

# GUIDANCE

## Adding a partner manager

Version 1.0

**NOTE:** This guidance is only relevant for the lead partner/applicant.

### STEP 1

Go to your full application. You should not be in edit mode for this procedure.

### STEP 2

When viewing the application form you can add contact details of the partners outlined in the application form. By adding the contact details for a partner a user account in the OMS is created based on these credentials and an invitation is sent.

You add the partner contact details and send the invitation by clicking the button "Access".

Interreg North Sea 2021-2027 Online Monitoring System

OMS DEMO (DEMO)  
Home > Project Applications > Full Application > OMS DEMO

**A.1 Identification**

A.1.1 Project title	OMS DEMO
A.1.2 Project acronym	DEMO
A.1.3 Lead Partner	North Sea Programme
A.1.4 Start Date	20/09/2022
A.1.4 End Date	30/08/2026
A.1.4 Project duration	48 months
A.1.5 Priority	Priority 2. A g
A.1.6 Priority specific objective	2.3 Developin

Demian

Edit Status Access Docs Actions

Demian

Edit Status Access Docs Actions

### STEP 3

In the Access overview you can start the authorised signatory procedure, add partner managers and grant view access to your application. For this procedures you will focus on the "Partner Managers" section.

Find the partner to which you want to define the manager, and click the button "Invite".

The screenshot displays the 'Interreg North Sea 2021-2027 Online Monitoring System' interface. The user is logged in as 'Demian'. The page title is 'OMS DEMO (DEMO) / Project Access'. The breadcrumb trail is 'Home > Project Applications > Full Application > OMS DEMO > Project Access'. There are three tabs: 'Status', 'Docs', and 'Actions'. The main content area is divided into three sections: 'Authorised Signatory', 'Partner Managers', and 'View Access'. The 'Authorised Signatory' section states 'No Project Authorised Signatory has been set for this project application. Please send an invitation to the person in your organisation that can assume this role.' and has a 'Start process' button. The 'Partner Managers' section has a heading 'Partner Managers' and a sub-heading 'Please provide the contact details of the manager of each partner organisation who can provide information about the organisation's role to the project.' Below this is a table with columns: Partner, Partner Manager, Invitation date, Status, and Manage. The table contains two rows: one for 'Demian LeadBen' (OMS LB) with status 'Accepted' and a 'Revoke access' button, and one for 'Private partner (Denmark)' with an 'Invite' button. A blue box highlights the 'Private partner (Denmark)' row, and a blue arrow points from its 'Invite' button to a larger 'Invite' button in the 'View Access' section. The 'View Access' section states 'No person have been granted with a viewing permission for this project application. Please send an invitation to the person in your organisation that you would like to provide access.' and has a 'Start process' button. At the bottom right, there is a 'Return to the application form' button.

### 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 for the correct organisation. You can in the overview clearly see which organisation you are about to invite a partner manager for.

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

Interreg North Sea 2021-2027 Online Monitoring System Demian

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

Access to Project	OMS DEMO
Access to Partner	Private partner (Denmark)
Partner Rights *	<p>Partner Manager</p> <p><i>Summary of rights</i></p> <ul style="list-style-type: none"> <li>- Authorised Signatory (AS) of Partner: Can approve/sign (but not edit) periodic reports on behalf of the partner</li> <li>- Partner Manager: Can designate a Controller and edit and prepare periodic reports on behalf of the partner</li> <li>- Controller: verifies the eligibility of reported expenditures in the periodic finance reports</li> </ul>
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 Demian

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

Home > Project access > OMS DEMO > Project Access

Your invitation has been sent and is pending acceptance

<b>Information</b>	
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"/>
<b>User Account</b>	
Date of invitation	28/01/2022 10:00:57
Date of modification	28/01/2022 09:56:17
Status of invitation	Pending
Access	No

## 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](mailto: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
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).