



**ENI  
CBCMED**

Cooperating across borders  
in the Mediterranean



Programme funded by the  
**EUROPEAN UNION**



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

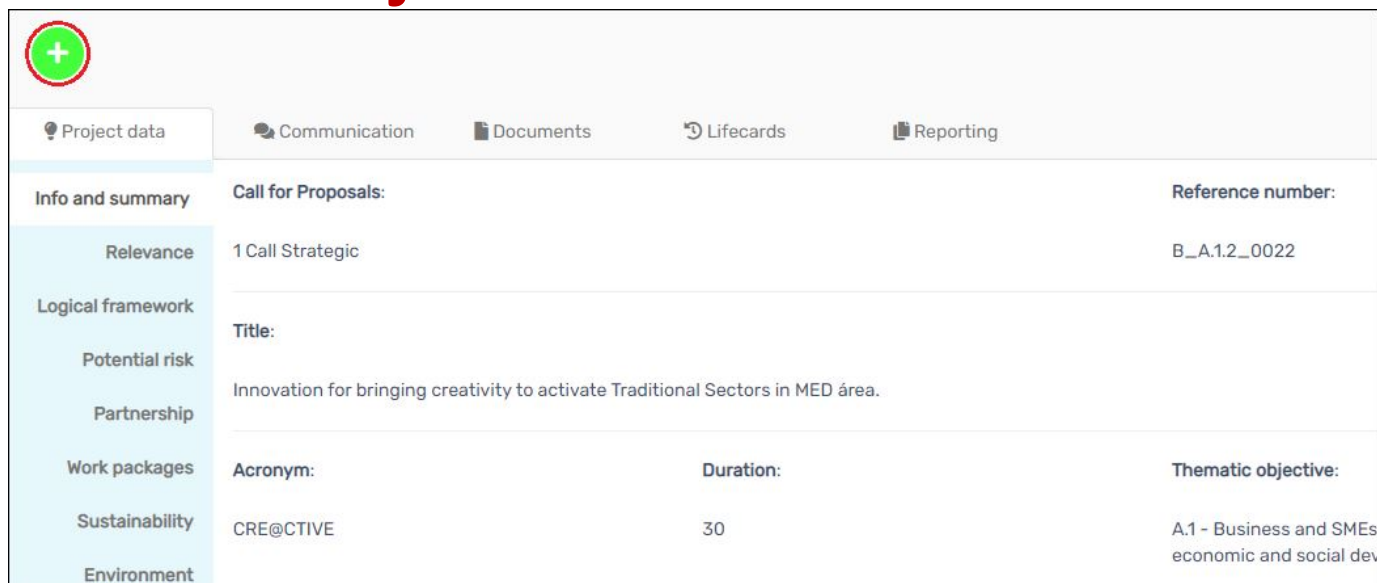
# **MIS Adjustment What you can “adjust” and functions**

**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



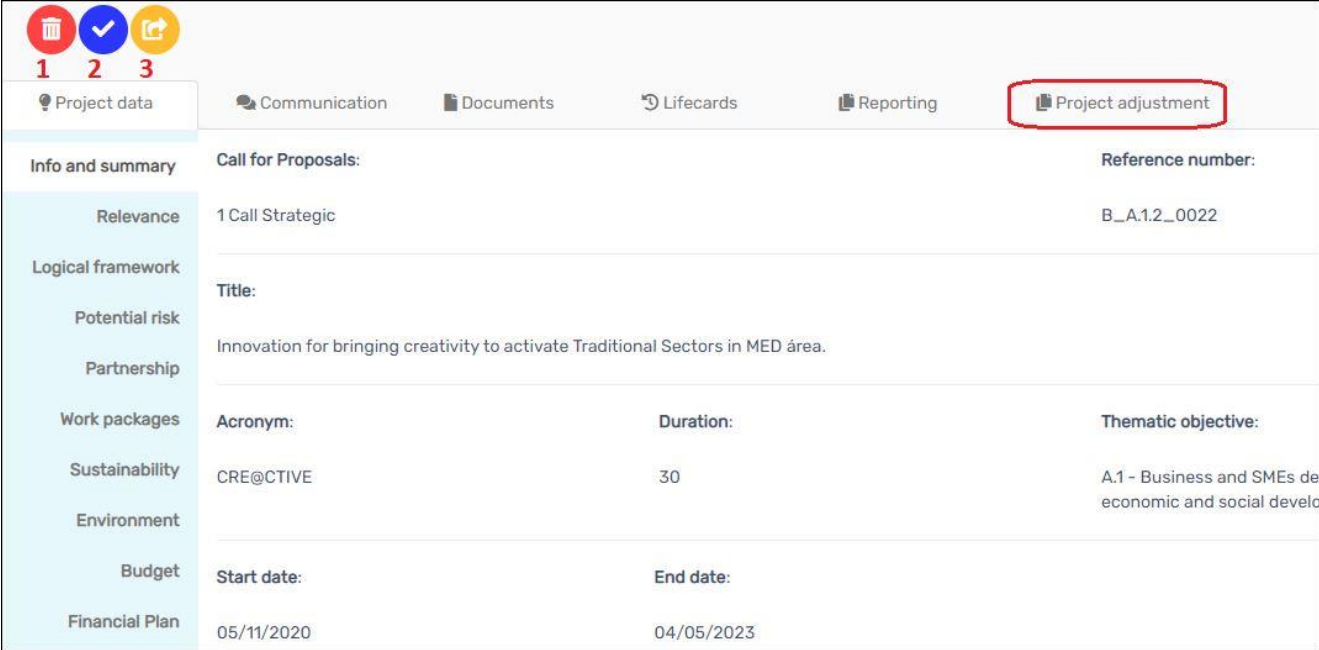
Project data	Communication	Documents	Lifecards	Reporting
Info and summary	Call for Proposals:	Reference number:		
Relevance	1 Call Strategic	B_A.1.2_0022		
Logical framework	Title:			
Potential risk	Innovation for bringing creativity to activate Traditional Sectors in MED área.			
Partnership				
Work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

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!



The screenshot shows a web interface for project management. At the top, there are three icons labeled 1, 2, and 3, corresponding to the steps described in the text. Below these icons is a navigation bar with tabs: Project data, Communication, Documents, Lifecards, Reporting, and Project adjustment (which is highlighted with a red box). The main content area is a form for 'Project adjustment'. It has a sidebar on the left with categories: Info and summary, Relevance, Logical framework, Potential risk, Partnership, Work packages, Sustainability, Environment, Budget, and Financial Plan. The form fields include: Call for Proposals (1 Call Strategic), Reference number (B\_A.1.2\_0022), Title (Innovation for bringing creativity to activate Traditional Sectors in MED area), Acronym (CRE@CTIVE), Duration (30), Thematic objective (A.1 - Business and SMEs de economic and social develo), Start date (05/11/2020), and End date (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

CRE@CTIVE 1ST

Project adjustment

1

innova

2

ADD

KEEP keywords

Description

3

X

X

X

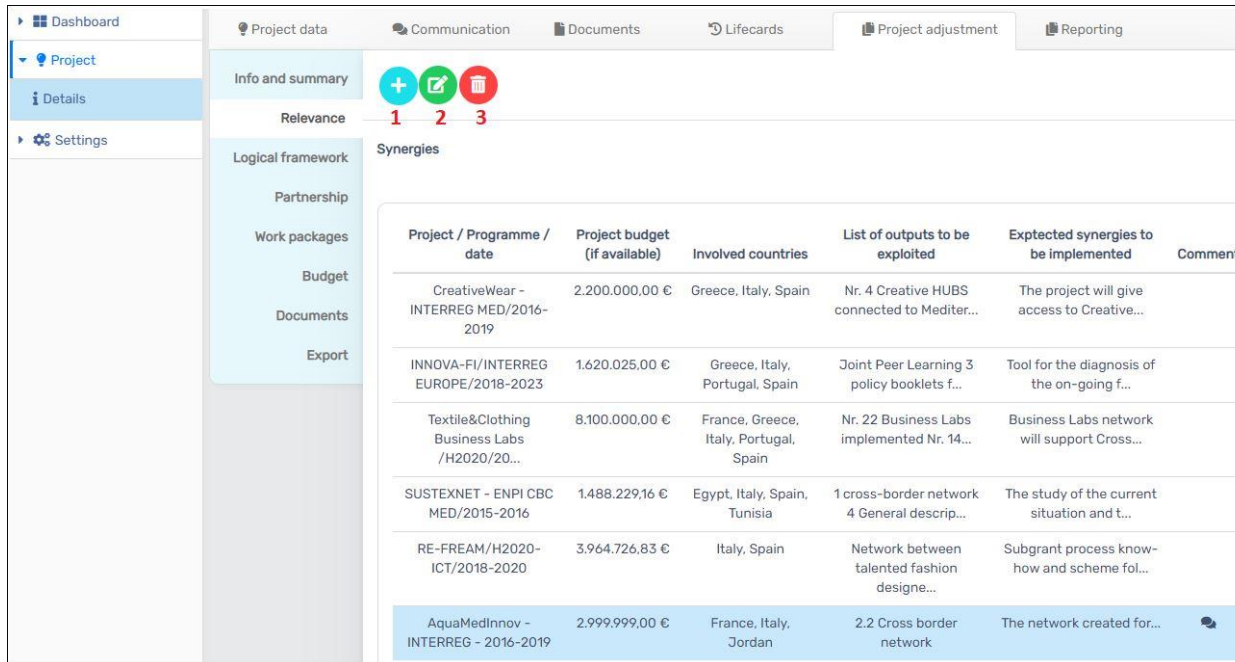
4

Save

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



The screenshot shows a web application interface for project management. The top navigation bar includes 'Dashboard', 'Project data', 'Communication', 'Documents', 'Lifecards', 'Project adjustment', and 'Reporting'. The left sidebar has 'Project', 'Details', and 'Settings'. The main content area is titled 'Project adjustment' and features a 'Relevance' section with three icons: a plus sign (Add), a pencil (Edit), and a trash can (Delete), numbered 1, 2, and 3 respectively. Below this is a table of synergies.

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

France Italy Jordan

Available

Cyprus Egypt Greece Israel Lebanon Malta Palestine Portugal Spain  
Tunisia Algeria

List of outputs to be exploited

2.2 Cross border network

Exptected 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 software 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 selected, showing 'Programme Expected results'. A modal window titled 'Edit expected results' is open, featuring a 'Project target' input field with the value '19' and a 'Comment' field with the placeholder text 'You must enter a comment explaining the reason of modification!'. The modal also includes 'Cancel' and 'Confirm' buttons.

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

Project data

Communication

Documents

Lifecards

Project adjustment

Reporting

Info and summary

Relevance

Logical framework

Partnership

Work packages

Budget

Documents

Export

1

2

3

4

5

+

✓

€

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

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



Workpackages

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, exiting Outputs can't be edited!!



- Activities: **Add/edit/delete** activities, and **undelete**

# Adjustment – What can you modify in Budget

The screenshot shows the 'Project adjustment' tab in a software interface. On the left is a sidebar with a menu containing 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', and 'Documents'. The 'Budget' item is selected. Above the table are six numbered icons: 1 (green plus), 2 (yellow document), 3 (orange pencil), 4 (red trash), 5 (green document with X), and 6 (orange document with pencil). The main area contains a table with the following data:

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

Project data

Communication

Documents

Lifecards

Project adjustment

Reporting

Info and summary

Relevance

Logical framework

Partnership

Work packages

Budget line

Cost category

WP

Output

Source of funding

50% rule

1

2

3

4

5

6

+

Search for: Budget Line code, Cost category, Partner, Unit

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
<div><div>+</div></div> WP1.SS.BEN.1376	<div>SS</div>	<div>BEN</div>	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	<div><div></div></div>
<div><div>✓</div></div> WP1.SS.BEN.7226	<div>SS</div>	<div>BEN</div>	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	<div><div></div></div>
<div><div>✓</div></div> WP4.HR.BEN.7225	<div>HR</div>	<div>BEN</div>	Senior Technician		<div>DAY</div>	300,00	184,00	€ 55.200,00	I-II-III-IV-V	<div><div></div></div>

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 shows a budget management interface with a sidebar on the left and a main table area. The sidebar has sections: 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', and 'Work packages'. The main area has a top section with 'Budget line', 'Cost category', 'WP', 'Output', and 'Sc' tabs. Below this is a search bar for 'WP1.SS.BEN.1376998 (Budget Line ...)' and a dropdown menu showing 'WP1.SS.BEN.1376998'. A red box highlights the search bar and dropdown, with a yellow '4' next to it. Below the search bar is a red box containing the text 'Total direct eligible cost is different from value contracted + 2.755,25 €', with a yellow '6' next to it. The main table has columns: 'Code', 'Cost category', 'Partner', 'Description', 'Justification', 'Unit', 'Number', 'Rate', 'Total', 'Semester incurred', and 'Comment'. The table contains four rows of budget lines. Annotations 1, 2, and 3 are red boxes around the 'Budget', 'Documents', and 'Export' buttons in the sidebar, respectively. Annotation 1 is a green checkmark icon, 2 is a red trash can icon, and 3 is a green plus icon.

Code	Cost category	Partner	Description	Justification	Unit	Number	Rate	Total	Semester incurred	Comment
WP4.HR.PP8.723C	HR	PP8	Senior Technician		DAY	20,00	320,00	€6.400,00	I-II-III-IV-V	
WP1.SS.PP8.7227	SS	PP8	Expenditure verifica...			0,00	0,00	€ 0,00	III-V	
WP1.SS.BEN.1376	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 displays the 'Documents' section of a project management interface. The left sidebar contains the following menu items: Info and summary, Relevance, Logical framework, Partnership, Work packages, Budget, Documents (highlighted), and Export. The main content area shows a 'Documents' section with three icons labeled 1, 2, and 3. Below these icons is a table with the following data:

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 web application interface with a top navigation bar and a left sidebar. The top bar includes tabs for 'Project data', 'Communication', 'Documents', 'Lifecards', 'Project adjustment' (which is active), and 'Reporting'. The left sidebar lists menu items: 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Documents', and 'Export'. The main content area under the 'Project adjustment' tab shows two export options: 'Export project' (with a subtext 'Export project in doc format') and 'Export budget' (with a subtext 'Export budget and financial plan in xls format'). Each option has a corresponding blue button labeled 'Export doc' and 'Export xls' respectively. The bottom portion of the interface is obscured by a grey rectangular block.

Menu Item	Action	Format	Button Label
Export project	Export project in doc format	doc	Export doc
Export budget	Export budget and financial plan in xls format	xls	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 icon), 2 (checkmark icon), and 3 (share icon). Below these are five tabs: Project data, Communication, Documents, Lifecards, Project adjustment (selected), and Reporting. On the left, a sidebar menu lists: Info and summary, Relevance, Logical framework, and Partnership. The main content area shows 'KEEP keywords' and a 'Description' field.

Project adjustment validation

Adjustment level type: Major

ErrorMajorMinorAdjustments

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	Comments
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

## MERCI

## شكراً



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