KARELIA
CBC // Cross-border cooperation

PROMAS

APPLICANT USER GUIDE

Table of contents

1. PROMAS REGISTRATION FOR APPLICANTS

In Promas, the applicant can request user name and password to participate to the call for proposal. Promas will automatically create call for proposal specific user name and password for the applicant and sends an email containing a link for confirming the user name and password, which must be changed after first login.

The user name requested for the previous call for proposals do not allow application submitting in later calls. E.g. each call for proposal requires new user name. The applicant can request user names for several different applications at the same call for proposal.

The applicant has a possibility to create additional user names in Promas. The user names may be with applicant rights or with reading rights. User name contains the applicant contact data which can be modified during the call for proposal and during the project implementation phase.

1.1 Registration for the call for proposal

Go to public site of Promas.

Site: https://www.promascbc.fi
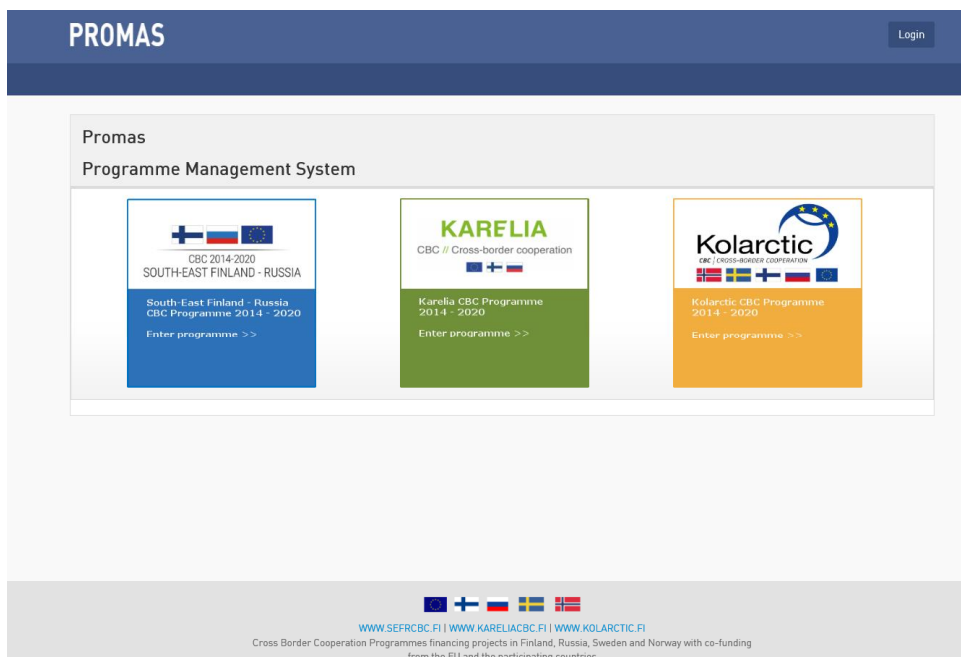
Choose the Programme by clicking its logo. You will be able to see list of the Call for Proposals in the Programme.

Following information is available about the Call for Proposals

- Programme name
- Name of the Call for Proposal
- Call for Proposal **type** (Open Call for Proposal or Restricted Call for Proposal)
- **Open Date** (date when Call for Proposal is opened)
- **Close Date** (date when Call for Proposal is closed, which means that after that participation to Call for Proposal is not possible)
- **Status** of the Call for Proposal
- **Description** of the Call for Proposal

For applying click %Register for call for Proposal+on the call for proposal you want to apply.

Following screen appears and applicant is requested to input email address to which login information will be sent.

PROMAS   Login

Home   Support

Open Call for Proposal example
Type: Open Call for Proposal

Login information will be sent to the given email address.

Email address *   [   ]

[Register]   [Cancel]

After successful registration, system shows following message to the applicant.

Information Dialog

ⓘ   Registration completed successfully. Username and Password has been sent to registered email address.
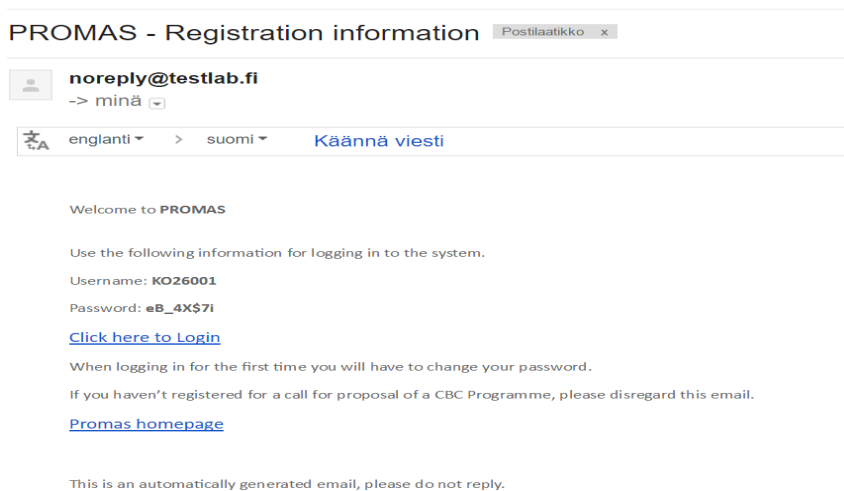
[OK]
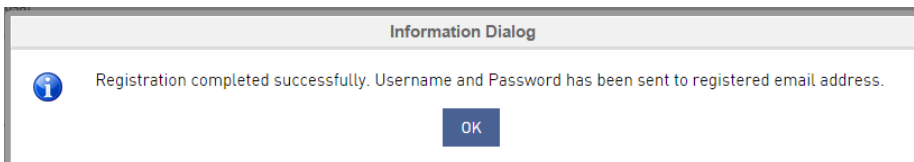
Applicant receives following email from noreply@testlab.fi.

PROMAS - Registration information   Postilaatikko   x

noreply@testlab.fi
-> minä ▾

文A   englanti ▾   >   suomi ▾   Käännä viesti

Welcome to **PROMAS**

Use the following information for logging in to the system.

Username: **KO26001**

Password: **eB_4X$7i**

Click here to Login

When logging in for the first time you will have to change your password.

If you haven't registered for a call for proposal of a CBC Programme, please disregard this email.

Promas homepage

This is an automatically generated email, please do not reply.

Email contains the Username and password for the applicant.

Login to Promas with credentials from the email by clicking the link in the email.

Login window opens.

Enter the Username and Password that you received from the reqistration email. Promas will require the change of the password on the first login.

Enter the old password and give the new password. Please note that password must contain at least 8 characters including a number and capital letter. The new Password cannot be the same as old one. Finish the change of the password by pressing Update push button.

Call for Proposals homepages opens.

In the right upper corner user can see Username that is logged in. Next to Username user can log out from the system.

In the main navigation bar user can find details of the support such as user guide and support contacts.

1.2   Managing User Rights (Applicants partners)

Applicant can also manage additional user rights for the Call for Proposal by selecting User Rights from the main navigation bar.
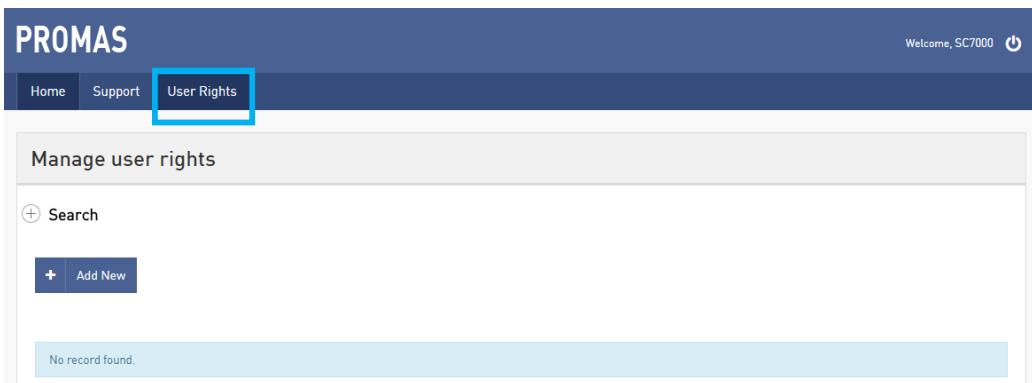
To Add New user, click Add New push button. New window opens
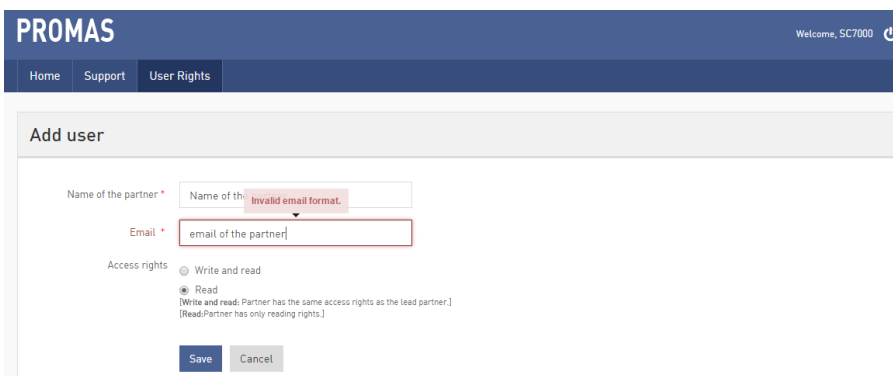
Promas requires following information for the partner registration:

- **Name** of the partner
- **Email** of the partner
- **Access rights:**
    - **Read:** partner has only reading rights
    - **Write and read:** partner has the same access rights as the lead partner

Finish the partner registration by pressing Save push button.

System displays message that user is added successfully and sends the registration email to the added partner (Same email content that described in Chapter 1.1).
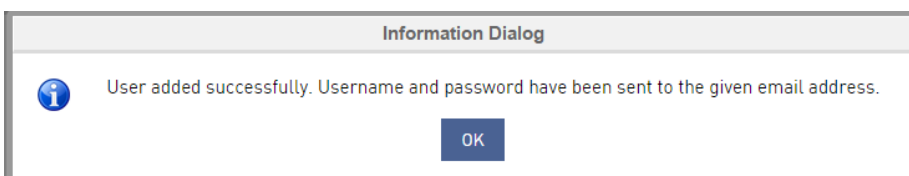
User returns back to Manage user rights page.
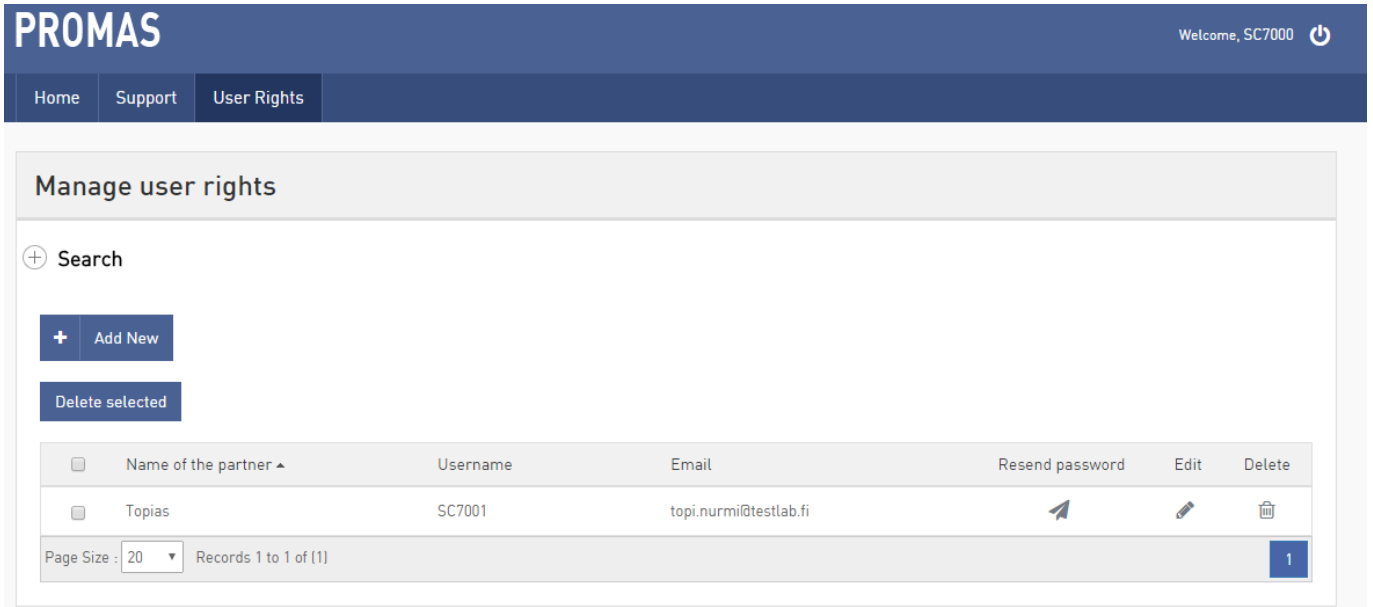

Following information and functionalities are available in the manage user rights page:

- Add New partner
- Delete selected users
- Name of the partner
- Username
- Email
- Resend password, in case partner forgets the password, applicant can resend the password via this functionality. System ask to confirm the resending. New password must be given when resent has been done.
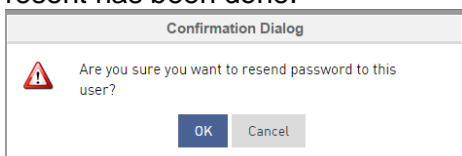
- Edit partner name or access rights (write & read or read)
- Delete partner. System ask to confirm user deletion.
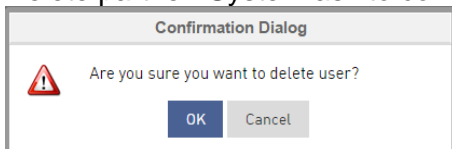
2.   APPLYING FOR CALL FOR A PROPOSAL: OPEN CALL FOR PROPOSAL

3.   APPLYING FOR CALL FOR A PROPOSAL: RESTRICTED CALL FOR PROPOSAL

Login to Promas with credentials from the registration email by clicking the Login link, or browse to

https://www.promascbc.fi > choose Login.

3.1 Filling in concept note

In a restricted call for proposal you fill in first so called concept note.

Click Fill Concept Note.

Click the Fill Concept Note push button. Concept Note windows opens.

3.1.1 Basic Information

Fill in the Basic information and the lead partner name. If needed, applicant can also add partners at the same time.

Fill in partners (if more than lead partner).

Fill Requested financing.

Press Save & Stay if you want to save your work and stay in the Basic information page. Press Save & Next if you are ready to move next form (tab) in the application.

3.1.2 Partners tab

Click Add/Edit information Icon in the view. Partner information page opens.

Provide Identity information for the Lead Partner:

- Name of the organisation in original language
- Department/unit in charge of the activities
- Business ID
- Legal status (Selection; Public or Private)
- Type of the organisation (Selection from the list)
- Description of the organisation
- Official address
- Postal address
- Telephone number
- Email of the organisation
- Website of the organisation

Continue with providing Contact Person details:

Contact Person

Name	Jaakko Kivi
Position	Land scaping specialist
Telephone number	+3589963537
Email	

Fulfill the Motivation and Capacity sections:

Motivation

What is the role of the partner in the project?

Why does the organisation participate in the project (reason and motivation)?

How does the organisation benefit from participating in the project?

Capacity

Operational Capacity

What are the organisation´s thematic competences and experiences relevant for the project?

Describe the organisation´s previous experience in participating in and/or managing EU co-financed projects or other international projects.

In the case of partners from outside the programme´s core area: What is the added value of this partner for the project?

And then fill in Financial Capacity information.

Click Save & Next or click Save & Stay to fill in another partners details.
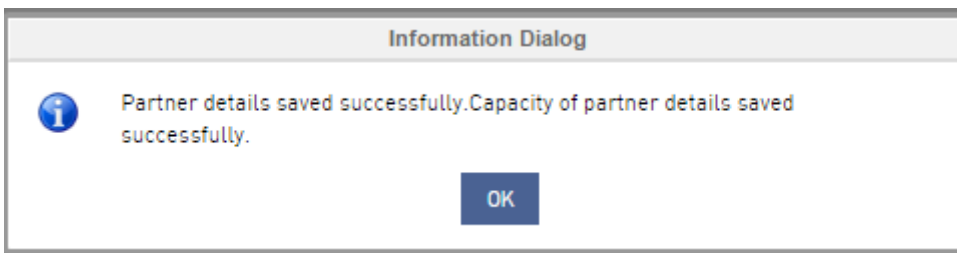
System informs that details have been saved successfully.

3.1.3   Summary

Applicant is required to provide an overview of the project to Summary.

Following areas should be covered in the summary:
- the problem the project is planning to solve and how it has been identified;
- the objective of the project;
- the expected change the project will make to the current situation;
- the target groups and beneficiaries of the project;
- the main outputs the project will produce;
- the approach planned to take (type of activities to be implemented);
- why cross-border cooperation is necessary for implementation of this

Basic Information | Partner information | **Summary** | Relevance | Implementation | Budget and Financing | Annexes | Signature

Give an overview of the project describing:

- the problem the project is planning to solve and how it has been identified;
- the objective of the project;
- the expected change the project will make to the current situation;
- the target groups and beneficiaries of the project;
- the main outputs the project will produce;
- the approach planned to take (type of activities to be implemented);
- why cross-border cooperation is necessary for implementation of this

The maximum length of the summary is 12 000 characters.

Summary text here

11983 characters remaining

« Previous | » Save & Stay | » Save & Next

3.1.4 Signature

PROMAS

Welcome, SC8000

Home | Support | User Rights

Concept Note

Print | Back

Basic Information | Partner information | Summary | **Signature**

By signing the application the Lead Partner on behalf of all partners, confirms that:

- the project partners have the sources of financing, professional competence and qualifications required by implementation of the proposed project;
- In case of approval of the project proposal by the Joint Monitoring Committee, our organisation will take the role of the Lead Partner with all the responsibilities assigned to it;
- our organisation is directly responsible for the preparation, management and implementation of the project and is not acting as an intermediary;
- neither our organisation nor the partners are in any of the situations excluding them from participating in contracts which are listed in the respective documents and we accept that if we participate in spite of being in any of these situations, we may be excluded from other procedures;
- if recommended to be awarded a grant, our organisation accepts the contractual conditions as laid down in the Grant Contract and in it's conditions;
- our organisation is fully aware of the obligation to inform without delay the Managing Authority if the same application for funding made to other financing programmes of the European Union or the participating countries has been approved after the submission of this application.

Name | Jaakko Kivi
Position | Specialisy
Date | 14/11/2016

« Previous | » Save & Stay | ✔ Submit | Cancel

Applicant must sign the application via Signature sheet by providing following information:

- Name
- Position
- Date

Press Submit push button to submit the application. System ask to confirm the submission.
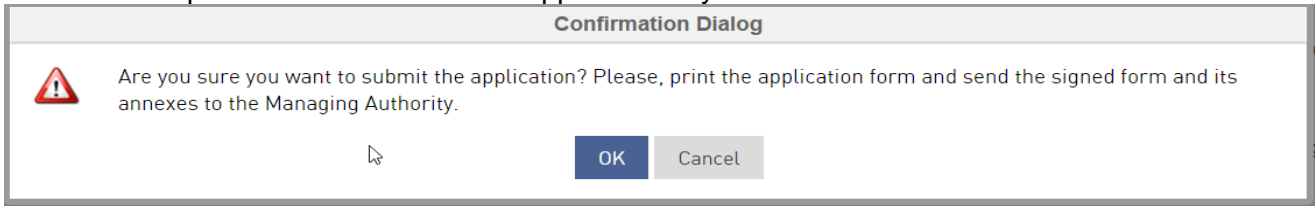
System informs that Application has been submitted successfully.
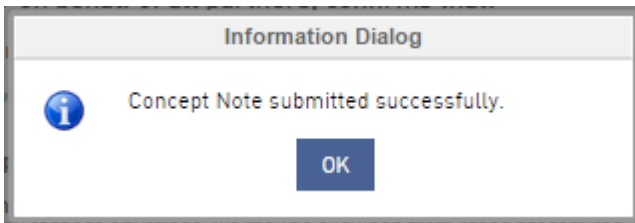
After concept note is submitted you can view the concept note by logging in to Promas and clicking View concept note.

You get an email that the concept note is submitted.

3.2   Viewing your concept note

Login to Promas public site as applicant (https://www.promascbc.fi).

You can see the status of your application (on Home page).

Click View Concept Note to print and sign the concept note.

3.3   Concept Note handling and approvals by Authority

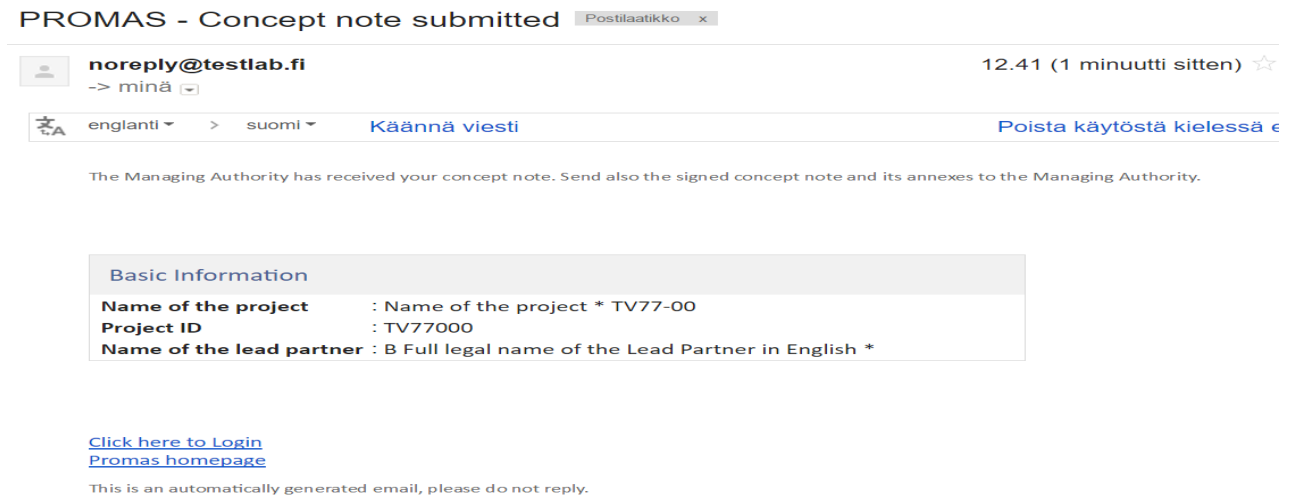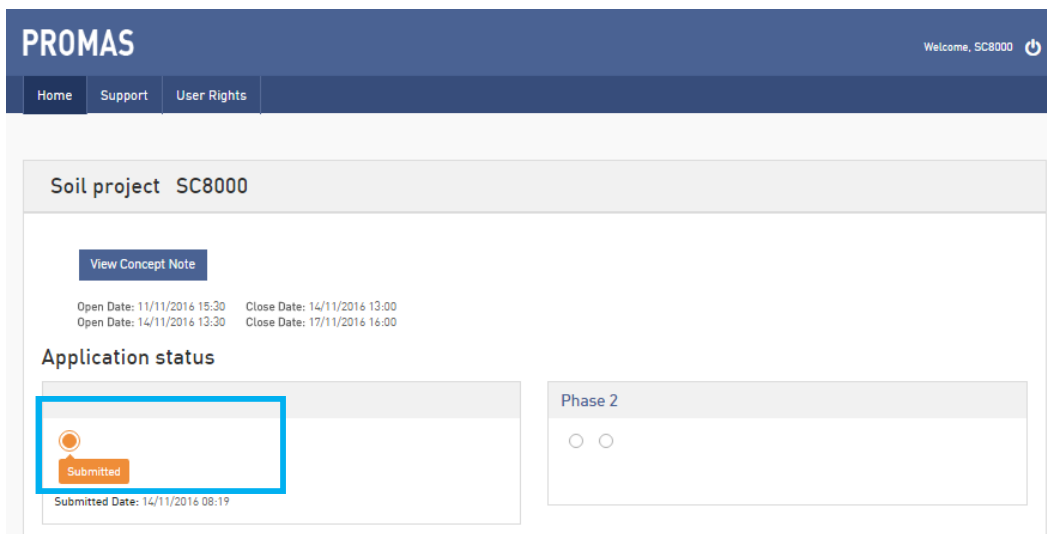You can see the statuses of your concept note on Promas Home page (when logging in with your username). You can see the progress of authority's processes.

In case of that Authority requests clarifications to the Concept Note (i.e. additional information). Applicant will receive an email for Request for clarification.
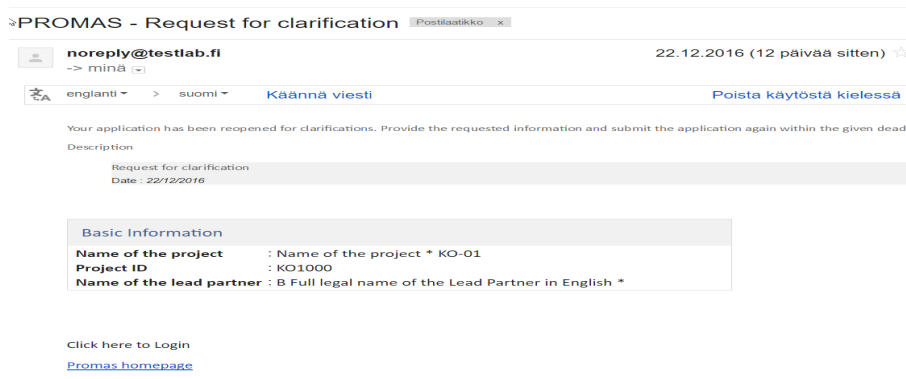
Also the Concept Note is reopened for providing the requested information. Press "Fill Concept Note" button to provide requested clarifications. Applicant must do the requested updates in the Concept Note and submit it for review again. It will return to status "Submitted".
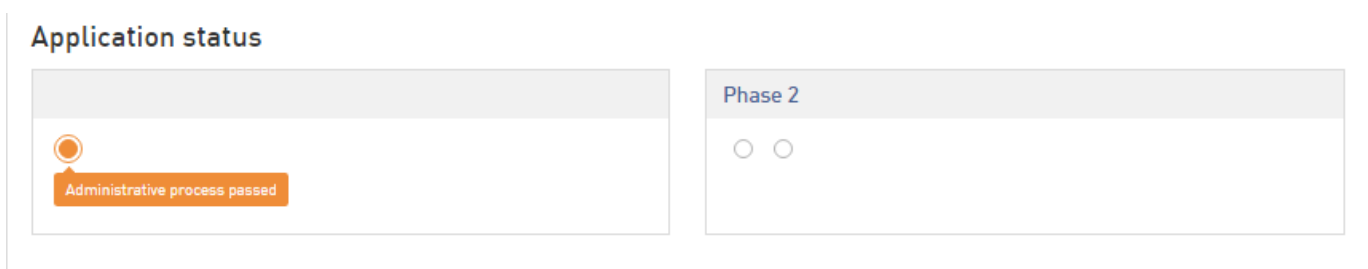
The authority conducts the administrative check for the submitted Concept Note. After the administrative check, the Concept Note is either rejected or approved. ***Administrative process passed*** means that administrative check has been conducted to the Concept Note and it is forwarded for the quality assessment.

The quality assessment will be done by the authority or by the external evaluator. After quality assessment has been done, status will be changed to ***Expert Evaluated.***

After the quality assessment, the application is forwarded to the committee handling, which makes the final decision whether applicant can continue to second phase of the call for proposal.

When concept note has passed the authority processes, you are invited to fill in the application. You get an email about it.

Concept Note will get status ***Phase I: Passed*** and Fill application form push button will be visible for application completion.
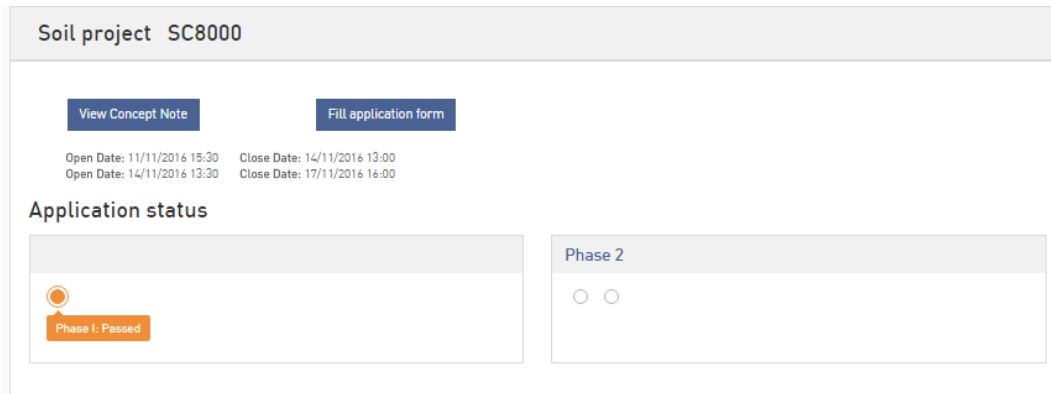
3.4 Filling in Application (Restricted Call for Proposal: Phase II)

After the Concept Note (first phase of the restricted call) has been approved, applicant must fill in the Application (second phase of the restricted call).

Login to Promas.
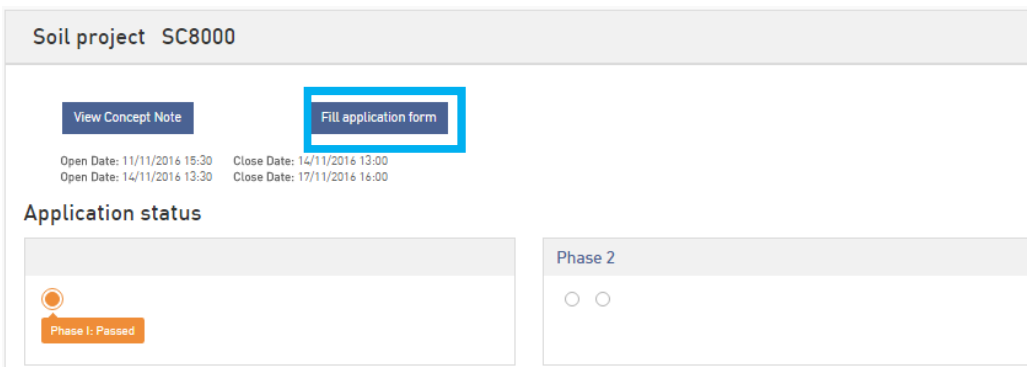
Click Fill application form push button. Application Form opens. Please note that some of the information is already copied from the concept note to the application.

3.4.1 Basic Information

Provide following Basic information to the application:

Application Form Details   Print   Back

Basic Information | Partner information | Summary | Relevance | Implementation | Budget and Financing | Annexes | Signature

Fields marked with asterisk (*) are mandatory.

Application Form Status	Pending
Name of the project *	Soil project
Acronym *	Sopo
Project ID	SC8000
Full legal name of the Lead Partner in English *	Oulu Soil diggers
Country of the Lead Partner	FI - Scandic
Region of the Lead Partner	Kaenuu
Priority *	Fresh sand
Thematic Objective	Thema objective for sand
Duration of the project in months	2

- Priority (Mandatory Selection)
- Thematic Objective (Select from the list)
- Duration of the project in months

Continue with Partner adding if needed. Provide Partner details and press Add push button.

Partners

Partner	Country	Region	Delete
No record found.			

Add a new partner

Full legal name of the Partner *	Oulu clean air tech company
Country of the Partner	FI - Scandic
Region of the Partner	Kaenuu

Add

Requested financing will be filled in automatically from Budget and financing tab that comes later.

Requested financing

Do not fill in. Automatically inserted from budget.

Total costs of the project	0 €		
Investments included in total costs	0 €	0	% of total financing
Requested programme financing	0 €	0	% of total financing

» Save & Stay   » Save & Next

Press Save & Stay if you want to save your work and stay in the Basic information page. Press Save & Next if you are ready to move next form in the application.

3.4.2 Partner information

Click Add/Edit information icon in the view. Partner information page opens below the partners list. Please note that some information is copied from concept note that is filled in earlier.

Provide/update following Identity information for the Lead Partner:

- Name of the organisation in original language (from Concept Note)
- Department/unit in charge of the activities
- Business ID
- Legal status (Selection; Public or Private)
- Type of the organisation (Selection from the list)
- Description of the organisation
- Official address
- Postal address
- Telephone number
- Email of the organisation
- Website of the organisation

Continue with providing Contact Person details:

Contact Person

Name	Hope Grass
Position	Air balloon specialist
Telephone number	+358507777777
Email	topi.balloon@balloon.air

Fill the Motivation and Capacity sections:

Motivation

What is the role of the partner in the project?

Why does the organisation participate in the project (reason and motivation)?

How does the organisation benefit from participating in the project?

Capacity

Operational Capacity

What are the organisation´s thematic competences and experiences relevant for the project?

Describe the organisation´s previous experience in participating in and/or managing EU co-financed projects or other international projects.

In the case of partners from outside the programme´s core area: What is the added value of this partner for the project?

Provide Financial Capacity information.

Press Save&Next to move next part of the Application or press Save & Stay to fill in another partners details.

System informs that partner details have been saved successfully.

3.4.3 Summary

Applicant is required to provide an overview of the project to Summary.

Following areas should be covered in the summary:
- the problem the project is planning to solve and how it has been identified;
- the objective of the project;
- the expected change the project will make to the current situation;
- the target groups and beneficiaries of the project;
- the main outputs the project will produce;
- the approach planned to take (type of activities to be implemented);
- why cross-border cooperation is necessary for implementation of this

3.4.4 Relevance

Relevance part of the application contains following sections:

- Objective
- Thematic indicators & Project specific indicators
- Work plan & Activity planner
- Sustainainability

3.4.4.1 Objective

Provide the Objective details to the application.

3.4.4.2 Indicators

Provide target value to Thematic indicators. Please note that Thematic Indicators are set by the program.

Thematic indicators	
Thematic indicator	**Target value**
Thematic indicator 1	25

Project specific indicators	
Indicator	**Target value**
Project indicator 1	50
⊖	
⊕	

Applicant can also add Project specific indicators by clicking + sign and inputting the indicator. (Similarly project indicator can be deleted via ‰sign)

3.4.4.3 Work plan & Activity planner

In the application form, applicant is also requested to prepare work plan for the project.

Work plan

Describe the main activities to be implemented in the project. Make sure the described activities and outputs are in line with the logical framework of your project.

Also, compose an indicative schedule and a RACI matrix for the project by providing information for each activity.

You can edit activities by clicking the activity on Activity planner.

Name	Description	Output	Country and Region
⊕			

Click + sign to add activity. Add activity pop up window opens:

Give the following information to the activity:

- Name of the activity (Mandatory)
- Description
- Status of the activity (selection: To Do; In Progress; Completed)
- Estimated start date (Mandatory)
- Estimated end date (Mandatory)
- Activity order (Mandatory)
- Accountable partner (selection based applicant information)
- Consulted partner (selection based applicant information)
- Informed partner (selection based applicant information)
- Location (selection based on the call for proposal data)
- Output (output/result of the activity)

Press Save push button to save the activity. System confirms that activity has been added successfully.

You can see the activities of your project in the work plan and in the activity planner view.

In the Activity Planner, applicant can view your activities on daily, weekly, monthly or yearly level.

Applicant can **Edit/Update/Delete** the activity by clicking the specific activity in the Activity Planner. Activity can be also deleted by clicking Í Ĕ sign on the work plan.

Activity planner is also updating RACI (Responsibility matrix) to the application which shows on the activity level following responsibilities of the partners:

- Responsible partner
- Accountable partner
- Consulted partner
- Informed partner

3.4.4.4   Sustainability

Applicant should provide also information to the sustainability section.

3.4.5   Implementation

Applicant must also provide requested information about the implementation.

3.4.6   Budget and Financing

In the application, applicant must also fill in the project budget. Click Add/Edit sign on Budget and Financing tab.

Applicant must provide the budget details to the budget form:

Budget Details:

- Type of Cost, provide budget figures per year to different cost types which are automatically listed in the budget form.
- Project Revenue

To Financial Plan, applicant must provide following information:

- Requested programme financing
- Co-financing from the project partners
- Co-financing from the other sources
- Amount of Investment
- National financing (This will be only filled in Kolarctic CBC Programme)

Project Budget

Title   Healthy environment

Programme Name   Scandinavia

Priority Name

Budget Details

Type of Cost	Year 1	Year 2	Year 3	Total
Planning	100	50	200	350
Analysis	200	50	100	350
Travel	50	50	50	150
Salaries	100	100	100	300
Implementation material	200	300	100	600
Total	650	550	550	1 750
Project revenue	200	100	200	500
Net eligible cost	450	450	350	1 250

Financial Plan

Requested programme financing	1 000	€ 76 % of total financing
Co-financing from the project partners	0	€
Co-financing from other sources	10	€
Total Co-financing	10	€ 1 % of total costs
Total financing	1 310	€

Investments included in total costs

Amount of investment	100	€
Share from total cost	8.00 %	

National financing

Norway	100	€
Sweden	200	€

Save   Cancel   Reset

Press Save push button, please note that Net eligible costs and Total financing must match to submit form, otherwise system informs about the mismatch.

Information Dialog

Net eligible costs and Total financing must match to submit form.

OK

Correct the budget details so that Net eligible costs and Total financing match.

Financial Plan

Requested programme financing	1 000	€ 80 % of total financing
Co-financing from the project partners	0	€
Co-financing from other sources	10	€
Total Co-financing	10	€ 1 % of total costs
Total financing	1 250	€

Investments included in total costs

Amount of investment	100	€
Share from total cost	8.00 %	

National financing

Norway	100	€
Sweden	140	€

Save   Cancel   Reset

Information Dialog

Project Budget Updated Successfully

OK

3.4.7   Annexes

On Annexes tab you can add attachments. Click Browse.

Browse your files. Choose file and click Open (Avaa). Click Upload.

The file will be uploaded.

You can see the uploaded files at the bottom of the page.

Application Form Details   Print   Back

Basic Information | Partner information | Summary | Relevance | Implementation | Budget and Financing | **Annexes** | Signature

Annexes
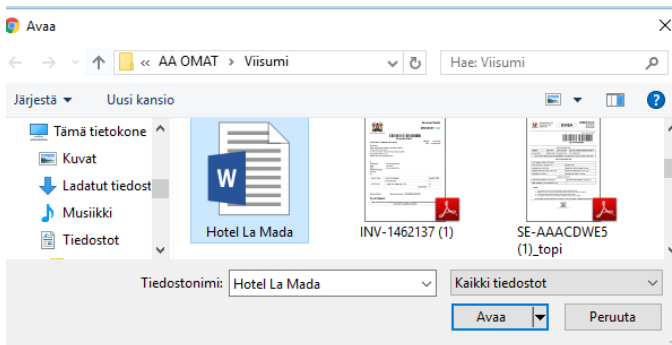
Upload and name the required annexes.

Description *

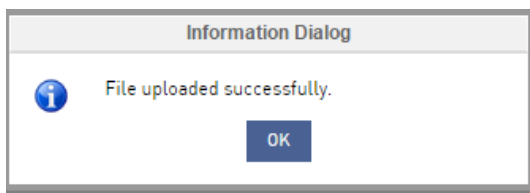Attachment file *   Browse

Upload   Reset

Annexes:

File Name	Description	Download	Delete
Hotel La Mada.docx	Details	⬇	🗑

3.4.8   Signature

Fill in signature details. Press Submit (by pressing Submit you send the application and cannot change it anymore).

Application Form Details   Print   Back

Basic Information | Partner information | Summary | Relevance | Implementation | Budget and Financing | Annexes | **Signature**

By signing the application the Lead Partner on behalf of all partners, confirms that:

• the project partners have the sources of financing, professional competence and qualifications required by implementation of the proposed project;

• In case of approval of the project proposal by the Joint Monitoring Committee, our organisation will take the role of the Lead Partner with all the responsibilities assigned to it;

• our organisation is directly responsible for the preparation, management and implementation of the project and is not acting as an intermediary;

• neither our organisation nor the partners are in any of the situations excluding them from participating in contracts which are listed in the respective documents and we accept that if we participate in spite of being in any of these situations, we may be excluded from other procedures;

• if recommended to be awarded a grant, our organisation accepts the contractual conditions as laid down in the Grant Contract and in it's conditions;

• our organisation is fully aware of the obligation to inform without delay the Managing Authority if the same application for funding made to other financing programmes of the European Union or the participating countries has been approved after the submission of this application.
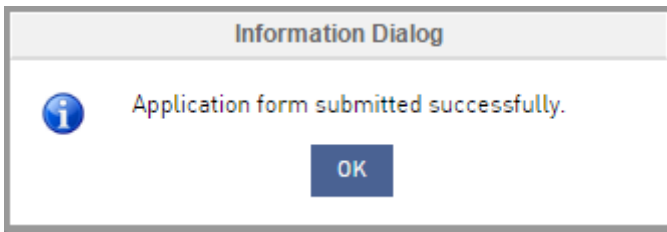
Name   Jaakko Teppo

Position   Ingenör

Date   11/11/2016

Previous   Save & Stay   ✔ Submit   Cancel
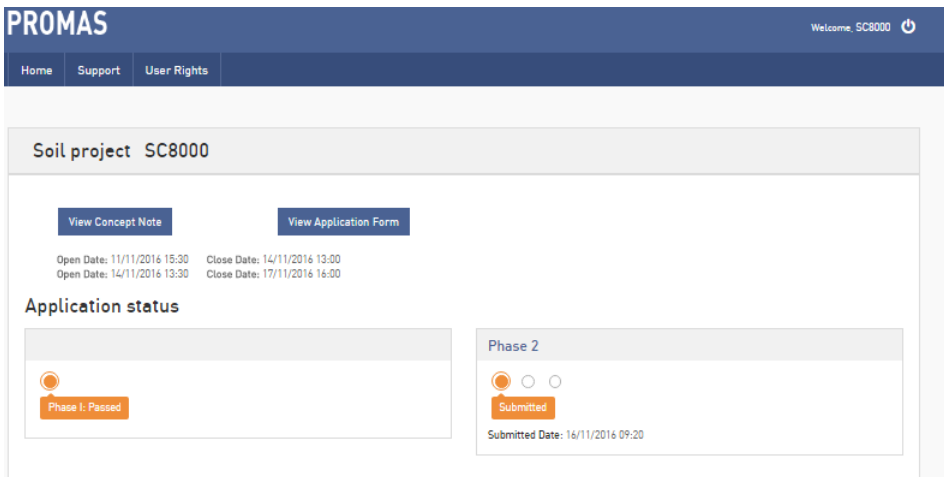
Confirm the submitting.

Confirmation Dialog

⚠ Are you sure you want to submit the application? Please, print the application form and send the signed form and its annexes to the Managing Authority.
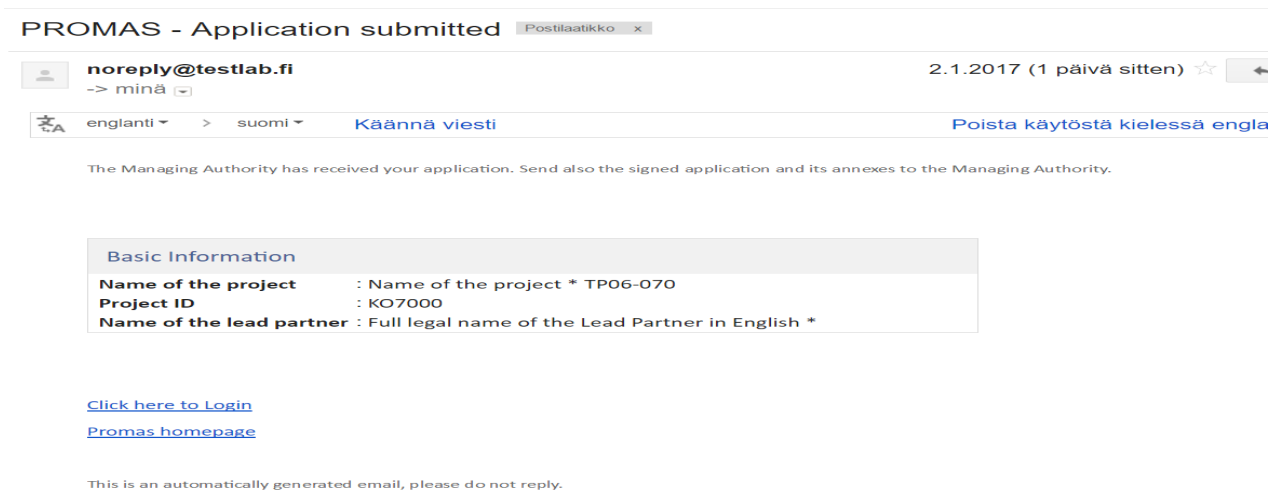
OK   Cancel

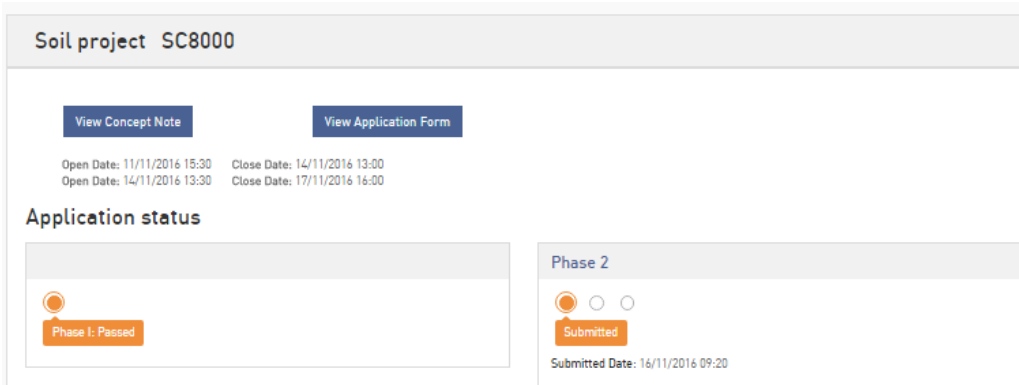You can view the submitted application on Promas (when you are logged in).

You also get email of the submitted application.

3.5   Viewing the Application

Login to Promas public site as applicant (https://www.promascbc.fi)

You can see the status of your application (menu: Home).
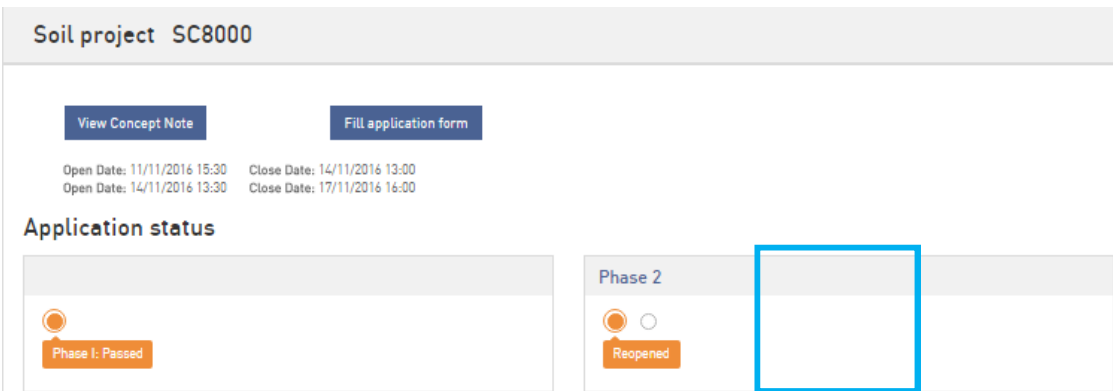

Click View Application Form link, application opens for viewing.

3.6   Authority approval process and statuses

3.6.1   Request for Clarification during administrative check

Applicant might be requested to provide additional information during administrative check by the authority. Status changes to Reopened.

Applicant also will receive email where request is communicated.

PROMAS - Request for clarification   Postilaatikko x

noreply@testlab.fi   2.1.2017 (9 päivää sitten)
-> minä

englanti   >   suomi   Käännä viesti   Poista käytöstä kielessä englanti ×

Your application has been reopened for clarifications. Provide the requested information and submit the application again within the given deadline.

Description

Request for clarification
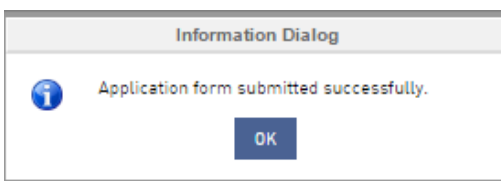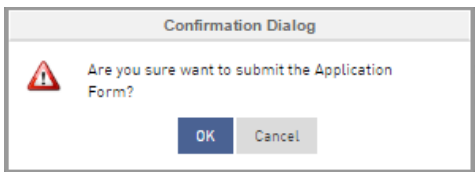Date : 02/01/2017

Basic Information

Name of the project	: Name of the project * KO06-01
Project ID	: KO6001
Name of the lead partner	: Full legal name of the Lead Partner in English *

Click here to Login

Promas homepage

Applicant updates the application as requested and Submits the application.

When application is Reopened, the applicant sees Fill application form on Promas Home page.

After submitting the application again, Status changes back to Submitted.

Confirmation Dialog

⚠ Are you sure want to submit the Application Form?

OK   Cancel

Information Dialog

ⓘ Application form submitted successfully.

OK

### 3.6.2   Application statuses

The authority opens the submitted application for administrative check, after the administrative check, the application is either rejected or approved. ***Administrative process passed*** means that administrative check has been conducted to the application and it is forwarded for the quality assessment.
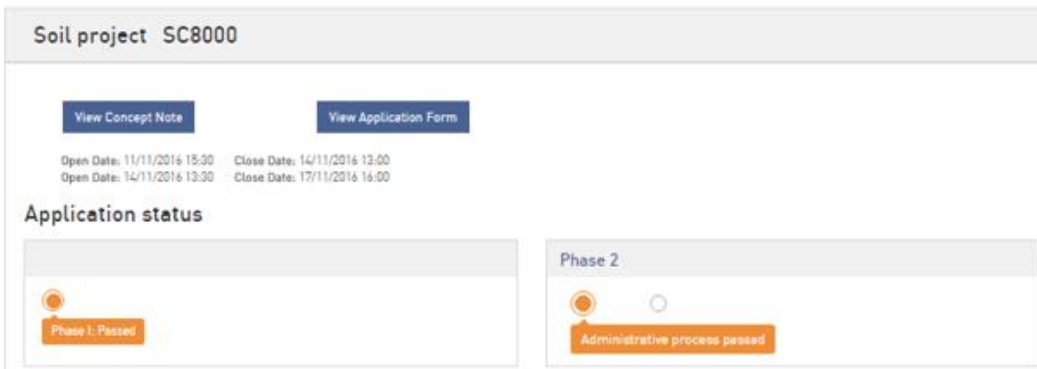
The quality assessment will be done by the authority or by the external evaluator/committee member. After quality assessment has been done, status will be changed to **Expert Evaluated**.
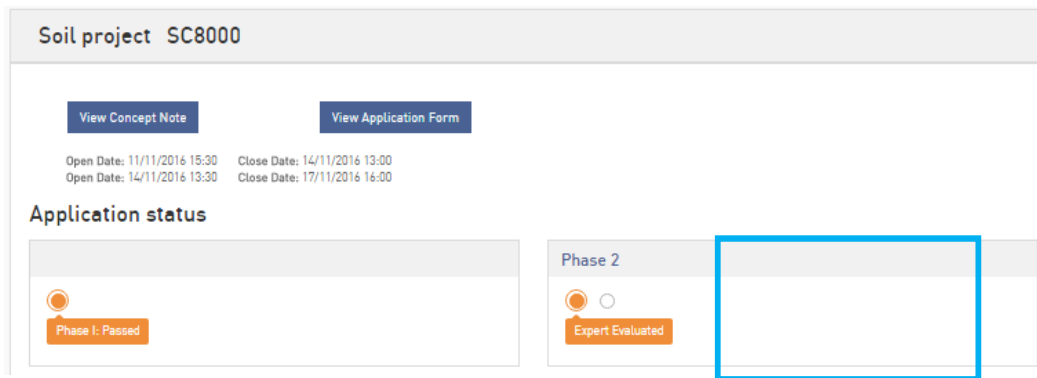
After the quality assessment, the application is forwarded to the committee handling, who makes the final decision on application approval or rejection. Statuses are: Committee: Approved (or Rejected/Reserve list).
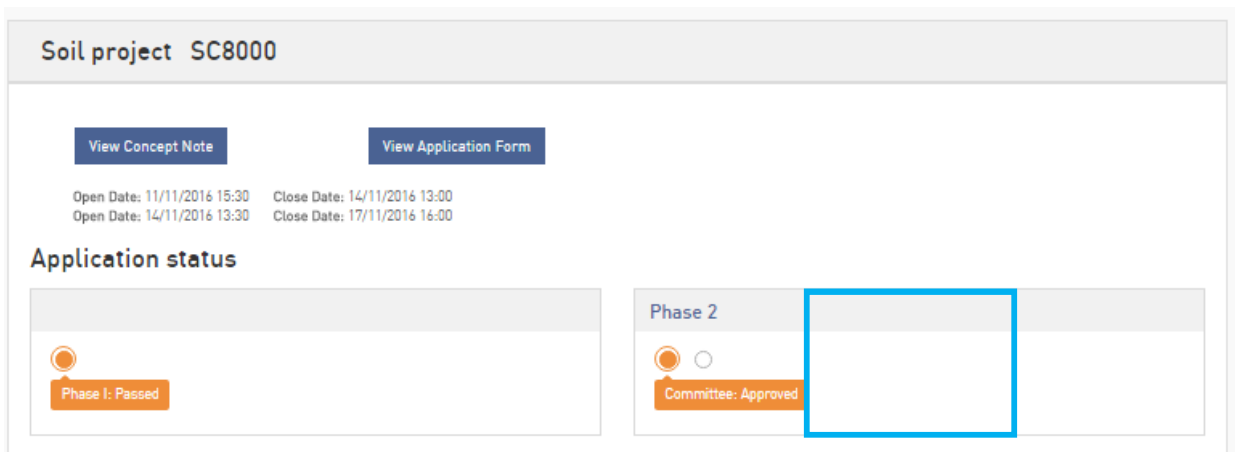

After Committee has approved the application, the authority prepares an executive order after which the Grant Contract negotiations can start. The executive order can be viewed as an attachment.
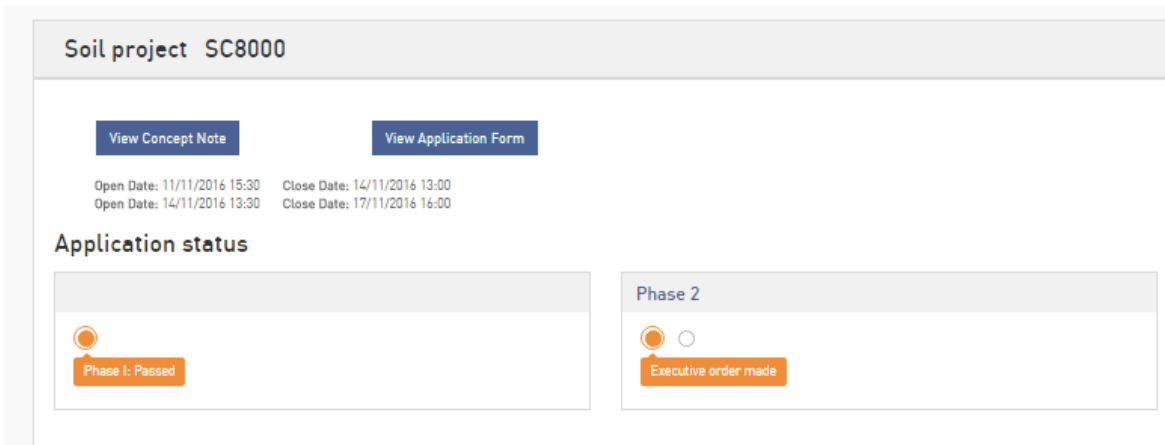
3.6.3 Request for clarification in negotiation phase

The authority might request clarification also in negotiation phase. Applicant will receive an email for Request for clarification.
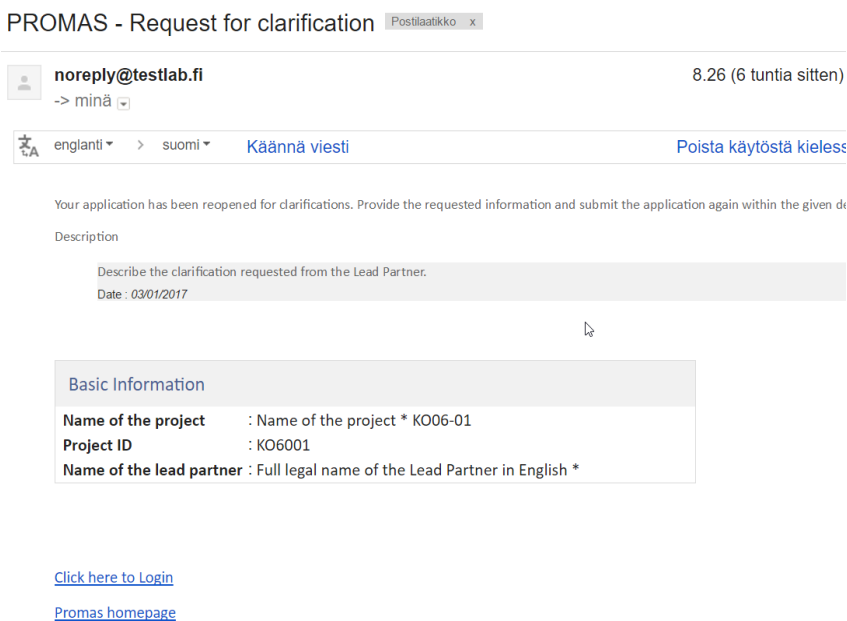
Application is reopened for providing the requested information. Press %Fill application form+button to provide requested clarifications. Applicant must do the requested updates or changes in the application and submit it again. Status changes back to Executive Order made.
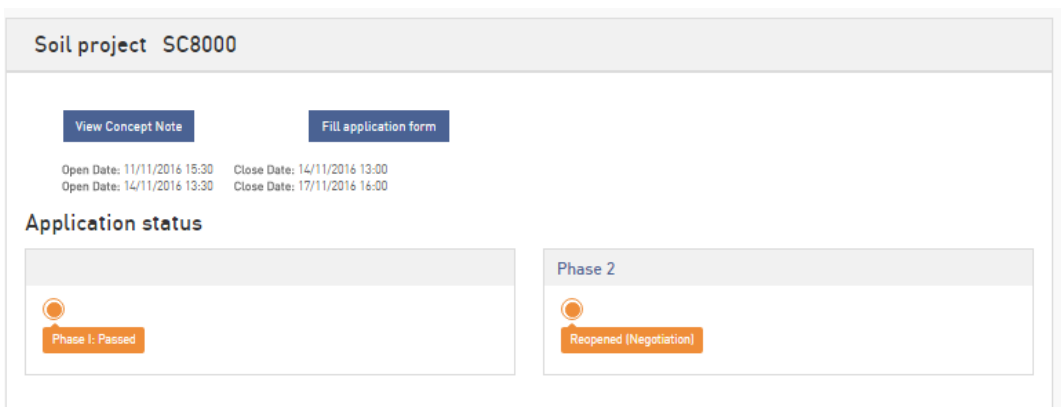
When all the information is provided by the applicant and approved by the authorities, negotiation phase is completed and status can change to Closed or Negotiation Concluded. Status Negotiation concluded means that authority will prepare the Grant Contract and sends printed version of it to the applicant for signing.


After authority has received signed Grant Contract, authority saves the Grant Contract in the system and application will get status Contracted. Please see more in Chapter 4.
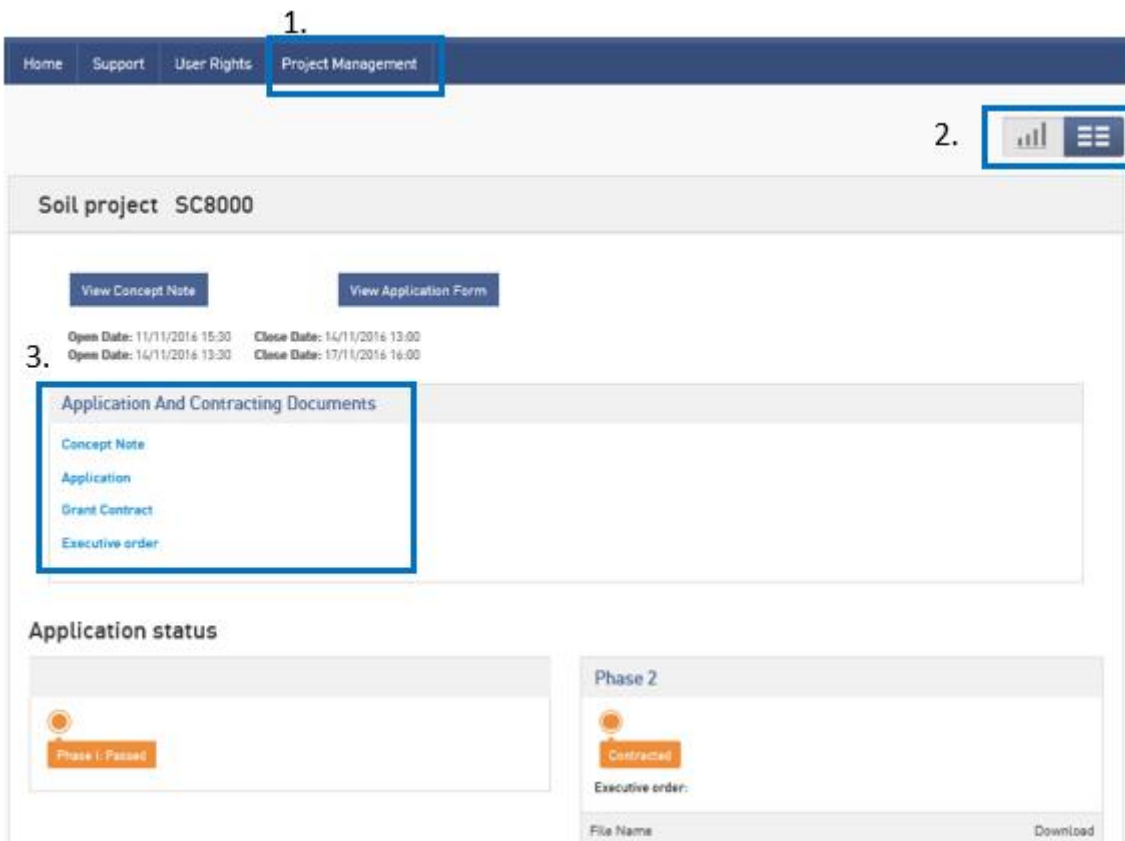
4. GRANT CONTRACT - CONTRACTED APPLICATION

When the authority has made a grant contract to applicant, it is visible in Promas home page for applicant. In the Promas home page applicant can also see other related documentation concerning applicant's application and grant contract. When application get, status contracted, following information is available in the Promas homepage.

Homepage view of Open Call for Proposal.
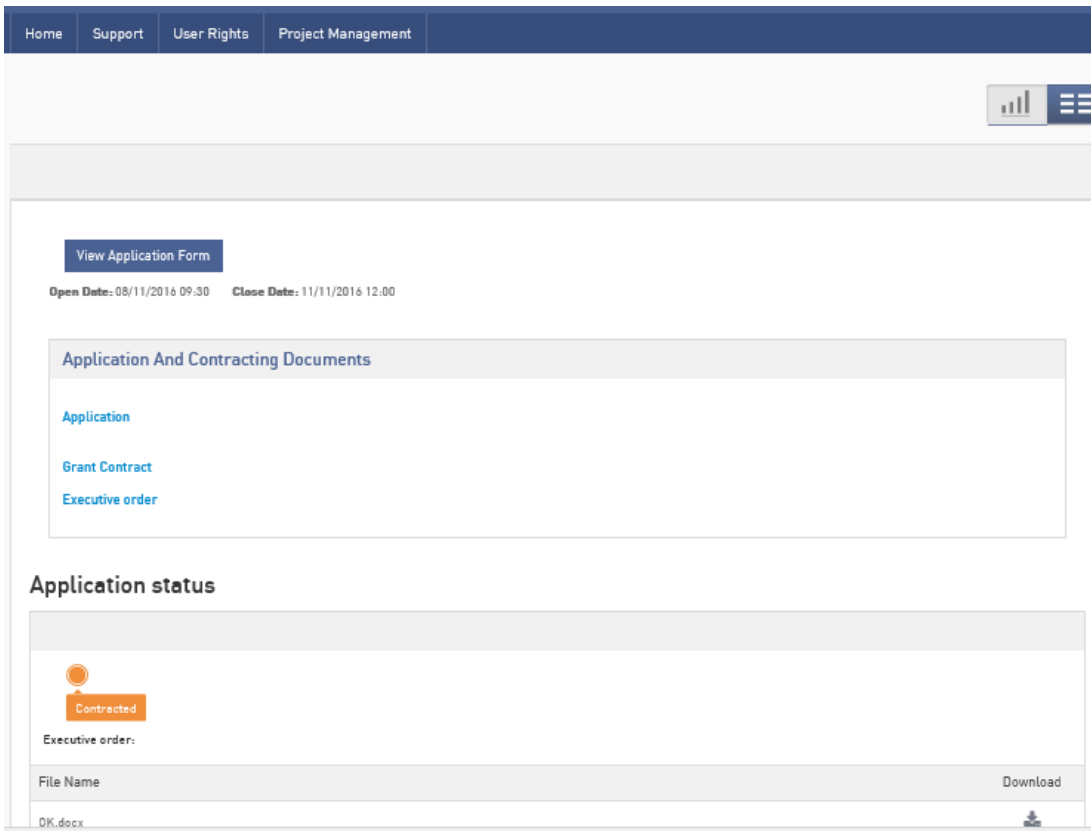
Homepage view of Restricted Call for Proposal.

1. Project Management link in the main menubar, this link is added to the applicant homepage after grant contract has been done and status has been changed to Contracted. (If you donq see this link, you might need to logout and login again). From this link, applicant can manage project related activities such as payment request and reporting. These functionalities are described more in detail in this user guide in the following chapters

2. Selection to change home page view from Application details view to Project Management Dashboard.

3. Application and Contracting documents. This section contains the links to the:

   ▪ Concept Note (Restricted call for proposal)
   ▪ Application
   ▪ Grant Contract
   ▪ Executive Order link for downloading.

4.1   GRANT CONTRACT

Applicant view the details of the Grant Contract by clicking the Grant Contract link in the Promas home page.

Following page opens.
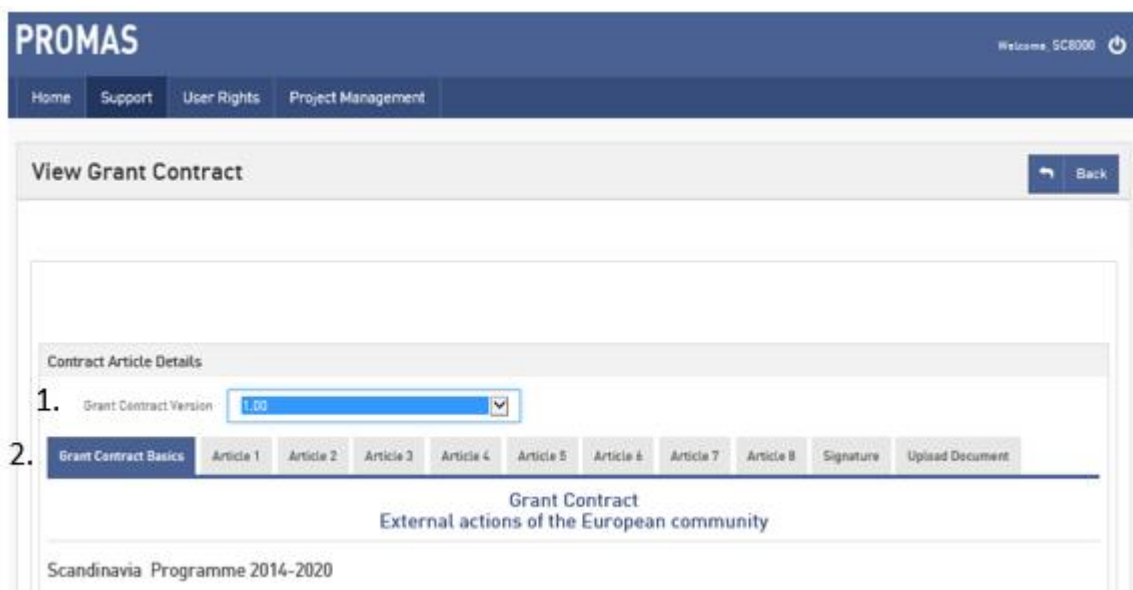
1. You can view different versions of Grant Contract

2. The Content of the Grant Contract has been divided to tabs

   • Grant Contract Basics

- Article 1: Purpose

- Article 2:

- Article 3: Implementation period of the Project

- Article 4: Financing the Project

- Article 5: Narrative and financial reporting and payment arrangements

- Article 6: Auditing and Verification Requirements

- Article 7: Annexes

- Article 8: Other specific conditions applying to the project

- Signature

- Upload Document: Attachments