

INSTRUCTIONS FOR ADDING A DOCUMENT:

"CONFIRMATION OF THE PROPOSAL BY THE REPRESENTATIVE ENTITY"

1. After logging in to the "Jagiellonian University Project Zone" system, select the "My projects" button from the menu on the left side of the screen (Fig. 1), which will open the list of User's projects (Fig. 2). From this list, select the appropriate project by clicking on the required list item, which will open the management view of this project. When searching for a project, you can use the filters located directly above the section with the list of projects (Fig. 3). They allow you to search for a project by the name of the implementing unit, the data of the Project Manager or CWN Project Supervisor, the project type, the project data (title), or only in progress. You can apply any number of filters at a time.

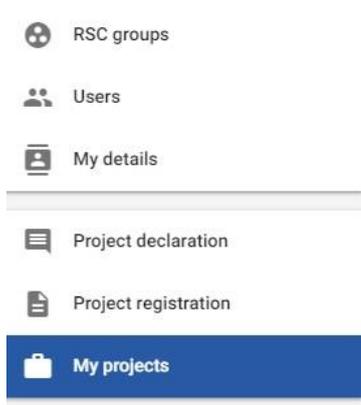


Fig. 1 - „My projects” button

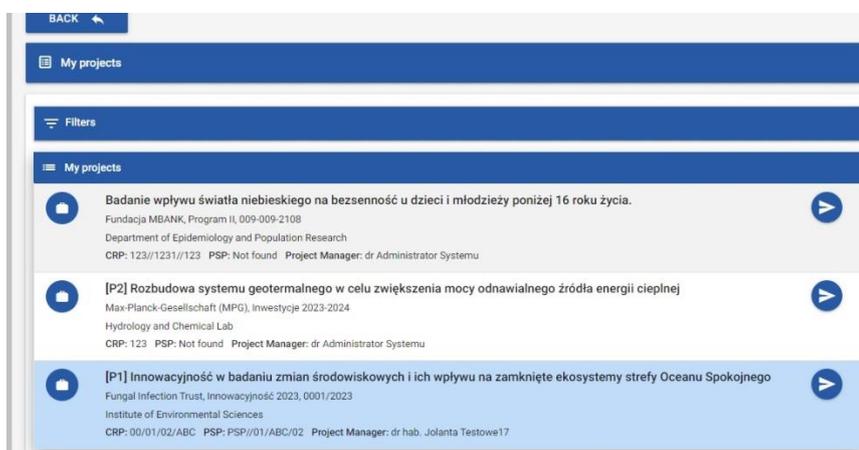


Fig. 2 – project list item

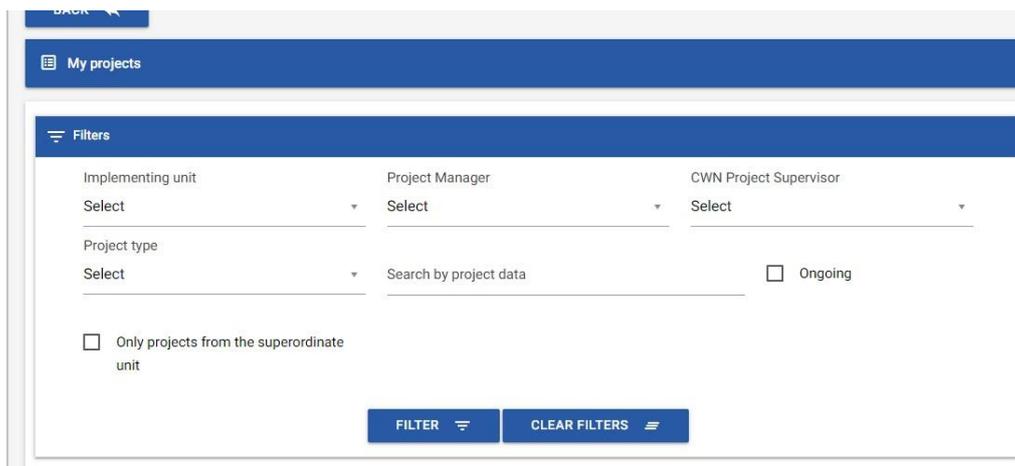


Fig. 3 – Project list filters

2. On the "Project management" view, in the "Preparation" section, click on the "Application preparation" button (Fig. 4)

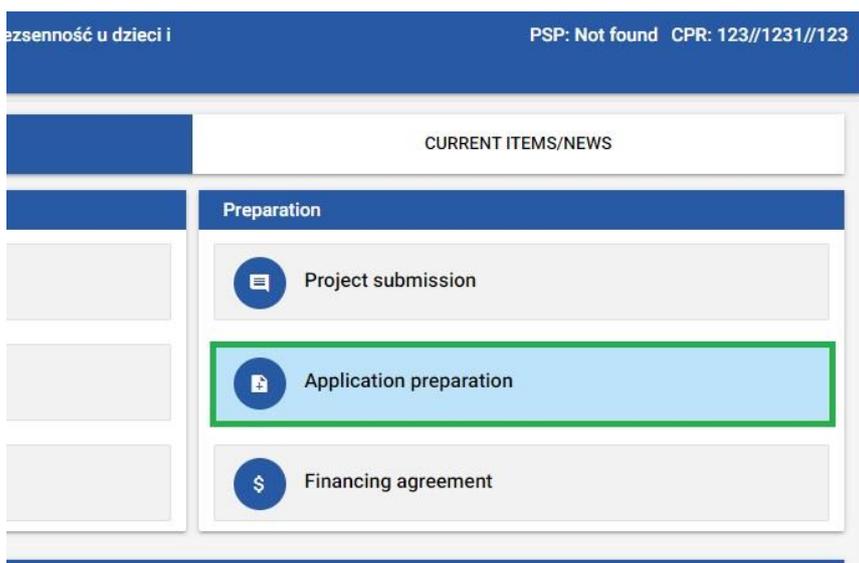


Fig.4 – "Application preparation" button

3. In the "Documents" section of the "Application preparation" view, click the "Add" button (Fig. 5), which will load a list with document types (Fig. 6) to the left of the "Documents" section.

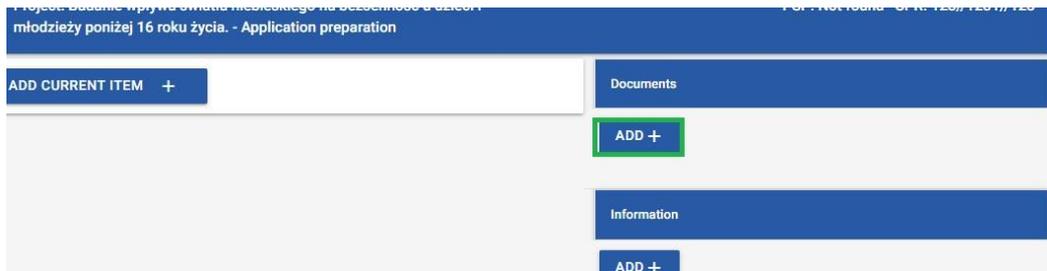


Fig. 5 – add documents button

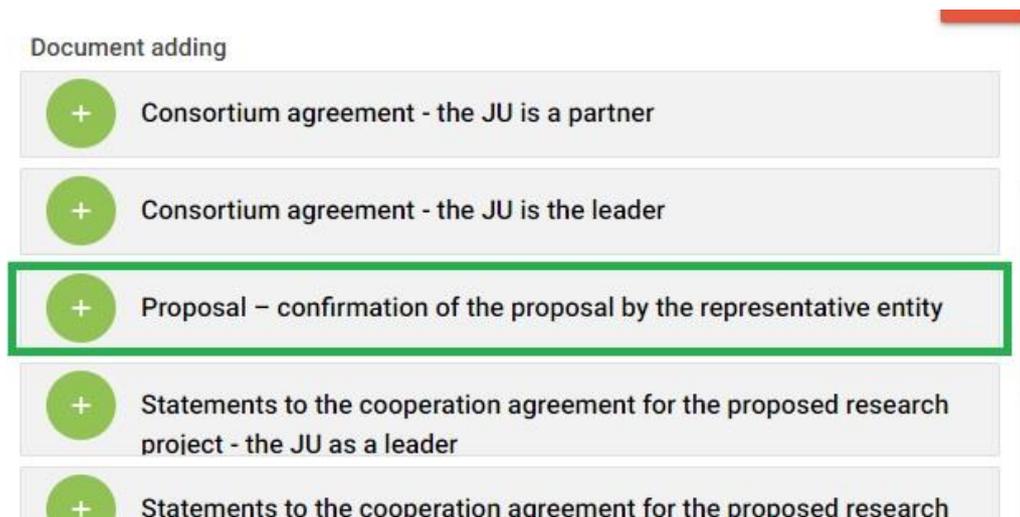


Fig. 6 – list of documents in the section "application preparation"

4. From the above list, select the document "Proposal – confirmation of the proposal by the representative entity", which will switch to the new view "Document" with the possibility of adding the requested document to the workflow (description of the view in point 6 of this manual Fig. 10-13)
5. The second way –
 - a) In the Project Management view (Fig. 7), which will open after clicking the "My projects" button, in the "Data" section, click the "Document register" button marked in green color, which will open the view with the list of documents (Fig. 8).

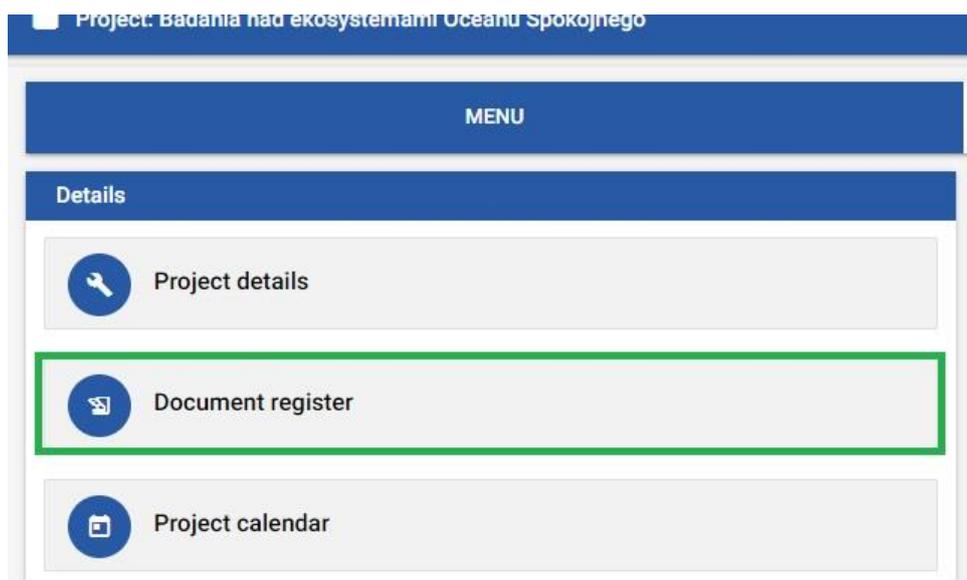


Fig. 7 - "Project Management" view

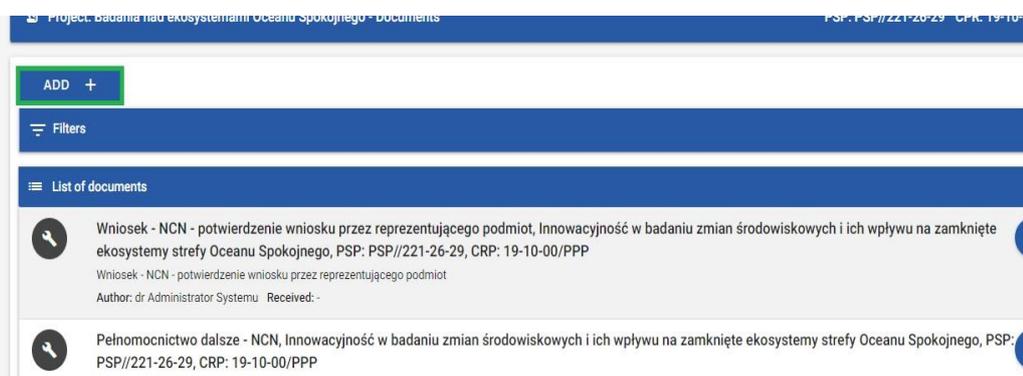


Fig. 8 – "Documents" view with the selected button to add new document

- b) In the current "Documents" view, click the "Add" button marked in green (Fig. 8), a modal window will open with document types divided into sections, whose names correspond to the names of sections in the Project Management view (Fig. 9)
- c) selecting (clicking) the button with the name of the document "Proposal – confirmation of the proposal by the representative entity" (marked in green in Fig. 9) will take you to the new view described in point 6. of this Instruction

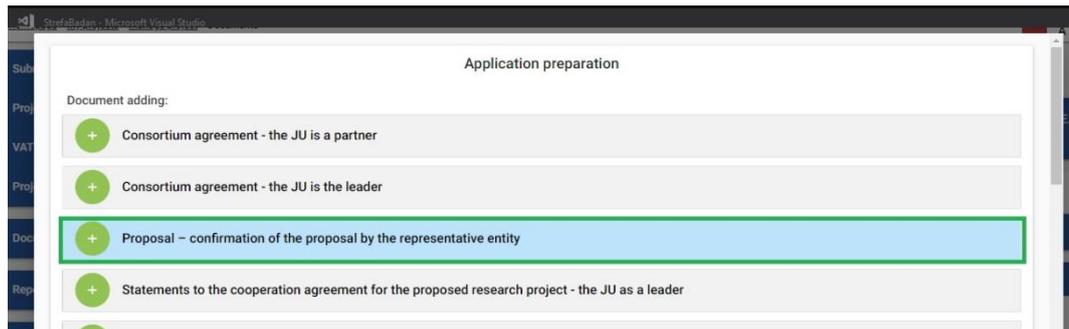


Fig. 9 – modal window with the selected button leading to the document generation view

6. The view is divided into 4 sections:

- a) "Basic information" – contains the most important project data and additional information for the person creating the document (Fig. 10),

The screenshot shows the "Basic information" section of a form. The fields and their values are:

- Project:** Innowacyjność w badaniu zmian środowiskowych i ich wpływu na zamknięte ek
- Unit:** Institute of Environmental Sciences
- CRP:** 19-10-00/PPP
- PSP:** PSP//221-26-29
- Project Manager:** prof. dr hab. Sebastian Testowe145
- Document type:** Application - NCN - confirmation of the application by the representing entity
- Notes:** (empty field)

Fig. 10 – "Basic information" section in the add document view

- b) "Documents for acceptance" – allows the User to attach files ("Confirmation of submission of the proposal by the person representing the entity" generated in the OSF system – as described in the Notes at the bottom of the "Basic information" section, Fig. 11)

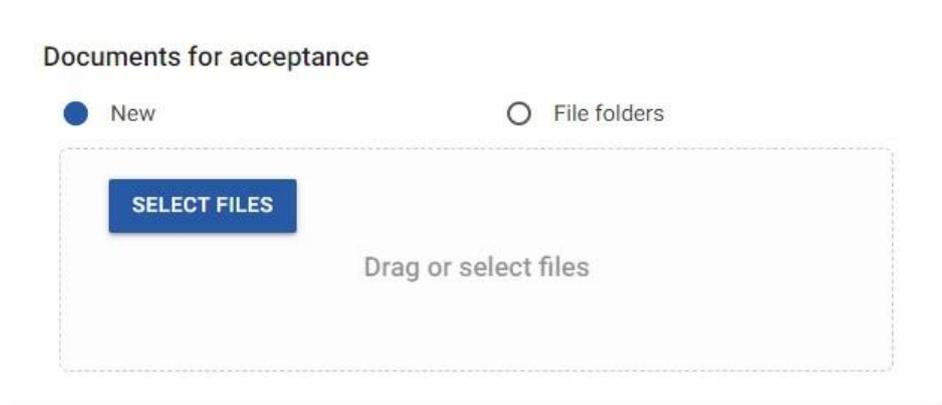


Fig. 11 – "Documents for acceptance" section in the add document view

- c) "Documents for viewing" – allows the User to attach files ("Confirmation of submission of the proposal by the project manager" – in the form of a document signed with an electronic signature or a scan of a document signed by hand and the final version of the proposal generated from the OSF in the form of a PDF file (unsigned) – in accordance with the Notes at the bottom of the "Basic information" section, Fig. 12)

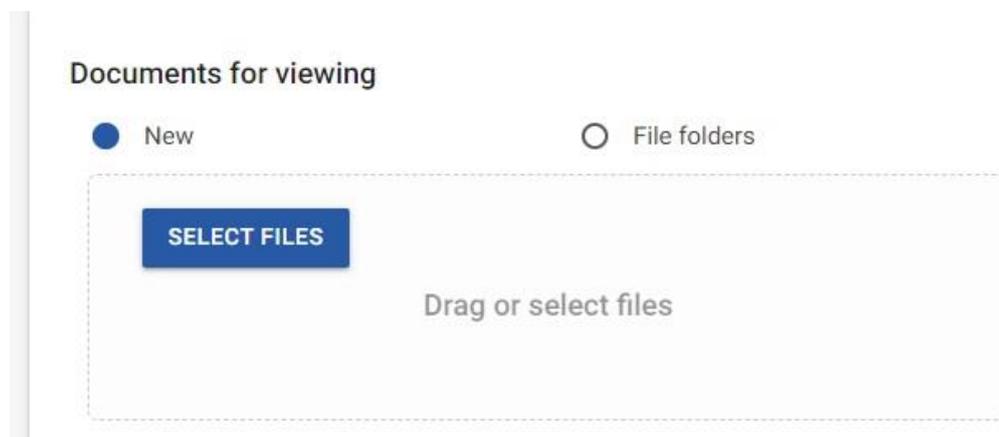


Fig. 12 – "Documents for viewing" section in the add document view

- d) "Document workflow" – allows you to view the path of circulation of this document (Fig. 13)

Document flow		
	Project supervisor at CWN	
	mgr Elżbieta Testowe64	
	Head of the unit implementing the project	
	prof. dr hab. Magdalena Testowe	
	Managers of other units involved in the implementation of the project	
	prof. dr hab. Magdalena Testowe	
	CWN Director	
	mgr Elżbieta Testowe64	
	JU Bursar	
	mgr Dariusz Testowe18	
	Rector	
	prof. dr hab. Piotr TestoweK50	
	Project manager	
	prof. dr hab. Sebastian Testowe145	

Fig. 13 – "Document workflow" section in the add document view

7. Pressing the "Save draft" button at the bottom of the page will save the document and attached files for later editing, but will not send them to electronic circulation (Fig. 14).
8. After adding the required documents, click "Save and finish" at the bottom of the page, which will send the document to electronic circulation (Fig. 14).



Fig. 14 – "Save draft" and "Save and finish" buttons