HELLENIC REPUBLIC
Ministry of Economy and Finance

GENERAL SECRETARIAT OF PUBLIC INVESTMENT & PA
NATIONAL COORDINATION AUTHORITY
MANAGING AUTHORITY "INTERREG 2021-2027"

Technical guidance of
MIS 2021 - 2027

USER INTERFACE

Version: 01.00
10-01-2023

HISTORY OF CHANGES		
Version	Date	Change Justification
01.0	10/01/2023	Initial Version

Contents

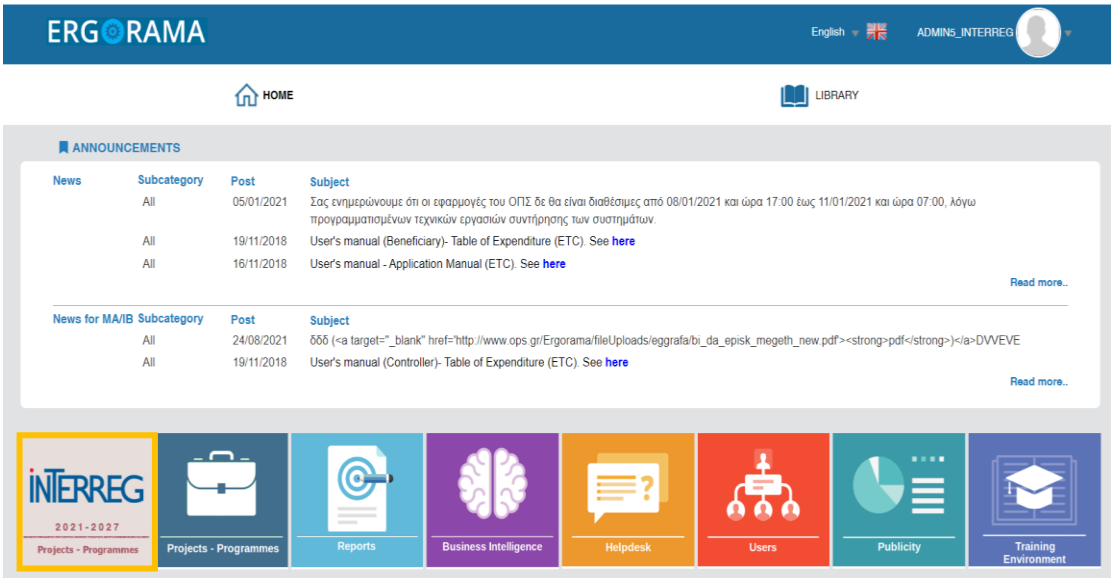
1. Introduction

The scope of this guide is to introduce the User Interface of the MIS for the Programming Period 2021-2027 (hereafter MIS).

2. User Interface

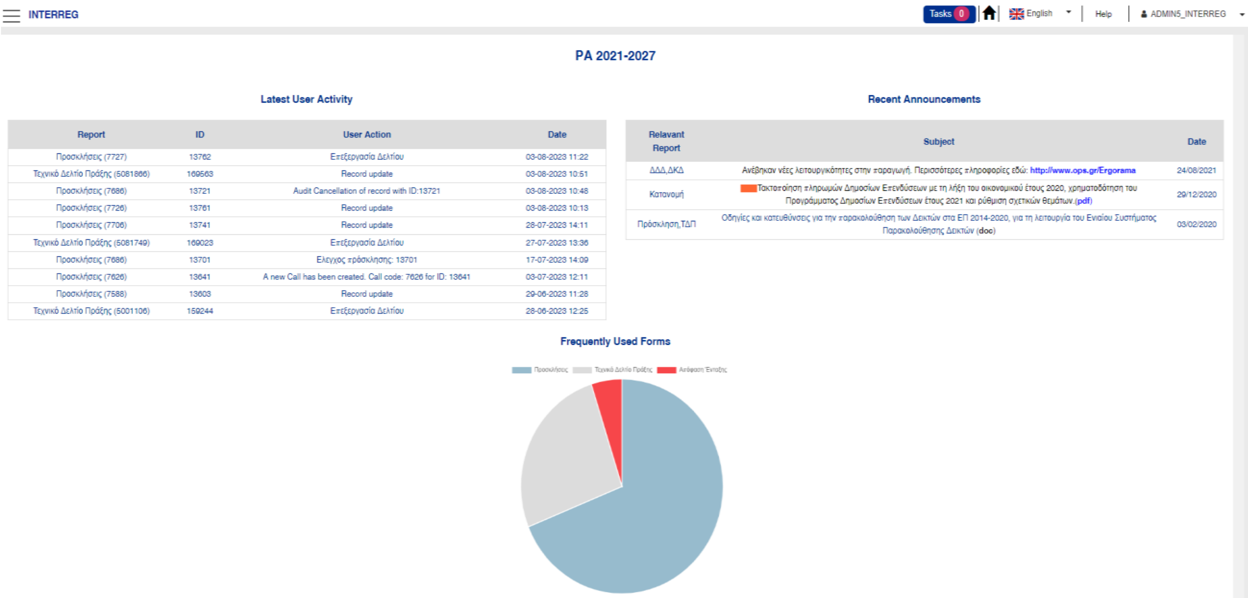
2.1 System Access

- Access to the MIS is available to those who have a user account with the appropriate access rights.
- The application can be accessed here: https://logon.ops.gr
- In the login page of the MIS interface, the users enter their account details and then clicks on ENTER to go to the MIS portal.
- From the available applications, the users select the icon «2021-2027 Project Monitoring» (if they are executives of Beneficiaries/Organizations (hereafter Beneficiaries) or «2021-2027 Projects - Programmes» (if they are executives of Managing or National Authorities (hereafter Managing Authorities or MAs).



2.2 Home Page

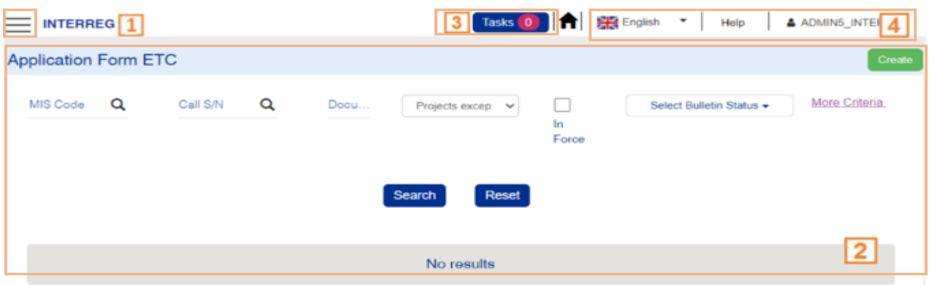
The user interface of the MIS 2021-2027 is then displayed:



Through the Home page - Dashboard, the user is informed about the latest forms he/she has processed, the recent MIS announcements for the PP 2021-2027 as well as the most frequently used forms. In the functional areas «Latest User Activity» and «Recent Announcements», the displayed entries are at the same time a link to the specific form/announcement. In the «Frequently Used Forms» pie, each color section refers to the search page of the corresponding form.

2.3 General System Page

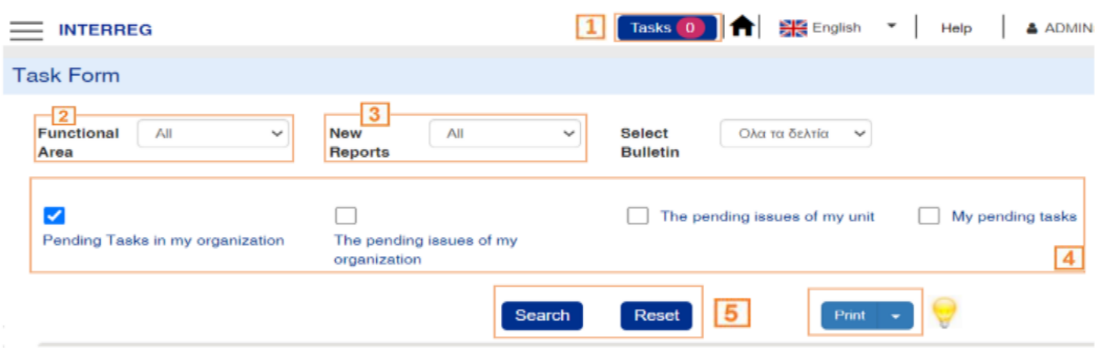
Any page in the MIS is divided into four (4) areas (orange boxes) as shown in the image below.



1. On the home page, by selecting ☰ the menus are displayed for the users to navigate to the forms assigned to them based on their role. Selecting an Operational Area, e.g. Evaluation and Approval, displays its sub-menu in the foreground.

2. By selecting a form from the sub-menu, the corresponding search page appears.
3. User pending issues (explained in the next paragraph).
4. From the toolbar | English | Help | ADMIN the users can:

   i. return to the web portal (2.1 of this guide)
   ii. choose language, between English and Greek
   iii. go to Help, related to the selected form
   iv. log out of the system, via the drop-down list.

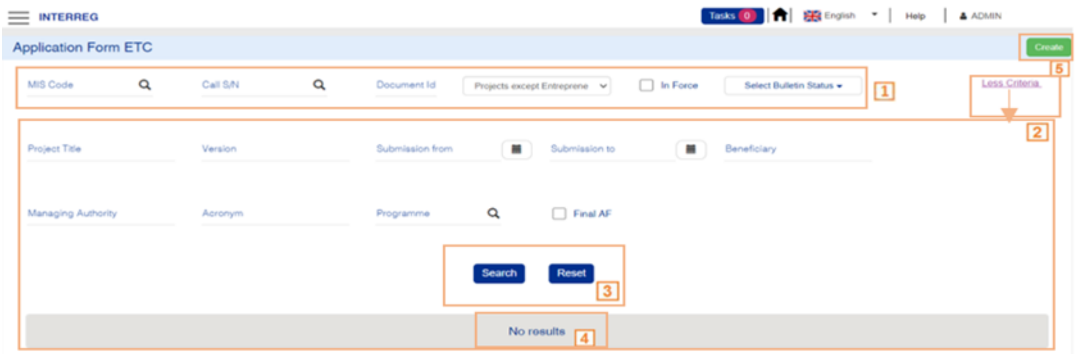


By choosing Tasks 0 1 the users are navigated to the Pending tasks screen. There, the users can see the drop-down menus for the «Functional Area» 2 and «Forms» 3. By selecting criteria, it is possible to search for the relevant pending issues. Alternatively, if the users wish to view «Pending Tasks in my organization» or the «The pending issues of my organization» 4, there is the possibility of a total overview by selecting the «check boxes». The corresponding button is selected to perform a search or a reset of the criteria 5.

The button Print displays in pdf or xls the pending issues of the organization according to the choices made by the users in the previous steps.

2.3.1 Search Page

The search screen includes the following:



1. Basic Search Criteria, which are always visible.
2. More Search Criteria are displayed by the option More Criteria while they remain hidden by selecting Less Criteria .
3. Search : selected to search.
4. Reset : selected to clear the filled criteria boxes.
5. Search Result Table (for details see §2.3.2).
6. Select Create

The system saves the search criteria from a previous search (even the additional criteria). It is suggested that the user should always select «Reset» for a new search to delete any retained criteria, especially for «More Criteria» that are closed.

With the «In force» check box checked, only the documents in force are displayed in the result table, while when it is unchecked, all documents are displayed.

The search results depend directly on the user's permissions.

2.3.2 Search Results Table

The search results table provides the users with the various possibilities:

1. Option to **show or hide columns** in the Search Results Table.
2. Specify the **entries per page** to be displayed in the search results.
3. Ability to internally **search** in all columns (displayed or hidden) of the Search Results Table (see section 2.4.1, similar functionality in the list of values)
4. The possibility of **sorting the search results** in ascending or descending order by the option .

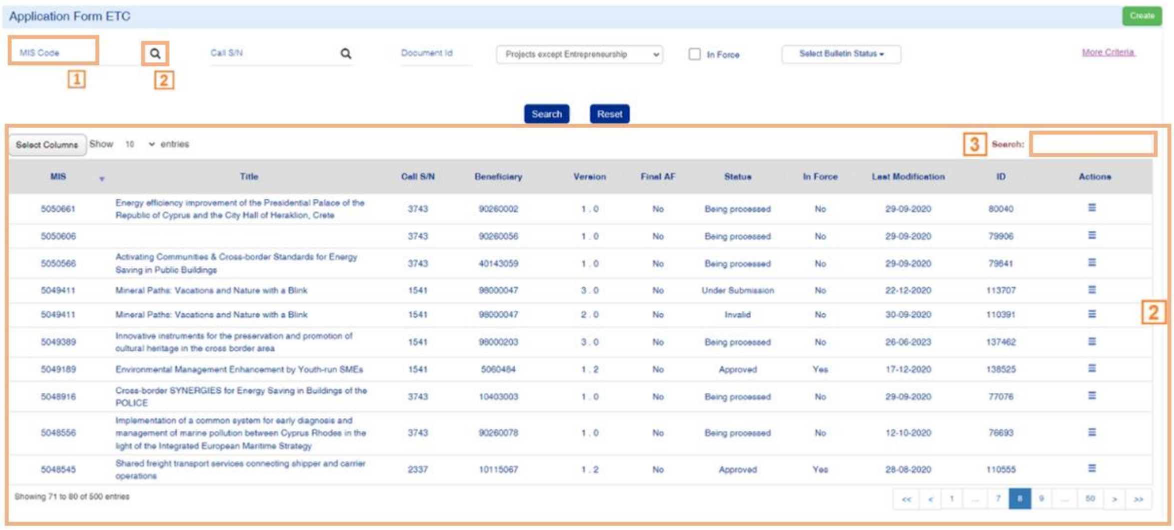
Sorting more than one column is possible by using the "Shift" key and sequential selection of the desired columns. Sorting using multiply columns is not possible for columns with sequence numbers (e.g. id of a document).

5. **Display of number of records** of the Search Results Table according to the selected criteria.
6. **Navigation** through the pages of the scoreboard.
7. **Actions:** Enable a pop-up menu with Actions available depending on the status of the report, the user's rights and responsibilities, e.g. Edit, Review, Submit, Finalize, etc. Actions, which are not available, are displayed in grey.

The scoreboard has a maximum display limit of 500 entries.

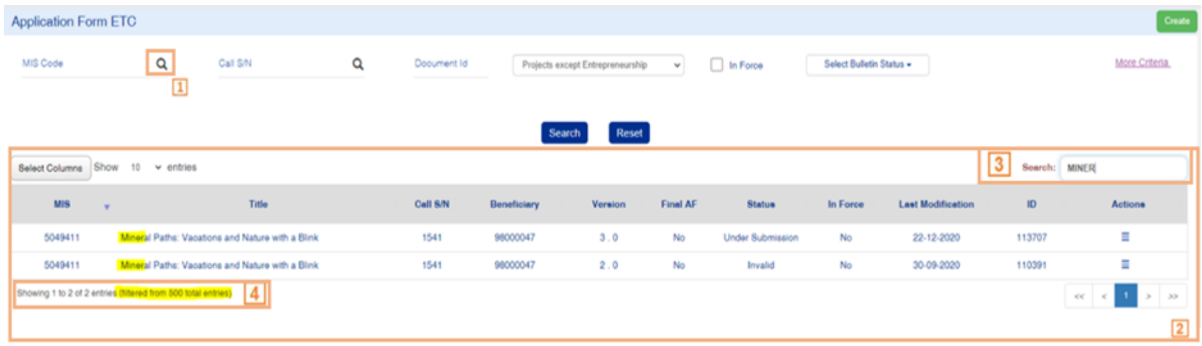
2.4 Fill in and Edit Fields

2.4.1 Fields with Search Button (List of Values)



MIS offers three independent ways to search for a specific document, which can also be combined for optimal use:

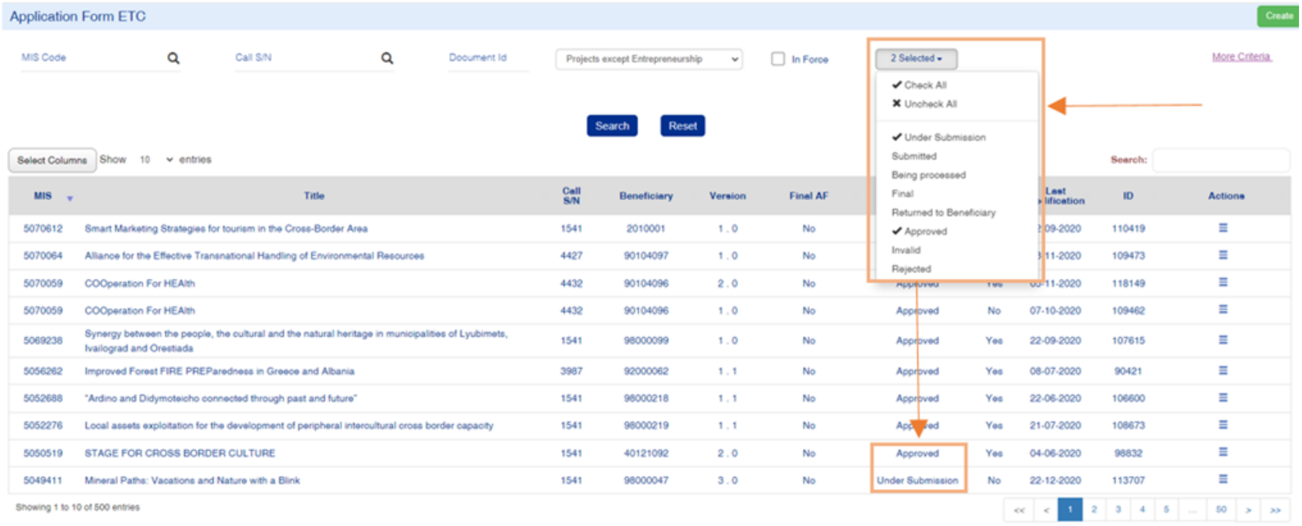
1. Entering a value in the field - appropriate when the users know exactly the value,
2. Selecting a value from the search lists - it is strongly recommended to enter the value in the field before clicking on the lens, because some lists are quite long and consume considerably more time and making it difficult to find the desired value.
3. Word search between search results - appropriate to further limit the large number of results.



For example, by typing «MINER» in field (3) the system further limits the results displayed. From this result list, depending on his rights, the users select the desired document.

2.4.2 Fields with drop-down list

Fields with drop-down lists (e.g. Form Status)



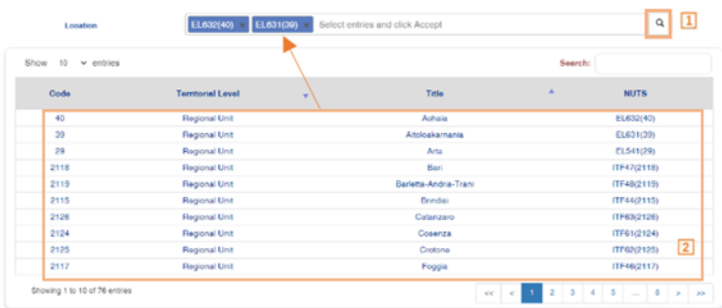
The user selects the drop-down list «Select Form Status» and the set of values is displayed, where it is possible to select one or more values.

2.4.3 Data Tables

Most of the electronic forms include data tables. The procedure for entering, editing, and deleting data in a table is described in the following sections.

2.4.3.1 Insert Data in the Table

1. If the users wish to enter expenditures in the table «Allocation of public expenditure of an action by category of expenditure». they select Add.
2. A pop-up window appears in which the user selects the search button (1) and then the desired value from the «Expenditure Category» list (2).



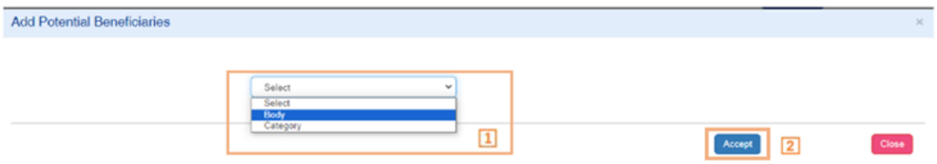
The system enables multiple values selection from the list.

3. The users select «Accept» Accept .
4. The system closes the pop-up window and enters the data in the table. Note that in some cases when selecting «Accept», data are inserted into the table, the fields are cleared for the users to proceed to the next entry.

2.4.3.2 Edit data in Tables

1. To edit an existing record in a table, the users select in the corresponding record:

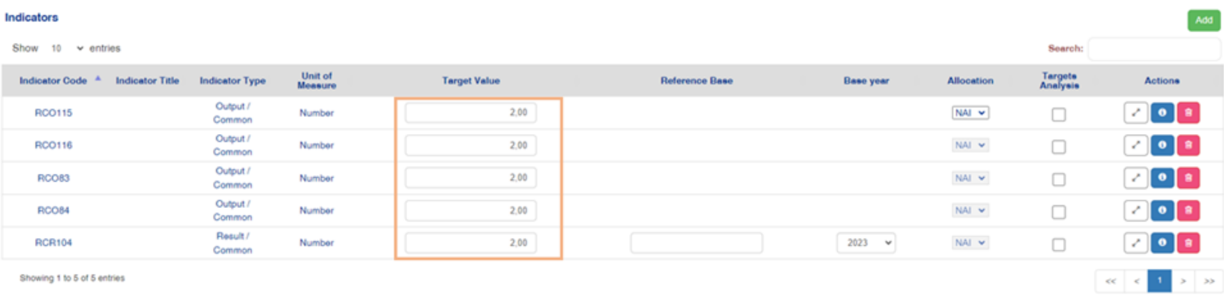
2. The pop-up window with the data of the selected record appears. After making the desired adjustments, the users select Accept :



By the option Close , the users return to the main screen without applying the changes.

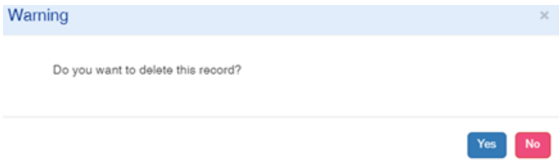
3. By the option Accept , the system displays the change in the specific table entry.

There are tables where the users can edit data directly within the table.



2.4.3.3 Delete data from the Tables

To delete an existing record in a table, the users select delete on the corresponding entry:



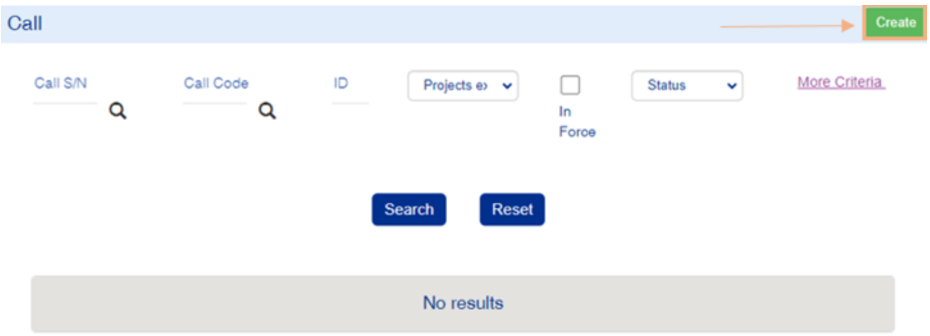
When a warning message appears, the users select «Yes» for the finalization of the deletion.

2.4.3.4 Other Options on the Tables

The following options are also available in the MIS:

BUTTONS	EXPLANATION
	Indicator analysis: Additional indicator information is provided.
	Development of a table row to display dependent data (e.g. Work Packages / Deliverables)
	Collapse of a table row to hide dependent data (e.g. Work Packages / Deliverables)

2.5 Form Creation



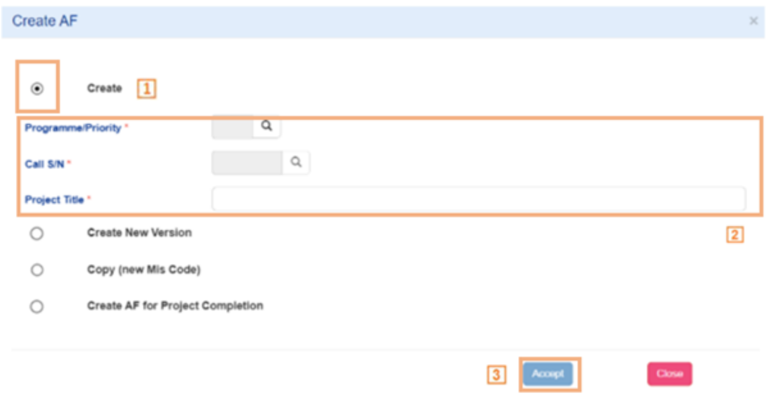
After selecting from the menu, the Functional Area, and the Form in which they wish to work on, the users can create a new document by clicking on Create .

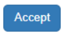
By selecting «Create», a pop-up window appears for further options, such as:

- **Create:** Create a new Form
- **Create New Version:** Create a Modification, Update, Corrigendum etc. of an existing form.

Depending on the form and the selected action, additional parameters may be requested to be entered or the options may change.

2.5.1 Create



To create a new form, the users follow the steps described in paragraph 2.5 and after selecting «Create» (1), fill in the mandatory fields e.g. «Programme /priority», «Call Code», «Title» (2) and finally select (3) 

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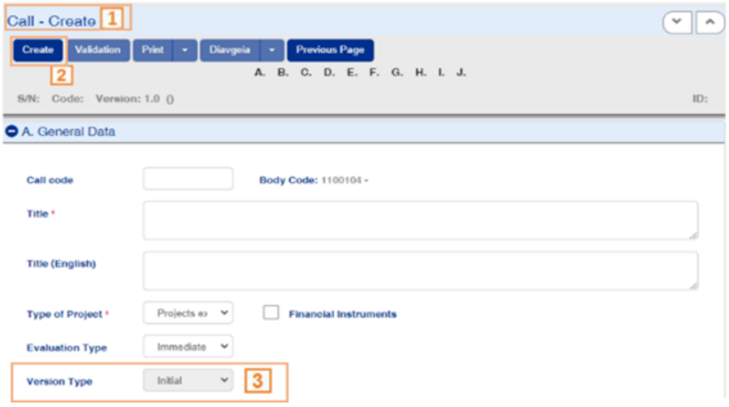
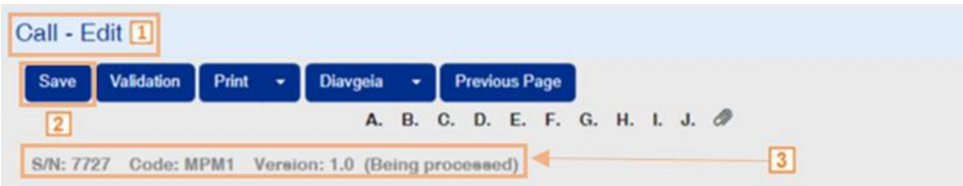
The system displays the registration screen with the title «Call - Create» (1).



To proceed with the creation of the document, the users must fill in the mandatory fields of the form.

The mandatory fields for the initial creation of a form are listed in the individual guides.

By selecting Create (2), the «Version Type» in section, A. «General Data» is set to initial and the system issues a version to the document (3).



After this option, the title of the screen changes to «Call - Edit» (1), while the action «Create» (2) above, is replaced with 

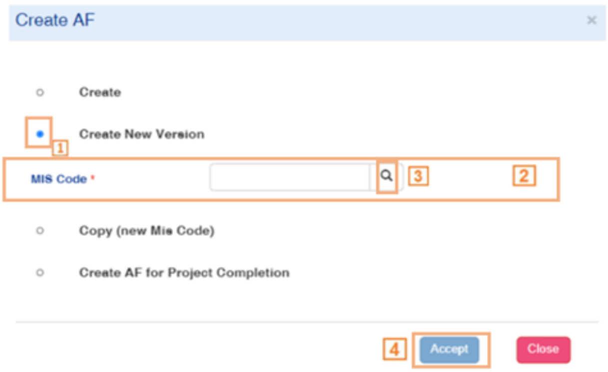
(2).

The system assigns a «Unique MIS Code», Status «Under Submission» (when the user is a Beneficiary) or «Being processed» (when the user is a Managing Authority) and a unique system number (id) (3). In case of the application form, the submission deadline as defined in the respective call displays in red letters.

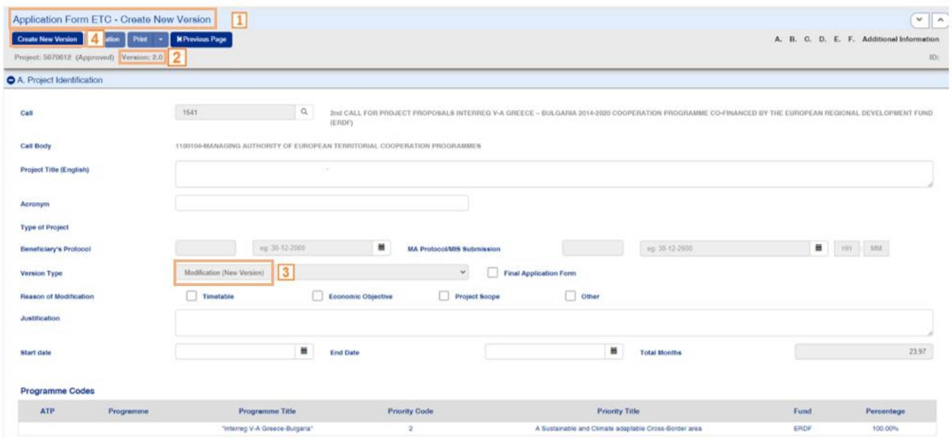
Fields with an asterisk next to their description indicate that they are mandatory.

e.g.

2.5.2 Create New Version



To create a new version of an existing form (e.g. Application Form), the users has to follow the steps of paragraph 2.5, select «Create New Version» (1), fill in the mandatory fields by typing e.g. «MIS Code» (2), click on the lens (3) and make a selection from the list. By clicking Accept (4) the users are navigated to the form «Call – Create New Version», as shown in the image below (1).

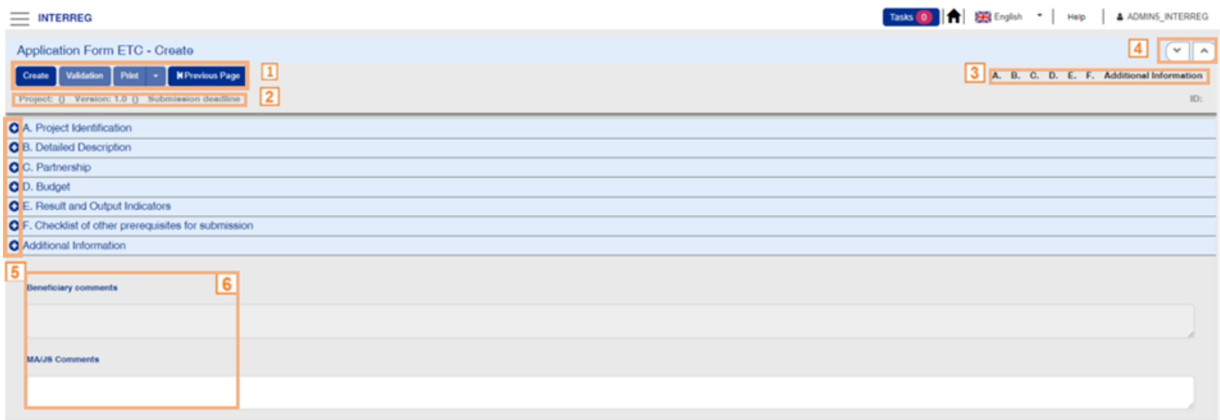


The field «Version Type» in section «A. General Data» is set to Modification (3) and the system increases the version of the report (2) by one unit (e.g. from 1.0 to 2.0). The users by clicking on the Create New Version (4) save the new application.

After this, the title of the form changes to «Call - Edit», the «Create New Version» is replaced by Save and an ID is assigned to the new form. In addition, the users are now able to edit the field «Version Type» and select Corrigendum or Update, in which case the version changes to 2.0 or 1.1 respectively.

2.6 Form Detailed Display

The detailed display of each form consist of the following areas (the Application Form is shown as an example).



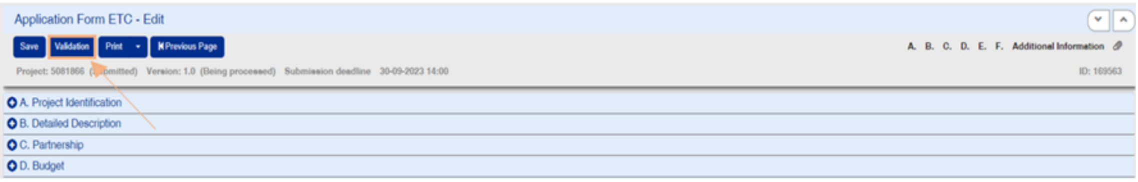
1. Taskbar of the form as described below.
2. Form Information: Id, MIS Code, Status etc.
3. Options to expand (show) and navigate or collapse (hide) specific tabs of the form.
4. Options to expand (show) or collapse (hide) all form tabs (A,B,C,D etc.)
5. Expand/collapse a specific tab, e.g. A.B.C etc.
6. Fields for comments by the Beneficiaries and Managing Authority

A detailed description of the functional modules of the system and the forms is done in the user manuals.

BUTTONS	EXPLANATIONS
Save	Save of data
Validation	Validation of data
Print	Print a form in pdf or doc format. In some cases, there is an option «Document Details», to fill in the header and footer of the administrative Document (e.g. Subsidy Contract) generated by the system.
Previous Page	Return to the Search page
Diavgeia	It concerns the «Call» and the « Subsidy Contract» for the Managing Authorities.

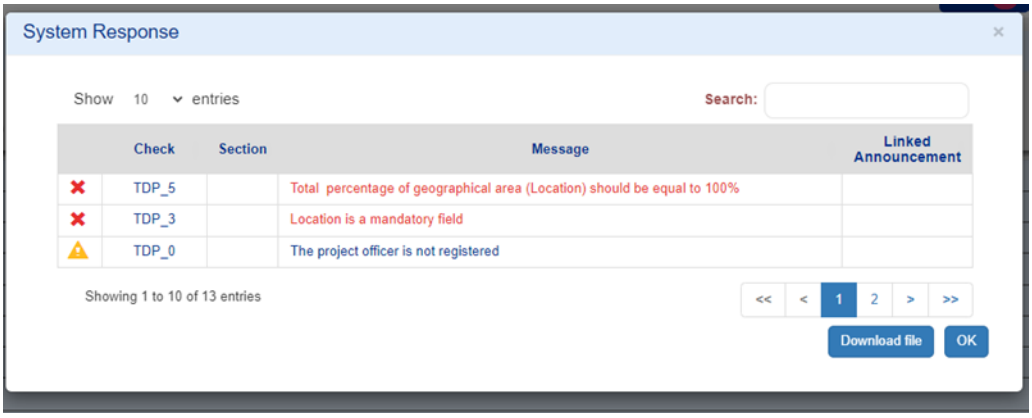
2.7 Form Validation

The users, after completing the data entry in a form, can execute the validations checks by selecting Validation from the form toolbar. Data validation is the process of checking the accuracy and quality of data in order to avoid errors, inconsistencies, and duplicates.



Please note that changes must be saved before Validation.

The system performs the validation checks and then a pop-up window with the detected errors or warnings or a successful validation message in case of no errors:



indicates errors that must be corrected before submission or finalization of a form.

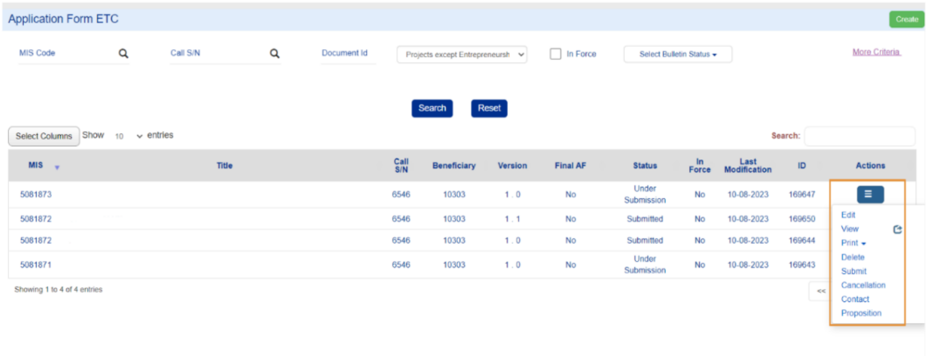
indicates warnings that the users should consider whether it is necessary to proceed with their correction or not. In any case, the form can be submitted or finalized with the warnings.

2.8 Form Actions

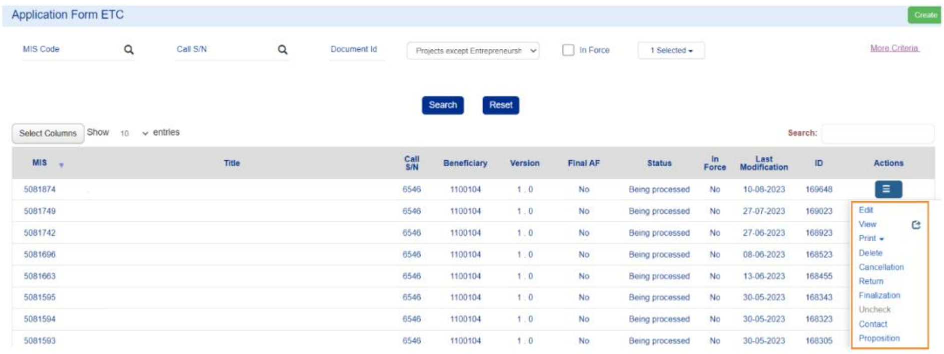
In the search page of a form, as mentioned in section 0 and in the Search Results Table, there is a column called «Actions».

Selecting ☰ leads to activate a drop-down list of Actions in the desired row (Active and Inactive) available depending on the status of the form, the user's rights, and responsibilities.

In an Application Form with the status «Under Submission» and for a Beneficiary (with full rights) the following actions are displayed:



For the Managing Authority user, the following are displayed:



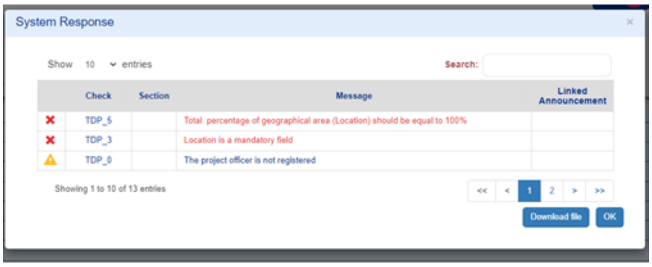
The form actions (excluding Communication and Proposition) are performed using the same procedure as the one shown in the example of the Application Form Submission below.

2.8.1 Form Submission from Beneficiary

If the Beneficiaries wish to submit a form, they select Submit from the action list, the system navigates them to the detailed screen entitled «Application Form - Submission» (1) with the corresponding button (2), as shown in the image below:

By selecting «Submit», the system performs logic-based validation checks and displays:

- Either a message with errors / warnings identified in the application form

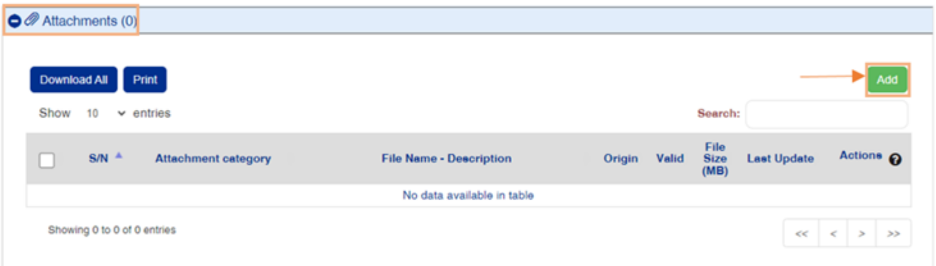


- Or a «Confirm Action» message, in which the users can (optional) enter comments and select «OK» to the question «Do you want to proceed with Submission? » for the submission to be completed.

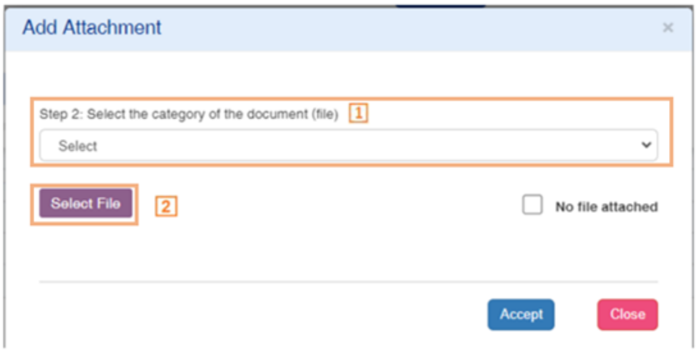
The screen changes from «Application Form ETC - Submission» to «Application Form ETC - View» (1) the «Submission» button is replaced with «Save» button Save . The «Save» button remains inactive in the View mode. (2) Once the AF has been submitted to the MA/JS, the Beneficiary can no longer edit it. The form's status change to «Submitted» (3).

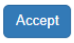
2.9 Attached Files

1. To attach a file, the users select Add in the section Attachments.

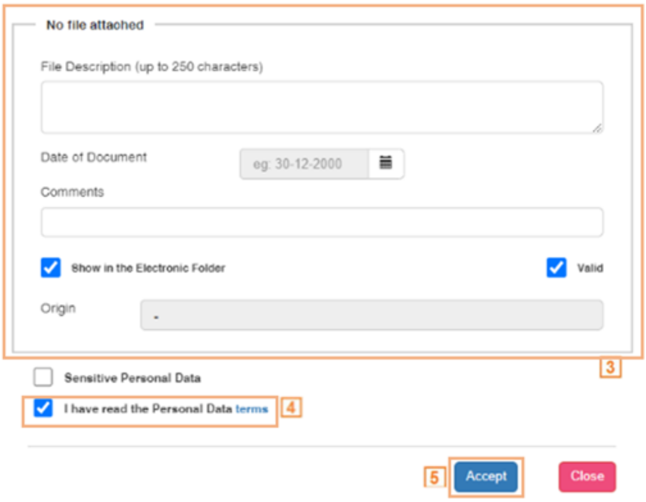


In the window that appears, the users select «Document Category» by clicking on (1) and attach the desired file by clicking on Select File (2).



3. Next, additional information about the attached documents can be registered, such as file description, comments, date of the documents are displayed (3). The selection of the checkbox «**I have read the Personal Data terms**» (4) is mandatory. For the attachment to be completed the users click on 

(5).

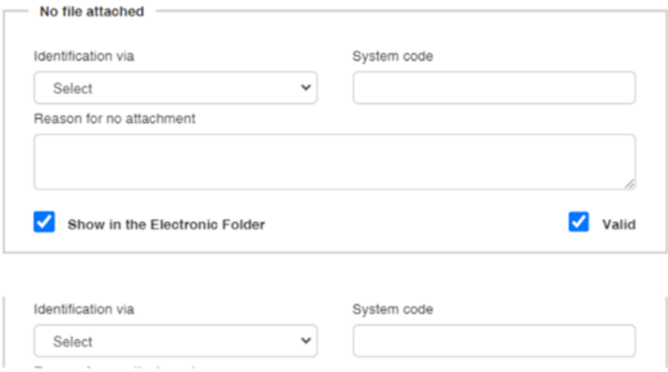


The check boxes «Show in Electronic File» and «Valid» refer to actions of the MA/JS.

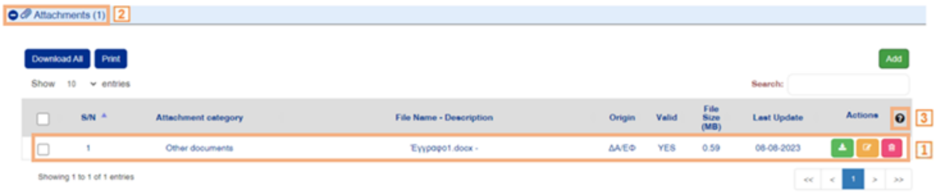
Documents attached to submitted forms cannot be deleted. They can only be marked by MA/JS as invalid.

In case that a document has been attached by mistake, there is the possibility to be marked as invalid from the MA.

4. The check box «Do not attach a file» is selected, either when it is not necessary to attach a type of file so the field «Comments of non-attachment» has to be filled in, or when the fields «Identification by» και «System Code» are filled in the place of an attachment.



5. By clicking Accept, the pop-up window closes and an entry for the document has been added to the Attachments table (1). The title of the «Attachments» section indicates the number of the attachments on the screen (2). The symbol ❓ is a related link to Help (3). Information about the attachments (1) is shown in the table rows such as file name, document category, file origin, file size etc.



The «File Origin» is filled in automatically by the system, using one of the values below:

- Beneficiary
- MA/JS
- Contact from Beneficiary
- Contact from MA/JS
- PDF by MIS

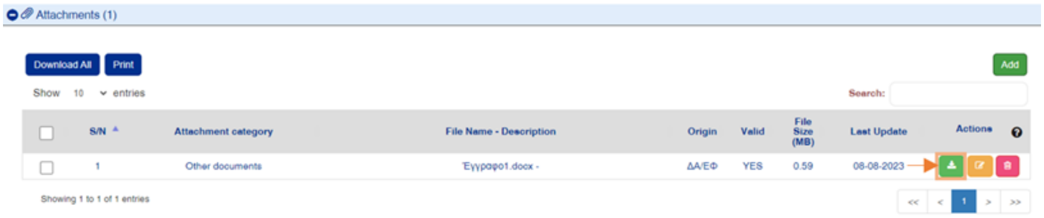
MA/JS Users can attach files to the finalized (audited) reports.

ATTENTION:

The name of the attached file must not exceed 190 characters and must not contain special characters (e.g. !, @,*,& etc.). Hyphen (-) and underscore (_) are allowed.
The file description must not exceed 250 characters.
The maximum file size to be attached is 40MB.
Maximum total size allowed for bulk download of attachments is 300MB.

2.9.1 Download Attached Files

1. To download a file attachment from the attachments table, select the option «Download»

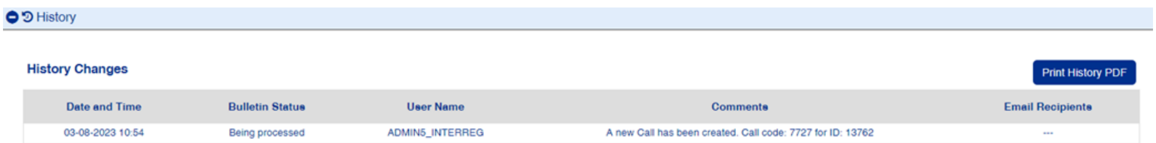


2. The browser displays a message to open or save the file on the computer, and the users can choose the file name and location on their computer to save the file.
3. To download more files, the users select the desired files using the check boxes located in the first row (1). To download all the files, the users must select the check box AA . Then, the users select «Download All» (2) and save all the selected files in their electronic device. By selecting «Print», the users can print a summary of the table records in pdf (3).

2.9.2 Edit and Delete of Attached Files

To edit an attachment, the users select the action edit of the table, while to delete an attachment, the users select the delete action (see section 0, similar to functionality in data tables).

2.10 History of Changes/Modifications

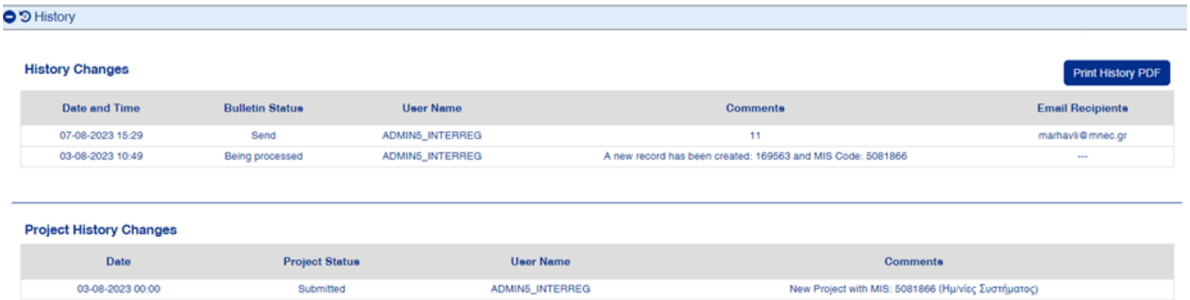


The last section of each form is the «Change History» where each row described the status change of the form details:

- System Date and Time
- Document Status
- Username
- Comments
- Recipients of the email message that has been automatically sent by the system when the form is submitted or finalized.

Clicking on Print, the users can print the history of changes in pdf format.

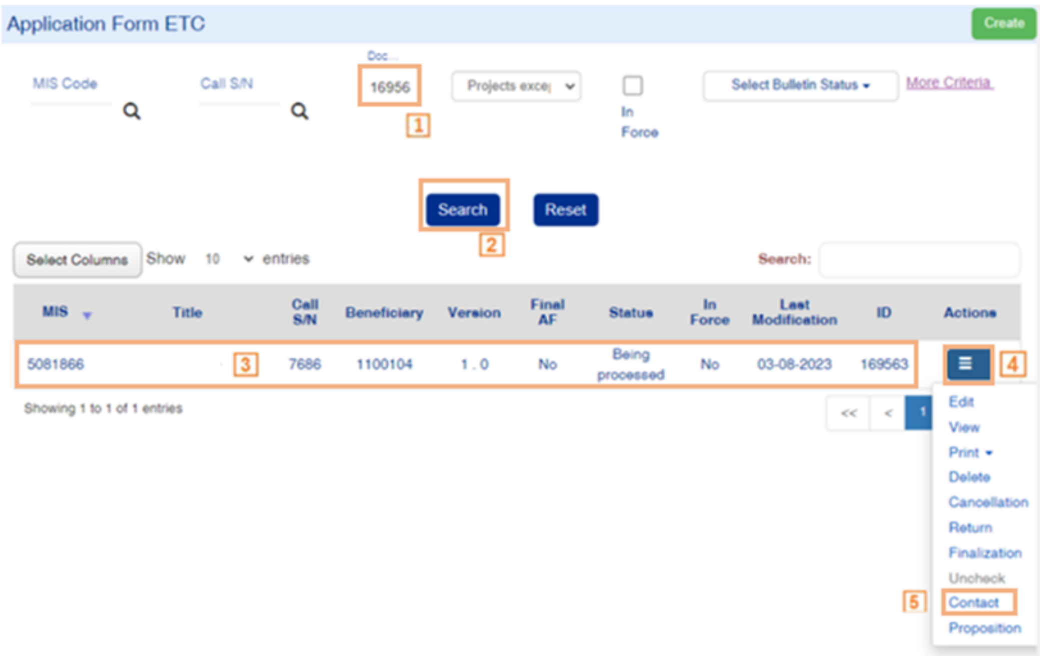
Especially in the case of e.g. the Application Form, there are two tables. The first one refers to the history of status changes of the form, while the second one refers to the history of status changes of the project, as shown in the figure below:



2.11 Contact

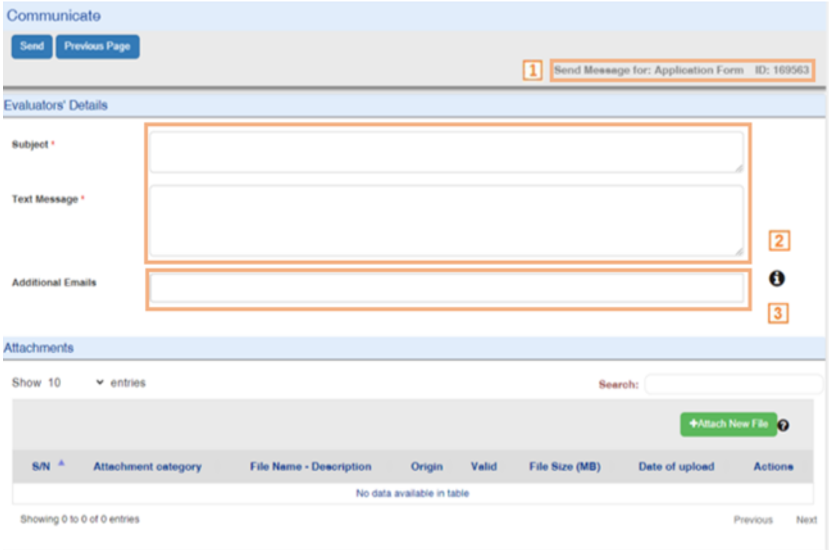
The «Contact» option does not concern a change in the status of the form, but it allows two-way communication between the MA and the Beneficiary. Below is an example of how the «Contact» action works in the Application Form.

After the users have found the desired record in the Search Results Table, they select the option **Contact** from the list of actions.



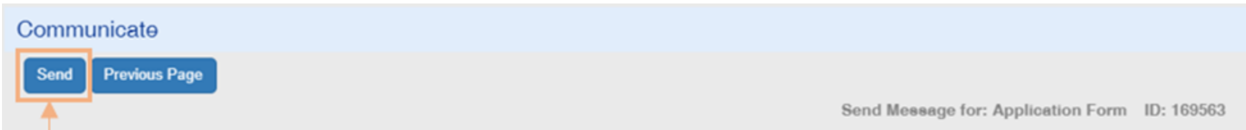
The system activates the «Contact» form, which indicates the ID of the relevant form (1). The users fill in the mandatory fields «Subject» and «Text Message» (2). The field «Email Recipients» (3) allows the users to add additional recipients in addition to those provided.

When entering multiple recipients, separate the emails with a comma.

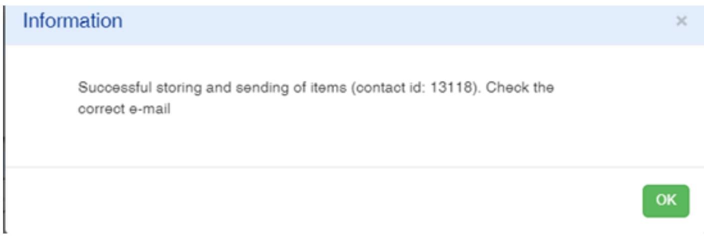


The users add attachments in the corresponding part of the screen, which are automatically transferred by the system to the attachments of the corresponding call.

The users select Send from the toolbar.



A message informing about the successful saving and sending of the data with the ID of the contact form is displayed.



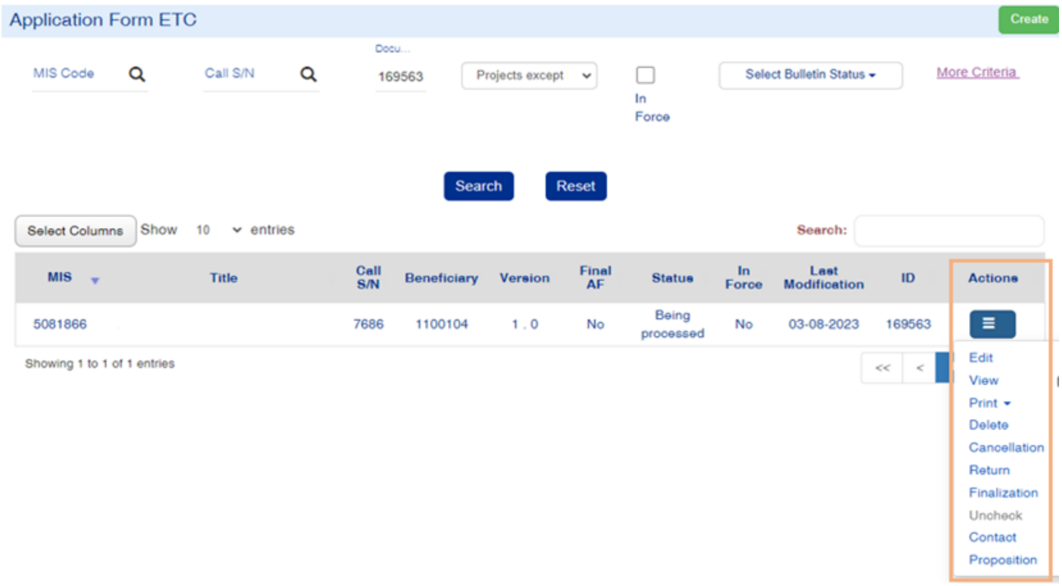
Upon proper completion of the action, an email is sent to the Beneficiary, MA and additional recipients.

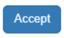
The attached files are not sent by email but there are saved in the relevant 's form attachments section (the origin column indicates files sent with contact).

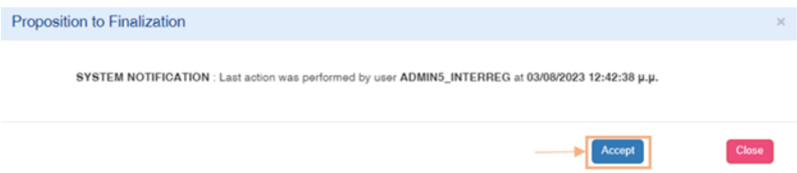
The option of contact is also recorded in the History of Changes. From the «Print» option of the History of Changes, the text of the Contact form is detailed.

2.12 Proposition

The «Proposition» option allows the users to forward the desired form to a senior manager/supervisor for: a) Recommendation for Finalization/Submission, b) Form assignment/delegation and c) Recommendation for return to beneficiary.



By selecting the forwarding option, a window appears with an update from the system for the last action performed on the system with the user's name and the exact time and date and then the users should select  .



The system opens a new page with information the document and its unique id number (1). The users then:

- select from the list «Select Action» the reason for forwarding the document (2),
- by clicking on the search button, select the user to whom they can forward the document (3),
- fill in text about the reason (4) and
- choose «Recommendation» (5).

The users can see any errors and warnings of the document, by clicking on Validation.

Annex – Table of Actions

The table below shows the total number of Actions (for either Beneficiary or MA/JS) of all system's forms. Detailed information on the actions of each form and possible technicalities can be found in the individual guides.

ACTION	EXPLANATION
Edit	The Edit key allows the User to recover the Table to enter and edit data. After performing the Create (Create, Create New Version or Copy) actions, the system changes the screen title to Edit.
View	Through the View key, the User recovers and views a Table without the possibility of entering and/or editing its data. After performing the Submit, Discard, Cancel, Return, Finalization and Undo actions, the form status changes from Create to View.
Print ▾	It allows the User to Print a form with an option to print it in pdf, docx or xlsx.
Submit	The Submit Form action (only for the Beneficiary) submits the form to the MA/JS.
Delete	The Delete action deletes the form permanently from the system. Once the deletion has been carried out, the user is navigated to the form's search screen. Deletion of a form is allowed when the form is in the status «Under submission» or «Being processed» and meets certain conditions, e.g. not submitted, returned, etc.
Rejection	Rejection of a document (for MA/JS users only), where provided, will result in the document status being changed to Rejected.
Cancellation	The Cancel action does not delete the form from the system but gives it a status of Invalid/Inactive and the user can retrieve it in View mode.
Return	With the Return action (only for MA/JS users), the MA/JS returns the form to the Beneficiary for corrections.
Finalization	Through the Finalization action (reserved to the Managing Authority/JS), the User performs the final control and 'locks' the document.
Uncheck	Action "Uncheck" for MA/JS users the followings can be performed: • the uncheck action returns an "locked" document the document status to «Being processed». A cancellation of a form is allowed when there no dependencies on it. • the reversal of the cancellation action turns a «Invalid/Active» document to «Being processed» • and the reversal of the Return action which changes the status from «Returned from Beneficiary» to «Being processed». For a Beneficiary, the Uncheck action is available in certain forms and will change the status from "Submitted" to «Under Submission».
Contact	This action involves two-way communication between the MA/JS and the Beneficiary, by sending a text and attachments, for various requests and any additional information.

Proposition	This action concerns forwarding a document: • with status «Under Submission» from the Beneficiary who created/edited it to the authorized user who will submit it • with status «Being processed», from the MA/JS user who has edited it to the authorized user who will finalize it. This action generates an automatic notification (email) and automatically saves the data of the form in pdf format.
Deadline lapse	With this action, the MA user can recall a «Public Procurement Legality Check» (Pre-Approval) form that has been returned to the Beneficiary and is in «Return to Beneficiary» or «Under Submission» status - always after a return, so that the form returns to «Being processed» status for the MA/JS.
Verification	The action «Verification (applies only to Expenditure Declaration Forms for MA/JS users) is only available on forms that are «Being processed». The MA/JS users verify Corrections in Amounts or Recommendations arise from the Administrative Verifications and the Beneficiary should be informed with the corresponding Report. In case, that there are no Correction Amounts or Recommendations, the MA/JS user can bypass the action of Verification and proceed with the Finalization of the form.
Tracking	This action gives the MA/JS user the right to make changes to specific fields of documents that is "Finalized". The forms on which Tracking is enabled include, but are not limited to, the following: • Table of Expenditures Forms in «Accepted», «Certified» or «Participation in an Account» status • On-the-spot verifications/audits, for «Final Reports in «Finalized» status.
Document overview	Documents overview action is enabled for documents «In Process» and activates for the beneficiary, the view ONLY of the «Attachments» and «History of Changes» sections.