



**ENI  
CBCMED**  
Cooperating across borders  
in the Mediterranean



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**EUROPEAN UNION**



**REGIONE AUTÒNOMA  
DE SARDIGNA  
REGIONE AUTONOMA  
DELLA SARDEGNA**

# **MIS Adjustment What you can “adjust” and functions**

**Aous TAMIMI**

# Goal of the presentation

- Ensuring that LBs know-how to proceed in filling in the adjustment section from its opening until the submission in the MIS.
- What you can modify in the project and when

# Adjustment - creation

Project data	Communication	Documents	Lifecards	Reporting
<b>Info and summary</b>	<b>Call for Proposals:</b>			<b>Reference number:</b>
<b>Relevance</b>	1 Call Strategic			B_A.1.2_0022
<b>Logical framework</b>	<b>Title:</b>			
<b>Potential risk</b>	Innovation for bringing creativity to activate Traditional Sectors in MED área.			
<b>Partnership</b>	<b>Acronym:</b>	<b>Duration:</b>	<b>Thematic objective:</b>	
<b>Work packages</b>	CRE@CTIVE	30	A.1 - Business and SMEs economic and social dev	
<b>Sustainability</b>				
<b>Environment</b>				

Whenever needed, you may ask your corresponding JTS Expert to enable adjustment at any moment for:

1. **Simple adjustment**, like adding new contact person, synergy....
2. **Minor adjustment**, like budget shift within programme rules, WPs output...
3. **Major adjustment**, like partner withdrawal, change...

P.S.: The adjustment procedure **blocks the reporting** until it's finalized and validated by JTS/MA

# Adjustment – it's like 1,2,3!

Info and summary	Call for Proposals:	Reference number:
Relevance	1 Call Strategic	B_A.1.2_0022
Logical framework	Title:	
Potential risk	Innovation for bringing creativity to activate Traditional Sectors in MED area.	
Partnership		
Work packages	Acronym:	Duration:
Sustainability	CRE@CTIVE	30
Environment		Thematic objective:
Budget	Start date:	End date:
Financial Plan	05/11/2020	04/05/2023

Once created (after clicking the green + button), 3 buttons will appear:

1. **Delete** the adjustment
2. **Validate**/Check the adjustment: to see the modification (useful when several are cooperating in the modifications)
3. **Send** the adjustment to JTS (*the simple adjustment will be applied immediately, no need for JTS validation*)

# Adjustment – What can you modify in Info and Summary

The screenshot displays the 'Info and Summary' section of the CRE@CTIVE system. The interface includes a sidebar with navigation options (Dashboard, Project, Details, Settings) and a main content area. The main content area has a top navigation bar with tabs for Project data, Communication, Documents, Lifecards, Project adjustment, and Reporting. The 'Project adjustment' tab is active, showing a search bar with 'Innova' entered, an 'ADD' button, and a list of keywords. The first keyword, 'Innovation capacity and awareness-raising', is highlighted with a red circle and labeled '2'. A red 'X' icon next to it is labeled '3'. A 'Save' button is labeled '4'. The page also shows a sidebar with navigation options and a top navigation bar with various project-related icons and tabs.

KEEP Keywords only (EU Database of projects).

1. You can **search** for keywords
2. **Add** them to the list
3. **Delete** (*hint : if you delete by error, just don't save!*)
4. **Save**

# Adjustment – What can you modify in Relevance

Project / Programme / date	Project budget (if available)	Involved countries	List of outputs to be exploited	Expected synergies to be implemented	Comment
CreativeWear - INTERREG MED/2016-2019	2.200.000,00 €	Greece, Italy, Spain	Nr. 4 Creative HUBS connected to Mediter...	The project will give access to Creative...	
INNOVA-FI/INTERREG EUROPE/2018-2023	1.620.025,00 €	Greece, Italy, Portugal, Spain	Joint Peer Learning 3 policy booklets f...	Tool for the diagnosis of the on-going f...	
Textile&Clothing Business Labs /H2020/20...	8.100.000,00 €	France, Greece, Italy, Portugal, Spain	Nr. 22 Business Labs implemented Nr. 14...	Business Labs network will support Cross...	
SUSTEXNET - ENPI CBC MED/2015-2016	1.488.229,16 €	Egypt, Italy, Spain, Tunisia	1 cross-border network 4 General descrip...	The study of the current situation and t...	
RE-FREAM/H2020-ICT/2018-2020	3.964.726,83 €	Italy, Spain	Network between talented fashion designe...	Subgrant process know-how and scheme fol...	
AquaMedInnov - INTERREG - 2016-2019	2.999.999,00 €	France, Italy, Jordan	2.2 Cross border network	The network created for...	

In this section, you may:

1. **Add** new synergy
2. **Edit** the newly added synergy
3. **Delete** the newly added synergy

Note that Edit and delete functions are available only for the newly created synergy

# Adjustment – What can you modify in Relevance – adding synergy

+ Create synergy ×

Project / Programme / date  
AquaMedInnov - INTERREG - 2016-2019

Project budget (if available)  
2999999

Involved countries

Selected	Available
France Italy Jordan	Cyprus Egypt Greece Israel Lebanon Malta Palestine Portugal Spain Tunisia Algeria

List of outputs to be exploited  
2.2 Cross border network

Expected synergies to be implemented  
The network created for...

Comment  
The project was a success story

Cancel Confirm

For newly added synergy, all fields, including the Comment, need to be filled

# Adjustment – What can you modify in Logical framework

The screenshot displays a web application interface for project management. At the top, there are tabs for 'Project data', 'Communication', 'Documents', 'Lifecards', 'Project adjustment', and 'Reporting'. The 'Project adjustment' tab is active. On the left, a sidebar menu includes 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Documents', and 'Export'. The 'Logical framework' section is expanded, showing 'Programme Expected results'. A dialog box titled 'Edit expected results' is open, allowing modification of a specific result. The dialog has a title bar with a pencil icon and a close button. It contains a 'Project target' field with the value '19', a 'Comment' field with the placeholder text 'You must enter a comment explaining the reason of modification!', and 'Cancel' and 'Confirm' buttons at the bottom right.

Project data   Communication   Documents   Lifecards   **Project adjustment**   Reporting

Info and summary   

Relevance

Logical framework   Programme Expected results

Partnership

Work packages

Budget

Documents

Export

Programme Expected results

Expected results   Programme   Project

**Edit expected results** ✕

**Project target**

19

**Comment** (Maximum of 250 characters)

You must enter a comment explaining the reason of modification|

Cancel   Confirm

In logical framework section, you can edit the project target only.

Comment field need to be filled when you modify the target prior to confirming.

# Adjustment – What can you modify in Partnership

Name	Country	Region	Official name of the organization in the original language	Legal Status	Active	Still in Budget	Comment
BEN	Spain	Comunidad Valenciana	Research Textile Institute	No profit organization (Association, Foundation)	✓		
PP01	Italy	Sicilia	ARCA Consortium	No profit organization (Association, Foundation)	✓		
PP02	Italy	Toscana	Municipality of Prato	Regional or local public administration	✓		
PP03	Tunisia	Monastir	MONASTIR EL FEJJA COMPETITIVNESS POLE "MFCPOLE"	Company or other private economic operator	✗	✓	

... almost everything! You can:

1. **Add** new partner
2. **Edit** existing partners (to add contact, auditors... etc)
3. **Deactivate** existing partner (in case of withdrawal for example)
4. **Enable** a deactivated partner
5. **Disable** the budget from the partner

# Adjustment – What can you modify in Partnership – edit partner

Project data   Communication   Documents   Lifecards   Project adjustment   Reporting

Info and summary  
Relevance  
Logical framework  
Partnership  
Work packages  
Budget  
Documents  
Export

General info   Experience and expertise   **Contacts**

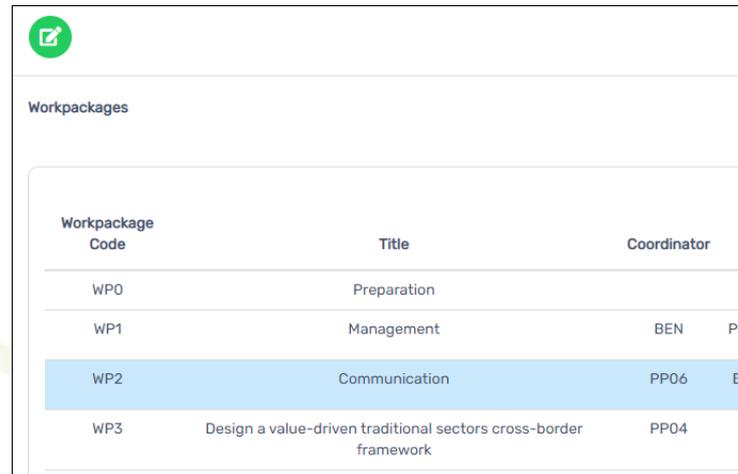
1 2 3 4 5 6 7

Name	Surname	Telephone	Email	Job title	Role	MIS Account
Umberto	La Commare	+390916615611	info@consorzioarca.it	President	Legal representative	
Luca Francesco	Leonardi	+390916615630	lleonardi@consorzioarca.it	EU Project Manager	Contact person	
Aous	TAMIMI	+32476710291	aous_tamimi@hotmail.com	Partner Auditor	Auditor	

In partner edit, you have the following functions:

1. Create MIS account for the selected contact
2. Edit MIS account for the selected contact
3. Disable MIS account
4. Enable MIS account
5. Add new contact person
6. Edit the info of the selected person
7. Delete the contact

# Adjustment – What can you modify in Work Packages



Workpackage Code	Title	Coordinator
WP0	Preparation	
WP1	Management	BEN PP0
WP2	Communication	PP06 BE
WP3	Design a value-driven traditional sectors cross-border framework	PP04



Main Page: **Edit** (to enter the selected WP)

- Info: *nothing to change*
- Outputs: You may **add/edit/delete** new outputs only, existing Outputs can't be edited!!
- Activities: **Add/edit/delete** activities, and **undelete**



# Adjustment – What can you modify in Budget

Name	Creation date	In force	Contracted	Author	Type	Status
BudgetShift_15_02_2021	an hour ago			Miriam Martínez Carbonell	BSS	
Budget contracted					SB	

To introduce a budget shift , you have the following functions:

1. **Add** budget shift
2. **View** budget shift (available when original budget is selected)
3. **Edit** budget shift
4. **Delete** budget shift
5. **Export** the selected budget
6. **Edit** Total budget per **sub-grants** (text only)

# Adjustment – What can you modify in Budget Lines

The screenshot displays a software interface for project adjustment. At the top, there are navigation tabs: Project data, Communication, Documents, Lifecards, Project adjustment (selected), and Reporting. On the left, a sidebar lists sections: Info and summary, Relevance, Logical framework, Partnership, and Work packages. The main area shows a table of budget lines with columns: Budget line, Cost category, WP, Output, Source of funding, and 50% rule. Below the table, there are six numbered icons (1-6) representing modification actions: 1 (Add), 2 (Edit), 3 (Clone), 4 (Delete), 5 (Export), and 6 (Unselect). A search bar is present with the text 'Search for: Budget Line code, Cost category, Partner, Unit'. A red warning message states: 'Total direct eligible cost is different from value contracted + 2.755,25 €'. Below this, a table lists budget lines with columns: Code, Cost category, Partner, Description, Justification, Unit, Number, Rate, Total, Semester incurred, and Comment.

Code	Cost category	Partner	Description	Justification	Unit	Number	Rate	Total	Semester incurred	Comment
WP1.SS.BEN.13765	SS	BEN	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	
WP1.SS.BEN.7226	SS	BEN	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	
WP4.HR.BEN.7225	HR	BEN	Senior Technician		DAY	300,00	184,00 €	55.200,00 €	I-II-III-IV-V	

Budget lines modifications have similar functions as reporting:

1. **Add** budget line
2. **Edit** budget line
3. **Clone** Budget line
4. **Delete** budget shift
5. **Export** the selected budget
6. **Unselect** lines

# Adjustment – What can you modify in Budget lines - functions

The screenshot displays a budget management interface with a sidebar on the left and a main content area. The sidebar includes sections for 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', and 'Work packages'. The main content area shows a search bar for budget lines, a table of budget lines, and a notification message.

Key features highlighted in the screenshot:

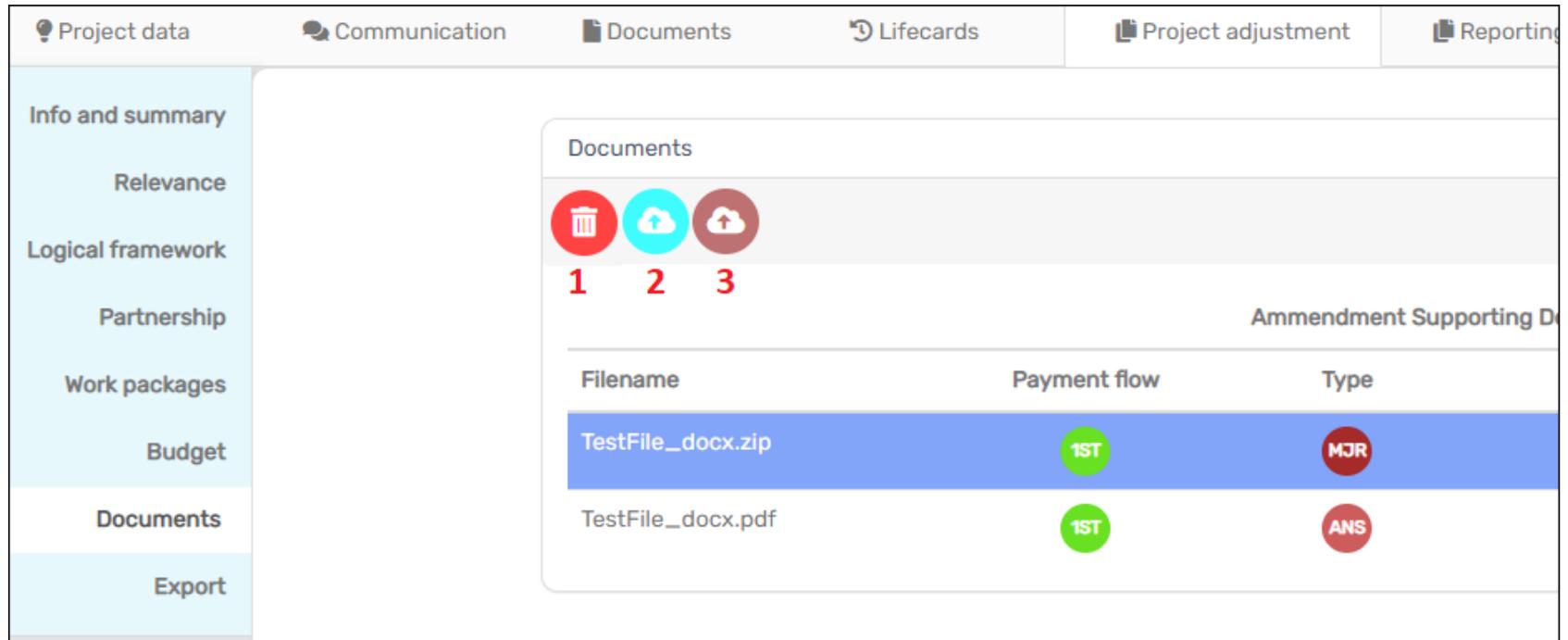
- 1:** Edit icon (pencil) next to the first budget line.
- 2:** Delete icon (trash) next to the second budget line.
- 3:** Add icon (+) next to the third budget line.
- 4:** Search bar containing the budget line code 'WP1.SS.BEN.1376998'.
- 5:** Back arrow icon in the top right corner.
- 6:** Notification message: 'Total direct eligible cost is different from value contracted + 2.755,25 €'.

Code	Cost category	Partner	Description	Justification	Unit	Number	Rate	Total	Semester incurred	Comment
WP4.HR.PP8.723C	HR	PPB	Senior Technician		DAY	20,00	320,00 €	6.400,00	I-II-III-IV-V	
WP1.SS.PP8.7227	SS	PPB	Expenditure verifica...			0,00	0,00 €	0,00 €	III-V	
WP1.SS.BEN.13765	SS	BEN	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	
WP4.HR.PP4.7225	HR	PP4	Senior		DAY	100,00	163,64 €	16.364,00	I-II-III-IV-V	

Other helpful functions:

1. Indication that the BL was **edited**
2. Indication that the BL was **deleted**
3. Indication that the BL was **added**
4. BL Code **search**
5. **Back** to previous page
6. **Difference** between contracted amount and the current amount

# Adjustment – What can you modify in Documents



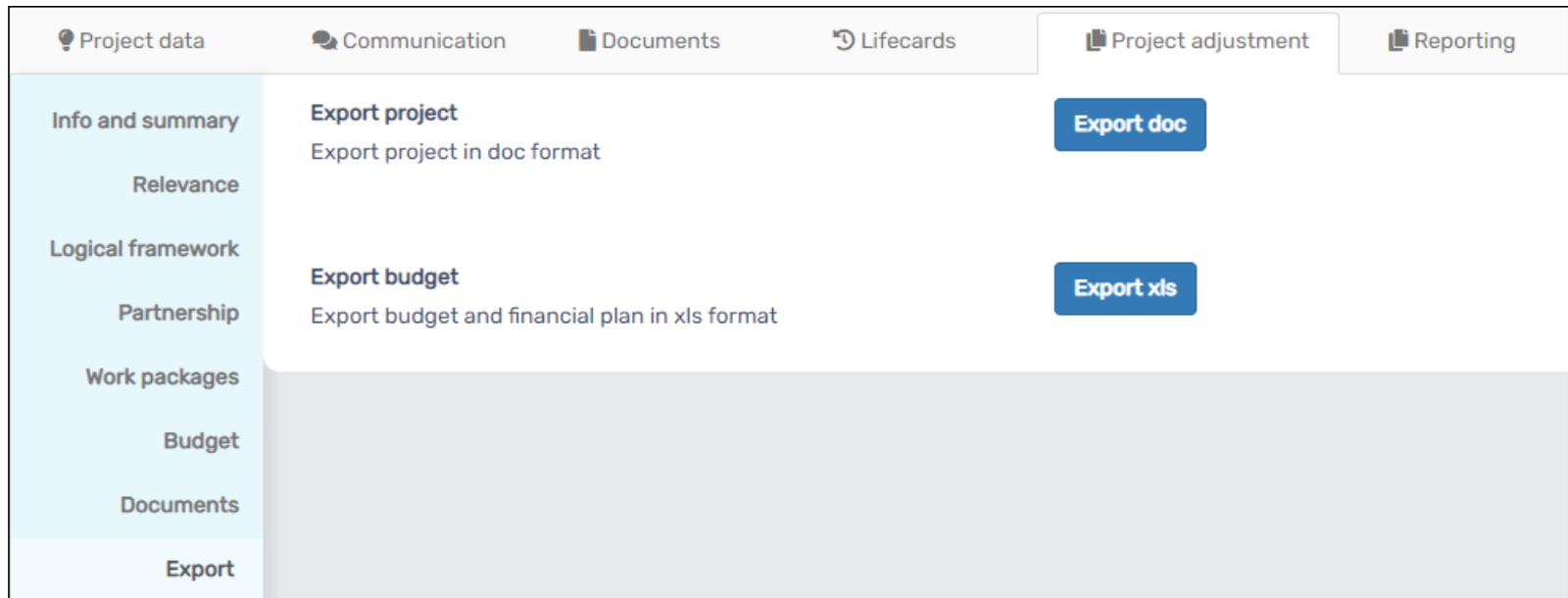
The screenshot shows a software interface with a top navigation bar containing tabs for 'Project data', 'Communication', 'Documents', 'Lifecards', 'Project adjustment', and 'Reporting'. A left sidebar lists menu items: 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Documents', and 'Export'. The 'Documents' tab is active, displaying a 'Documents' section with three icons: a red trash can (labeled '1'), a cyan upload icon (labeled '2'), and a brown upload icon (labeled '3'). Below the icons is a table titled 'Amendment Supporting Documents' with columns for 'Filename', 'Payment flow', and 'Type'.

Filename	Payment flow	Type
TestFile_.docx.zip	1ST	MJR
TestFile_.docx.pdf	1ST	ANS

Adjustment related documents upload are with the usual functions/limits:

1. Delete selected file
2. Upload adjustment document(s) – limited to 30M
3. Upload Major adjustment required document(s) – 30M

# Adjustment – What can you modify in Export



The screenshot displays a software interface with a top navigation bar and a main content area. The navigation bar includes tabs for 'Project data', 'Communication', 'Documents', 'Lifecards', 'Project adjustment', and 'Reporting'. The 'Project adjustment' tab is active. On the left, a sidebar menu lists 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Documents', and 'Export'. The main content area shows two export options: 'Export project' (with a description 'Export project in doc format' and an 'Export doc' button) and 'Export budget' (with a description 'Export budget and financial plan in xls format' and an 'Export xls' button').

Export Option	Description	Action Button
Export project	Export project in doc format	Export doc
Export budget	Export budget and financial plan in xls format	Export xls

You may export the project narrative in \*.doc format and the project budget in xls format

# Adjustment – Final step

The screenshot shows a web interface for project adjustment. At the top, there are three numbered buttons: 1 (trash), 2 (checkmark), and 3 (refresh). Below these are navigation tabs: Project data, Communication, Documents, Lifecards, Project adjustment (selected), and Reporting. On the left, a sidebar menu includes 'Info and summary' (with a search box), 'Relevance', 'Logical framework' (with 'KEEP keywords' next to it), and 'Partnership'. The main content area shows a 'Description' field.

**Project adjustment validation**

**Adjustment level type: Major**

Error Major Minor Adjustments

Description		Expected	Found	Difference
Page	Section	Action	Description	Field
Relevance	Synergies	Added	AquaMedInnov - INTERREG - 2016-2019	
Partnership	Contacts	Added	PP1	
Documents	Amendment Supporting Documents	Added	TestFile_.docx.pdf	

Prior to sending to JTS (button 3 in the image), it's always useful to click on "validate" (button 2) to check what modifications were done & if no errors are present...

# Adjustment – Final step

Project adjustment validation

Adjustment level type: Major

Error Major **Minor** Adjustments

Description	Expected	Found	Difference	Percentage	Comr
Added Budget Shift					
Modified Cost Category HR (%) decreased	1.927.029,6 €	1.918.069,6 €	-8.960 €	0,46 %	
Modified Cost Category SS (%) increased	478.501 €	485.261 €	6.760 €	1,41 %	
BEN Modified Total Eligible Costs Amount	537.426,12 €	547.484,12 €	10.058 €	1,87 %	
PP8 Modified Total Eligible Costs Amount	117.558,97 €	105.146,97 €	-12.412 €	10,56 %	
WP1.SS.PP8.722711 Deleted Budgetline	WP1.SS.PP8.722711				not n
WP1.SS.BEN.1376998 Added Budgetline		WP1.SS.BEN.1376998			will b
WP1.SS.BEN.722637 Modified Budgetline Number	3	2	-1		Audit
WP1.SS.BEN.722637 Modified Budgetline Total	14.100 €	9.400 €	-4.700 €		Audit
WP4.HR.PP8.723023 Modified Budgetline Number	48				
WP4.HR.PP8.723023 Modified Budgetline Total	15.360 €				

Page	Section	Action
Work packages	Workpackage Outputs	Added

Project adjustment validation

Adjustment level type: Major

Error **Major** Minor Adjustments

Description	Expected	Found	Difference	Percentage

Page	Section	Action	Description	Field	Expected	Found
Partnership	Partners	Modified	PP3		ENABLED	DISABLED
Documents		Added	TestFile_.docx.zip			TestFile_.docx

... and you can see if it's minor or major adjustment...

# THANK YOU FOR YOUR ATTENTION

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