



**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

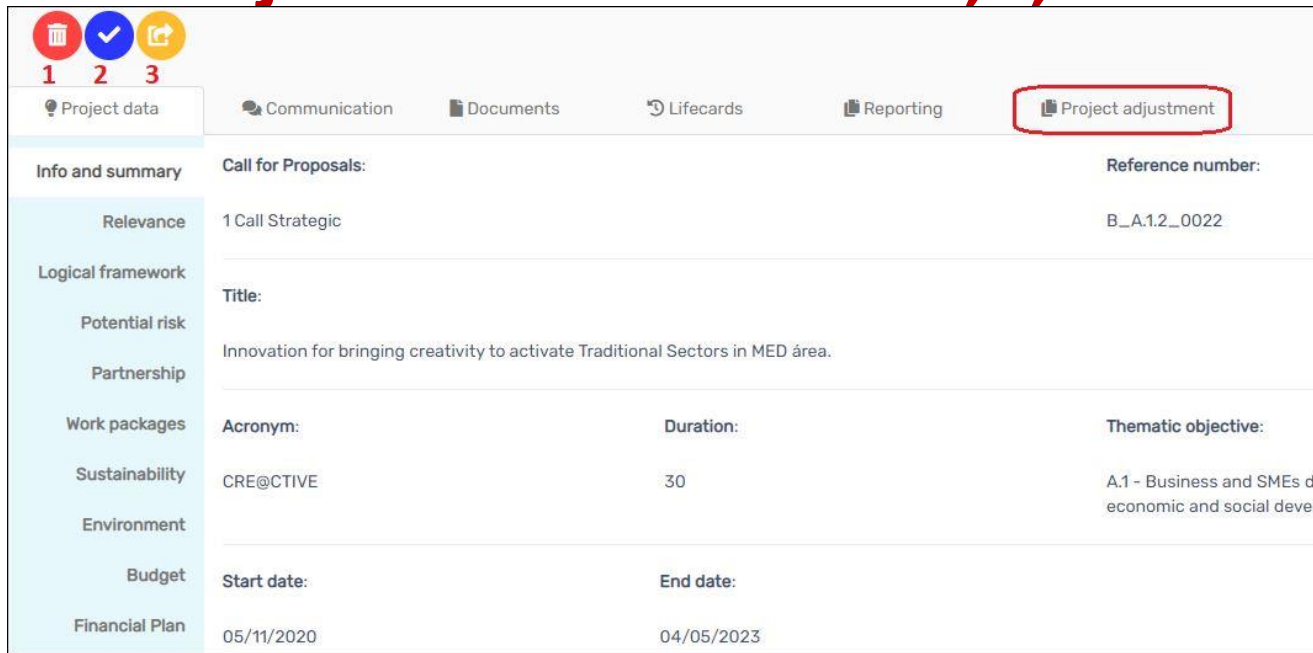
Project data	Communication	Documents	Lifecards	Reporting
Info and summary	Call for Proposals:	Reference number:		
Relevance	1 Call Strategic	B_A.1.2_0022		
Logical framework	Title:			
Potential risk	Innovation for bringing creativity to activate Traditional Sectors in MED área.			
Partnership				
Work 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 circular buttons labeled 1, 2, and 3. Button 1 is red with a trash icon, button 2 is blue with a checkmark icon, and button 3 is yellow with a send icon. Below these buttons 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 divided into a sidebar on the left and a main form on the right. The sidebar has sections: Info and summary, Relevance, Logical framework, Potential risk, Partnership, Work packages, Sustainability, Environment, Budget, and Financial Plan. The main form contains fields for Call for Proposals, Reference number, Title, Acronym, Duration, Thematic objective, Start date, and End date.

Section	Field	Value
Info and summary	Call for Proposals:	1 Call Strategic
	Reference number:	B_A.1.2_0022
Logical framework	Title:	Innovation for bringing creativity to activate Traditional Sectors in MED area.
	Acronym:	CRE@CTIVE
Work packages	Duration:	30
	Thematic objective:	A.1 - Business and SMEs de economic and social develo
Budget	Start date:	05/11/2020
	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 data Communication Documents Lifecards Project adjustment Reporting

Info and summary

Relevance

Logical framework

Partnership

Work packages

Budget

Documents

Export

KEEP keywords

Description

Innovation capacity and awareness-raising	X
Institutional cooperation and cooperation networks	X
SME and entrepreneurship	X

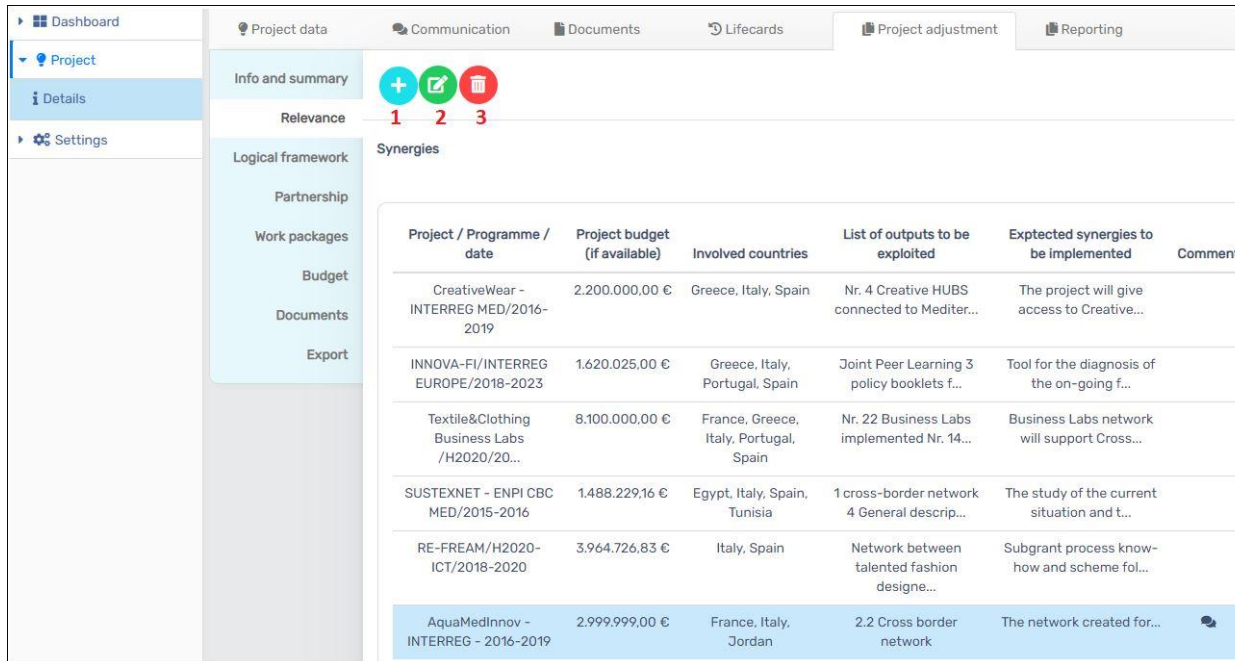
ADD

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 contains a 'Relevance' section. This section has three icons: a plus sign (Add), a pencil (Edit), and a trash can (Delete), each with a number below it (1, 2, and 3 respectively). Below these icons 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 web application interface for project management. At the top, there are tabs for 'Project data', 'Communication', 'Documents', 'Lifecards', 'Project adjustment', and 'Reporting'. The 'Project adjustment' tab is active. On the left, a sidebar menu includes 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Documents', and 'Export'. The 'Logical framework' section is expanded, showing 'Programme Expected results'. Below this, there are two items: '1.2.1 - Increased number of MSME enterprises' and '1.2.2 - Cross-border enterprise alliance and cooperation'. An 'Edit expected results' modal is open, showing a 'Project target' field with the value '19' and a 'Comment' field with the text 'You must enter a comment explaining the reason of modification!'. The modal has 'Cancel' and 'Confirm' buttons at the bottom right.

Project data Communication Documents Lifecards Project adjustment Reporting

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

Programme Expected results

Expected results Programme Project

1.2.1 - Increased number of MSME enterprises

1.2.2 - Cross-border enterprise alliance and cooperation

Edit expected results

Project target

19

Comment (Maximum of 250 characters)

You must enter a comment explaining the reason of modification!

Cancel Confirm

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

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

Adjustment – What can you modify in Partnership

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)	<div></div>		
PP01	Italy	Sicilia	ARCA Consortium	No profit organization (Association, Foundation)	<div></div>		
PP02	Italy	Toscana	Municipality of Prato	Regional or local public administration	<div></div>		
PP03	Tunisia	Monastir	MONASTIR EL FEJJA COMPETITIVNESS POLE "MFCPOLE"	Company or other private economic operator	<div></div>	<div></div>	<div></div>

... 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: 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget' (selected), and 'Documents'. The main area displays six numbered icons (1-6) for budget shift actions: 1. Add (green plus), 2. View (yellow document), 3. Edit (orange pencil), 4. Delete (red trash), 5. Export (green document with X), 6. Edit total (yellow document with pencil). Below these is a table of budget shifts.

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

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

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

Adjustment – What can you modify in Budget Lines

The screenshot shows the 'Project adjustment' tab in a software interface. On the left, a sidebar lists navigation options: Info and summary, Relevance, Logical framework, Partnership, Work packages, Budget, Documents, and Export. The main area displays a toolbar with six numbered icons: 1 (Add), 2 (Edit), 3 (Clone), 4 (Delete), 5 (Export), and 6 (Unselect). Below the toolbar, a search bar is present. A red warning message states: 'Total direct eligible cost is different from value contracted + 2.755,25 €'. A table lists budget lines with columns: Code, Cost category, Partner, Description, Justification, Unit, Number, Rate, Total, Semester incurred, and Comment. The table contains three entries: WP1.SS.BEN.1376, WP1.SS.BEN.7226, and WP4.HR.BEN.7225.

Code	Cost category	Partner	Description	Justification	Unit	Number	Rate	Total	Semester incurred	Comment
WP1.SS.BEN.1376	SS	BEN	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	
WP1.SS.BEN.7226	SS	BEN	Expenditure verifica...			3,00	4.700,00	14.100,00	III-V	
WP4.HR.BEN.7225	HR	BEN	Senior Technician		DAY	300,00	184,00	€ 55.200,00	I-II-III-IV-V	

Budget lines modifications have similar functions as reporting:

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

Adjustment – What can you modify in Budget lines - functions

The screenshot shows a budget management interface. On the left is a sidebar with tabs: 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Documents', and 'Export'. The main area displays a table of budget lines. At the top, there are icons for adding, editing, deleting, and other functions. A search bar at the top right contains the text 'WP1.SS.BEN.1376998 (Budget Line ...)' and 'WP1.SS.BEN.1376998'. A red box highlights a message: 'Total direct eligible cost is different from value contracted + 2.755,25 €'. Numbered annotations (1-6) point to specific UI elements: 1 points to a green checkmark icon, 2 points to a red trash can icon, 3 points to a green plus icon, 4 points to the search bar, 5 points to a back arrow icon, and 6 points to the cost difference message.

	Code	Cost category	Partner	Description	Justification	Unit	Number	Rate	Total	Semester incurred	Comment
Budget	WP4.HR.PP8.723C	HR	PP8	Senior Technician		DAY	20,00	320,00	€6.400,00	I-II-III-IV-V	
Documents	WP1.SS.PP8.7227	SS	PP8	Expenditure verifica...			0,00	0,00 €	0,00 €	III-V	
Export	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

Project data Communication Documents Lifecards Project adjustment Reporting

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

Documents

1 2 3

Amendment Supporting Document

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.

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 interface shows a top navigation bar with three icons labeled 1, 2, and 3. Below them are tabs for Project data, Communication, Documents, Lifecards, Project adjustment (selected), and Reporting. A sidebar on the left contains a menu with 'Info and summary' (selected), 'Relevance', 'Logical framework', and 'Partnership'. The main content area has a 'KEEP keywords' section 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	Ammdendment 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

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