



User Manual:

Work Package menu

EU-fin (FP7)

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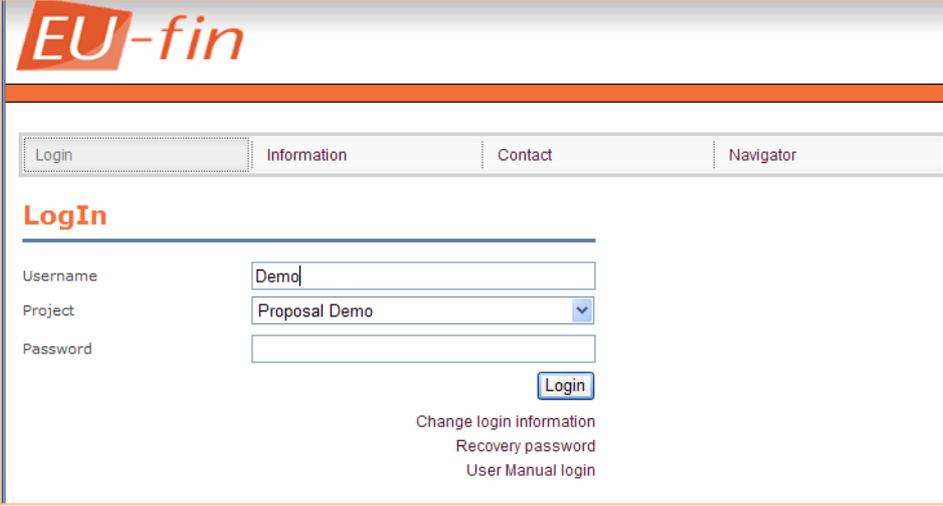
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## 1. Log-in

To login in the work package menu of EU-fin, your coordinator must have given you the role ‘Work Package leader’ for your work package. If you can’t log-in in the work package leader menu, or you see the wrong work package, please contact your coordinator to change the settings. You have received your log in information (user name and password) and the link to EU-fin by e-mail. Contact your coordinator if you haven’t. Use the link in this e-mail or go to the EU-fin website by using the link: <http://www.eufin-fp7.com/>. Click on Beneficiary menu. The following window will appear:

### The log in procedure:

You can change your password before you log-in, see section 5. Change log in information.



To log in you have to fill in and/or choose from the drop down menu:

1. **User name:** Your user name is sent to you by e-mail by your coordinator. Enter or copy and paste your user name. Then press <enter>.

The project(s) and beneficiary(ies) to which you are linked will appear automatically. If you have lost your e-mail about your user name, please ask your coordinator for a new e-mail.

2. **Project:** If you work for more than one project, select the right project from the drop down menu.

3. **Password:** You have received your password by e-mail from your coordinator. Enter or copy and paste your password.

Press <enter> or click on the button <Login>. You will enter the work package leader menu

## 2. Manage deliverables

You will enter the work package leader menu:

The screenshot shows the 'EU-fin Demo Beneficiary C' interface. At the top, there are navigation tabs: 'Deliverables', 'Status report', 'Reports', and 'User manual'. Below this is a 'Deliverable Status' section with a note: 'As WP leader, please complete the table below with actual start & end date and %-tage complete by clicking on *Edit* by each deliverable. Note: if the work on the Deliverable is not started yet, do not fill the start/end date.'

Deliverables											
#	No.	WP/Task	Deliverable name	Leading Beneficiary	Nature	Level	Planned start date	Planned end date	Actual start date	Actual end date	% completed
Edit	1	Work package 1	First deliverable	B	R	PP	01-09-2010	30-09-2010	04-09-2009		0
Edit	2	Work package 1	Second deliverable	B	P	PP	01-01-2010	31-12-2010	22-01-2010		0
Edit	3	Work Package 2	3	B	D	CO	01-01-2010	31-01-2010	01-12-2009		50

At the bottom left of the table, there is a 'New row' button.

### 2.1 Insert deliverables

Click on <Deliverables> in the navigation panel to navigate to this page. The list of deliverables is shown, click on 'New row' to add new deliverables.

The following window will pop-up:

The screenshot shows the 'EU-fin Proposal Demo' interface. At the top, there are navigation tabs: 'Deliverables', 'Reports', and 'User manual'. Below this is a 'Deliverables' form with the following fields:

Deliverables											
#	No.	WP/Task	Deliverable name	Leading Beneficiary	Nature	Level	Planned start date	Planned end date	Actual start date	Actual end date	% completed
No.	<input type="text"/>	WP/Task	<input type="text"/>	Leading Beneficiary	<input type="text"/>	Level	<input type="text"/>	Planned end date	<input type="text"/>	Actual end date	<input type="text"/>
Deliverable name	<input type="text"/>										
Nature	<input type="text"/>										
Planned start date	<input type="text"/>										
Actual start date	<input type="text"/>										
% completed	<input type="text"/>										

At the bottom right of the form, there are 'Update' and 'Cancel' buttons.

Enter the fields and click 'Update' to save the information.

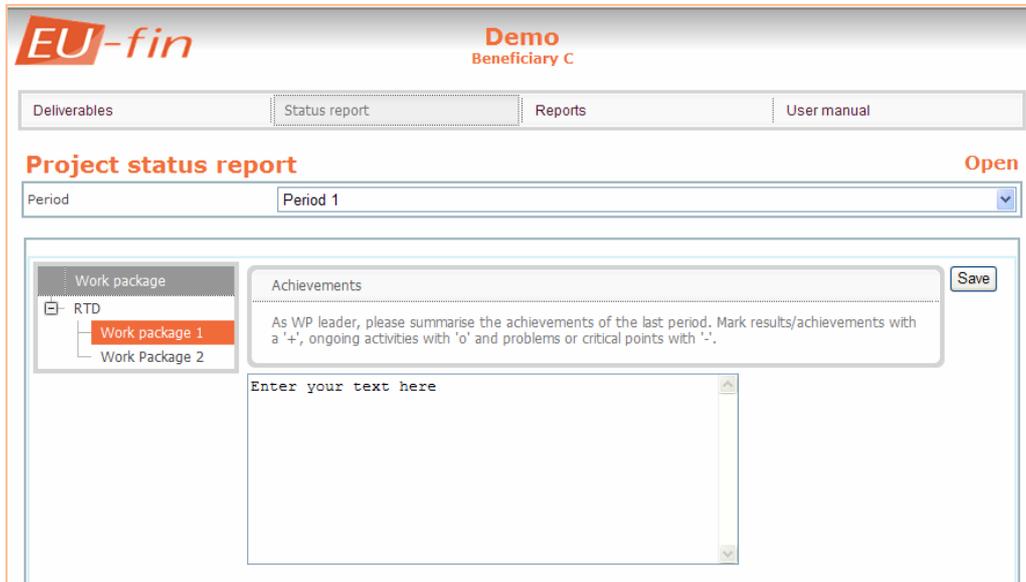
### 2.2 Manage deliverables

The deliverables that are entered can be changed at all times. To change deliverables follow this procedure:

1. Click on <Deliverables> in the navigation panel
2. Locate the right deliverable and click on 'Edit' in front of this deliverable
3. The deliverable information will open
4. Update the information
5. Click on 'Update' to save the new information

### 3. Status report

Work package leaders can report the status of work packages via EU-fin. Click on ‘Status report’ in the navigation panel, the following page will appear:



The screenshot shows the 'EU-fin' interface for 'Demo Beneficiary C'. At the top, there is a navigation bar with 'Deliverables', 'Status report', 'Reports', and 'User manual'. Below this is the 'Project status report' section, which includes a dropdown menu for 'Period' set to 'Period 1' and an 'Open' button. On the left, a 'Work package' navigation panel shows a tree structure with 'RTD' expanded, containing 'Work package 1' (highlighted) and 'Work Package 2'. The main content area is titled 'Achievements' and contains a text box with the placeholder 'Enter your text here'. A 'Save' button is located in the top right corner of the text box area. The text box contains the following instructions: 'As WP leader, please summarise the achievements of the last period. Mark results/achievements with a '+', ongoing activities with 'o' and problems or critical points with '.'.'

The procedure for entering text:

1. Period

Select the right period from the drop down menu

2. Work package

Select the right work package in the work package navigation panel

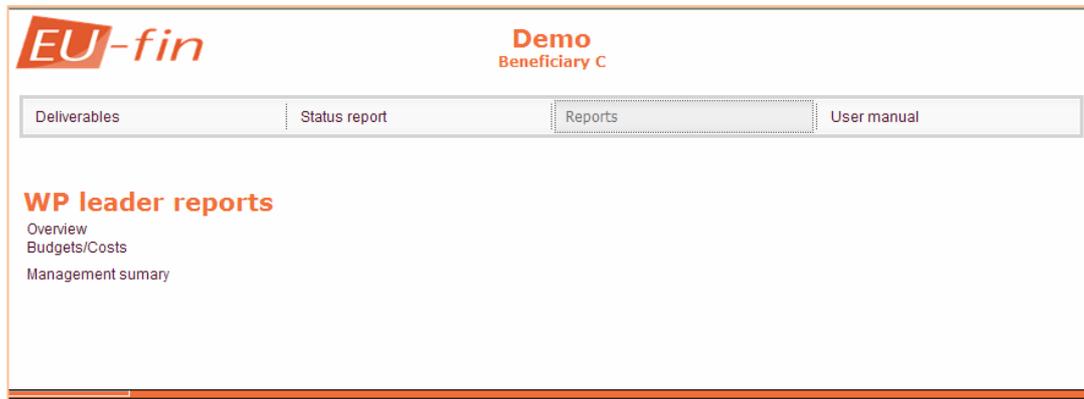
3. Text

Enter the text, as described above each text box

4. Save

Click on ‘Save’ before navigating to another work package

## 4. Generate reports



As a work package leader you can view and export the data for your work package. Follow this procedure:

1. Click on <Reports> in the navigation panel

2. Click on the name of the report

The overview will open in a new window

3. The information can be exported to excel by clicking on <Export> below the overview

Depending on your settings you can open or save the overview

## 5. Change log in information

If you want to change your log in information, click on 'Change login information' on the log in page. The following window will pop-up:

**EU-fin**

### Change login information

Username

Change password

Old password

New password

Confirm new password

Change E-mail

Old E-mail address

New E-mail address

Confirm new E-mail address

### Change you password

1. Username  
Enter your username
2. Old password  
Enter your old password
3. New password  
Enter your new password
4. Confirm new password  
Enter your new password

Click on <Change Password> to save the new password

### Change your e-mail address

1. Username  
Enter your username
2. Old E-mail address  
Enter your old e-mail address
3. New E-mail address  
Enter your new e-mail address
4. Confirm new E-mail address  
Enter your new e-mail address

Click on <Change E-mail> to save the new e-mail address

## 6. Retrieve password

If you forgot your password, the password can be send to you from EU-fin. Click on 'Recovery password' on the log in page and the following window will appear:



The screenshot shows a web page for Navigator Co. Ltd. with the tagline 'We are the solution for all your financial software problems'. Below the logo, there is a section titled 'Forgotten password'. This section contains two input fields: 'Username' with the value 'boer001' and 'E-mail' with the value 'Hans.deboer@email.com'. A 'Submit' button is located to the right of the E-mail field.

### Retrieve your password:

1. Username  
Enter your username
2. E-mail  
Enter the e-mail address that is registered in EU-fin

Click <Submit> to submit your request, your password will be send to you in an instant (possibly delayed by your organisations e-mail server). Contact your coordinator if your password is not send to you.