

# Common monitoring and information system

## Reporting in IMIS system

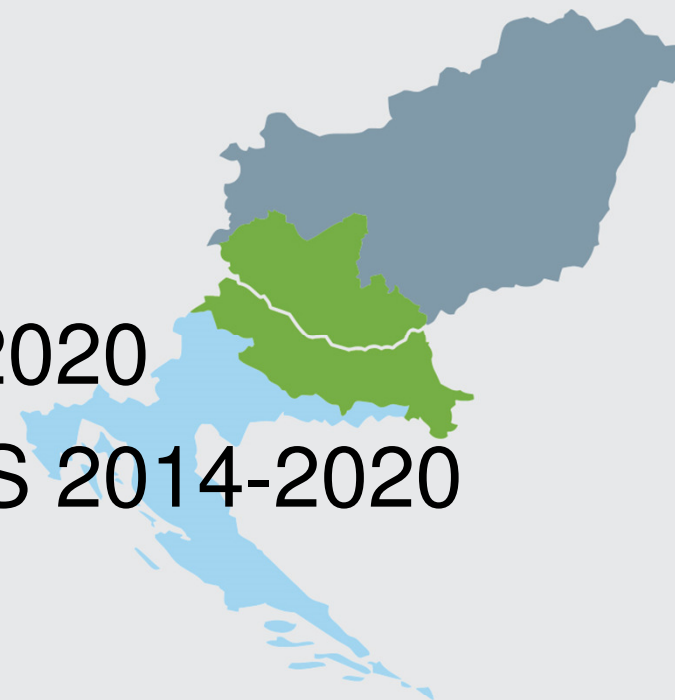
27.02.2018

Eszter Németh

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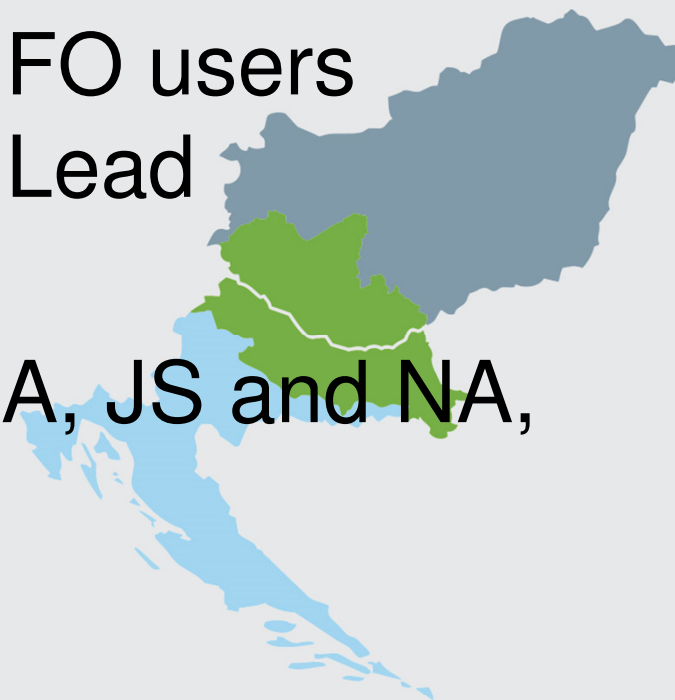
# Content

- IMIS team
- Login to the IMIS 2014-2020
- Beneficiary report in IMIS 2014-2020
- HelpDesk



# IMIS team

- Technical support for the FO users (Applicant, Beneficiaries, Lead Beneficiaries)
- Close cooperation with MA, JS and NA, FLC controllers
- Online Helpdesk system



# IMIS 2014-2020 functionality

- Online application modul
- Partner level online reporting (both sides)
- Integrated control modul for both sides
- Communication module (automatic emails)
- New visual identity and technical solutions
- Time stamp, e-signatures



# Technical requirements

- Language of the system: English
- Operating system: using a desktop operating system is recommended (e.g. Microsoft Windows)
- Browser: Mozilla Firefox 46.0.1 and above, Google Chrome 50.0 and above, Internet Explorer 11.0 and above
- PDF reader (e.g.: Adobe Reader), Document management software (e.g.: Microsoft Office) to open .DOC files.
- Internet connection



# Installation of the certificate – 1.

- The FO reporting and signatory users will be created on the Back Office.
- The FO reporting user will receive automatically email from the system:

Sender: noreply@imis2014-2020.eu

Subject: IMIS 2014-2020 system Front Office -  
Login information

- check also your spam folder

# Installation of the certificate – 2.

- download the certification (link is in the email)



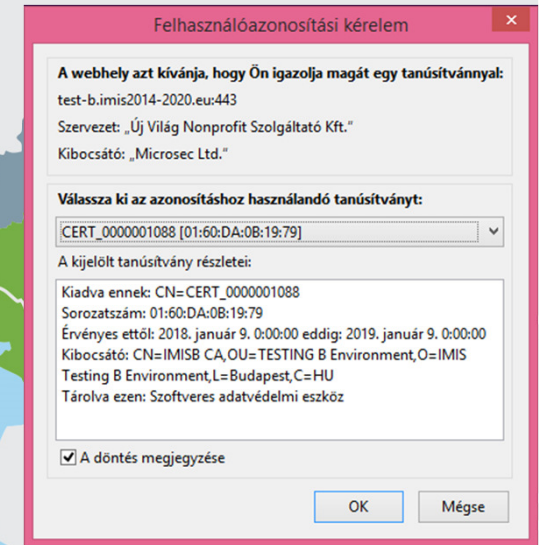
Download

Description of installing the downloaded certificate

- install your certification according to the description
- login to the system

# Login to the Front Office

1. Select the certificate belongs to your user name
2. Enter the Username and Password from the registration email



IMIS 2014-2020 Login (Front office HU-HR)

USERNAME !      PASSWORD !

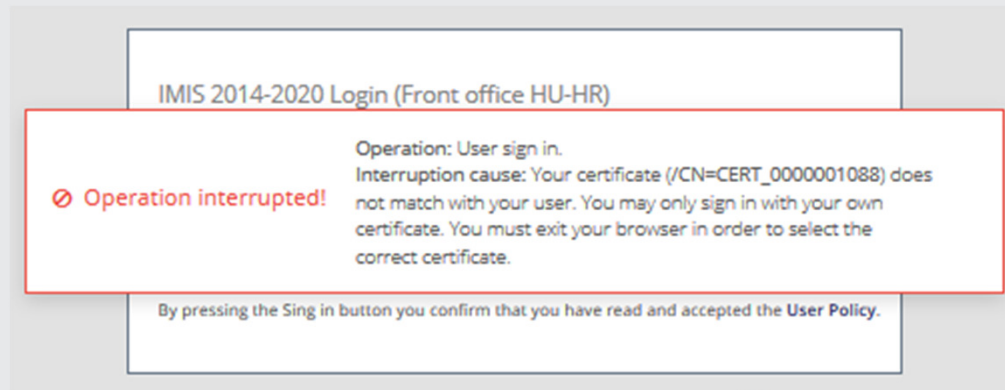
          

[Forgot password](#)

By pressing the Sing in button you confirm that you have read and accepted the User Policy.



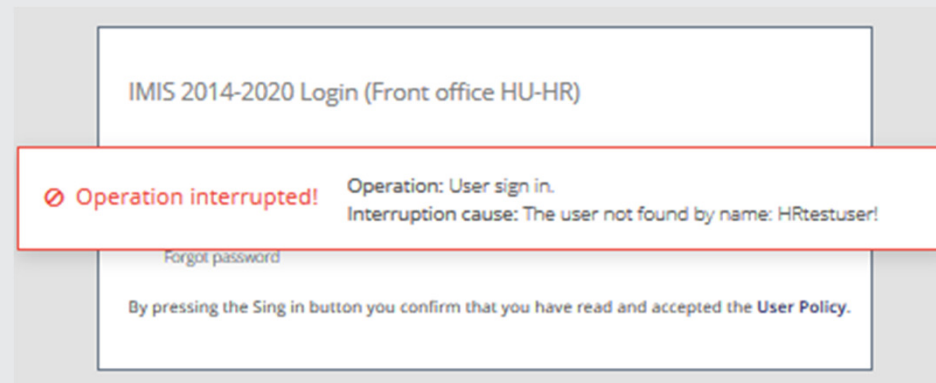
# Possible errors during the login – 1.



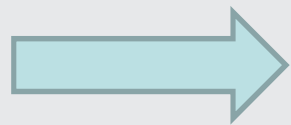
Not the right certificate was selected at the first step

➔ Restart your browser, and select the right certificate

# Possible errors during the login – 2.

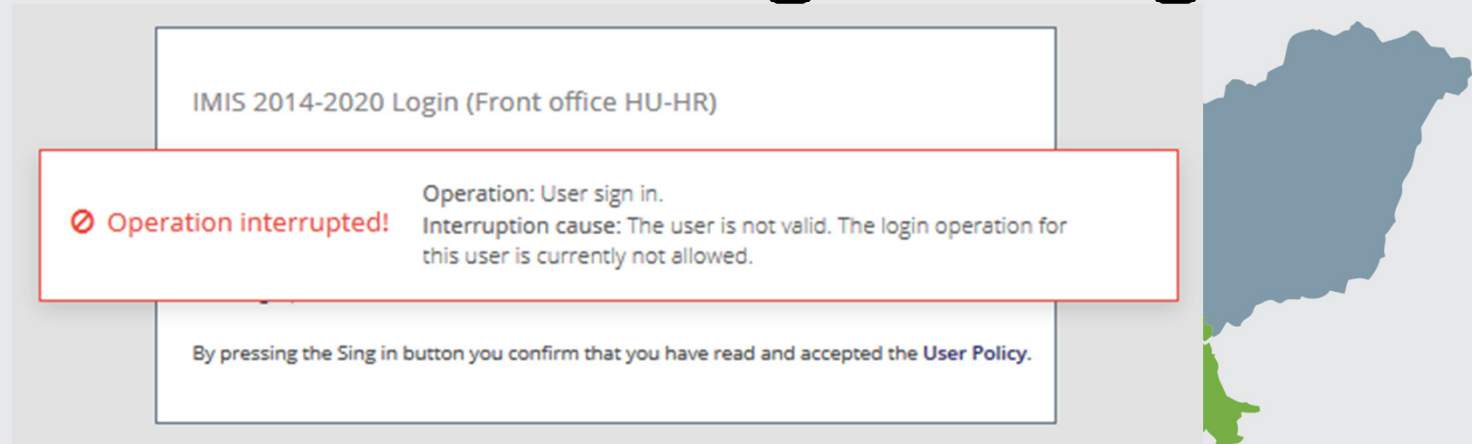


Not the right username was given

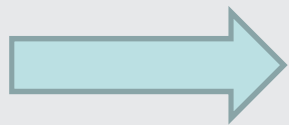


Check the registration email and your username again

# Possible errors during the login – 3.

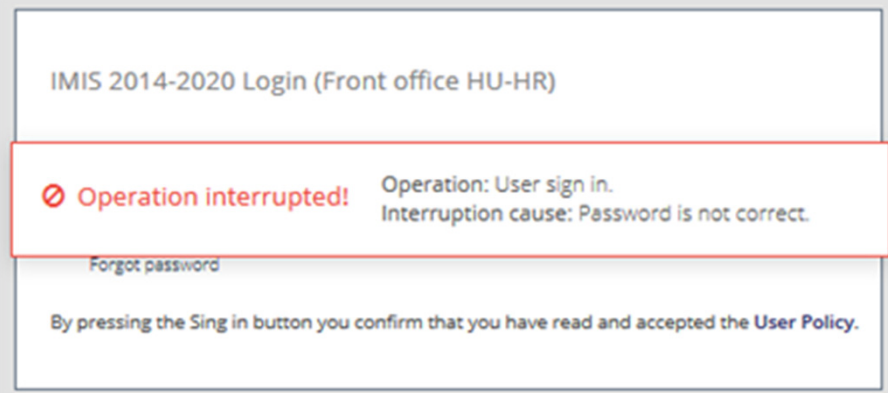


The FO user creation process has not finished yet

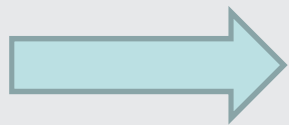


Please, wait 1 hour, then try it again.  
If it still exists, please contact the JS via LB

# Possible errors during the login – 4.



The user password is not correct/valid.

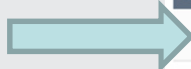
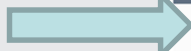


Please, try again, or click on the „Forgot password” button

- *The temporary password in the registration email is valid for 2 hours -*

# Front Office screens

Here you can start a new beneficiary report (BR), or search for a previously submitted or started one

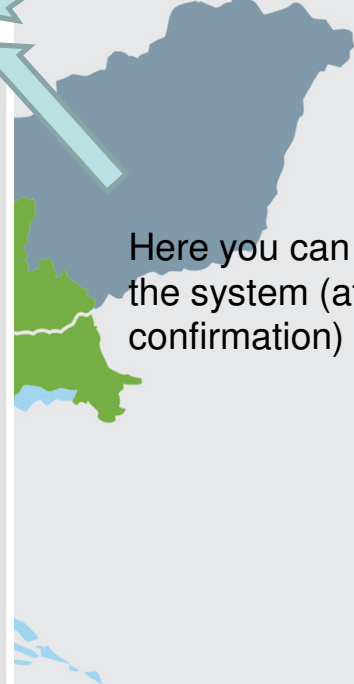


Here you can change your password and email address

Here you can open the User manual



Here you can quit the system (after confirmation)



# Interreg V-A Hungary-Croatia Co-operation Programme 2014-2020

MAIN MENU

- ▼ BENEFICIARY REPORT
  - New
  - Search
- ADMINISTRATION
  - ▼ PERSONAL SETTINGS
    - Change Password
    - Change E-mail

BENEFICIARY REPORT
Save

INFORMATION REMINDER

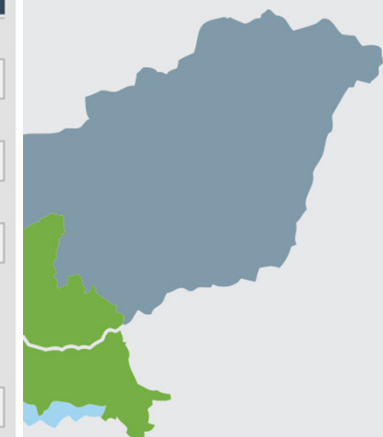
MAIN DATA
REPORTING PERIODS
INVOICES
ACTIVITIES
INDICATORS
INFORMATION & PUBLICITY
WK

BR NUMBER	BR ID	PROJECT PART ID	PROJECT ACRONYM
<input type="text"/>	<input type="text"/>	HRbematoprojektv85/B1	HRbematoprojektv85
PROJECT TITLE		START DATE OF PROJECT	END DATE OF PROJECT
Imis Office EUTAF HUHR bematató projekt		25/09/2017	25/09/2019
BENEFICIARY		LEAD BENEFICIARY NAME	
B1 - Ben_HR		LB - LB_HU	
CONTACT PERSON NAME			
Legal R			
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <span>Save</span> <span>Cancel</span> </div>			
REPORTIN			
REPORTING PERIOD(S)			
Reporting period 04			
BR. SETTLE			
BR SETTLE PERIOD START DATE	BR SETTLE PERIOD END DATE		
<input type="text" value="25/09/2018"/>	<input type="text" value="24/01/2019"/>		
FINAL BENEFICIARY REPORT			
<input type="checkbox"/>			

#	NAME	FROM DATE	TO DATE
1	Reporting period 01	25/09/2017	24/01/2018
2	Reporting period 02	25/01/2018	24/05/2018
3	Reporting period 03	25/05/2018	24/09/2018
4	Reporting period 04	25/09/2018	24/01/2019
5	Reporting period 05	25/01/2019	24/05/2019
6	Reporting period 06	25/05/2019	24/09/2019
7	Reporting period 07	25/09/2019	25/09/2019

Page: 1 / 1
Total: 7
Hit on page: 10

Main data – FO  
User manual 4.1



You can set up  
reporting period

**BENEFICIARY REPORT** Save

INFORMATION REMINDER

MAIN DATA REPORTING PERIODS INVOICES ACTIVITIES INDICATORS INFORMATION & PUBLICITY WK

BUDGET HEADING BUDGET LINE BUDGET ITEM INVOICE NUMBER

SUPPLIER NAME

RESULTS FOR:

View New Modify Delete Add Invoice

BUDGET HEADING	BUDGET LINE	BUDGET ITEM	INVOICE NUMBER	SUPPLIER NAME	DESCRIPTION	PERFORMANCE DATE	ORIG

Page: 1 / 1 Total: 0 Hit on page: 10

BUDGET LINE	AMOUNT IN EUR
1. Preparation costs	0,00
2. Staff costs	0,00
3. Office and administrative expenditure	0,00
4. Travel and accommodation costs	0,00
5. External expertise and services costs	0,00
6. Equipment expenditure	0,00
7. Infrastructure and works	0,00
<b>Total invoices</b>	<b>0,00</b>
Lump sum amount	0,00
<b>Total amount</b>	<b>0,00</b>

## Invoices – FO User manual 4.3

- Lump sum amount will be automatically added to the 1st Beneficiary report
- Flat rate will be automatically calculated based on the invoices
- Invoices can be added by clicking on „NEW” button
- If there was any invoices in the previous BRs which were not 100% accepted, they can be added by clicking on „Add invoice” button
- The system will automatically calculate the Total amount of the BR in the lower section of the table



**INVOICE** [Save] [Cancel]

**GENERAL DATA**

INVOICE NUMBER: TEST Invoice    SUPPLIER NAME: TEST Supplier    MULTIPLY?:

MULTIPLY INFO BOX

DESCRIPTION: TEST description

ISSUED: 01/01/2017    PERFORMANCE DATE: 01/01/2017    PAID ON: 01/01/2017

BUDGET HEADING: [Dropdown]    BUDGET LINE: [Dropdown]

VAT RECLAIMER:     ERA CODE: [Text]

2. Staff costs  
4. Travel and accommodation costs  
5. External expertise and services costs  
6. Equipment expenditure

CURRENCY: Croatian kuna    EXCHANGE RATE: 7,4188    DIFFERENT EXCHANGE RATE:     EUR TO CUR. DIF. EXCHANGE RATE: [Text]

NAME	AMOUNT IN SELECTED CURRENCY	AMOUNT IN EUR	CHECKED
NET amount	100 000,00	13 479,27	
VAT amount	0,00	0,00	
Gross amount	100 000,00	13 479,27	
Reported amount	70 000,00	9 435,49	
Eligible expenditure occurring outside the eligible area	0,00	0,00	
Accepted amount			<input type="checkbox"/>
Eligible amount			
Not eligible amount			

COMMENT OF THE BENEFICIARY (IF THERE IS ELIGIBLE EXPENDITURE OCCURRING OUTSIDE THE ELIGIBLE AREA)

## Invoices - Built-in counterchecks

- Multiply invoice: the same invoice number and supplier name
- Only the relevant Budget heading/line/item can be selected
- The system calculates the EUR amount automatically based on the monthly exchange rate
- The system checks if the reported amount is bigger then the remaining amount on the selected budget line

⊘ Operation interrupted!

Operation: Save invoice

Interruption cause: The reported amount on the Budget Line: [5.7.01 other ] would be more than the planned amount on budget lines:

Budget Line: [5. External expertise and services costs] has not enough remaining amount. Difference: [-6 836,49 EUR]

Budget Line: [5.7 Other services] has not enough remaining amount. Difference: [-7 035,49 EUR]

Budget Line: [5.7.01 other ] has not enough remaining amount. Difference: [-7 035,49 EUR]



**INVOICE** [Close]

[Save] [Cancel]

GENERAL DATA   NOTICE FOR COMPLETION   **DOCUMENTS**

DOCUMENT ID   SUBJECT   PREPARED BY (USER NAME)   SENT BY (PARTNER ID)

SENT BY (PARTNER NAME)   DATE OF PREPARATION FROM   DATE OF PREPARATION TO   METHOD OF SUBMISSION

[Search] [Clear search terms]

RESULTS FOR:

[View] [Modify]

ORDER	DOCUMENT ID	TYPE	SUBJECT	PREPARED BY (USER NAME)	SENT BY (PARTNER ID)
1	2018/000-003-7554	Attachment	Invoice	HRbemutatoprojektv85B1R01	
1	2018/000-003-7556	Attachment	Proof of payment	HRbemutatoprojektv85B1R01	
1	2018/000-003-7558	Attachment	Proof of fulfilment	HRbemutatoprojektv85B1R01	
1	2018/000-003-7560	Attachment	Contract	HRbemutatoprojektv85B1R01	
1	2018/000-003-7562	Attachment	Tenders	HRbemutatoprojektv85B1R01	
1	2018/000-003-7564	Attachment	Supporting documents	HRbemutatoprojektv85B1R01	
1	2018/000-003-7566	Attachment	Other	HRbemutatoprojektv85B1R01	

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## Invoices - Documents

- After saving the general data of the invoice the Documents tabsheet appears
- At least one document is obligatory to be uploaded to the Invoice folder
- The maximum upload file size is 30 MB but there is no restriction on the combined size of the documents.
- Compressed zip files can also be uploaded.

BENEFCIARY REPORT Save

INFORMATION REMINDER

MAIN DATA REPORTING PERIODS INVOICES ACTIVITIES INDICATORS INFORMATION & PUBLICITY WK < >

View Modify

ACTIVITY NO.	ACTIVITY NAME	REPORTING PERIOD 01	REPORTING PERIOD 02	REPORTING PERIOD 03
1	Project administration and management	X	X	X
2	Information and publicity	X	X	X
3	Activity 1		X	

Activities – FO User manual 4.4

BENEFCIARY REPORT Save

INFORMATION REMINDER

MAIN DATA REPORTING PERIODS INVOICES ACTIVITIES INDICATORS INFORMATION & PUBLICITY WK < >

View Modify

INDICATOR NAME

project specific indicator 1

Number of secondary schools involved in the project

Number of awareness rising events (workshops, trainings, educational programmes) targeting or promoting sustainable developm

Number of project events (conference, workshop, meeting, seminar, study tour, exchange programs etc.)

Number of people directly benefiting from the project (e.g. participants of events, trainings, workshops, etc.)

Training courses developed and delivered (formal and informal)

Number of educational institutions in the border region that offer courses jointly or with region- or neighbouring country-specific c

Indicators –  
FO User manual 4.5

BENEFCIARY REPORT Save

INFORMATION REMINDER

ACTIVITIES INDICATORS INFORMATION & PUBLICITY WORKS AND PERMITS PUBLIC PROCUREMENT TENDERS < >

View Modify

NO	INFORMATION & PUBLICITY TYPE	COMMUNICATION TOOL	PLANNED LANG
1	EVENTS (e.g. opening/closing conference, workshops, fairs, information days etc.)	workshops	EN
2	PROMOTIONAL MATERIALS (e.g. leaflets, brochures, publications)	publications	HU-HR
3	WEB	web	HU-HR-EN

Information and publicity –  
FO User manual 4.6

# Interreg V-A Hungary-Croatia Co-operation Programme 2014-2020

**BENEFICIARY REPORT** Save

INFORMATION REMINDER

FINANCIAL PROGRESS BUDGET COST REVENUES SOURCES OF FUNDING DOCUMENTS

DOCUMENT ID TYPE SUBJECT PREPARED BY (USER NAME)

SENT BY (PARTNER ID) SENT BY (PARTNER NAME) DATE OF PREPARATION FROM DATE OF PREPARATION TO

METHOD OF SUBMISSION

Search Clear search terms

RESULTS FOR:

View New Modify Delete

ORDER	DOCUMENT ID	TYPE	SUBJECT	PREPARED BY (USER NAME)	SENT BY (PARTNER ID)
797	2018/000-003-7538	Attachment	Work and permit	HRbemutatoprojektv85B1R01	
796	2018/000-003-7536	Attachment	Revenue	HRbemutatoprojektv85B1R01	
795	2018/000-003-7534	Attachment	Outcome	HRbemutatoprojektv85B1R01	
794	2018/000-003-7532	Attachment	Information and publicity	HRbemutatoprojektv85B1R01	
793	2018/000-003-7530	Attachment	Indicator	HRbemutatoprojektv85B1R01	
792	2018/000-003-7528	Attachment	Activity	HRbemutatoprojektv85B1R01	
791	2018/000-003-7526	Attachment	Invoice	HRbemutatoprojektv85B1R01	

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## Documents – FO User manual 4.13



In this screen you can see the document folders of the beneficiary report. This is also the place where documents uploaded for invoices, activities etc. are summarised.

# Procedure of the submission – 1.

FO User manual – 7.

Version: 1.0.99-p1 User: HRbemutatoprojektv85B1R01

**BENECIARY REPORT SEARCH**

BR ID:  BR NUMBER:  BR STATUS:

Search Clear search terms

RESULTS FOR:

Modify Delete Check Send for signing Generate

LAST MODIFICATION DATE	BR ID	BR NUMBER	BR STATUS
22/02/2018 15:19:09			Under preparation
29/01/2018 11:03:54	BR 3	3_1	Approved
17/10/2017 14:09:01	BR 2	2	Approved
17/10/2017 13:18:18	BR 1	1	Approved

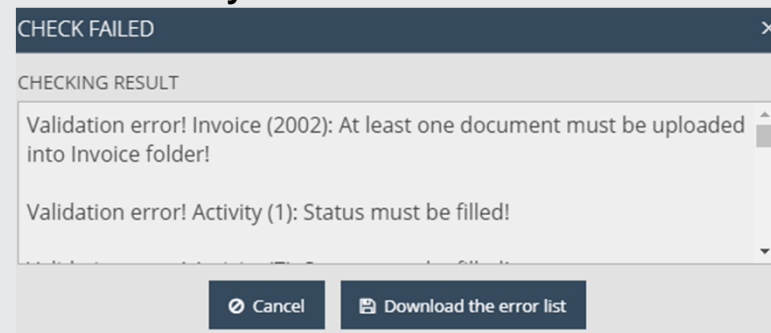
Here you can continue the creation

Here you can generate a DRAFT BR version

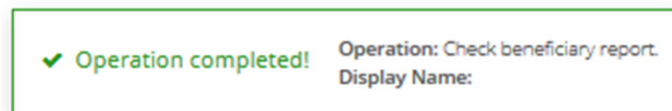
Here you can check the BR

# Clicking on check

- **Check failed** – if the autocheck identifies errors in the beneficiary report, a popup window will appear with clear error messages. Click on the “Download the error list” button to open or download the error list in .DOC format, or click “Cancel” to close the popup window and continue editing the report. The report can only be submitted if all listed errors have been corrected.



- **Check successful** – if the autocheck finds no errors in the beneficiary report, the user will be notified in a popup message about this and the user can submit the report



# Procedure of the submission – 2.

BENEFICIARY REPORT SEARCH

BR ID  BR NUMBER  BR STATUS

Q Search Clear search terms

RESULTS FOR:

View Modify Delete Check Send for signing

LAST MODIFICATION DATE	BR ID	BR NUMBER	BR STATUS
22/02/2018 16:01:35			Checked
29/01/2018 11:03:54	BR 3	3_1	Approved
17/10/2017 14:09:01	BR 2	2	Approved
17/10/2017 13:18:18	BR 1	1	Approved

FO User manual – 7.

Here you can send the BR for signing

The BR status is automatically updated:

- After the successful check: Checked
- After sending for signature: Under signature
- After e-sign, but before submission: Under submission
- After submission by the signatory user: Submitted
- If the FLC send completion letter: Need amendment



# Procedure of the submission – 3.

FO User manual – 8.

The screenshot shows a web interface for searching beneficiary reports. At the top, there is a header 'BENEFICIARY REPORT SEARCH'. Below it are three input fields: 'BR ID', 'BR NUMBER', and 'BR STATUS' (with a dropdown arrow). To the right of these fields are two buttons: 'Search' and 'Clear search terms'. Below the search fields, it says 'RESULTS FOR:'. Underneath, there is a row of four buttons: 'View', 'Generate', 'Back to modification', and 'E-sign'. Below the buttons is a table with the following data:

LAST MODIFICATION DATE	BR ID	BR NUMBER	BR STATUS
30/11/2017 12:35:57			Under signature

Three light blue arrows point to the 'View', 'E-sign', and 'Back to modification' buttons from external text annotations.

Here you can check the BR

Here you can e-sign the BR

Here you can send back the BR to the recording user, if modification is needed

# Procedure of the submission – 3.

FO User manual – 8.

BENEFIICIARY REPORT SEARCH

BR ID:  BR NUMBER:  BR STATUS:

Search Clear search terms

RESULTS FOR:

View Generate Back to modification E-sign Submit

LAST MODIFICATION DATE	BR ID	BR NUMBER	BR STATUS
30/11/2017 12:35:57			Under signature

Here you can submit the BR

The BR status is automatically updated:

- After submission by the signatory user: Submitted
- If the FLC send completion letter: Need amendment
- After FLC approval: Approved
- After FLC rejection: Rejected



# Completion

- The BR has Need amendment status
- At the invoice screen on the NOTICE FOR COMPLETION tabsheet every FLC comment will be visible
- The modification/submission procedure is the same like the original submission

INVOICE

Cancel

GENERAL DATA NOTICE FOR COMPLETION DOCUMENTS

View

#	NOTICE FOR COMPLETION
1	Bérsegédlet hiányzik, kérjük szíveskedjen pótolni!

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# IMIS Office Helpdesk

- If you have technical question, don't hesitate to contact us:  
[itoffice@szpi.hu](mailto:itoffice@szpi.hu)

To detect the problem, please provide a complete description of the problem, possibly by attaching a print screen. For easier identification please provide an Application Title / Project or Project Part ID respectively.



Thank you for your attention



HVALA

