

APPLICANT GUIDANCE

Adding a Partner manager (when being a partner manager)

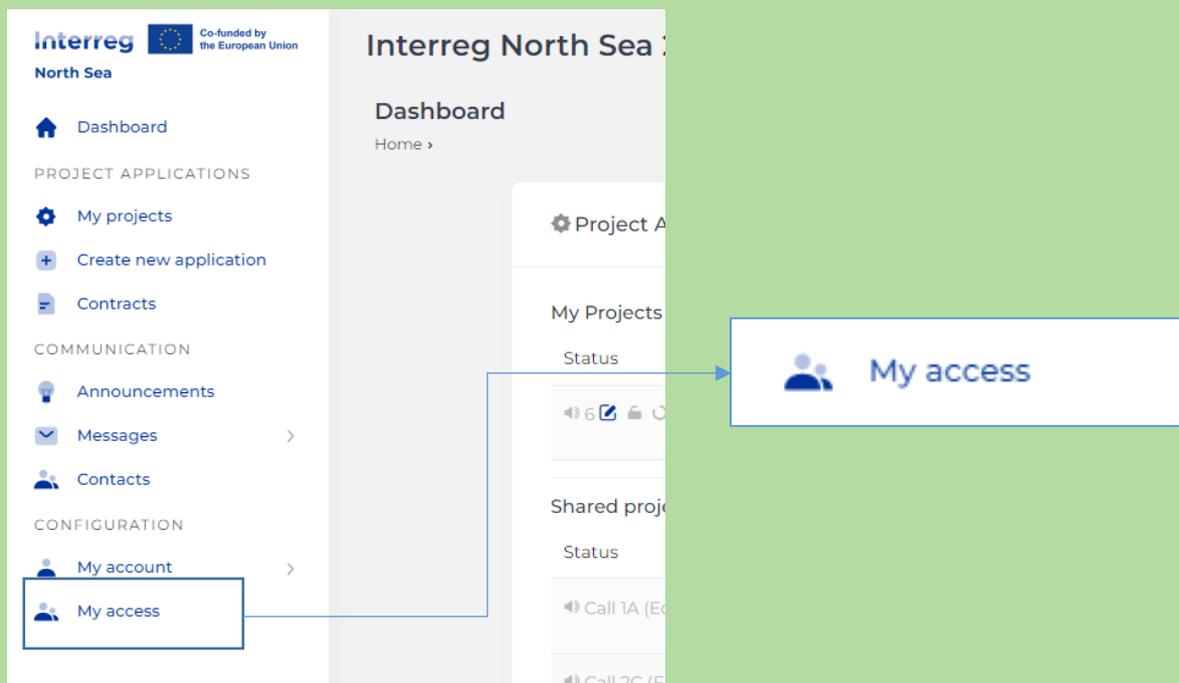
Version 1.0

In this guidance show step-by-step how one partner manager can invite another partner manager. This is needed when one member of staff in one organisation needs to invite a colleague to work on the same project.

NOTE: This guidance is relevant for all partner and project managers. A partner manager can only invite a partner manager for their own organisation, however the project managers can invite project partners for all organisations involved in the project.

STEP 1

In the menu located to the left choose the item "My access".



STEP 2

Under "My access" you can find the projects you are involved in and what your access rights in these projects are.

Click on the button "Project Access" for the project to which you want to invite a colleague to become a partner manager.

The screenshot shows the 'Interreg North Sea 2021-2027 Online Monitoring System' interface. The main heading is 'Project access: My access' with a breadcrumb trail 'Home > Project access > My access details'. There are three project cards:

- DEMO OMS DEMO**: Roles include 'Partner Authorised Signatory for North Sea Programme' and 'Project Authorised Signatory'. A 'Project Access' button is present.
- C7Da New SSP in Call 1**: Role is 'Partner Manager of The Agency Engine'. A 'Project Access' button is present.
- test22 test27092022**: Roles include 'Partner Manager of New LB' and 'Project Owner/Manager'. A 'Project Access' button is present.

A 'Summary of permissions' box on the right lists:

- View access allows non-editing permission on project application and periodic reports.
- Partner Managers can edit Lol and Self-declaration documents during application submission, assign Controllers and Partner Authorised Signatories, and can edit periodic reports.
- Partner Authorised Signatories can submit the project application and project-level periodic reports. Limited to a total of 3 persons.
- Project Managers can edit the project application and project-level periodic reports, as well as assign Project Authorised Signatories and Partner Managers.
- Project Owners have all rights of Project Managers and also are the ultimate administrator of the project and main contact with the JS.

STEP 3

Scroll down to the section "Partner Managers", and click the button "New invitation".

The screenshot shows the 'Partner Managers' section. A sub-heading states: 'Partner Managers can edit Lol and Self-declaration documents during application submission, assign Controllers and Partner Authorised Signatories, and can edit periodic reports.' Below this is a table with columns: Partner Manager, Partner, Invitation date, Status, and Manage.

Partner Manager	Partner	Invitation date	Status	Manage
	Vasso Org			-
	Web developer LTD			-
	Manolis org			-
Christoffer Villsen New LB	The Agency Engine	06/09/2022	Accepted	Revoke access Delete
Demian LeadBen OMS-LB	SSP Lead Partner	30/03/2022	Accepted	-

A 'New invitation' button is located at the bottom right of the table.

STEP 4

Now you have to insert the first- and last name, followed by direct email address of the person. Please double check that you invite the correct individual.

Once you have inserted the relevant information click the button "Save".

Interreg North Sea 2021-2027 Online Monitoring System

OMS DEMO / Invite user

Home > Project access > OMS DEMO > Project access: Invite user

Demian

Access to Project	OMS DEMO
Access to Partner	Private partner (Denmark)
Partner Rights *	Partner Manager <i>Summary of rights</i> - Authorised Signatory (AS) of Partner: Can approve/sign (but not edit) periodic reports on behalf of the partner - Partner Manager: Can designate a Controller and edit and prepare periodic reports on behalf of the partner - Controller: verifies the eligibility of reported expenditures in the periodic finance reports
First name *	<input type="text"/>
Last Name *	<input type="text"/>
Organisation *	Private partner
E-mail address *	<input type="text"/>

[Save](#)

Please check for errors: E-mail address, First name, Last Name

[Return to the application form](#)

STEP 5

Once you have clicked the button "Save", you should see the following picture confirming that the invitation has been sent correctly.

Interreg North Sea 2021-2027 Online Monitoring System

OMS DEMO / Project access

Home > Project access > OMS DEMO > Project Access

Demian

[Re-send invite](#) [Cancel](#) [Project access](#)

Your invitation has been sent and is pending acceptance

Information	
Parent user	Demian LeadBen @ OMS-LB
Access to Project	OMS DEMO
Access to Partner	Private partner
Project Rights	View
Partner Rights	Partner Manager
First name	Christoffer
Last Name	Villsen
Organisation	Private partner
E-mail address	<input type="text"/>
User Account	
Date of invitation	28/01/2022 10:00:57

STEP 6

You have now finalised inviting the partner manager. The invited partner manager will receive the following confirmation email.

Invitation to join the North Sea OMS

User Demian LeadBen in the North Sea OMS (Online Monitoring System) has invited you

Private partner ([redacted]@gmail.com)

to join the system and have access to the following submissions:

OMS DEMO

To complete the process and access the Online Monitoring System, please confirm your e-mail address by following the steps below:

1. Go to [https://oms.interregnorthsea.eu/app/partners-access/\[redacted\]](https://oms.interregnorthsea.eu/app/partners-access/[redacted])
2. Your e-mail address will be confirmed and you will be given your password.
3. Write down your password and store it in a safe place.
4. Use the login form to enter the system.
5. Your account will be connected to the submissions mentioned above and you will have viewing access on them.

This is an automated message. Please do not reply. For support requests please mail support@oms.interregnorthsea.eu

Kind regards,

The North Sea Team

The partner manager can after accepting the invitation and activating the user account do the following things:

1. Initiate the signature of the Letter of intent (if relevant)
2. Initiate the signature of the self-declaration (if relevant)
3. Initiate the appointment of a partner authorised signatory (once the project is approved)
4. Initiate the appointment of a partner controller (once the project is approved).

Questions or comments?

Get in touch! Feel free to contact one of our project advisors. Find contact details for our staff at interregnorthsea.eu.

