

Controllers workshop

The Control Module in Jems, training

Aija Prince, Pieter Lowers | Interact | 22.11.2023

Interact



Co-funded by
the European Union
Interreg

What is **Jems**



Harmonised tool based on HIT and Interreg collective knowledge



Developed by Interact with the help of a Core Group (7 programmes). Takes into consideration feedback and input of a larger User group (the 52 programmes that signed Jems licence agreement to test/use Jems)



Taking into consideration results of User tests, feedback and proposals (if relevant for Jems users community)

How is Jems being developed



Software development started in May 2020
and is still ongoing



Development in 2 weeks sprints/cycles

Every 2 weeks functional pieces of software are presented to public in online Sprint Review meetings. Feedback is provided on the spot or on Helpdesk and is integrated in future developments



Jems releases: 8 releases so far, 9th expected on 19 January 2024

**End of Core development phase – 1Q
2023**

By Date

3,5 years of development



Expressed interest to use/test Jems

55



Signed License agreements

52



Releases

8 (last, 26.09.2023)



Sprint Reviews

89

Gathering requirements

Harmonised Implementation Tools



Developed by Interreg programmes for Interreg Programmes



Used for selection and monitoring of Interreg projects



Templates, checklists, methodologies, glossary

Gathering control requirements



HIT group on Control was kicked off in January 2021 taking into account input from previous control workshops (Bergen – May 2019, Bilbao – October 2019, online – December 2020)



HIT subgroup on Risk-Based sampling
(throughout 2021)



HIT subgroup on public procurement
(throughout 2021)

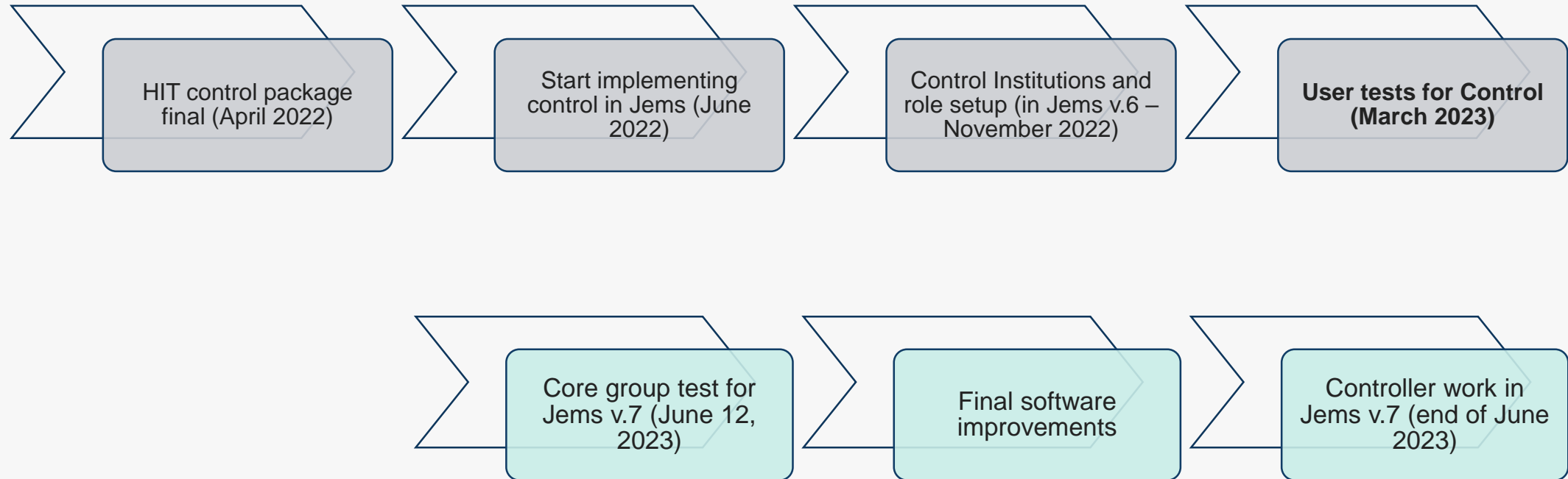
HIT group on Control Package

Outputs:

- Templates for:
 - Control certificate
 - Control report and Checklist
 - Public procurement Checklist
- Methodology for Risk-based management verifications

All final HIT control package outputs were published in HIT community by April 2022 (with only some legislation updates on Control report and Checklist on January 2023).

Control timeline in Jems



Control relevant sections in Jems

Control report

Includes all controller work: Control report, Control checklists, Control certificate, Clarifications, basic handling of national controls on top of control work (if applicable), basic handling of appeals on control work (if applicable).

Delivered with Jems v.7 (30 June 2023). Section can be already fully tested in Jems demo instance and is described in Jems draft manual for v.7.

Control institutions

Includes: setup of control institution, assignment of users to control institution and assignment of control institution to partners.

Was delivered with Jems v.6 (November 2022)

Role setup for control

Setup of roles for controllers coordinator and national controllers.

Role setup is possible from the beginning in Jems, special privilege for Control institution management was delivered with Jems v.6 (November 2022)

User tests Controllers

March 2023

Goal of the tests

Evaluate the usability of developed features

Usability of new workflows (Control)

Participants:

Helje (Estonia) – March 15th, 2023

Julija (Latvia) – March 16th, 2023

Vesna (Serbia) – March 21st, 2023

The screenshot displays the 'Control report' page in the Jems application. The page is structured as follows:

- Follow-up measures from last certified report:** A section for reporting on previous measures.
- Conclusions and recommendations:** A section for summarizing findings and providing recommendations.
- Follow-up measures for next partner report:** A section for planning future actions.
- Generate Control certificate & Report:** A section with a 'Generate report file' button.
- Table of Control Reports:** A table listing generated reports with the following columns: File name, Location, Creation date, User, File size, Description, and Actions.

File name	Location	Creation date	User	File size	Description	Actions	Attachments
ControlReport 1 - 14-042023 - LPT1 - R2.pdf	Control report	03/16/2023 03:04 PM	cert@devitq.com	51.4 KB		✓	📎
ControlCertificate 2 - 14-042023 - LPT1 - R2.pdf	Control certificate	03/16/2023 03:04 PM	cert@devitq.com	24.4 KB		✓	📎
ControlCertificate 1 - 14-042023 - LPT1 - R2.pdf	Control certificate	03/16/2023 03:02 PM	cert@devitq.com	24.3 KB		✓	📎

Follow-up Actions



Immediate improvements

Changed names / improved user guidance in some sections already for Jems test version



Jems improvements for version 7

Created tickets to be implemented and ready for Jems release version 7



Jems improvements for the future

Noted additional improvements for future Jems versions



Feedback for User documentation

Noted down suggestion to explain in detail some of the functionalities

Controllers workshop

Control in Jems

Sofia, Bulgaria
16-17 May 2023

Goal of the session

- Risk-based management verifications (RBMV) in Jems
- Results of the Controllers User tests
- Demo of the Control Module

Target Group

- Controllers



Feedback taken up from Sofia, May 2023



Feature specified	Status
Export of control checklist	Implemented
Notifications when things are uploaded in Control communication	Implemented
Skip control	To be implemented
Export of Expenditure verification	Wishlist - Can be developed by programmes as an Export plug-in
A way to monitor overspending per cost category at partner level	Can be seen in financial overview tables and can be blocked by programmes via a pre-submission check

Controller section in eMS and Jems

eMS

Control institution and controller assignment to partners

Sampling cannot be documented

Sitting ducks – remaining at the level of the controller

Data loss when reopening control work (fixed in later eMS versions)

4-eyes-principle within one control checklist

Jems

Control institution assignment to partners

Automatic and manual sampling possible

Parked expenditure – sent back to the level of the partner

No data loss when reopening control work

4-eyes-principle with two separate checklists

Jems roadmap

Summer 2023



MA/JS verification
and Payments

Management verification
on project level (finances
and content)

Regular payments to
projects

Autumn 2023



Programme
Monitoring

Payment claims to EC

Audit and corrections
(start)

SFC transmission of data*

eID

Winter 2023/24



Closure

Audit and corrections

Programme and project
closure

SFC annual accounts*

data exports*

Spring till end 2024



"Nice to have"
phase

Extension of features
adding value to the
system (according to
prioritisation)

* plugins: contributions by programmes possible and welcome

Status: 5.9.2023

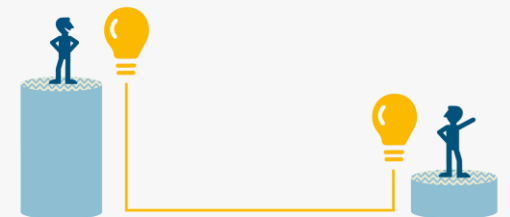
Longer term prioritisation

Core development phase till end of Q1 2024:

Provision of the whole programme and project workflow
Additional „horizontal“ features (to be prioritised with care)

Additional developments till end of 2024:

Adding the most valuable features from a (quite large) collection of suggestions, **including suggestions for Control module**



When to reach out via Jems Helpdesk

Before reaching out to Jems team:

Did you look up certain section in User Manual/Technical manual?

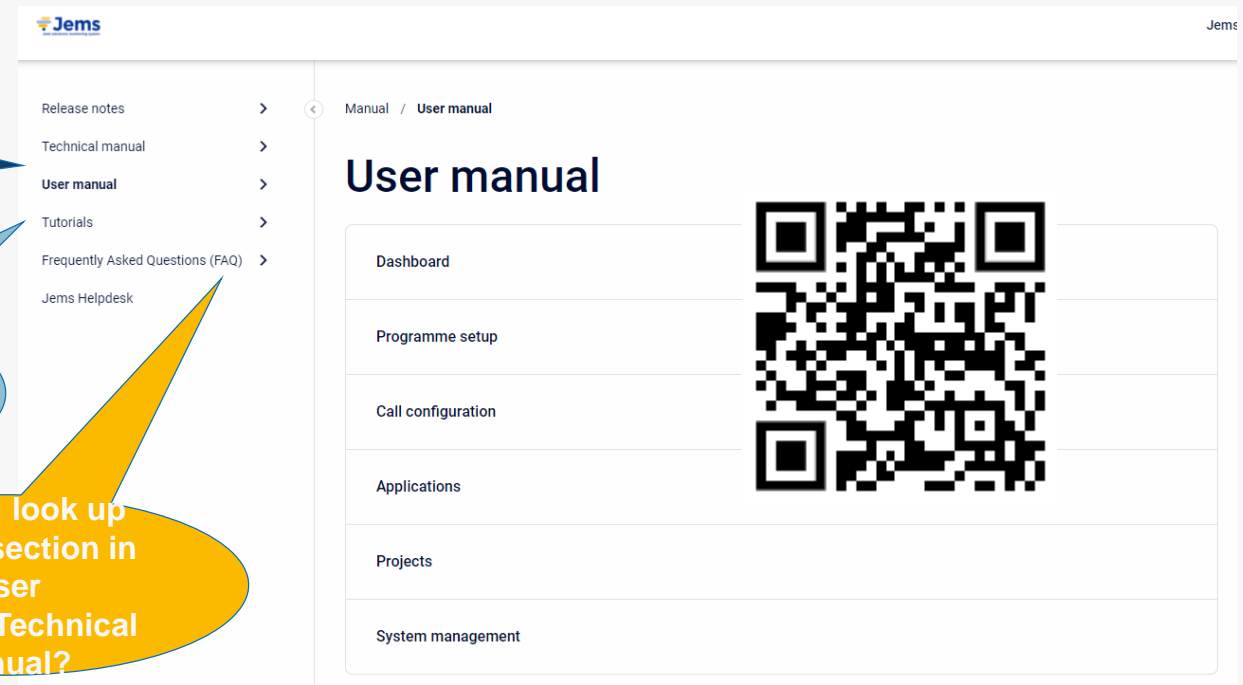
Did you check the video tutorials?

Did you look up certain section in User Manual/Technical manual?

Lump sums and Unit costs in Jems (Version 4.0.1)

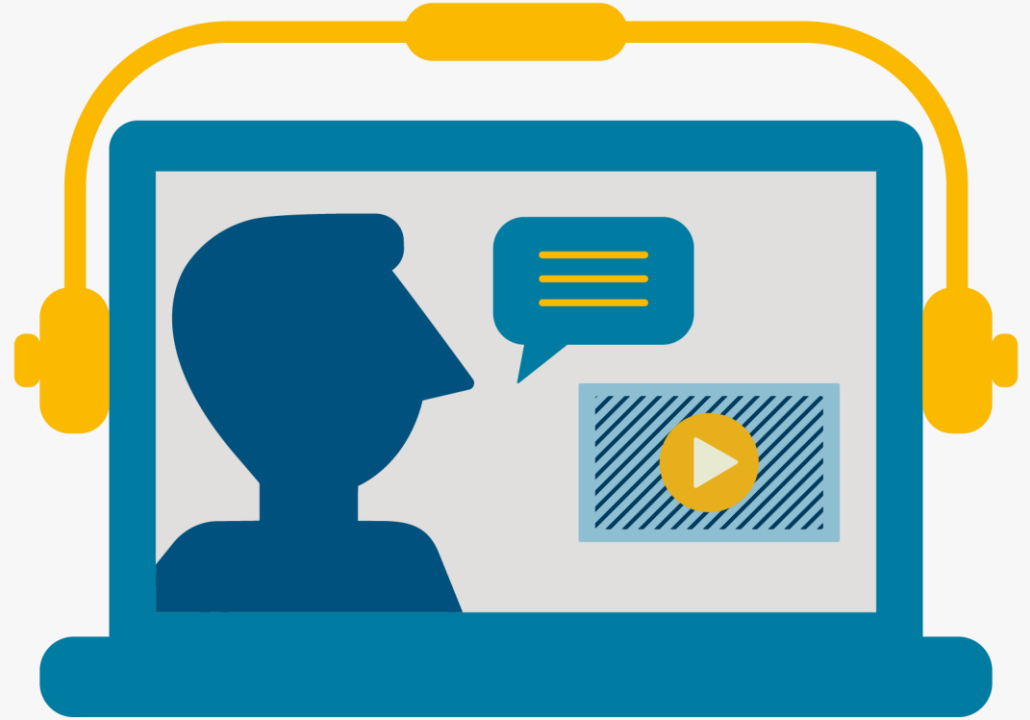


© Jems

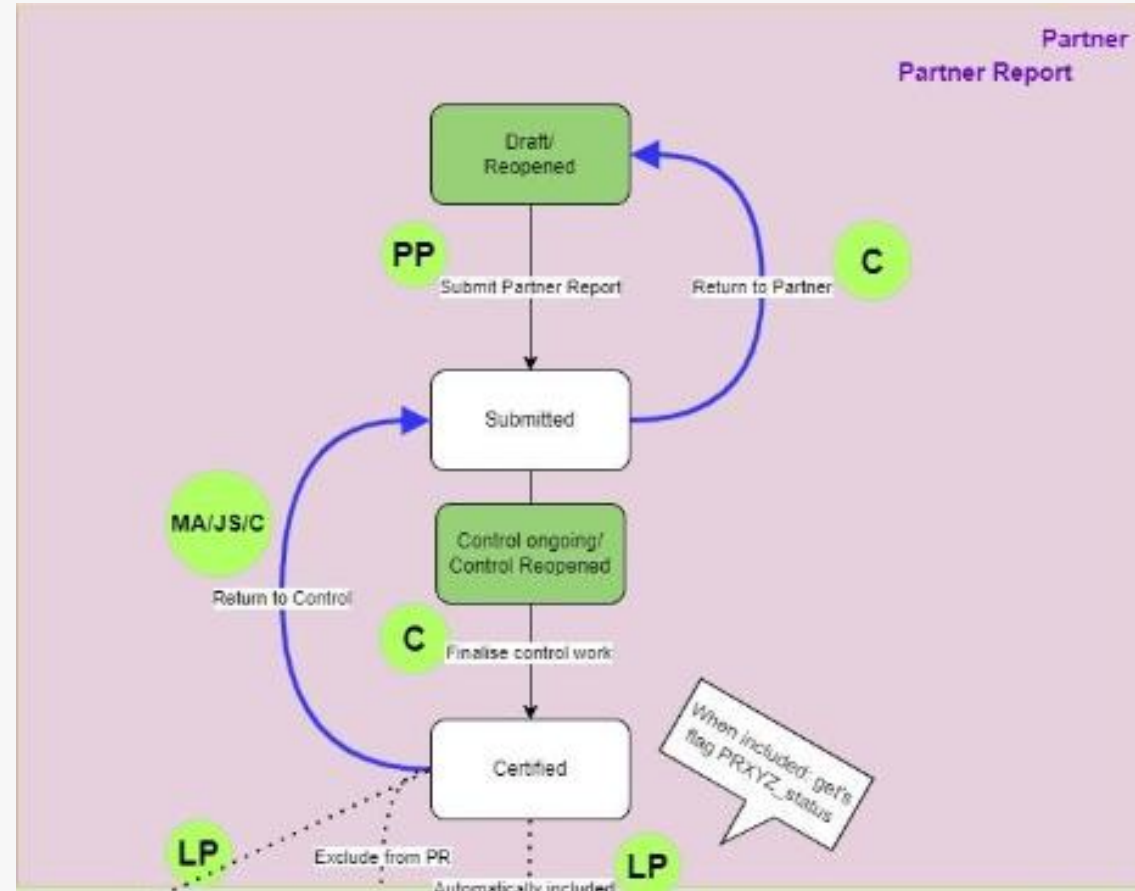


The screenshot shows the Jems user manual interface. On the left is a navigation menu with items: Release notes, Technical manual, User manual, Tutorials, Frequently Asked Questions (FAQ), and Jems Helpdesk. The main content area is titled 'User manual' and contains a list of sections: Dashboard, Programme setup, Call configuration, Applications, Projects, and System management. A large QR code is positioned on the right side of the manual content area.

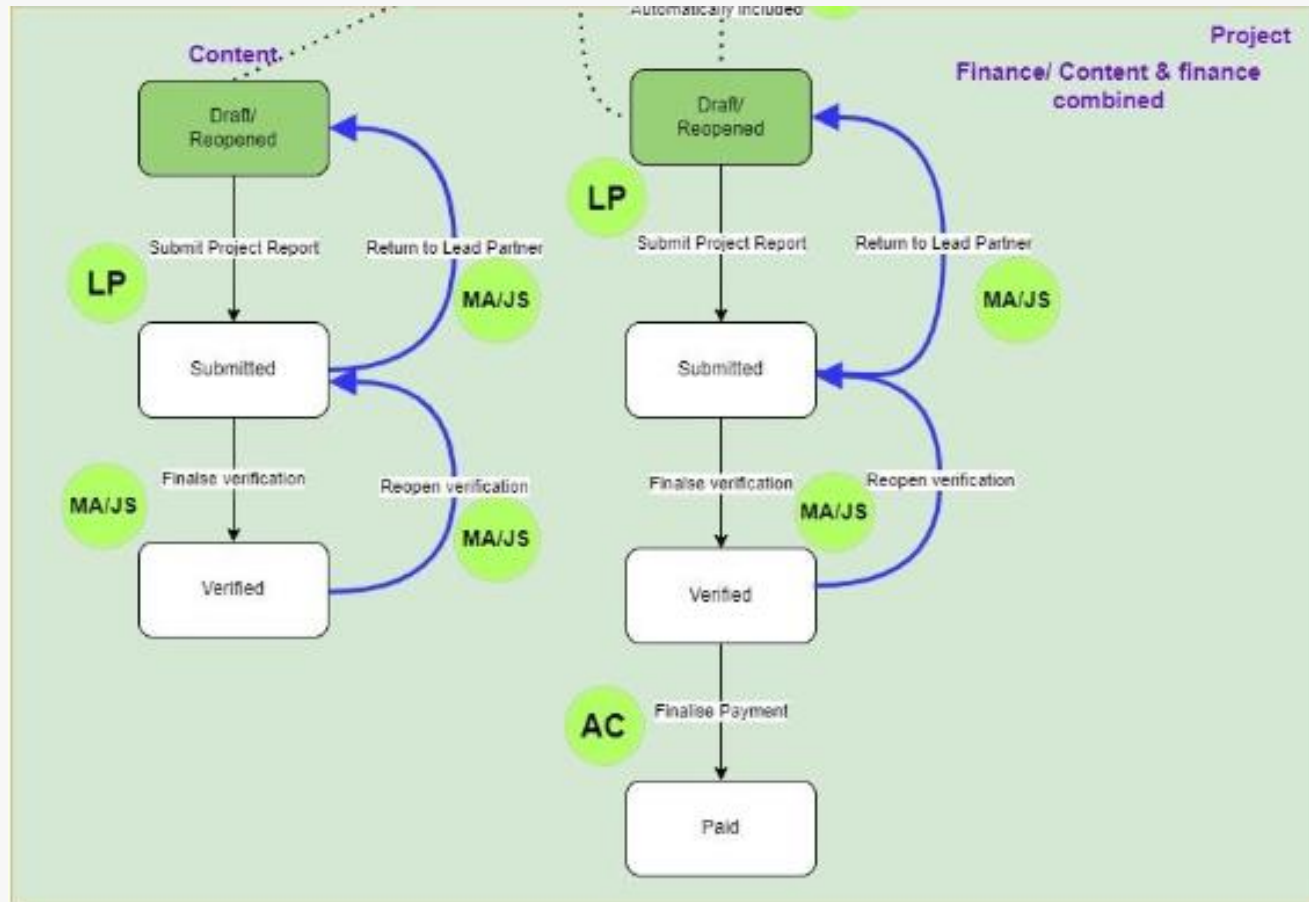
Control demo in Jems



Business logic, Partner Report



Business logic, Finance/ content & finance combined



Before we start...

Disclaimers:

- This is a training session to learn how Jems works.
- Jems is very customizable, you might not see in this training what you see with the programme installations. Most likely you have more rights in the training here. For example we allow here: assignment of the control institution to partners which often is done by a Central Approval Body (National Authority) or the MA/JS
- Notifications are not send to e-mails (we are not using your e-mail address 😊)
- We made a fake project and notifications so do not dive into reading the context of the project and don't assess eligibility → this session is more to see the workflow and functionalities in Jems.
- Checklists, Risk based sampling are the HIT templates & pre-submission checks are basic, they will be further configured by programmes. Try them out knowing they will be customized in real environments.

Let's start Working group per table



15 Min

What did we prepare for you:

- On table 2 logins: 1 **partner**, 1 **control manager**
 - We prepared a project that you will all be working on together
 - Test instance: <https://lisbon.interact-eu.net/>
1. 2 people from your table logs in as the partner and control manager, the remaining people go to the link and each creates an account
 - **Control manager**, go to the control institution and add other colleagues (**controllers**) around your table (except for the partner) to your control institution
 - **Partner user**, create a partner report and focus on making at least 15 items in the list of expenditure, make them unique and submit the report

Control work (1)



15 Min

- Test instance: <https://lisbon.interact-eu.net/>
2. **Controllers** go to the project you find on your dashboard (also look at the notifications) and look for the partner you are assigned to. Navigate to the report submitted by the partner and start control work. Try to upload something under the control communication section. Compare with the **partner** what they can see after you started control work.
 3. Go to the expenditure verification tab and look at how the sampling is carried out. Make some corrections to the cost items and park two expenditure items.

Control work (2)



15 Min

- Test instance: <https://lisbon.interact-eu.net/>
4. **Controllers**, instantiate and finish some of the checklists that you can find under the checklist section.
 5. Go to the overview and finalize tab and look at what has been added there in the overview table and Generate certificate and the control report, download them and upload them again.
 6. Finalize the control work

Control work (3)



15 Min

- Test instance: <https://lisbon.interact-eu.net/>
7. **Partner** user navigate to your dashboard and go to the report and check the control work. Start a new partner report and look at the list of expenditure. Reinclude a parked item and add some other expenditure and submit a new report.
 8. **Controller** look at the new report and reopen the partner report.
 9. **Partner** look at what you can do in the partner report when it is reopened (e.g. how it is different from a normal draft) and resubmit.

Cooperation works

All materials will be available on:

[Interact connections / MC community](#)