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Organisations database and **current developments**

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IT Tools and Monitoring Systems Network

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Content

1. **Organisations** database

   - pros, cons, headaches

   - solution? – under development

2. Partner **reporting/ control**

   - Similar to JEMS

   - Supporting documents and GDPR

   - Sample generator

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1.

Organisations database

Why?

Previously: organisations created in each application form

=> list of organisations with slightly different "doubles"

=> how to count indicators per organisation?
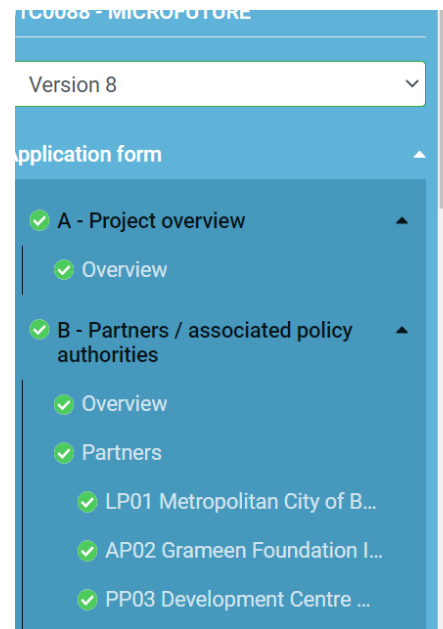
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What?

Organisations database imported to the **website** => users link their community profiles to an already existing organisation or create a new one

What?

In **Portal** => applicants select an already existing organisation or create a new one

What?

To **limit** the creation of doubles and incorrect information:

- Name suggestion while typing

- Name, country, NUTS, legal status blocked

Result (current situation)

Pros:

- Single list of organisations, projects partners linked to the same institution => more meaningful indicators and communication

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Edit organisation

Details | Projects

This organisation is involved in these projects:

01C0162 - RAW4RES *as* **Partner**
Call 1 | Enhancing responsible mining policies and raw materials resilience in EU regions

01C0056 - EMBRACER *as* **Partner**
Call 1 | intErconnecting MoBility acRoss europeAn CitiEs and subuRbs

01C0128 - GH2M *as* **Partner**
Call 1 | Accelerating the deployment of green hydrogen mobility in EU regions

01C0262 - WeSTEMEU *as* **Partner**
Call 1 | Women for Science, Technology, Engineering, and Mathematics in Europe

Result (current situation)

Cons:

- Still doubles
  created

Organisations

[+ Create organisation]

Name	Address	City	Postal co
Bucharest Ilfov Regional Development Agency	163 Mihai Eminescu, 2nd floor, 2nd district, Bucharest	Bucharest	020076
Bucharest-Ilfov Regional Development Agency	Mihai Eminescu 163	Bucharest	20076
Bucharest – Ilfov Regional Development Agency (BI-RDA)	163 Mihai Eminescu, 2nd floor, 2nd district	Bucharest	20076
3			

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Result (current situation)

Cons:

- a lot of work for the SysAdmins (correcting typos, legal status and name changes etc.)
- any change to the organisation is applied to all projects and in all application form versions

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Problem

How to reconcile:

- List of unique partners
- JS not being involved in partner name changes
- Partners able to change the organisation name at all times
- Mitigate the risks linked to users changing organisation data in other projects
- Partners who selected same organisation, now disagreeing on the name
- Keeping old organisation name in the old versions of the AF in case of legal succession

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Solution

1. Clean the organisation list (**merge clear duplicates**) involved in recommended projects

2. Add **project dependent** fields:

   - Department

   - Department address

Solution

3. Make the **partner name editable** to project users

- Focus on UX to prevent unwanted changes

- Automatic notification to other project users and JS officers

4. **Link new organisation** with the old partner in case of legal succession (all budget and activities data are kept)

Solution

5. Potentially more cleaning done by COM unit (?)

6. Potentially a cleaning of organisations involved in recommended projects after each call

7. Accept that the **result will not be 100% correct**

Other actions we considered

1. Using VAT as unique identifier more consistently

   - Pre-formatting VAT fields

   - Blocking creation of new organisations with same VAT no

2. Adding other identifiers (PIC)

3. Blocking the creation of new organisations

4. Cleaning the entire organisation list

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2. Partner reporting/ control

Close to JEMS

(not only visually)

ORIGINN / Partner reports / Financial reports "Government of Catalonia - Department of Climate Action, Food and Rural Agenda" / Report 1 (Semesters 1–1)

✓ Report identification   ✓ Activity summary   ✗ List of expenditures   ✗ Procurements   ✓ Financial overview   ✓ Submit

Report number	1
Project acronym	ORIGINN
Project title	Economic and social transformation in rural areas through industrial innovation, emphasis in agri-food sector
Application form version	3
Partner number	1
Partner name	Government of Catalonia - Department of Climate Action, Food and Rural Agenda
Partner until	-
Legal status	Public

Reporting period start

Semester 1 (begins on 01 March 2023)   ⌄

Reporting period end

Semester 1 (ends on 31 August 2023)   ⌄

identification | ✅ Activity summary | ❌ List of expenditures | ❌ Procurements | ✅ Financial overview | ✅ Submit

n 1 is incomplete.
n 2 is incomplete.

dd expenditure

Cost category	Contract number	Application form item number or month ?	Description	Employee/supplier	Document reference number	Date of invoice/document	Date of payment
Staff costs ⌄	⌄	02 - February ⌄	0/300	0/300	0/300	Please select	Please select Date must not be after 31/08/2023
External expe ⌄	LP01-001 ⌄	10 - Exchang ⌄	0/300	0/300	0/300	Please select	Please select Date must not be after 31/08/2023 This field is required for submission.

nditures | ❌ Procurements | ✅ Financial overview | ✅ Submit
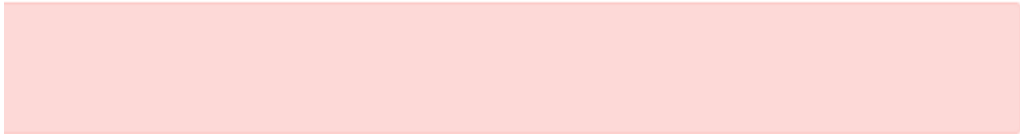
Currency	Exchange rate	Total amount declared (including VAT)	Total amount declared in EUR	Total amount certified by controller	In case of correction, error related to
Euro ⌄	1.00000	500.00	500.00	0.00	0/300
Euro ⌄	1.00000	0.00	0.00	0.00	0/300

eport identification   ✅ Activity summary   ❌ List of expenditures   ❌ Procurements   ✅ Financial overview   ✅ Submit

Contract LP01-001: You are only required to list subcontracts of at least 50,000 EUR excl. VAT.

+ Add procurement

Contract number	Contract name	Reference number	Contract date	Contract type	Contract amount (excl. VAT) in EUR	Above EU threshold	Procedure applied	Supplier name	Supplier VAT number	Partner's comments	Controller's comments	Created in	Last changed	
LP01-001		🗑		Services	10,000.00	Yes						2	11/04/2023	🗑 Delete

Procedure types

Open Procedure
Any interested supplier may respond to an advertisement in the OJEU (or another publication if below EU thresholds) by submitting a tender/offer.

Restricted procedure
Any interested supplier may respond to an advertisement in the OJEU (or another publication if below EU thresholds) From those a selection is made to submit a tender/offer.

Competitive procedure with negotiation
Any interested supplier may respond to an advertisement in the OJEU. From those a selection is made and invited to submit an initial tender/offer. The contracting authority may then open negotiations with the potential suppliers to seek improved offers.

Contract number	LP01-001
Created in	2
Last changed	11/04/2023

Contract name

0/100

Reference number

0/100

Contract date

Please select

Contract type

Services

Contract amount (excl. VAT) in EUR

10,000.00

Above EU threshold

Yes

Procedure applied

Please select

Supplier name

0/100

Supplier VAT number

0/100

Sub contract(s)

+ Add subcontractor

Report identification | ✅ Activity summary | ❌ List of expenditures | ❌ Procurements | ✅ Financial overview | ✅ Submit

Partner expenditure overview

Cost category	Total partner budget	This report	This report - certified	Total reported so far	% of partner budget used	Remaining budget
Preparation costs	17,500.00	17,500.00	0.00	17,500.00	100.0%	0.00
Staff costs	170,615.00	500.00	0.00	500.00	0.3%	170,115.00
Office and administration	25,592.00	75.00	0.00	75.00	0.3%	25,517.00
Travel and accommodation	25,592.00	75.00	0.00	75.00	0.3%	25,517.00
External expertise and services	147,801.00	0.00	0.00	0.00	0.0%	147,801.00
Equipment	0.00	0.00	0.00	0.00	0.0%	0.00
Infrastructure and works	0.00	0.00	0.00	0.00	0.0%	0.00
(Net revenue)	0.00	0.00	0.00	0.00	0.0%	0.00
Total	387,100.00	18,150.00	0.00	18,150.00	4.7%	368,950.00

Partner expenditure breakdown per source of funding

Please note, that changing entries in "List of expenditures" and also the net revenue in the "Partner expenditure overview" table will reset the contribution.

	Total	ERDF / NO	Total partner contribution	Partner contribution from public sources	Partner contribution from private sources
Declared by Partner	18,150.00	14,520.00	3,630.00	3,630.00	0.00
Certified by FLC	0.00	0.00	0.00	0.00	0.00

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Upload of supporting documents

Under discussion/ development

- By cost category, not individual LoE items

- Tags vs pre-set folders

- Sensitive data protection

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Sample based control

- Interreg Europe own sampling methodology

- Sample generator included in the system (under development)

- Control documents incl. checklist in the system

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Time for questions ?

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Thank you!

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Title of Event
Location