



**ENI  
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Cooperating across borders  
in the Mediterranean



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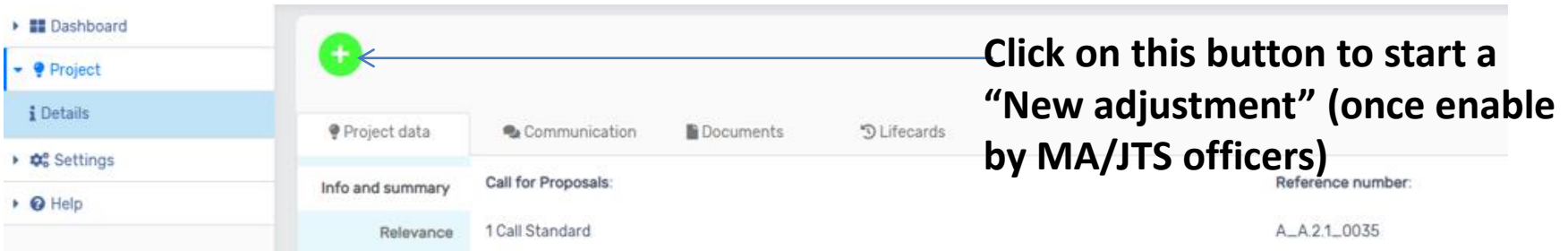
# **How to deal with project adjustments using the MIS (Management Information System)**

**Rome, October 2019**

# Project adjustments-Summary

LEFT MENU SECTION	ACTION DETAILS	AMENDMENT TYPE
<b>Info and Summary</b>	Modify Keep keywords	Simple Adjustments –no validation required
<b>Relevance</b>	Add/Modify synergies	Simple Adjustments –no validation required
<b>Logical Framework</b>	Modify expected results indicators ( <b>target values</b> )	Minor – (validated by MA/JTS officer)
<b>Partnership</b>		
	Update Partners' contacts details (email, telephone, etc.)	Simple Adjustments –no validation required
	Modify partner information (name, legal status, etc.)	Minor – (validated by MA/JTS officer)
	Add a new Partner	Major – (approved by JMC – addendum to the Contract)
	Disable a Partner	Major – (approved by JMC – addendum to the Contract)
<b>Work packages</b>		
	Add/modify/disable <b>NEW</b> Outputs	Minor – (validated by MA/JTS officer)
	Add/modify/disable Activities	Minor – (validated by MA/JTS officer)
	Modify output indicators ( <b>target values</b> )	Minor – (validated by MA/JTS officer)
	Add/modify/disable <b>NEW</b> output indicators	Minor – (validated by MA/JTS officer)
	Add/modify output's target group	Minor – (validated by MA/JTS officer)
<b>Budget shift</b>	Minor if < 20% CostCateg./Partners (on budget contracted)	Major if > 20% (approved by JMC – addendum to the Contract)
	Add/modify/disable/clone linee di budget	Minor – (validated by MA/JTS officer)
	Modify source of funding	Minor – (validated by MA/JTS officer)
	Update section on 50% rule	Minor – (validated by MA/JTS officer)
<b>Financial plan</b>		Minor – (validated by MA/JTS officer)
<b>Financial capacity</b>		Minor – (validated by MA/JTS officer)

# Project adjustments-Content 1/5



Click on this button to start a “New adjustment” (once enable by MA/JTS officers)

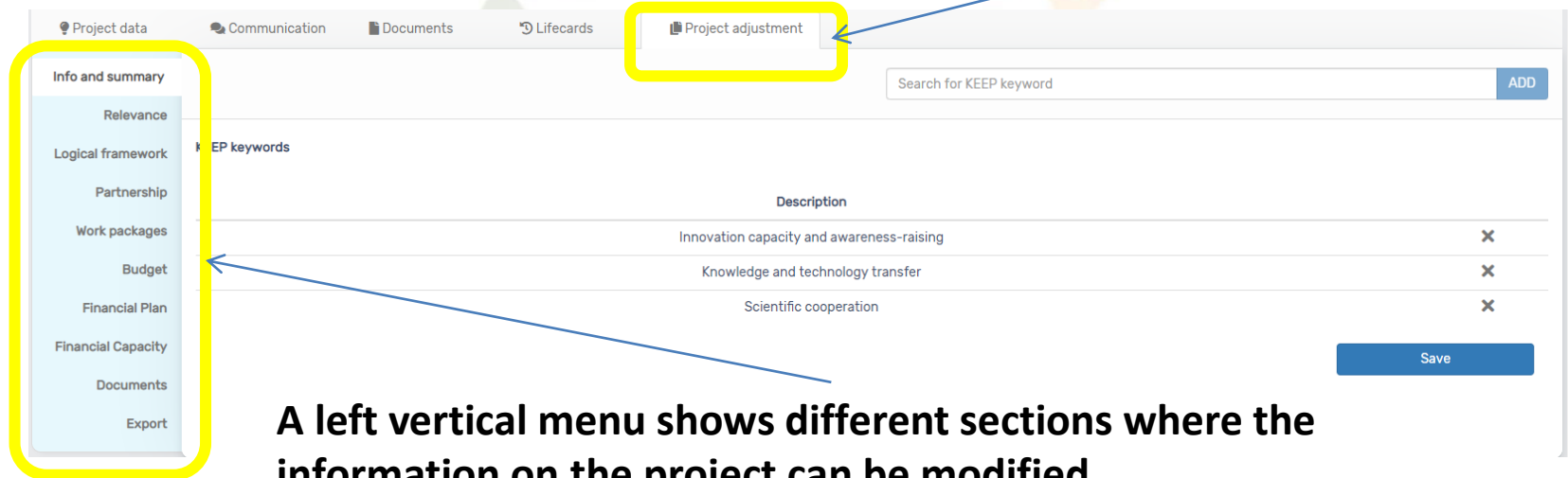
Reference number: A\_A.2.1\_0035

Project data | Communication | Documents | Lifecards

Info and summary | Call for Proposals: 1 Call Standard

Relevance

A new tab “Project adjustment” appears



Project data | Communication | Documents | Lifecards | **Project adjustment**

Search for KEEP keyword

Info and summary

- Relevance
- Logical framework
- Partnership
- Work packages
- Budget
- Financial Plan
- Financial Capacity
- Documents
- Export

KEEP keywords	Description	
	Innovation capacity and awareness-raising	×
	Knowledge and technology transfer	×
	Scientific cooperation	×

A left vertical menu shows different sections where the information on the project can be modified

# Project adjustments-Content 2/5

Project data Communication Documents Lifecards Project adjustment

Info and summary

Relevance

Logical framework

Partnership

Work packages

Budget

Financial Plan

Financial Capacity

Documents

Export

KEEP keywords

Description

Energy efficiency

Renewable energy

Scientific cooperation

Search for KEEP keywords

ADD

Save

Delete one of the keywords, add a new one then save

Project data Communication Documents Lifecards Project adjustment

Info and summary

Relevance

Logical framework

Partnership

Work packages

Budget

Financial Plan

Financial Capacity

Documents

Export

Synergies

Project / Programme / date	Project budget (if available)	Involved countries	List of outputs to be exploited	Expected synergies to be implemented
Promotion of higher penetration of Distr...	1.991.077,25 €	Cyprus, France, Greece, Italy, Portugal, Spain	1) Online tool for optimized sizing of h...	StoRES focuses on the development of the...
Enhancing storage integration in buildin...	1.237.442,15 €	Cyprus, Greece	1) A generalized model able to assess al...	StoRES focuses on the optimal design/ope...
Smart net metering for promotion and cos...	1.219.838,00 €	Cyprus	1) development & validation of optimum pr...	SmartPV investigates DR coupled with sel...
Promotion of PV energy through net meter...	1.279.526,00 €	Cyprus, France, Greece, Portugal, Spain	Initiatives, tariffs & PV potential, tes...	PV-NET focused on developing and enhanci...
Integrated Smart GRID Cross-Functional S...	15.839.775,00 €	Cyprus, Greece, Italy, Portugal, Spain	1) Integration of innovative smart grid ...	inteGRIDy aims to integrate cutting-edge...

Select a synergy, edit it and then save

# Project adjustments-Content 3/5

**Edit expected results**

**Project target**  
248.5

**Comment** (Maximum of 250 characters)  
Comment

Cancel Confirm

Expected results	Expected results indicators	Programme target	Project target	Comment
4.3.2 - Reduced and cleaner energy consumption in public buildings through the use of renewable energy measures and energy saving interventions	4.3.2.C	771.0	248.5	
4.3.2 - Reduced and cleaner energy consumption in public buildings through the use of renewable energy measures and energy saving interventions	4.3.2.D	1800000.0	386.0	
4.3.2 - Reduced and cleaner energy consumption in public buildings through the use of renewable energy measures and energy saving interventions	4.3.2.E	1800000.0	386.0	
4.3.1 - Enhanced capacity of public institutions to plan and implement sustainable energy policies and measures with regard to public buildings	4.3.1.A	25.0	5.0	
4.3.1 - Enhanced capacity of public institutions to plan and implement sustainable energy policies and measures with regard to public buildings	4.3.1.B	25.0	5.0	

Select an expected results indicator, edit the project target, insert a comment and then confirm

# Project adjustments-Content 4/5

Project data Communication Documents Lifecards **Project adjustment**

Info and summary  
Relevance  
Logical framework  
**Partnership**  
Work packages  
Budget  
Financial Plan  
Financial Capacity  
Documents

**General info** Experience and expertise Contacts

Select a Partner and click on edit

Name	Country	Region	Official name of the organization in the original language	Legal Status	Active	Still in Budget	Comment
BEN	Cyprus		University of Cyprus	Body governed by public law	✓		
PP01	Greece	Dytiki Makedonia	TECHNOLOGICAL RESEARCH CENTRE OF WESTERN MACEDONIA	Body governed by public law	✓		
PP02	Israel		The municipality of Eilat	Regional or local public administration	✓		
PP03	Italy	Sardegna	University of Cagliari	Body governed by public law	✓		
PP04	Israel		Ben Gurion University	Regional or local public administration	✓		
PP05	Cyprus		Deloitte Limited	Company or other private economic operator	✓		
PP06	Cyprus		tration		✓		

Name of the organisation in original language (if available):  
University of Cyprus

Department/Service:  
FOSS RESEARCH CENTRE FOR SUSTAINABLE ENERGY

Translation in English:  
University of Cyprus

Acronym:  
UCY-FOSS

Legal status:  
Body governed by public law

Country:  
Cyprus

Official address:  
University House "Anastasios G. Leventis", 1 Panepistimiou Avenue 2109 Aglantzia, Nicosia, CyprusPO BOX 20537, 1678 Nicosia, Cyprus

National registration number:  
LAW 1441989

Website:  
✓

Profit-Making:  
☐

Other project:  
UCY will apply for the following projects (see acronym) in this call. As Partner:S-Tourism/A1.3REEFSET/A1.3SAVVY TREES/B4.3SMART-on-Sea/A2.2DIAMONDS/B4.1IORDANES/B4.2Recycle Beirut/B4.2TTT/B4.3As Applicant:INEVIT-ABLE/A1.34f

VAT status:  
☐

Dedicated budget:  
16170000

Annual total staff:  
more than 1.001

Dedicated staff:  
835

Save

# Project adjustments-Content 5/5

Project data Communication Documents Lifecards Project adjustment

Info and summary  
Relevance  
Logical framework  
Partnership  
**Work packages**  
Budget  
Financial Plan  
Financial Capacity  
Documents  
Export

Select a Work package and edit it

Workpackages

Workpackage Code	Title	Coordinator	Involved partners	Programme expected result
WP0	Preparation	BEN	PP01,PP02,PP03,PP04,PP05,PP06	
WP1	Management	BEN	BEN,PP01,PP02,PP03,PP04,PP05,PP06	
WP2	Communication	PP05	BEN,PP01,PP02,PP03,PP04,PP05,PP06	
WP3	Design and implementation of the pilot demonstration actions	BEN	PP01,PP02,PP03,PP04,PP05,PP06	4.3.2
WP4	Implementation of tools, cost-benefit analysis and training	PP01	BEN,PP02,PP03,PP04,PP05,PP06	4.3.1

Project data Communication Documents Lifecards Project adjustment

Info and summary  
Relevance  
Logical framework  
Partnership  
Work packages  
Budget  
Financial Plan  
Financial Capacity  
Documents

Workpackage Info Workpackage Outputs Workpackage Activities **Workpackage Outputs Indicators** Workpackage Targets

Workpackage Code: WP3

Output Indicators

Output	Output indicator	Target	Comment
Pilot actions in buildings in 4 countries	4.3.2.7.h - Number of public buildings and/or facilities benefiting from Renewable Energies & Energy Efficiency (REEE) measures.	8	
Optimal integration of 3 cost-effective technologies in public buildings	4.3.2.5.e - Number of cost-effective technologies for energy efficiency and renewable energy solutions implemented on a pilot basis.	3	

Update “WP Info” or “WP Outputs” or “WP output indicators” or “WP target”

# Project adjustments-Budget 1/4

Project data Communication Documents Lifecards Project adjustment

Info and summary  
Relevance  
Logical framework  
Partnership  
Work packages  
**Budget**  
Financial Plan  
Financial Capacity  
Documents  
Export

+ Create new budget shift

Name	Creation date	In force	Contracted	Author	Type	Status
Budget contracted		✗	✓		BSS	✓

Prepare a budget shift which will clone the one "in force"

+ [ ] [ ] [ ] [ ] [ ] [ ] [ ]

Name	Creation date	In force	Contracted	Author	Type	Status
Budget contracted TEST for Training in Rome		✗	✓		BSS	✓
BudgetShift_27_09_2019	2 hours ago	✗	✗	Michelle Lakeridou	BSS	✗

Select the new budget, click on edit and start to modify the Budget-Lines



# Project adjustments-Budget 2/4

**Budget line** Source of funding 50% rule

**Modify Budget-lines, source of fundings or 50% rules**

Total direct eligible cost is different from value contracted + 8.265,75 €

Code	Cost category	Partner	Description	Justification	Unit	Number	Rate	Total	Semester incurred	Comment
WP1.HR.BEN.88479	HR	BEN	Personnel cost	Personnel expenses	DAY	170,00	225,00 €	38.250,00 €	I-II-III-IV-V-VI	
WP1.HR.PP1.88265	HR	PP1	Personnel cost	Human resources for ...	DAY	43,75	240,00 €	10.500,00 €	I-II-III-IV-V-VI	
WP1.HR.PP2.88270	HR	PP2	Personnel cost	Personnel expenses	DAY	50,00	200,00 €	10.000,00 €	I-II-III-IV-V-VI	
WP1.HR.PP3.88267	HR	PP3	Personnel cost	Personnel expenses	DAY	25,00	240,00 €	6.000,00 €	I-II-III-IV-V-VI	
WP1.HR.PP4.88268	HR	PP4	Personnel cost	Personnel cost for P	DAY	30,00	300,00 €	9.000,00 €	I-II-III-IV-V-VI	
WP1.HR.PP5.88271	HR	PP5	Personnel cost	Personnel expenses	DAY	50,00	320,00 €	16.000,00 €	I-II-III-IV-V-VI	
WP1.HR.PP6.88269	HR	PP6	Personnel cost	Personnel expenses	DAY	50,00	200,00 €	10.000,00 €	I-II-III-IV-V-VI	
WP1.SS.BEN.88306	SS	BEN	Verification of expe...	This concerns the ce...	UNIT	1,00	6.600,00 €	6.600,00 €	I-II-III-IV-V-VI	
WP1.SS.PP1.88307	SS	PP1	Verification of expe...	This concerns the ce...	UNIT	1,00	7.500,00 €	7.500,00 €	I-II-III-IV-V-VI	

**Edit Budgetline**

WP: WP1

Partner: PP1

Description: Verification of expenses

Justification: This concerns the certification of all project expenditures.

Cost category: External services

Unit: Unit

Rate: 7500

Number: 1

Total: 7.500,00 €

Semester incurred: 1

Comments (Maximum of 250 characters):

Cancel Confirm

**Select a Budget-Line and click on edit to modify its details.**

**Always insert a comment to justify the modification.**

# Project adjustments-Budget 3/4

Budget line Source of funding 50% rule

Validate the budget to check if there are errors



## Budget Validation

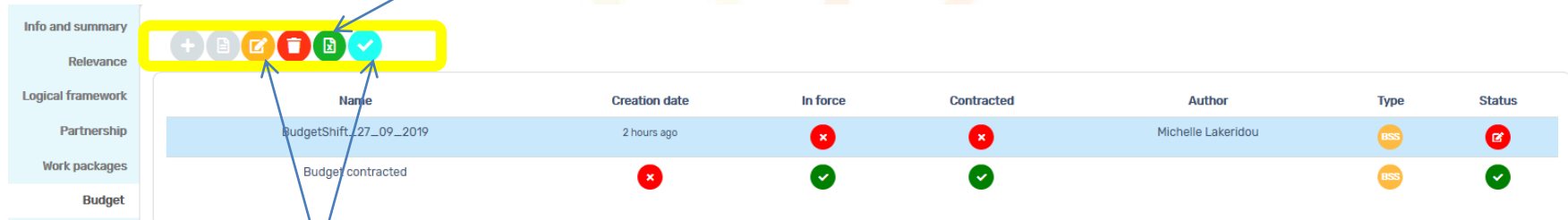
### Error in budget validation

Code	Description	Expected	Found	Difference
Code 219	Total Budget Max	2.868.390,35 €	2.876.533,21 €	8.142,86 €

Code	Cost category	Partner	Description	Justification	Unit	Number	Rate
WP1.HR.BEN.88479	HR	BEN	Personnel cost	Personnel expenses	DAY	170,00	225,00 €
WP1.HR.PP1.88265	HR	PP1	Personnel cost	Human resources for ...	DAY	43,75	240,00 €
WP1.HR.PP2.88270	HR	PP2	Personnel cost	Personnel expenses	DAY	50,00	200,00 €
WP1.HR.PP3.88267	HR	PP3	Personnel cost	Personnel expenses	DAY	25,00	240,00 €

# Project adjustments-Budget 4/4

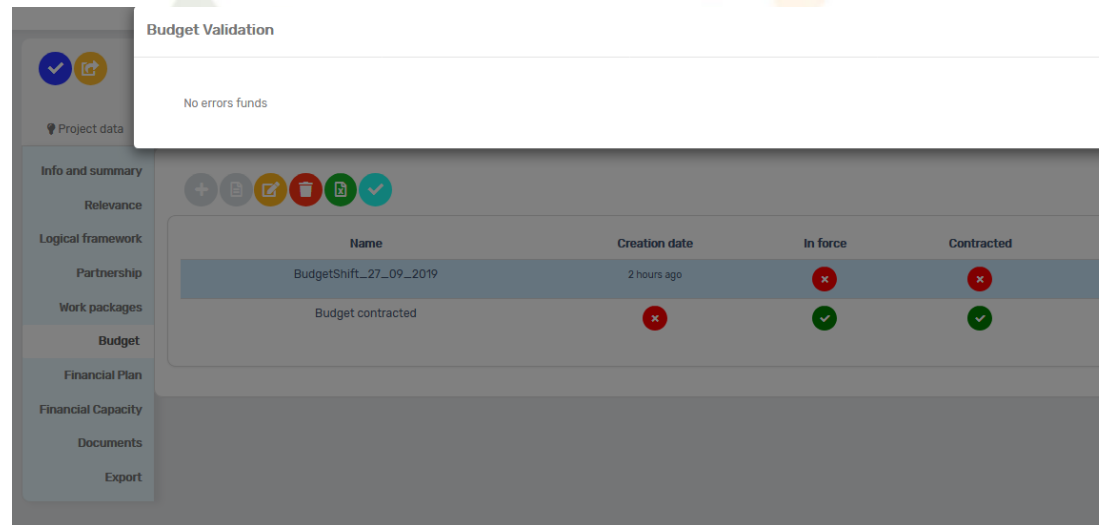
At any time you can export an excel file of your budget shift to share it with your partners



Info and summary								
Relevance								
Logical framework								
Partnership								
Work packages								
Budget								

Name	Creation date	In force	Contracted	Author	Type	Status
BudgetShift_27_09_2019	2 hours ago	✗	✗	Michelle Lakeridou	BSS	✗
Budget contracted		✗	✓		BSS	✓

At any time you can re-edit and re-validate your budget shift



Budget Validation

No errors funds

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

Name	Creation date	In force	Contracted
BudgetShift_27_09_2019	2 hours ago	✗	✗
Budget contracted		✗	✓

# Project adjustments- Last steps 1/2

Once all modifications are done, you should validate your adjustment to check if it is “simple/minor/major”

Project data Communication Documents Lifecards Project adjustment

Info and summary  
Relevance  
Logical framework  
Partnership  
Work packages  
Budget  
Financial Plan  
Financial Capacity  
Documents

Export project  
Export project in doc format  
Export doc

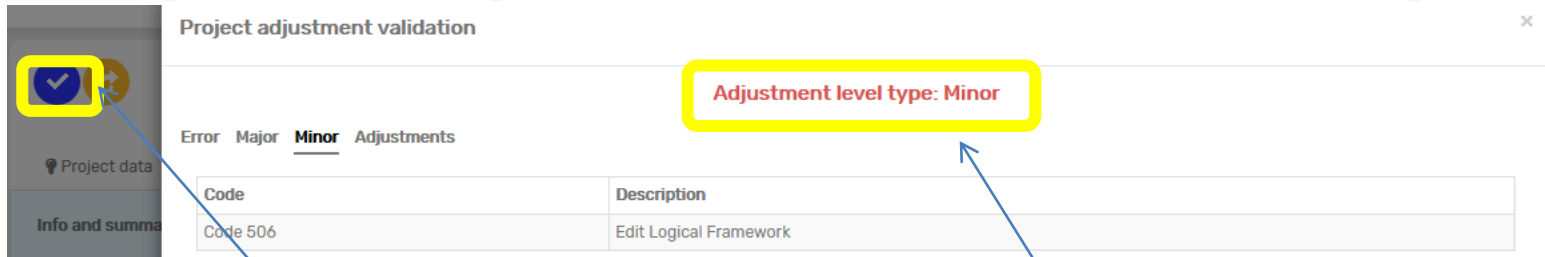
Export budget  
Export budget and financial plan in xls format  
Export xls

Export

At any time you can export the project information (narrative in .doc and financial data in .xls)

The screenshot shows a web application interface for project management. At the top, there are five tabs: 'Project data', 'Communication', 'Documents', 'Lifecards', and 'Project adjustment'. The 'Project adjustment' tab is selected. On the left side, there is a vertical menu with the following items: 'Info and summary', 'Relevance', 'Logical framework', 'Partnership', 'Work packages', 'Budget', 'Financial Plan', 'Financial Capacity', 'Documents', and 'Export'. The 'Export' item at the bottom of this menu is highlighted with a yellow box. In the main content area, under the 'Project adjustment' tab, there are two sections. The first section is titled 'Export project' and contains the text 'Export project in doc format' and a blue button labeled 'Export doc'. The second section is titled 'Export budget' and contains the text 'Export budget and financial plan in xls format' and a blue button labeled 'Export xls'. A blue arrow points from the text 'Once all modifications are done, you should validate your adjustment to check if it is “simple/minor/major”' to a yellow box containing a blue checkmark icon and an orange icon with a document and a checkmark. Another blue arrow points from the text 'At any time you can export the project information (narrative in .doc and financial data in .xls)' to the 'Export' button in the left menu.

# Project adjustments- Last steps 2/2



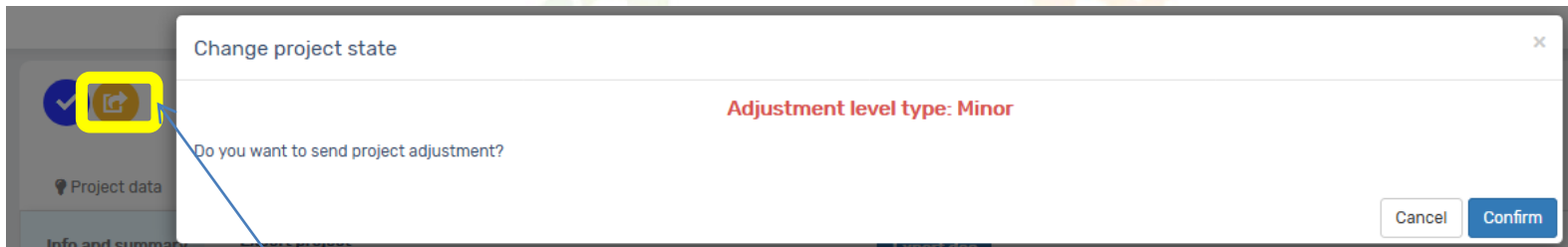
Project adjustment validation

Adjustment level type: Minor

Error Major **Minor** Adjustments

Code	Description
Code 506	Edit Logical Framework

When clicking on “Validate” a message appears



Change project state

Adjustment level type: Minor

Do you want to send project adjustment?

Cancel Confirm

When all the modifications are done, click on “Send adjustment to MA/JTS”

**THANK YOU FOR YOUR ATTENTION**

**MERCI**

**شكراً**



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REGIONE AUTONOMA  
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