# User Management Tool for *INTERREG+ IT system*

User Manual for Front Office users

v1.3.2

**Version History**

| Date | Version | Description |
|---|---|---|
| 11/01/2021 | 1.0.0 | First version for INTERREG+ User Management Tool |
| 01/03/2021 | 1.1.0 | Addition of view (read-only) type Front Office user |
| 21/06/2023 | 1.2.0 | Update – addition of 2021-2027 Programing Period |
| 08/11/2023 | 1.3.0 | Update – addition of User account information |
| 07/11/2024 | 1.3.1 | Update – Forgot password function; Keycloak account management |
| 11/02/2025 | 1.3.2 | Update – addition of HUHR Programme access to 2021-2027 Programming Period |

## Table of Contents

# Intoduction

***The INTERREG+ IT system accommodates the monitoring systems of the different cross-border Programmes for both the 2014-2020 and the 2021-2027 programing periods.*** The user management tool of the system supports association of a user account with multiple roles for different projects / project parts, and/or in different programmes in both programing periods. Therefore, holding multiple roles has the convenience of accessing many different projects with the same user.

In this manual, the reader is provided with fundamental information on user management in the INTERREG+.

# User Registration

## Accessing the system through the appropriate site

The User who wishes to register in the INTERREG+ system, first must access the system by one of the links below, according to the Programme the User is associated with:

For Front Office of the **2014-2020 programing period** (i.e. Lead Beneficiary and/or Beneficiary) users:

| | |
|---|---|
| https://huhr.interregplus.eu | Interreg V-A Hungary-Croatia Co-operation Programme 2014-2020 |
| https://huskroua.interregplus.eu | Hungary-Slovakia-Romania-Ukraine ENI CBC Programme 2014-2020 |
| https://husrb.interregplus.eu | Interreg–IPA Cross-border Cooperation Programme Hungary–SerbiaHungary-Serbia |
| https://skhu.interregplus.eu | Interreg V-A Slovakia-Hungary Cooperation Programme |

For Front Office of the **2021-2027 programing period** (i.e. Applicant, Lead Partner and/or Partner) users:

| | |
|---|---|
| https://huskroua.interregplus.eu/21-27 | Interreg VI-A NEXT Hungary-Slovakia-Romania-Ukraine Programme 2021-2027 |
| https://husk.interregplus.eu/21-27 | Interreg VI-A Hungary-Slovakia 2021-2027 |
| https://husrb.interregplus.eu/21-27 | Interreg VI-A IPA Hungary Serbia 2021-2027 |
| https://huhr.interregplus.eu/21-27 | Interreg VI-A Hungary-Croatia2021-2027 |

***Note that the choice of the access site for user registration does not limit Front Office user access to other Programmes or programing periods using the same account.***

## General remarks on user management

The INTERREG+ system identifies and authenticates the user by the unique username and password combination; to log in the system uses a one-step authentication only; therefore, the username must be unique. Besides the username, the system requires a unique e-mail address, as well.

The INTERREG+ system uses a so-called user-account solution for user management. The user account offers the possibility to assign multiple roles/rights to the same user. Thus, it is possible that a user is assigned to multiple:

- Projects/Project Parts;
- rights, i.e. Applicant, Recording and Signatory user, View user;
- roles, i.e. Project-level (Lead Beneficiary) and Project Part-level (Beneficiary);
- Programmes, i.e. HUHR, SKHU (2014-2020), HUSK (2021-2027), HUSRB, and HUSKROUA.

*Therefore, before registering, it is advised to consider the tasks, roles, and rights the user would be entitled to and chose the username accordingly.*

Rules of username choice:

- the username must be unique – a username can be registered only once in the system;
- only alphanumerical characters (i.e. letters and numbers) can be used – special characters are forbidden.

Rules of password choice:

- alphanumerical and special characters are allowed;
- the password must be at least 8 character long;
- the password must contain at least a digit (i.e. 1, 2, 3, etc.), a capital letter (i.e. A, B, C, etc) and a special character (i.e. *, ?, !, etc.).

*In case of a password is forgotten, the password can be reseted by clicking on the* ***Forgot Password?*** *button on the login window. The system sends an e-mail to the user e-mail address, following the instructions the task can be completed.*

## The process of user registration

Upon accessing the appropriate website, the User should click on the **Register** button on the opening login screen.



After filling in all the required fields, submit your data by clicking on the **Register** button at the bottom.

Upon successful registration, the system would ask for e-mail address verification. Please check the mailbox belonging to the e-mail address provided at registration, and verify your e-mail address by clicking on the link within.
*As the verification e-mail sent by the system contains a link, based on the settings of your local e-mail client, the verification e-mail may be automatically directed to your spam folder or even to the deleted items folder. Therefore, please check your settings before commencing the registration process, in needed contact your local IT professional.*

Upon successful e-mail verification, the system would log your new User in automatically; your User Registration process is successfully done, the user is created in the INTERREG+ system.


## Forgetting the password

In case of forgetting the password, the User can reset the password using the 'Forgot password?' function. It is in the middle right of the login screen.

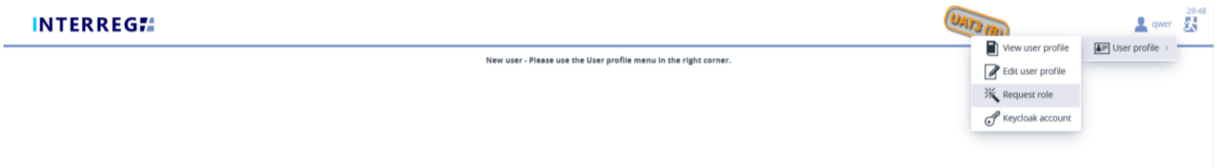


The User must provide the username to which the password is forgotten and submit it to the system. The system will send a generated e-mail to the e-mail address registered in the user account. The user must follow instruction provided in the e-mail to complete the password change.

## Role Request for User

***Please note that registering to any Programmes in the 2021-2027 programing period, the Applicant role is automatically assigned to the user!***

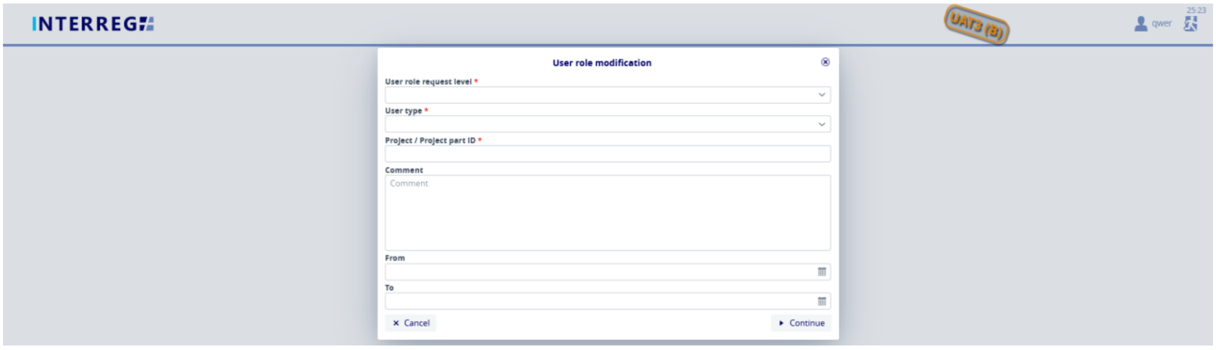
To request a Front Office role (other than Applicant) for your User, use the User Account icon on the right of main header. A 'user role request process' can be initiated by clicking on the **Request role** menu item.




By clicking on the **Request role** menu item, a ‘User role modification’ communication panel opens in. The User should provide the appropriate information for the requested user role by filling in the appropriate fields:

- *User role request level*: here can be chosen the level, which the user requests access to:
  - **Project-level** role– Lead Beneficiary (2014-2020; Project Report) / Lead Partner (2021-2027; Project Report, Project modification) or**;**
  - **Project Part-level** role – Beneficiary (2014-2020; Beneficiary Report) / Partner (2021-2027; Project Partner Report);
- *User type*: here can be chosen the exact role the user requests:
  - **Recording** user – this type of user is allowed to edit a report, but cannot sign and submit it;
  - Signatory – this type of user is not allowed to edit a report, but can sign and submit it;
  - **Recording & Signatory** – both Recording and Signatory roles are assigned to the user, can manage both Recording and Signatory user tasks, or;
  - **View** – this type of user is a ‘read-only’ user, only allowed read-only access, no editing of reports is possible;
- *Project / Project Part ID*: here the ID of the Project or Project Part must be provided, which the user requests access to.
  *Note that only ID of Project / Project Part of the respective Programme can be provided, through the access site of which the user logged in the system!*
  The **project ID** is the same as the application ID, e.g. **SKHU/1901/1.1/999** for the Hungary-Slovakia 2014-2020 Programme or **HUSK/2301/1.1.1/A/9999** for the Hungary-Slovakia 2021-2027 Programme.
  The **project part ID** is the project ID extended with the Beneficiary (2014-2020) or Partner (2021-2027) ID, e.g. **SKHU/1901/1.1/999/B1** for the Hungary-Slovakia 2014-2020 Programme or **HUSK/2301/1.1.1/A/9999/P1** for the Hungary-Slovakia 2021-2027 Programme.
  *Information on the project (part) ID can be obtained from the Project Form.*
- *Comment*: here the user can provide any additional information, if necessary;
- *From / To*: the user can indicate the validity period of the user role; in general, it shall be left empty.

The request can be submitted by clicking on the **Continue** button at the bottom of the panel. By clicking on the **Cancel** button, the request can be withdrawn.




Upon successful request process, a confirmation message appears, and the user receives a confirmation e-mail to the mailbox provided at registration.


Submitting multiple user role requests at a time is not supported, in such case the below message appears.

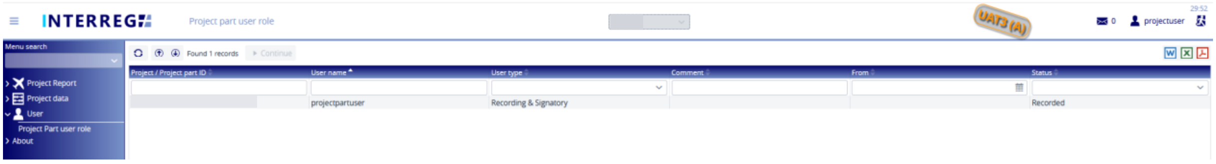

***A User may have been associated with more than one project/project part, in such case as many role request must be initiated as many project/project parts the User wishes to have access to.***

Important rules to keep in mind when requesting a role:

- the Project ID or Project Part ID you provide in your request cannot be modified during the role request acceptance process. In case of inappropriate ID is provided, the request should be rejected, and a new role request must be initiated.
- A User may fulfill the Lead Beneficiary / Lead Partner (Project-level) user role (Recording and/or Signatory) and the Beneficiary / Partner (Project Part-level) user role (Recording and/or Signatory), in such case two separate requests shall be submitted, one for Project-level and the other is for Project Part-level. *Note that as the Project-level Recording user has the right to attend to role requests of the Project Part-level users, first submit the project-level role request!*
- A User may have been associated with Project(s) and/or Project Part(s) of different Programmes, in such case the user role request must be initiated by accessing the system through the appropriate site (see links here).

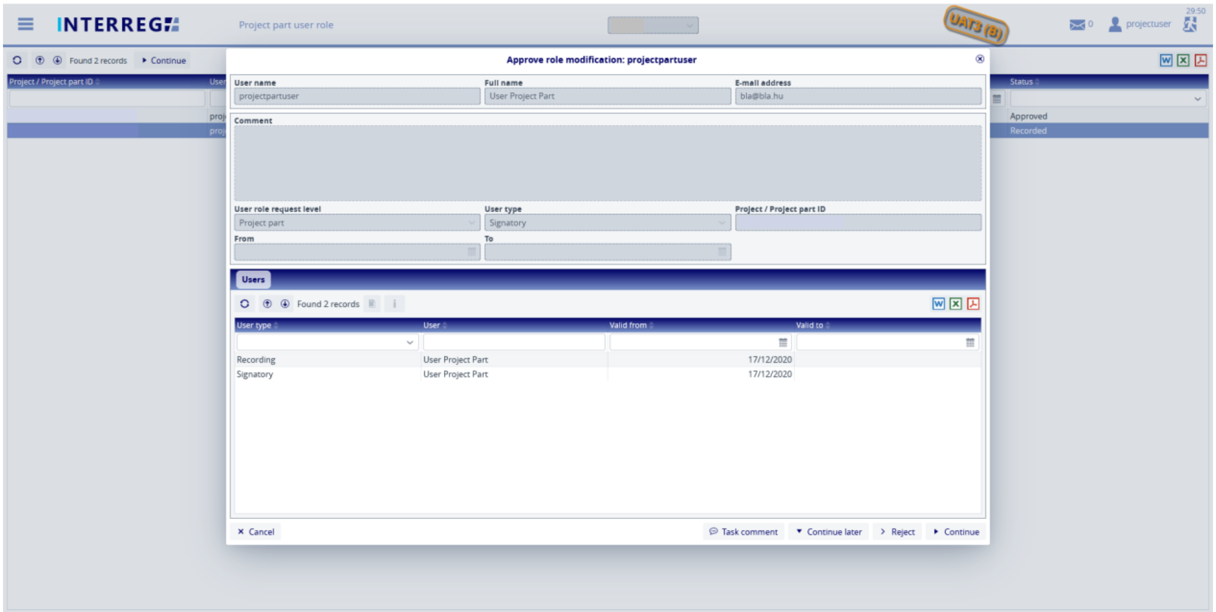
## Accepting a Project Part-level Role Request by Lead Beneficiary/Partner Recording User

***The Project Part-level role request acceptance process is made by the Recording User of the Lead Beneficiary/Partner of the Project to which the user role is requested.*** The submitted role request can be found in the *Project part user role* menu item under the *User* menu point on the left upper corner of the screen in the Main Menu. All ever submitted requests are displayed, every unattended role request is marked as 'New' in the status column, the attended ones are marked as 'Approved' or 'Rejected' (depending on the outcome of their approval processes). As a new role request is submitted, the corresponding Lead Beneficiary/Partner Recording User is informed by e-mail sent automatically by the system. The new role request can be attended to by selecting it from the list and clicking on the **Continue** button.



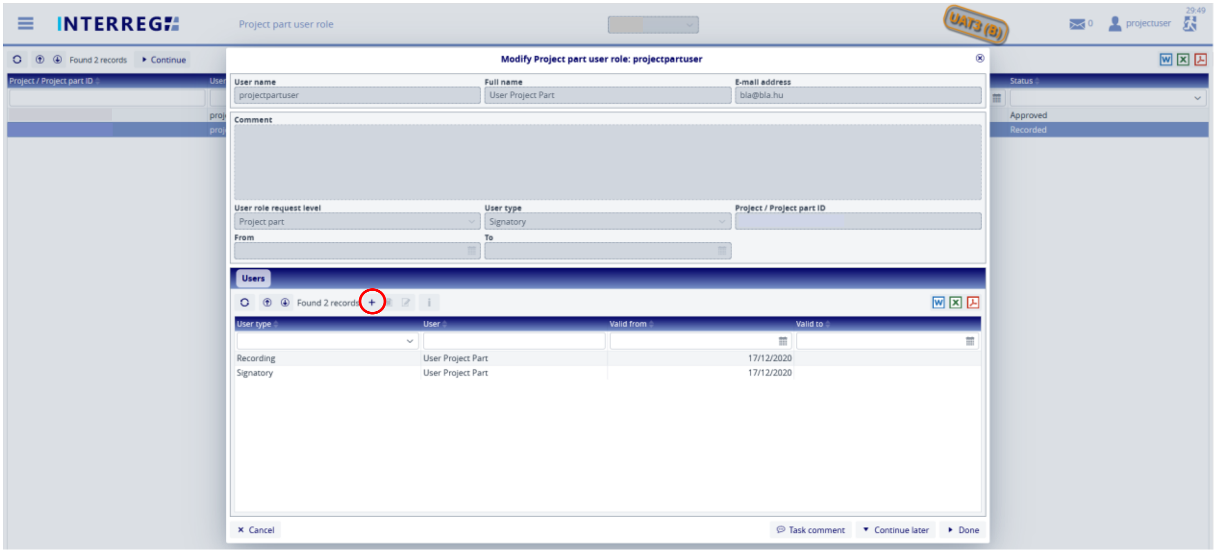
1) After a user role request task is attended to, an information window opens, where all information on the request and on the associated Project roles are available. Based on the information, the LB Recording User decides how to proceed:
   - by the **Cancel** button, the request acceptance process can be postponed;
   - by the **Continue later** button, the request acceptance process can be postponed, in this case the request returns to the pool;
   - by the **Reject** button, the request can be rejected, in such case the process ends, no user role associations are made, *the decision is delivered to the user by e-mail*. In case of rejection, details of the decision can be provided by the **Task comment** button, this information would be also included in the e-mail sent by the system;
   - by the **Continue** button, the process can be carried on.

   The above described buttons are found at the bottom of the communication window (see below).

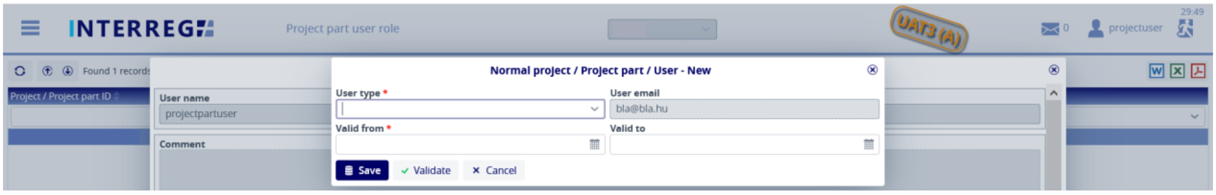



2) *a)* In case of a positive decision (i.e. Continue) the same information window appears: the upper part of the window still shows provided data for information, the bottom half, under the *Users* tab, is where the user role associations can be made. If any user role association were already made to the given Project Part, it would be listed here. Under the *Users* tab, the existing roles can be modified or new one(s) can be created.

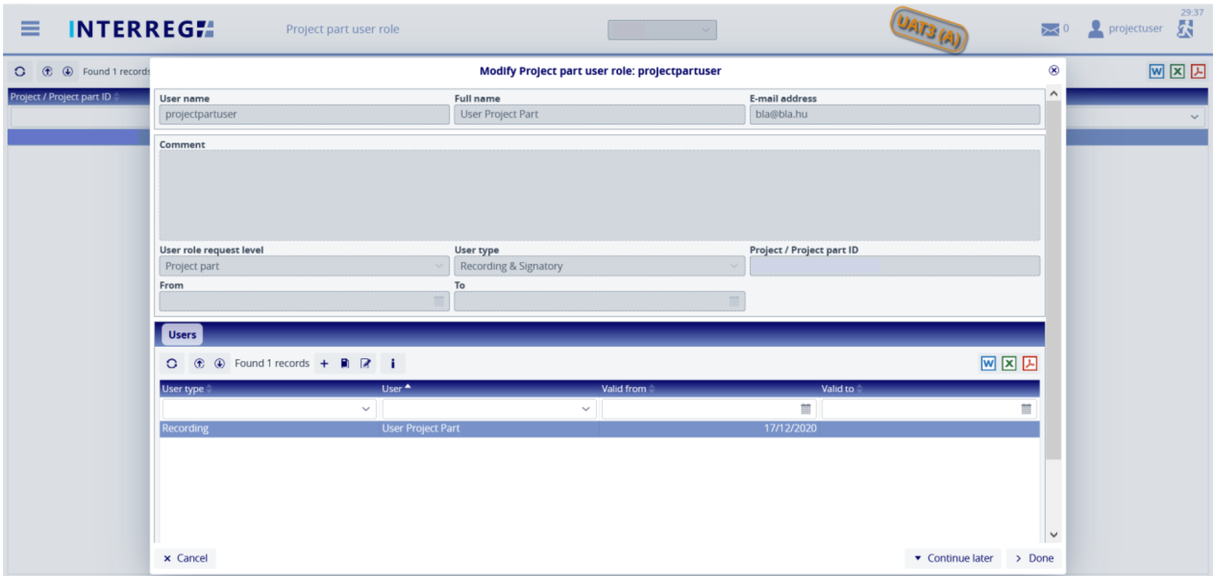
   *Rules of user role assignment:*
   - *only one Recording User role can be assigned to any given Project or Project Part;*
   - *multiple Signatory User role can be assigned to any given Project or Project Part;*




*b)* By clicking on the **Add** ( + ) button (under the *Users* tab) the requested new user role association can be started; a communication panel opens. In the opening communication panel, the role must be set (according to the request) and the start of the user validity (valid from field). The start of the user validity must be the day of the role request acceptance. The user email is not editable; it is filled in by the system from the user's profile.

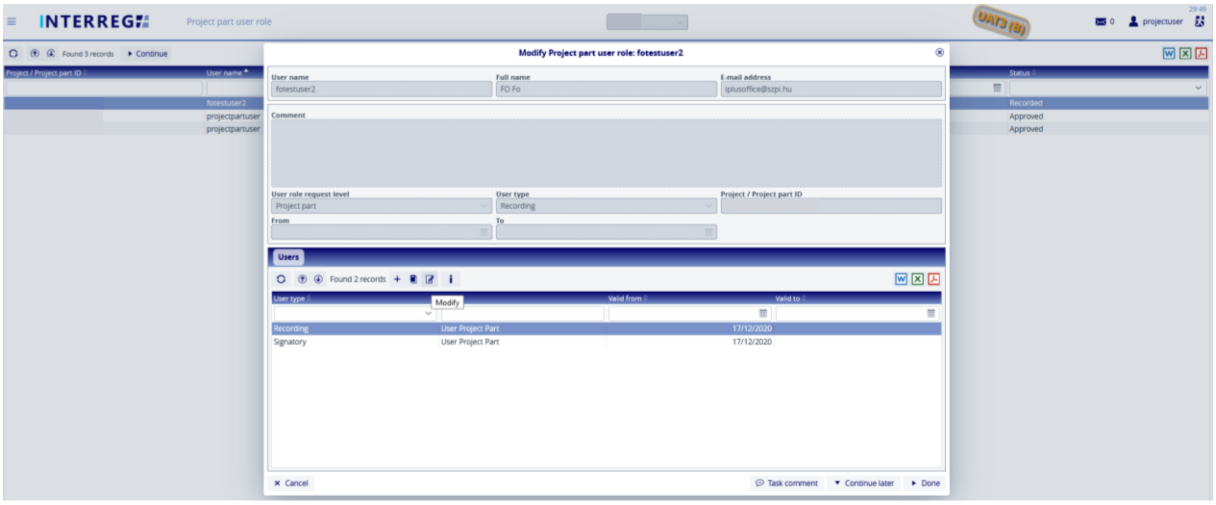


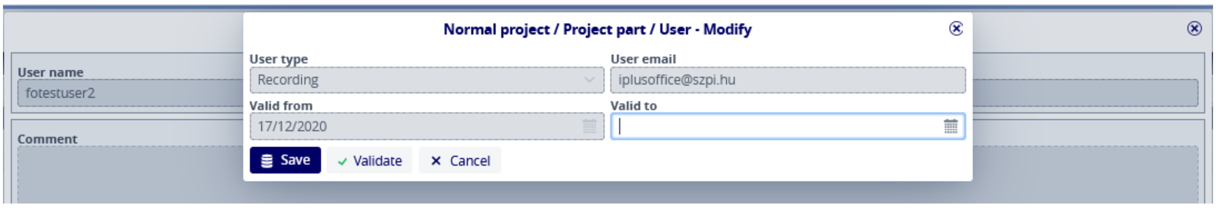

*c)* When all data are appropriately provided, the user role association is made by clicking on the **Save** button. The newly formed user role is listed under the *Users* tab. Before finishing the acceptance process the newly formed user roles can be edited or deleted.
The pre-existing user roles cannot be deleted; however, the end of user validity ('valid to' field) can be modified.



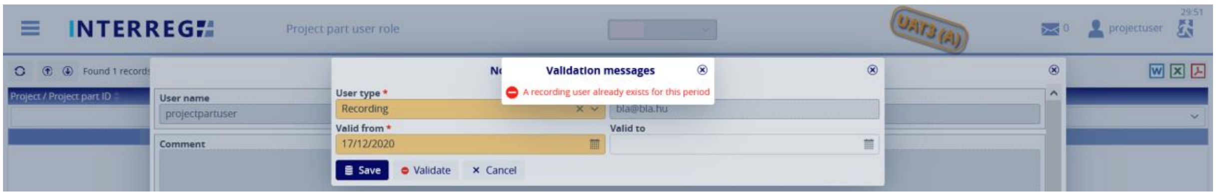
3) When all requested (and proven to be correct) role(s) are created, the User Role Request Process must be finalized by clicking on the '**Done**' button. By clicking on the '**Done**' button, the system sends out a confirmation e-mail to the users involved in the role request.
   ***PLEASE NOTE THAT THE PROCESS CAN BE FINALIZED BY THE DONE BUTTON WITHOUT ADDING ANY NEW ROLES!*** *In such case, a Confirmation message appears; by clicking on '**Cancel**', it is possible to return to the process; by clicking on the '**Ok**' button, the process is finalized and no user role associations would be made.*


**If a user role is requested to a Project Part, where there is/are active user(s), then before the request could be fulfilled the existing user role association must be invalidated by setting the pre-existing users' 'Valid to' date**. After selecting the existing role from the list, the modification can be started by the (**Modify**) button. The existing user's 'Valid to' date must be set to the day before the actual date, this way the new user's validity can start with the actual date (i.e. the day of the request acceptance process).



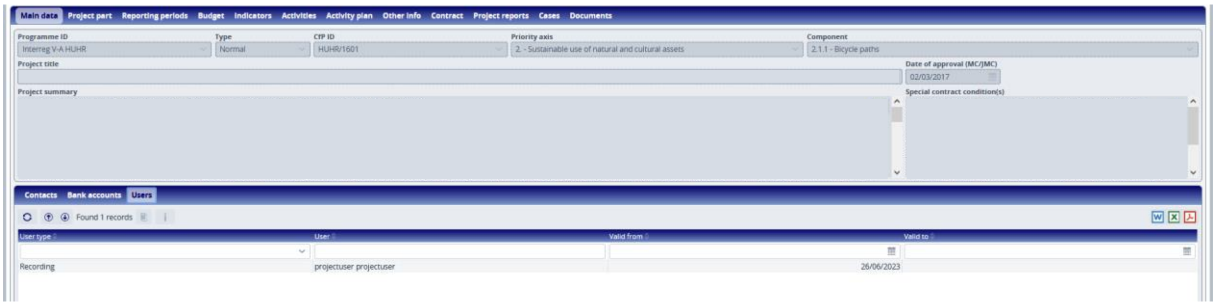

Only one Recording user can be active at a time on each Project or Project Part, however as many Signatory user can be associated with a Project or Project Part as necessary (in such case all Signatory users must complete the signing of the Report). Therefore, the existing roles must set accordingly before the new role creation described in *paragraph 2) b).* In case of Recording user, the system sends an error message if new user role is added when there is already an active Recording user.

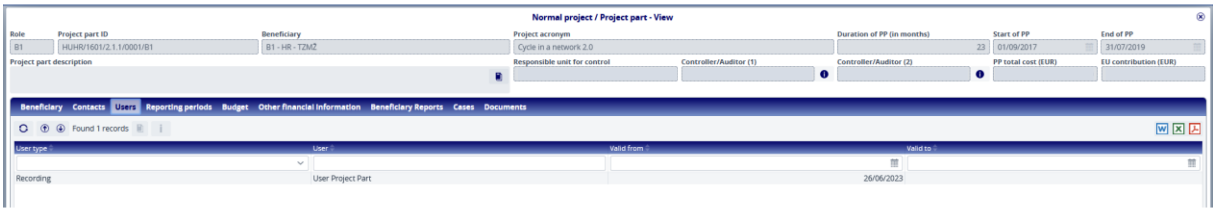



# Viewing user information (user profile, role)

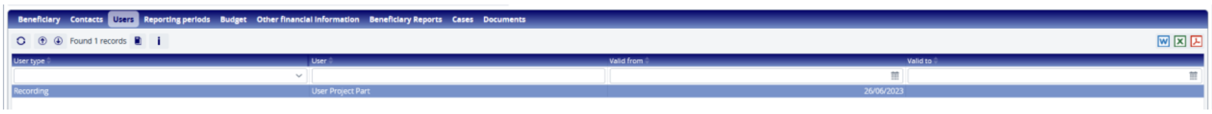
## Users of a project / project part

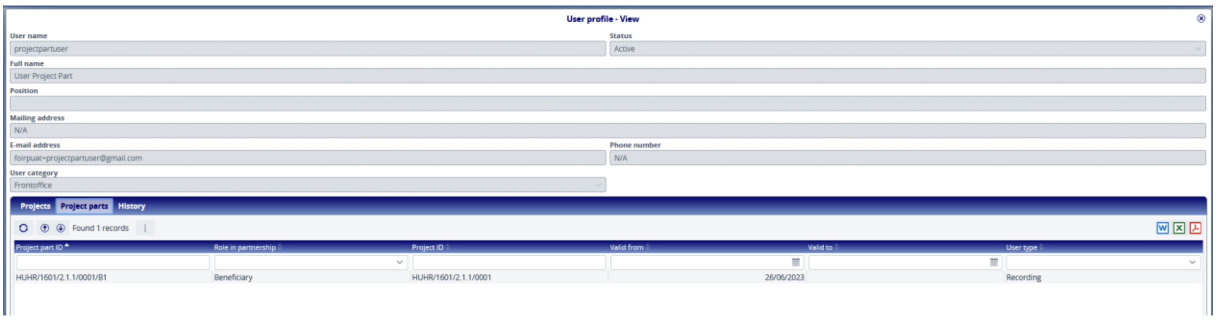
A project-level user can see the project information, whereas a project part-level user can see the project part information, under the *Users* tab; all (valid and invalid) users can be viewed. The project-level *Users* tab is located under the *Main data* tab; the project part-level *Users* tab can be found under the respective *Project part* tab.





The user list screen also displays information about the user type (Recording Signatory, View), and the validation of the user role (‘Valid from’, ‘Valid to’ fields). Detailed information about the user profile can be reached, by selecting the user in question and clicking the ‘Information’ button.

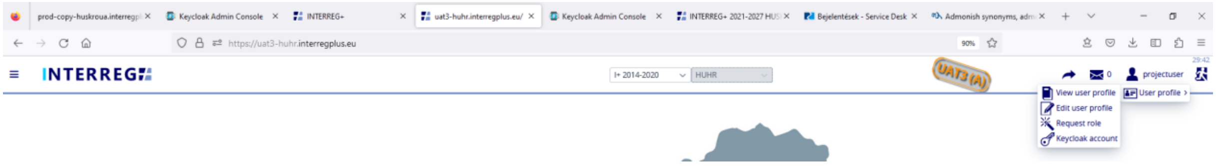




The user profile screen, beside the user information, provides information on the project(s) / project part(s) the user is associated with. Under the *Projects* and/or *Project parts* tabs all projects / project parts can be seen, the user holds a valid or invalid role.

### User Profile information

A user can view their roles and associated projects / project parts in the User profile. The details of the user Profile is accessible through the View user profile.

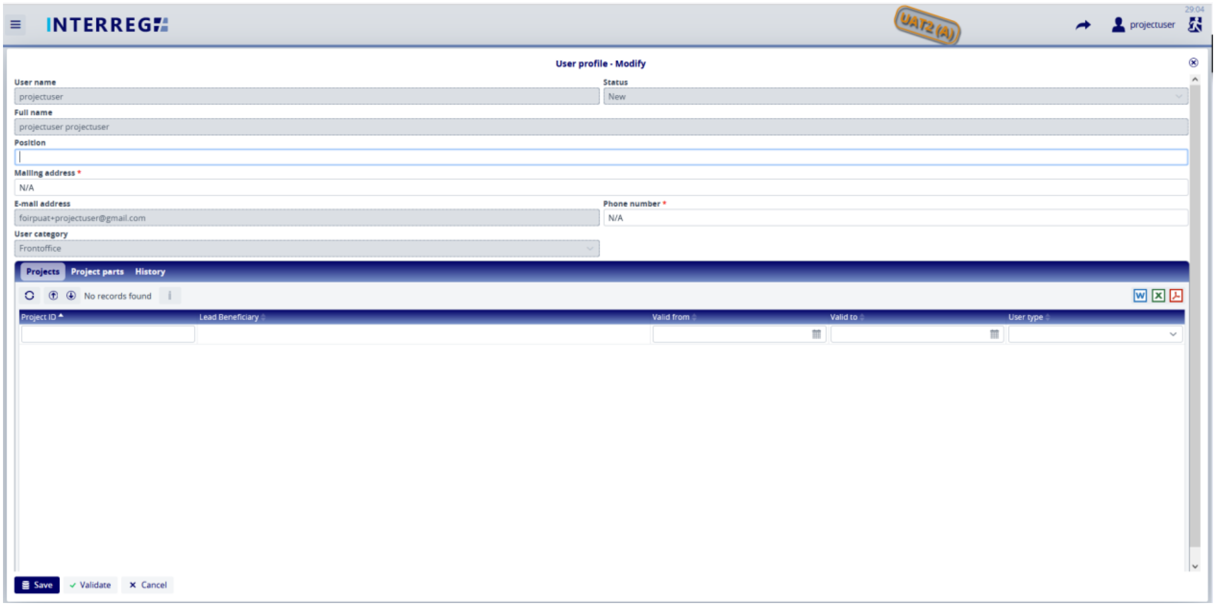



In the upper half of the user profile, the user credentials are seen; in the lower part under the *Projects* and the *Project parts* tabs, information is found about the user roles and the associated projects / project parts.


## Editing user information

### Edit User Profile

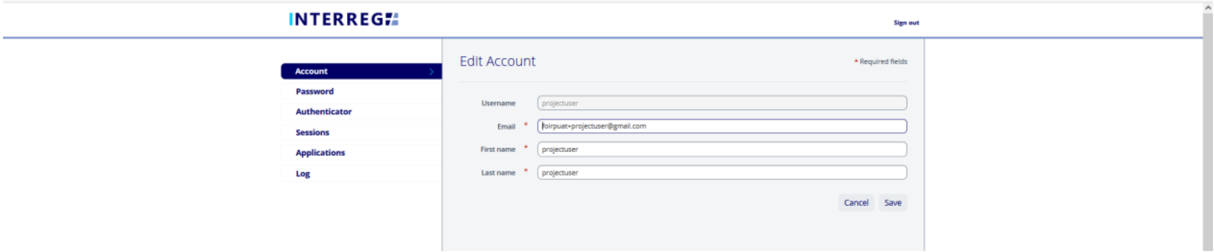
To edit personal information of the user profile, access it via the User profie / Edit user profile menupoint. Here the position, mailing address, and phone number can be provided.

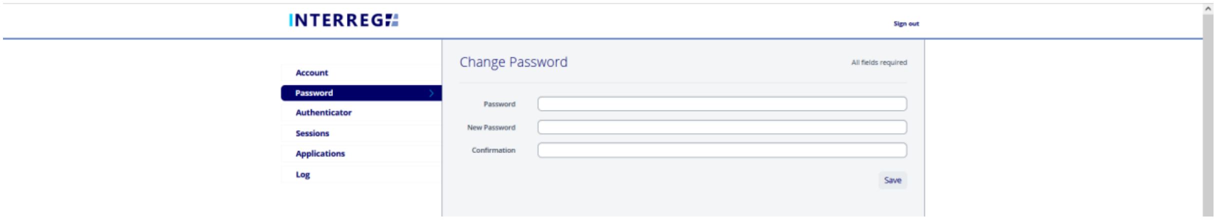



After making any changes, the user must save those with the 'Save' button located at the left bottom corner.

## Keycloak account

The Keycloak is the authentication center of the INTERREG+ application. The user can change the First and Last name, the user e-mail address and the password accessing it via the User profie / Keycloak account menupoint. _Note that the username cannot be modified._




When a modification is made, it must be saved with the 'Save' button.

**Note that the modified credential(s) (e-mail address and/or name) will be applied in the INTERREG+ user account only upon a new login. Therefore, it is imperative that log off the system and log in again immediately after making the modification(s).**

**Also note that after changing the user e-mail, upon the first login attempt, the system will ask for confirmation of the new user e-mail, therefore the user must be absolutely sure to provide an e-mail address to which the user has access!**

# Accepting a Project-level Role Request by Joint (Technical) Secreteriat

_The Lead Beneficiary / Partner role request acceptance process is made by the Programme Manager of the respective project. The User will be notified via automatic e-mail by the system._

# Technical Assistance and Support

Should you have any technical issue concerning INTERREG+ IT System functioning, please contact INTERREG+ Support Team at the iplussupport@szpi.hu e-mail address.

_To support your case, please, provide a description of the problem with as much details as possible, and attach screenshots, of which the entire screen is visible. Additionally, please provide the Project (Part) ID and the username._