APOGEE INFORMATION SYSTEMS

https://apogee.lu

Index
Effective cooperation through live data exchange

Interact Data Exchange

User Manual

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1

Introduction

INDEX is monitoring platform for Projects related to a variety of European Programmes. It's based on the Essence CMS platform which allows for a quick and easy development and in addition it provides tools for easy administration, a high level of security and fast response making the user experience unique.

With revolutionary design and functionality, INDEX allows the user to easily browse through the different Programmes Projects that he monitors and also provide him with data analysis through specialized reports. The produced reports are enriched with special filters to manage the result dataset and plenty of graphs and maps with the appropriate data.

The system provides a complete set of useful information that are accessible from the menu itself and gives the opportunity to have a fully operational comment engine for each report.

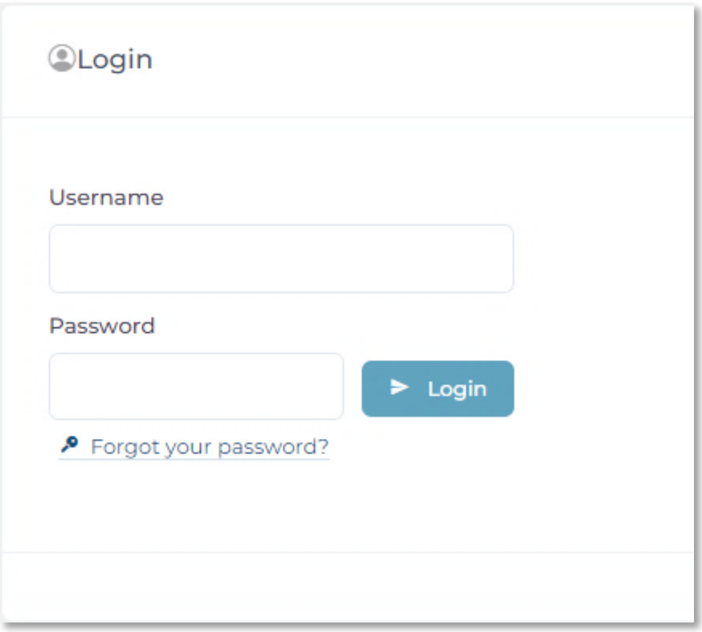
Last but not least, INDEX comes with a continuous data synchronization procedure from any source and data structure (Rest API's, JSON, etc.) as well as the option for a completely manual data upload process. Monitoring all the above, a logging process keeps track on any transaction made for debugging and troubleshooting purposes.

2

Login to the System

Begin by navigating to: https://index.interact.eu/ on your browser address bar (Google Chrome, Mozilla Firefox, Safari etc.), upon loading the system will prompt you to the login page and the form that you will be needed to fill:

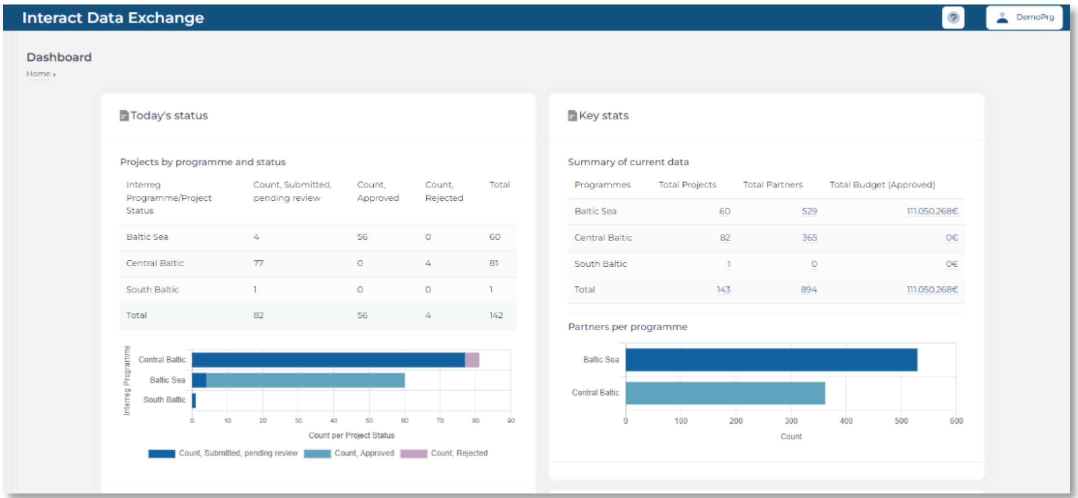
- **Username / e-mail** and
- **Password**



After submitting the correct credentials, clicking to the **Login** button, will log you in the INDEX *Dashboard*.

1. Dashboard

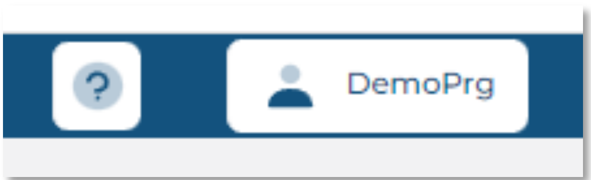
Upon entering the System, you will be presented with the INDEX Dashboard screen.



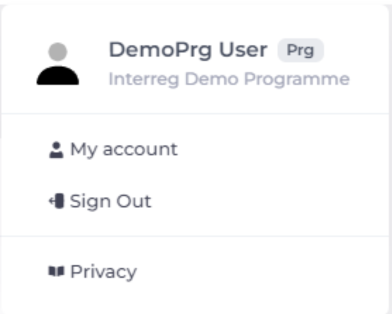
In this page you will come across the following sections:

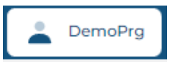
2. Basic Links

Overlooking the upper right corner, you notice the following Links:



1) Using the Contact Support icon  will get a support form to appear from the right of your screen containing all the fields necessary for you to submit a message with a specific subject to the support department.



2) The Account Options button  initially displays the User Name of the Account that logged into the system at any given time and by clicking on to it the following menu appears:

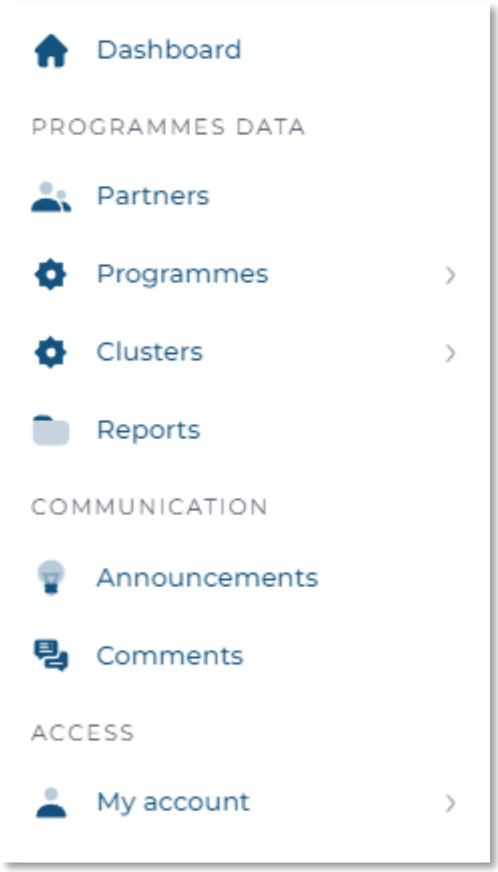
My account: Overview or manage the details of your Essence Account.

Sign Out: Use this option to Log out of the System.

Privacy: Review the Privacy Policy regarding the usage of the System.

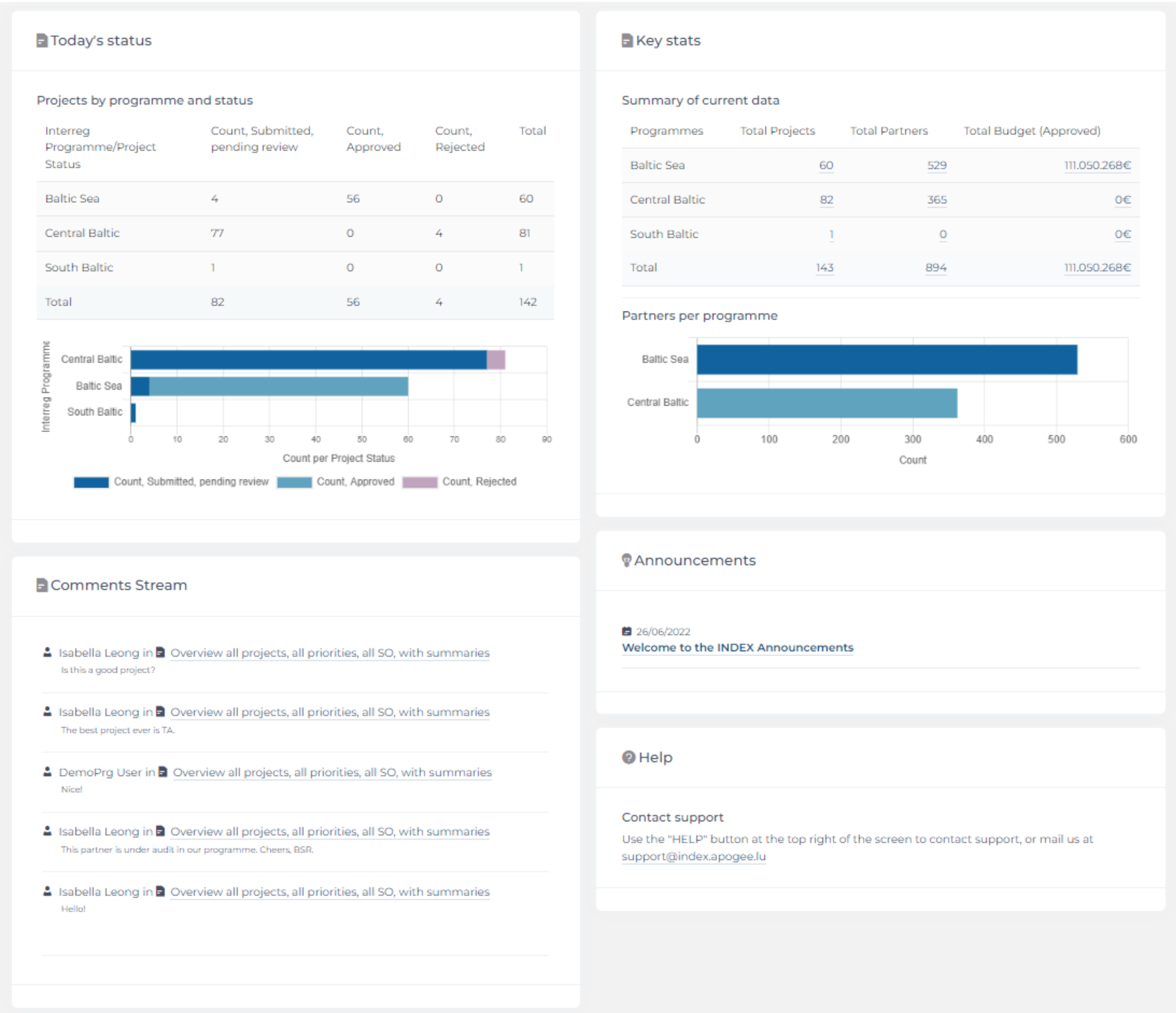
3. Main Menu

You can navigate through the different INDEX pages using the Main Menu presented as a left vertical side panel.



4. Dashboard Contents

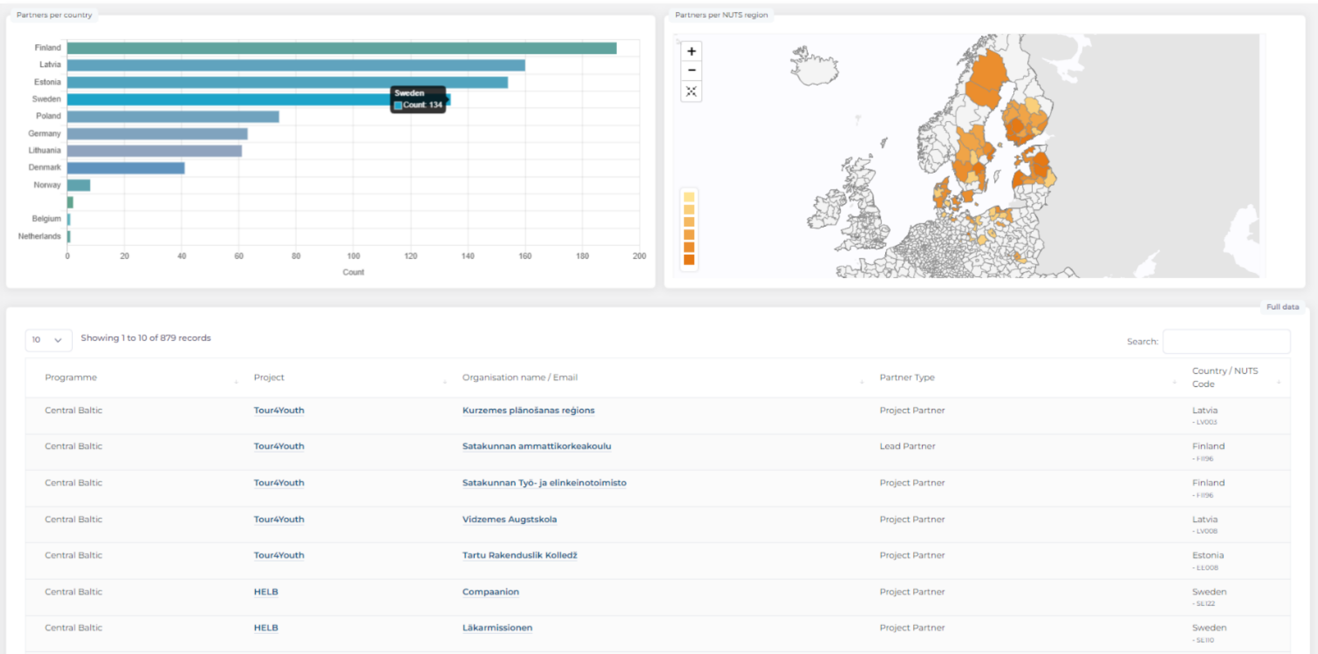
The Dashboard page contains key information segments about running Projects and their data alongside others regarding Comments, Announcements and Help.



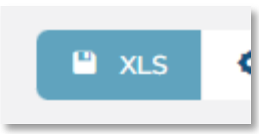
3

Partners

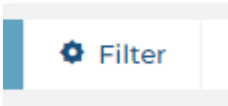
This section includes all information about Project Partners in the form of data graphs and data tables. You can easily modify the data shown using the filter section in the upper right toolbar and also export in the form of XLS document for further use.



Programme	Project	Organisation name / Email	Partner Type	Country / NUTS Code
Central Baltic	Tour4Youth	Kurzemes plānošanas reģions	Project Partner	Latvia - LV003
Central Baltic	Tour4Youth	Satakunnan ammattikorkeakoulu	Lead Partner	Finland - FI196
Central Baltic	Tour4Youth	Satakunnan Työ- ja elinkeinotoimisto	Project Partner	Finland - FI196
Central Baltic	Tour4Youth	Vidzemes Augstskola	Project Partner	Latvia - LV008
Central Baltic	Tour4Youth	Tartu Rakenduslik Kolledž	Project Partner	Estonia - EE008
Central Baltic	HELB	Compaanion	Project Partner	Sweden - SE122
Central Baltic	HELB	Läkarmissionen	Project Partner	Sweden - SE110

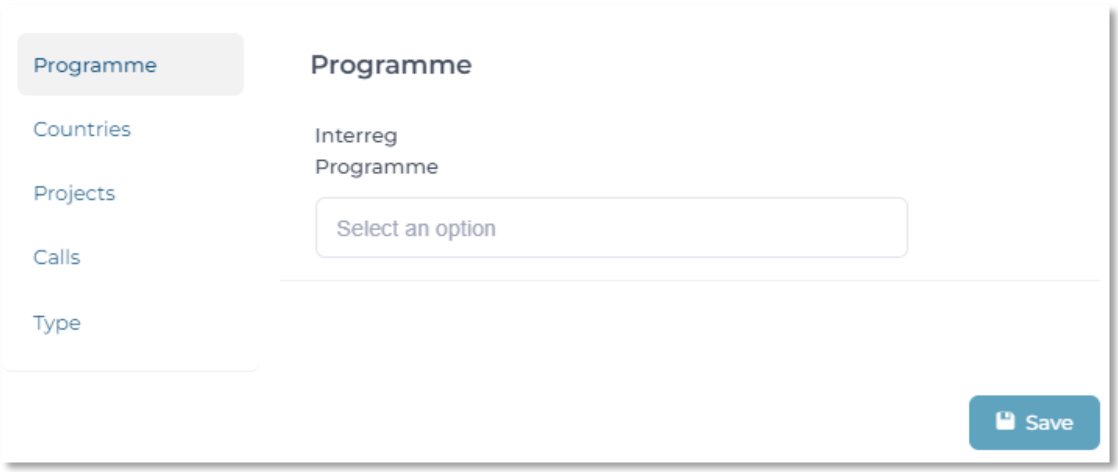


To directly download an XLS type file with the current dataset simply click on the "XLS" button located in the upper right button toolbar. The appropriate file will shortly begin to download through your browser.

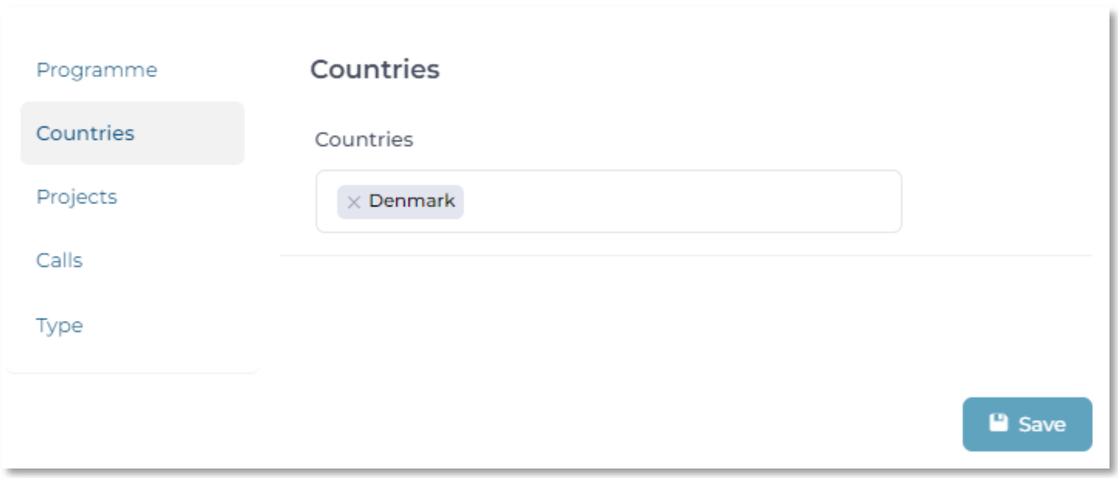


You can easily filter the dataset you are being presented by using the "Filter" button from the toolbar. Below we will further analyze the usage of each filter respectively.

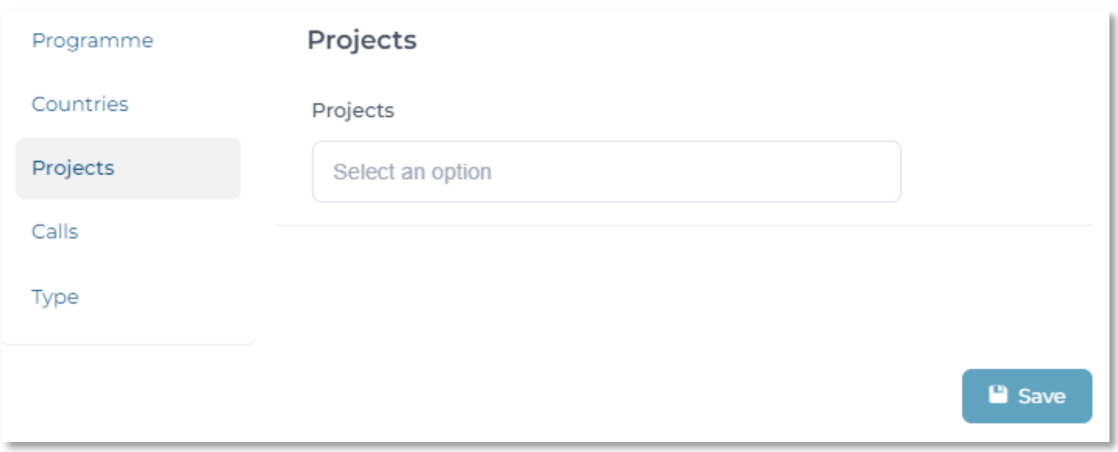
1) Filter by Programme using the dropdown box to select the ones you prefer.



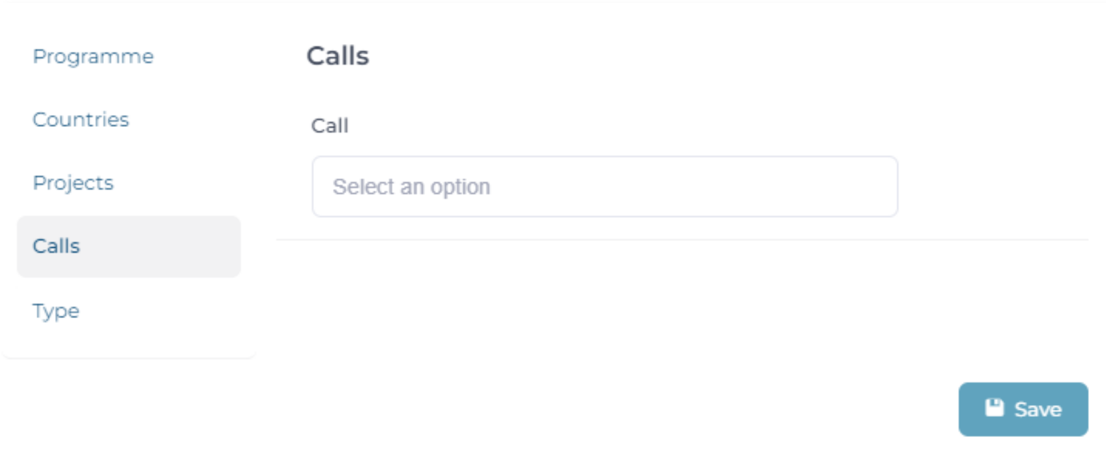
2) Filter by Country using the dropdown box to select the ones you prefer.



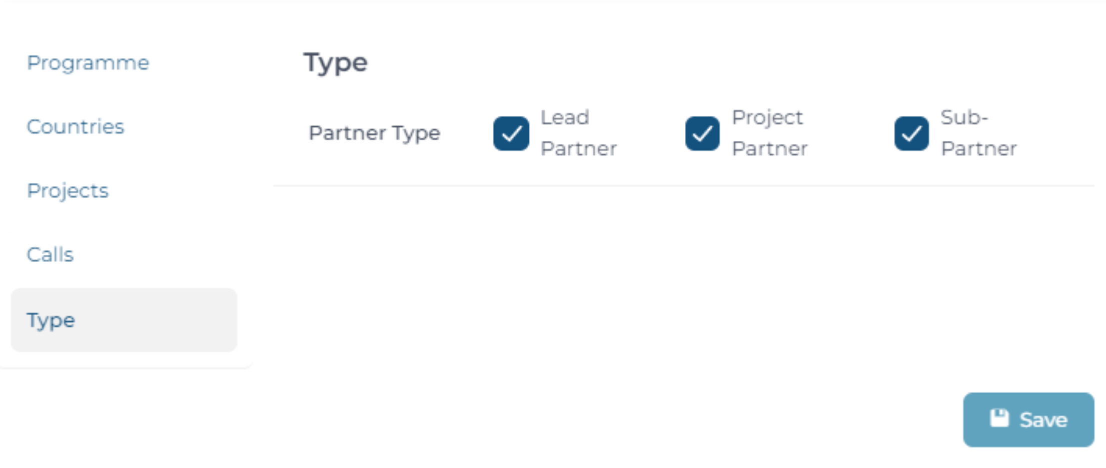
3) Filter by Project using the dropdown box to select the ones you prefer.

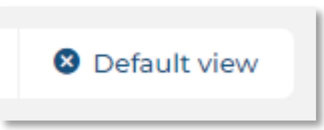


4) Filter by Call using the dropdown box to select the ones you prefer.

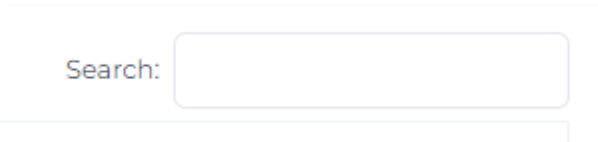


5) Filter by Type clicking on the appropriate checkbox.





You can return to the default dataset setup using the “Default view” button on the toolbar.



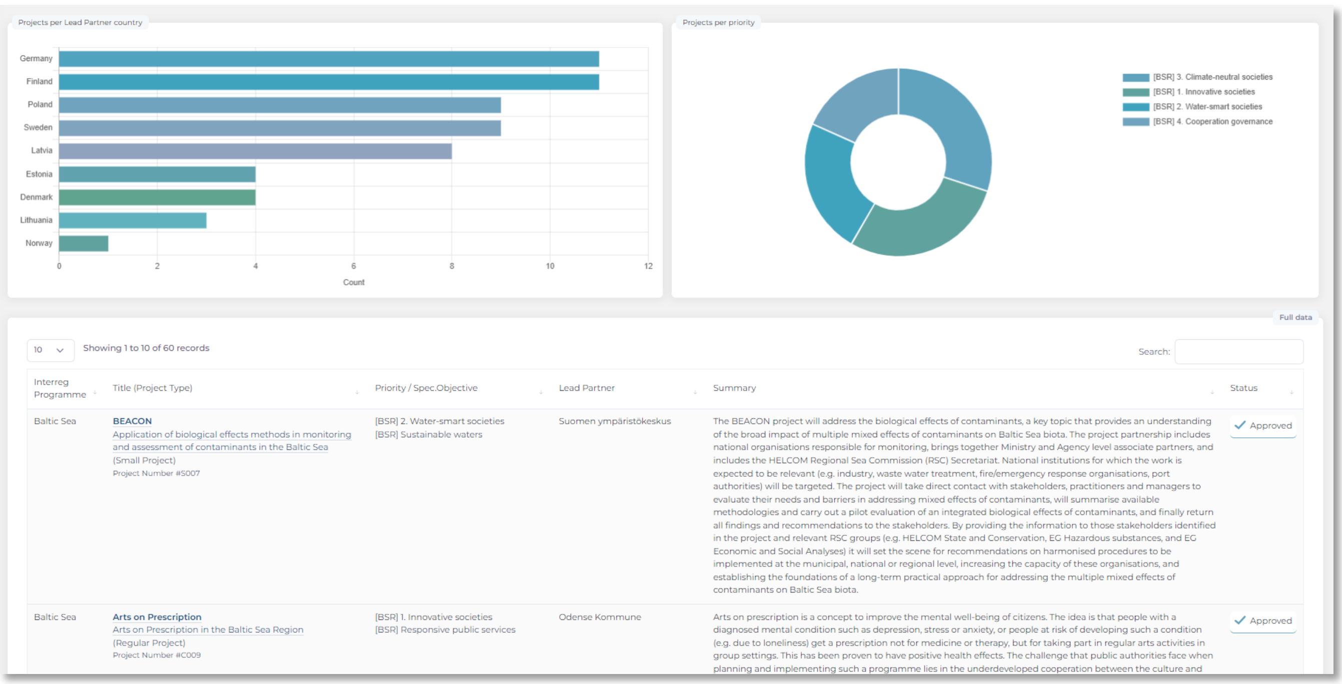
On the other hand, you can narrow down the results shown on the data table by searching some terms in the “Search” box. The result of the filtering is immediate as the engine performs a search each time you type any character in the search box.

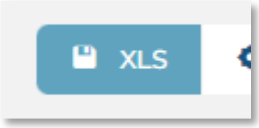
4

Programmes

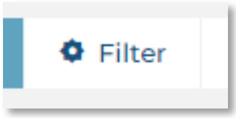
The Programmes section further divides into the regions that participate to the project. Selecting one of the regions from the drop-down menu you will be presented with the selected regions Programme Applications data.

When you select a region a dashboard page with the region data will be presented. You can adjust the data presented by accessing the filter button in the upper right toolbar and also export the data in XLS form.



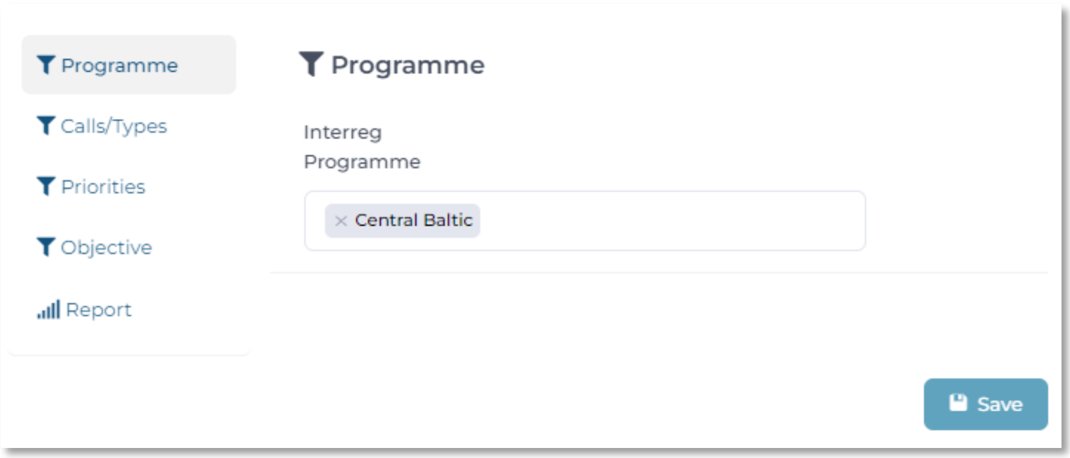


To directly download an XLS type file with the current dataset simply click on the "XLS" button located in the upper right button toolbar. The appropriate file will shortly begin to download through your browser.

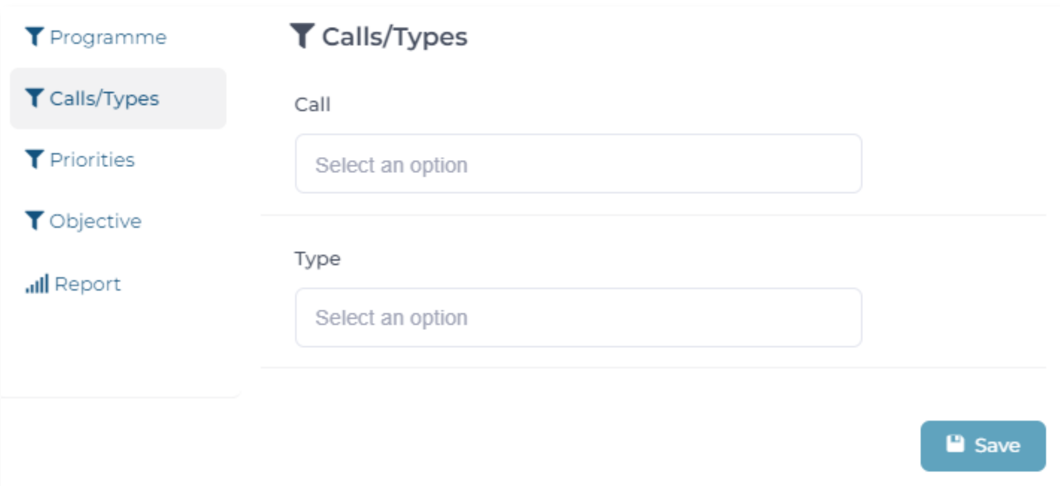


You can easily filter the dataset you are being presented by using the "Filter" button from the toolbar. Below we will further analyze the usage of each filter respectively.

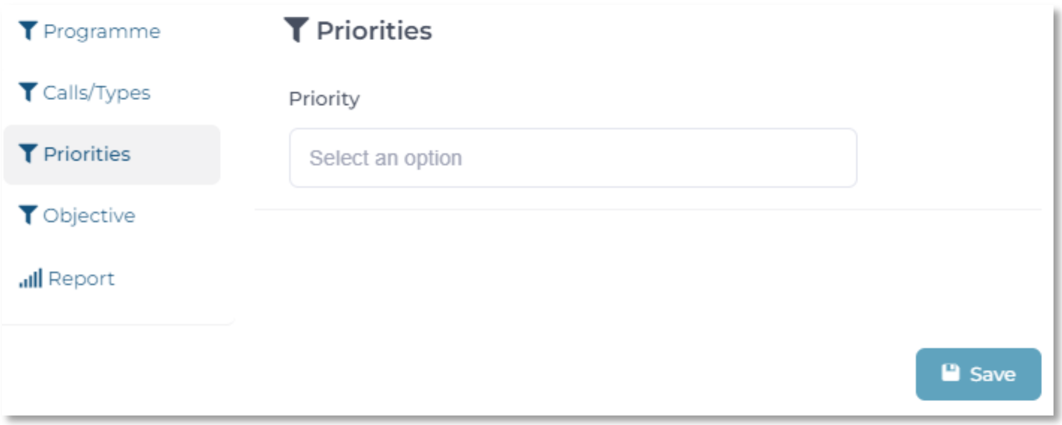
1) Filter by Programme using the dropdown box to select the ones you prefer.



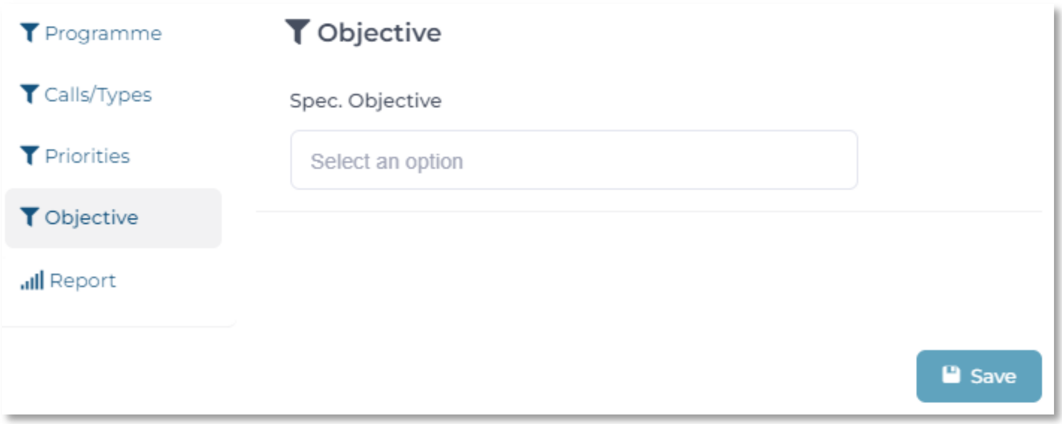
2) Filter by Call or Type of the Project using the dropdown box to select the ones you prefer.



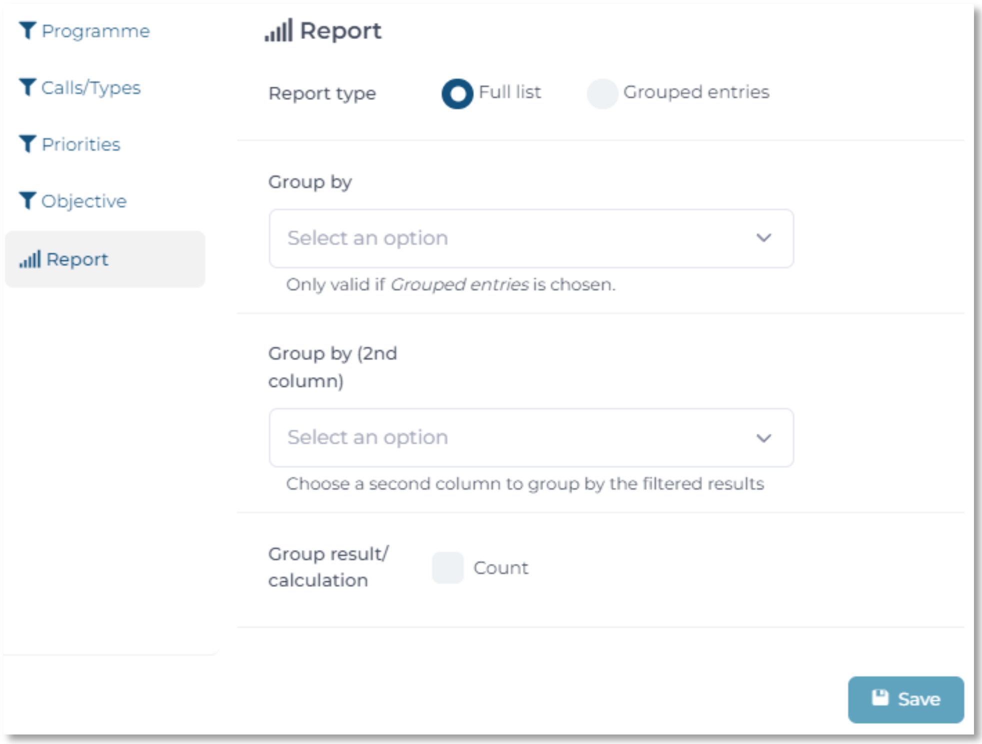
3) Filter by Priority using the dropdown box to select the ones you prefer.



4) Filter by Objective using the dropdown box to select the ones you prefer.



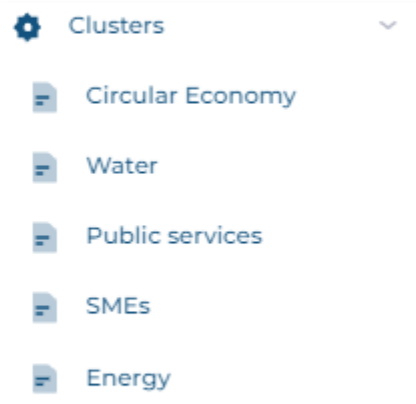
5) Filter by report Type, group results by one or two columns (meaning that you have selected Grouped Entries in the Type filter) and last determine if you want to have a result / calculation Count feature.

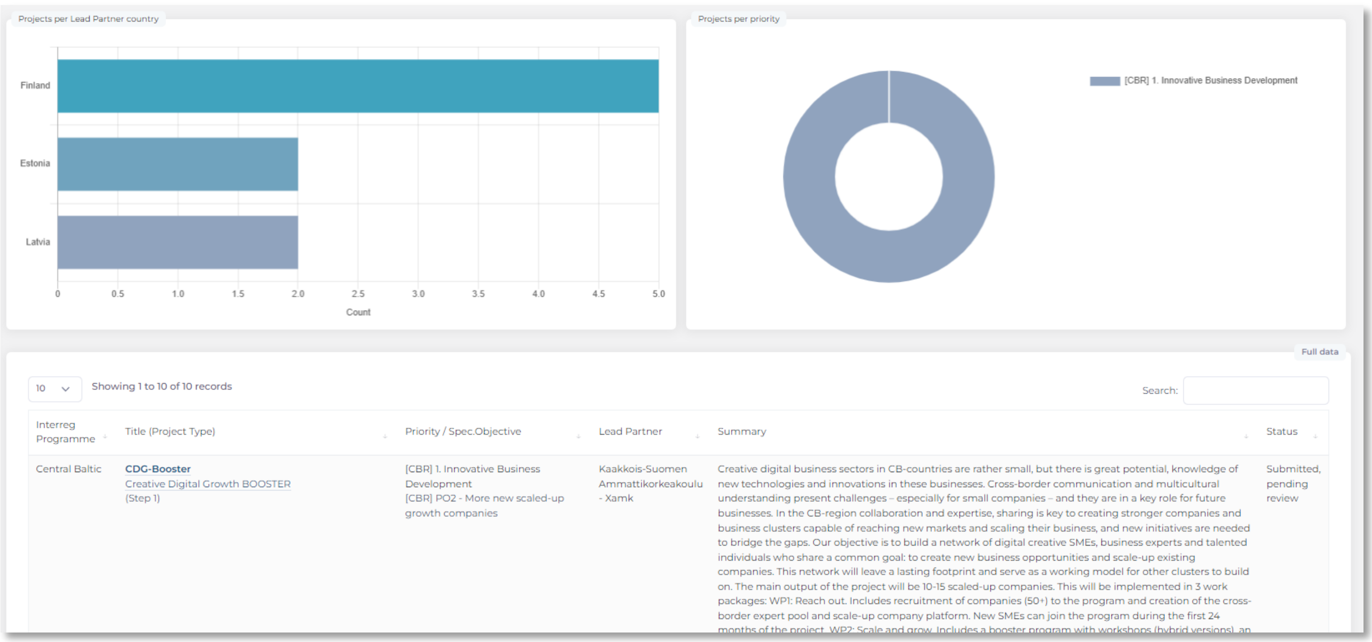


5

Clusters

The Clusters menu lets you access Applications based on specific pre-defined Priorities. Similar to the standard Applications page you can further filter your results or export them in XLS format.



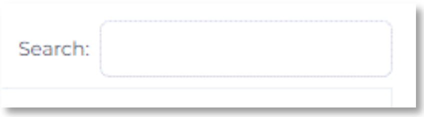


6

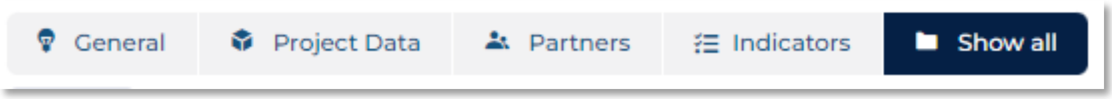
Reports

In this section you will have access to Reports in the form of a multifunctional table.

You can search for specific terms using the search bar:

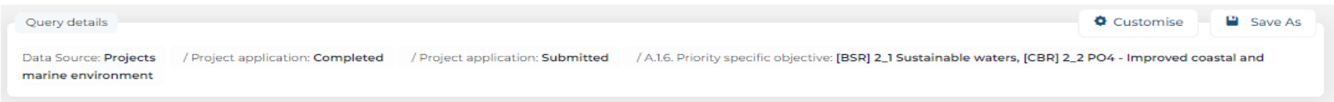


Also, there is a filtering bar that allows you to manage the records that you see based on a specific type:



1. Reports View Page

In this particular view you can further manage the project applications through the query details section and save as a preset.

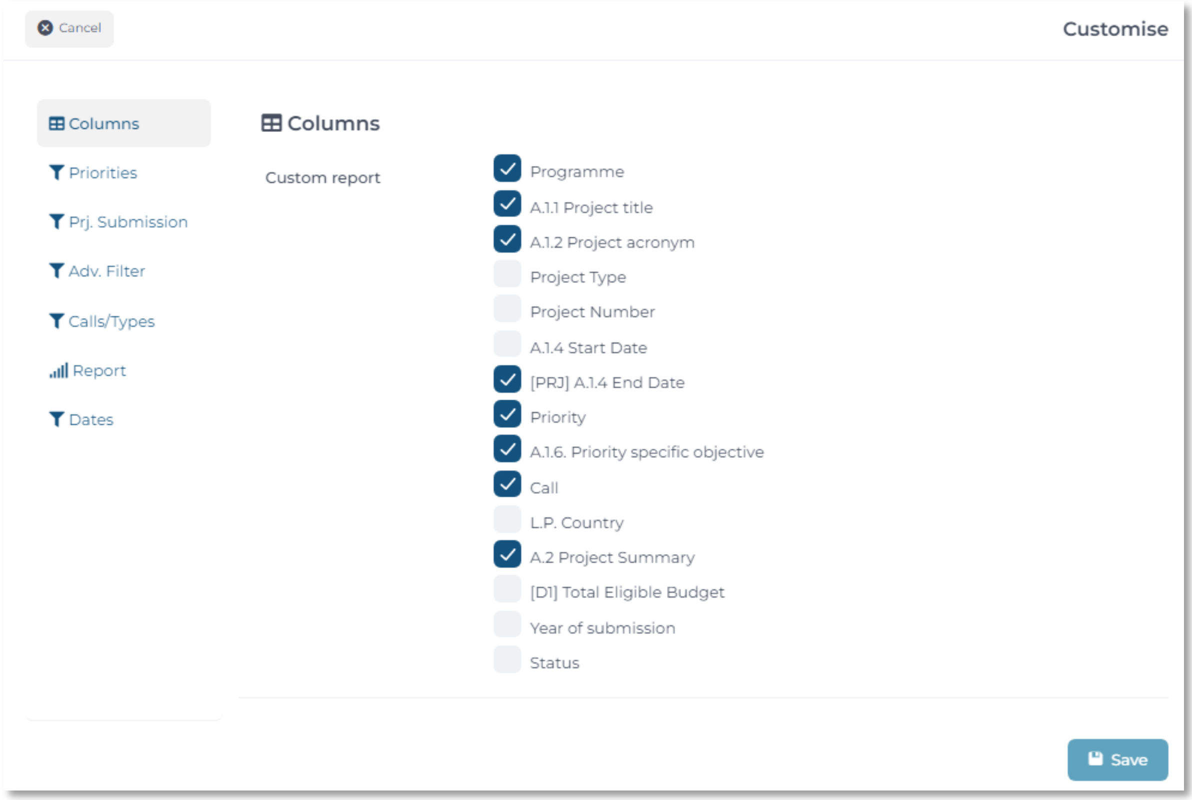


In addition, there is a project application summary table which allows you to monitor the applications, leave a comment or reply to another user's comments and also export the data in the form of XLS spreadsheet. More about comments and how to handle them in the following comments section.

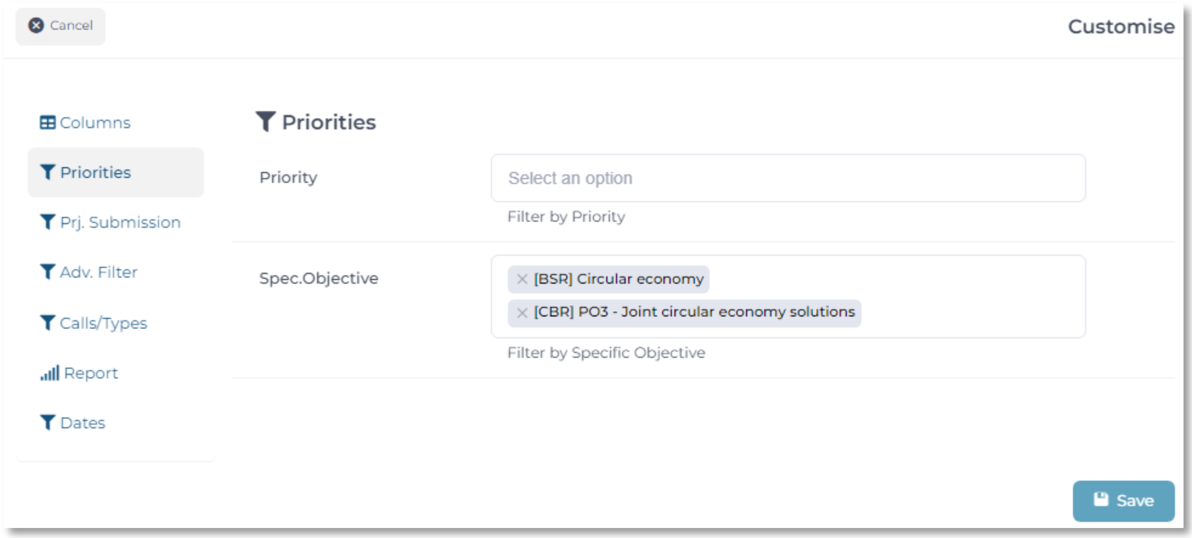
2. Customise Report Queries

You can freely customise the report queries to change the output result. Clicking on the "Customise" button located on the top right corner of the queries section will open a new window with all the possible customisation options.

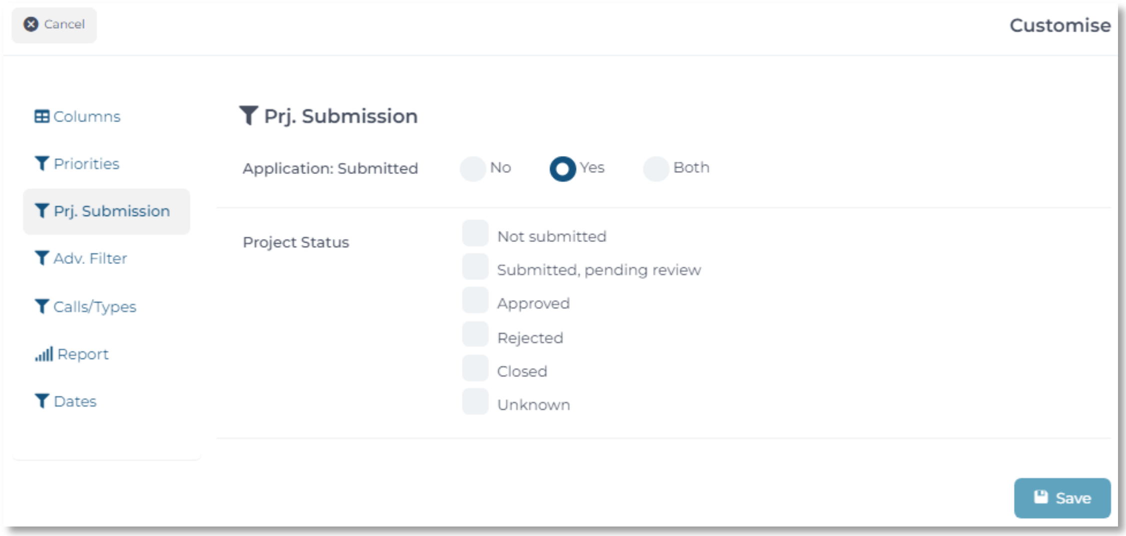
In the Columns tab you can select which of the columns will be visible to you after applying the queries.



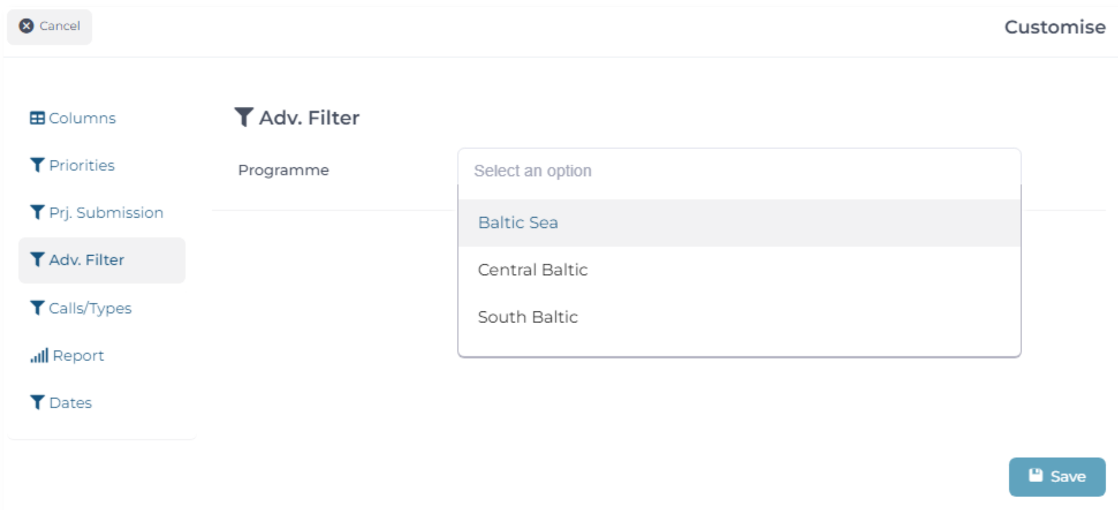
In the Priorities tab you can set a priority filter directly and also a filter by Specific Objective.



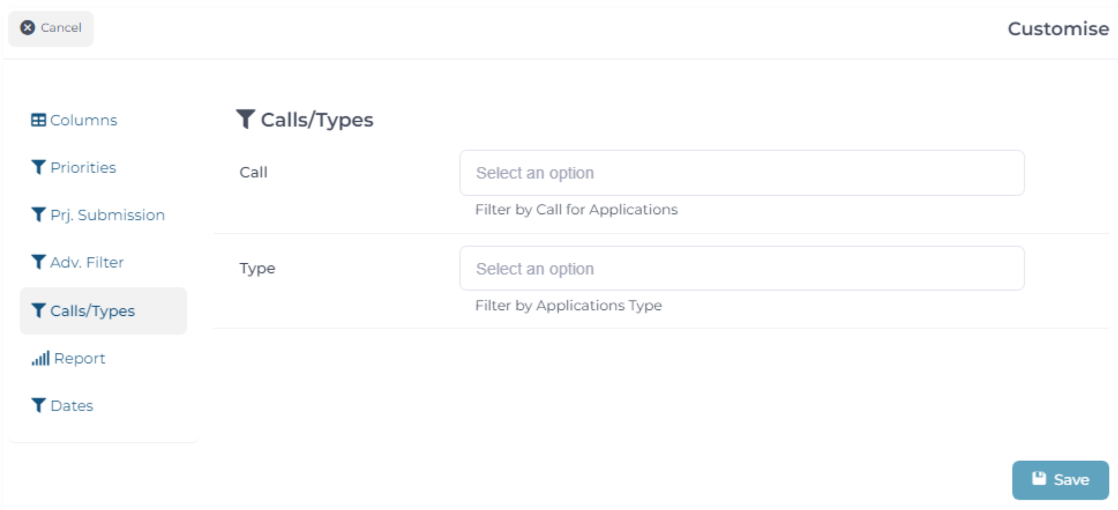
In the Project Submission tab, you can filter by the submission state and status.



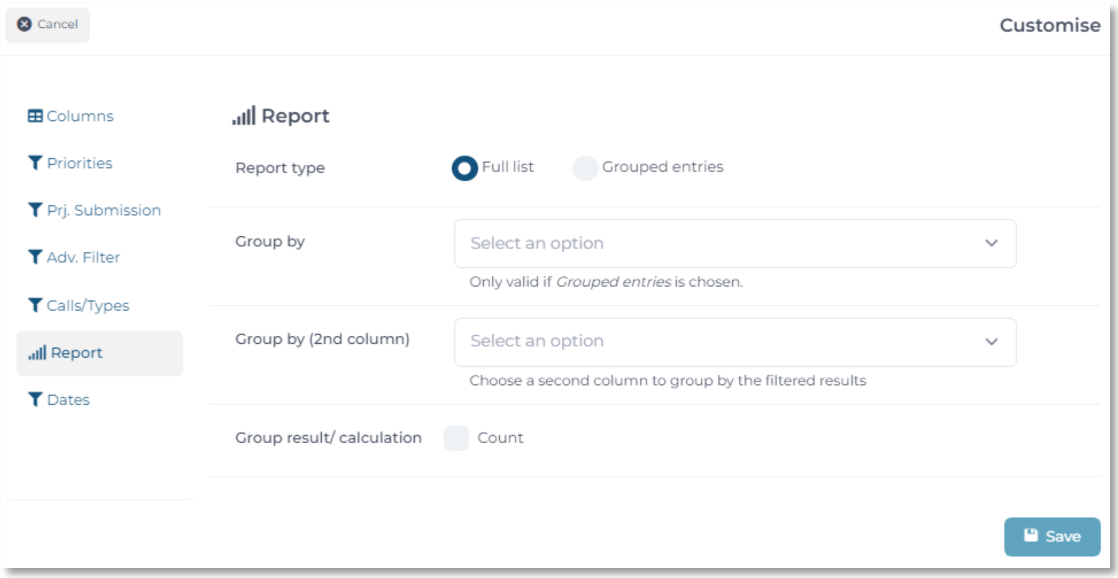
In the Advanced Filter you can specifically select to filter by region Programme.



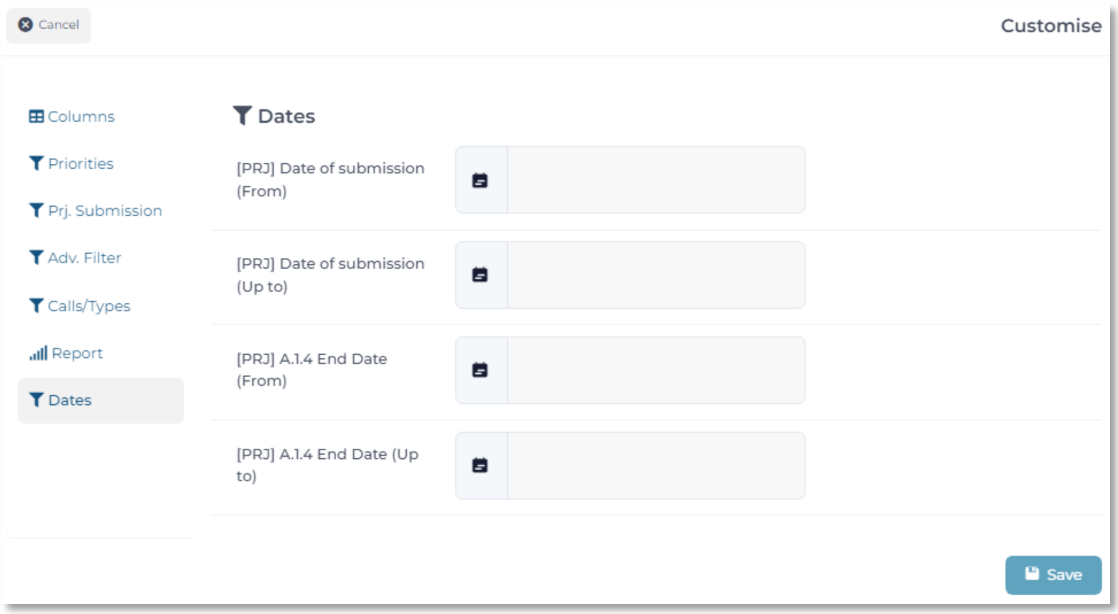
In the Calls / Types tab you can either filter by Call or by Type of the Applications.



In the report tab you can filter by report Type, group results by one or two columns (meaning that you have selected Grouped Entries in the Type filter) and last determine if you want to have a result / calculation Count feature.



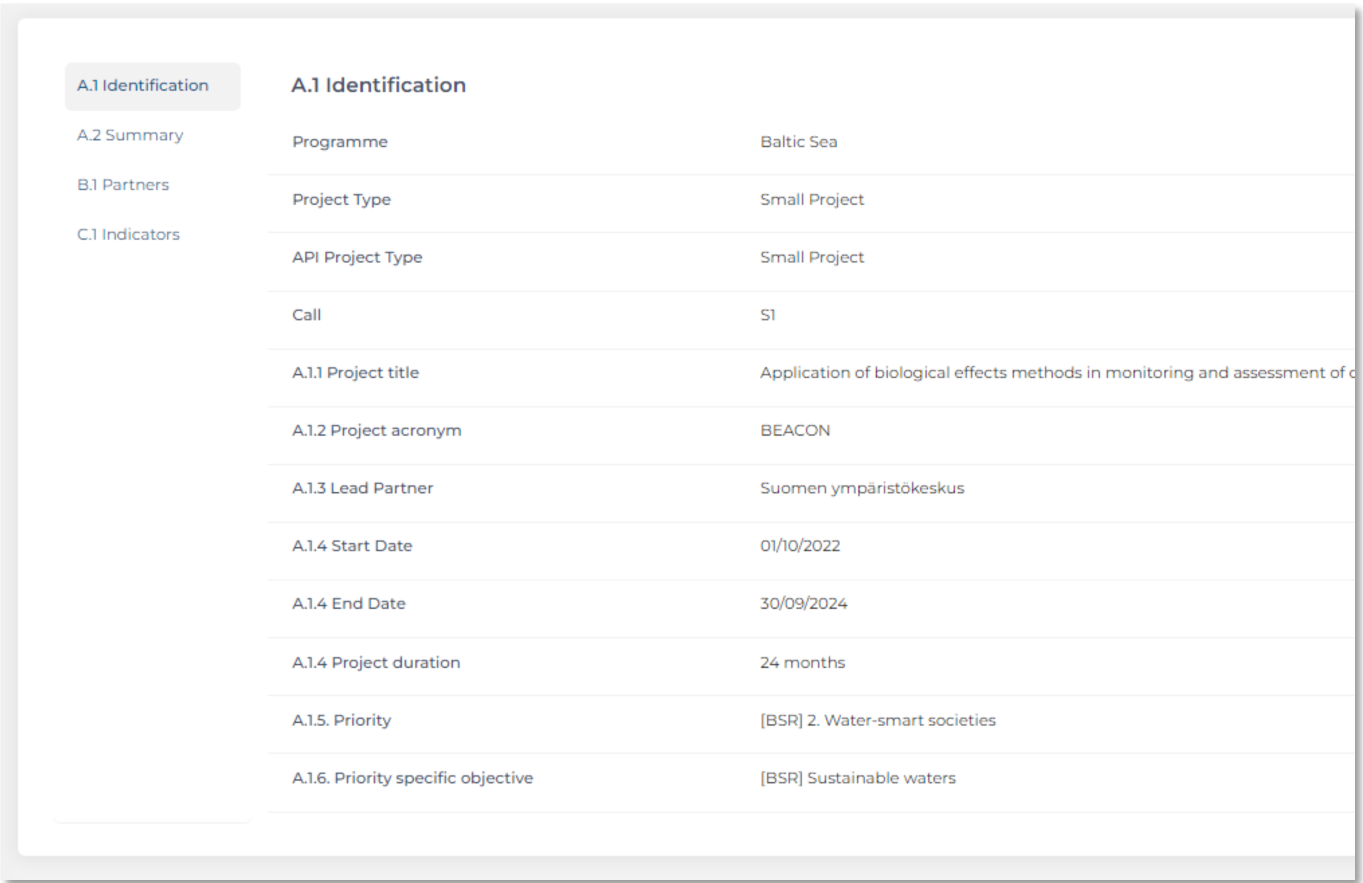
Finally, in the Dates tab you can set a range of dates of the Project submission or the A.1.4.



3. Application Details

Using the details icon, you can browse through all the details of the selected application.

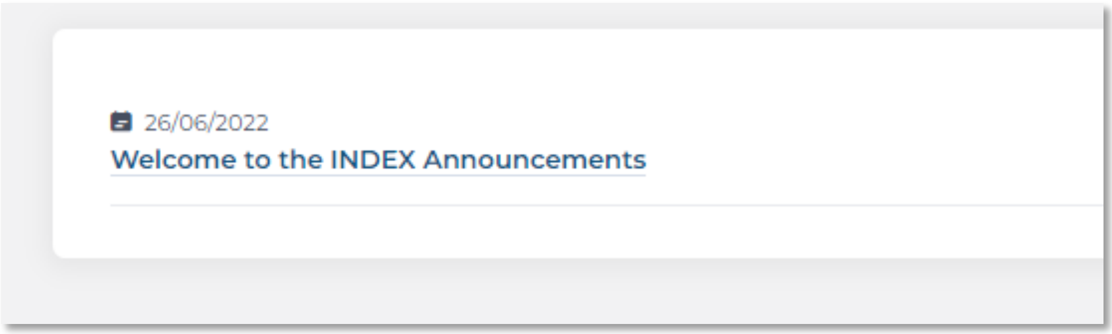
Application Details Page View:



7

Announcements

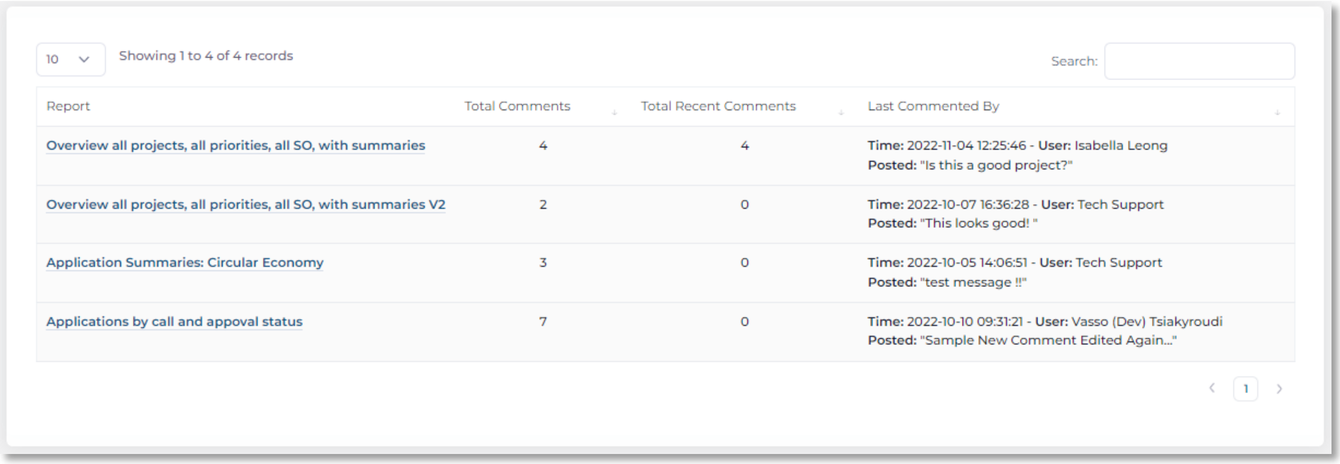
This is the INDEX Announcements section. You can browse through the different entries to get updates on new functionality or other changes.



8

Comments

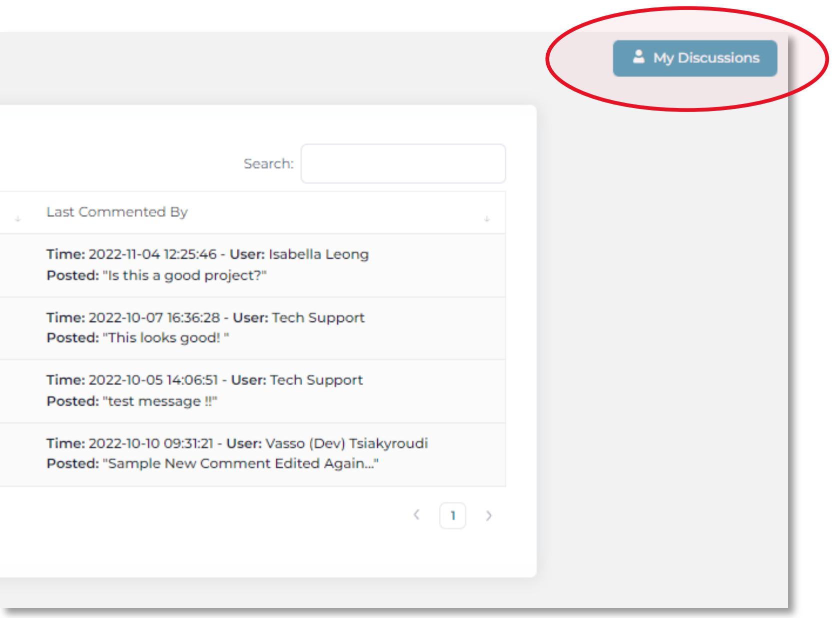
In the Comments section you will find a detailed table containing all the recent conversations.



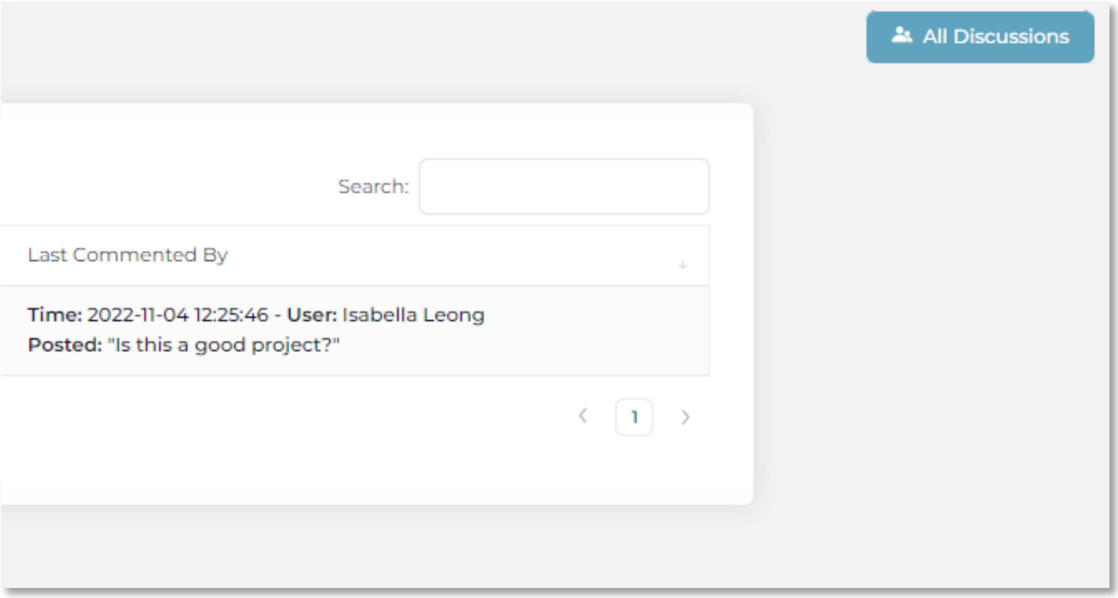
10 Showing 1 to 4 of 4 records Search:

Report	Total Comments	Total Recent Comments	Last Commented By
Overview all projects, all priorities, all SO, with summaries	4	4	**Time:** 2022-11-04 12:25:46 - **User:** Isabella Leong **Posted:** "Is this a good project?"
Overview all projects, all priorities, all SO, with summaries V2	2	0	**Time:** 2022-10-07 16:36:28 - **User:** Tech Support **Posted:** "This looks good! "
Application Summaries: Circular Economy	3	0	**Time:** 2022-10-05 14:06:51 - **User:** Tech Support **Posted:** "test message !!"
Applications by call and appoval status	7	0	**Time:** 2022-10-10 09:31:21 - **User:** Vasso (Dev) Tsiakyroudi **Posted:** "Sample New Comment Edited Again..."

If you are interested in seeing your personal conversations you can click on “My Discussions” button, located on the top right corner.

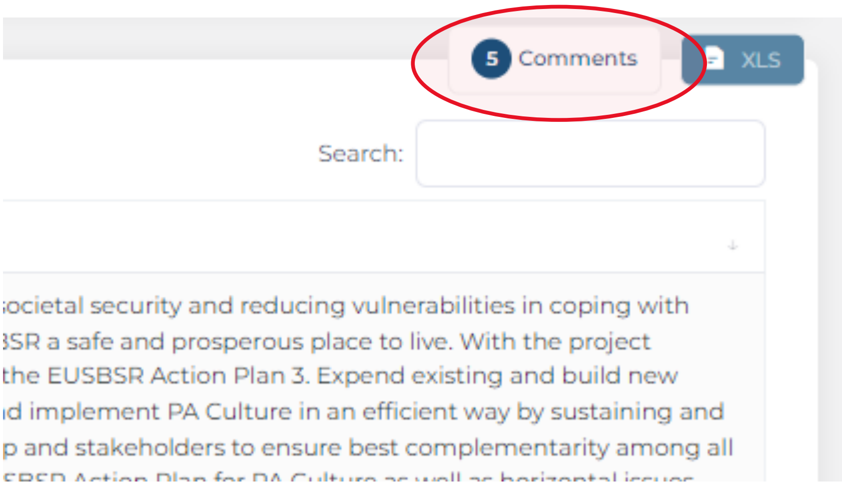


To return to the general overview of comments just click on the “All Discussions” button.

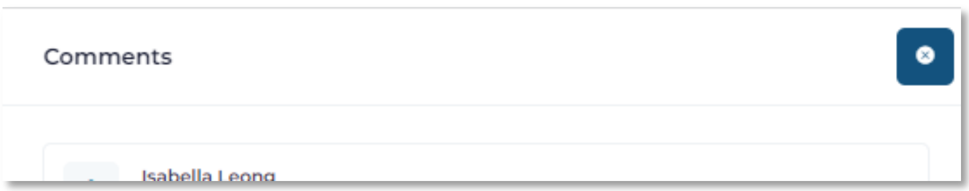


1. Commenting on a Report

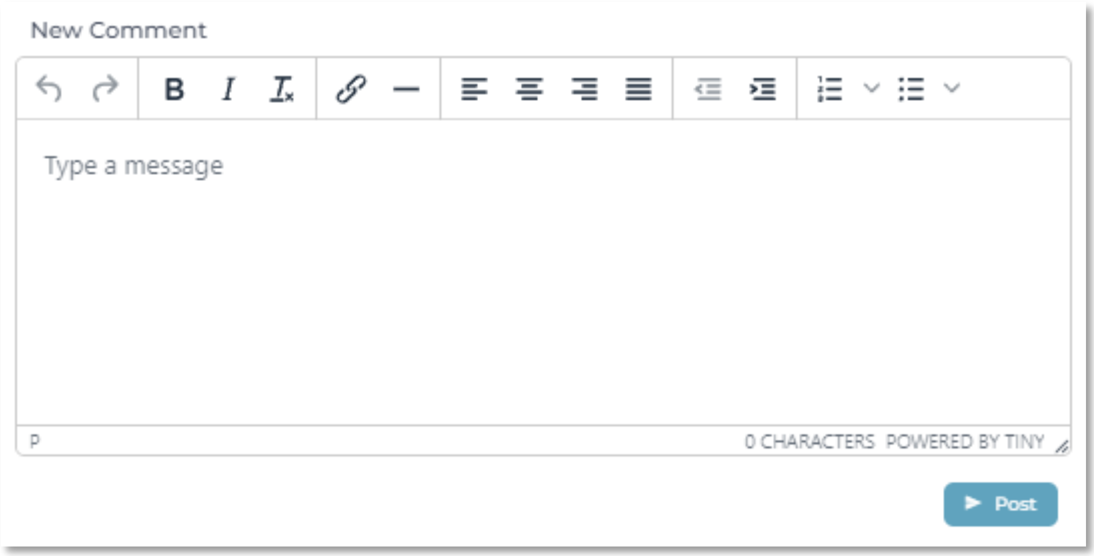
If you want to participate in a conversation by commenting on a report the first step is to click on the "Comments" button located on the top right of the report applications segment on the Reports page.



Immediately a sidebar will emerge from the right of your screen containing all the comments related to the specific report you are currently watching, a fully functional editor to compose and submit your own comment and hovering your mouse onto any of the comments a variety of action buttons will appear as soon as you have any relation to the comment or you are an administrator. You can dismiss the sidebar by clicking anywhere in the rest of the screen or by clicking the "x" icon on the top right corner.

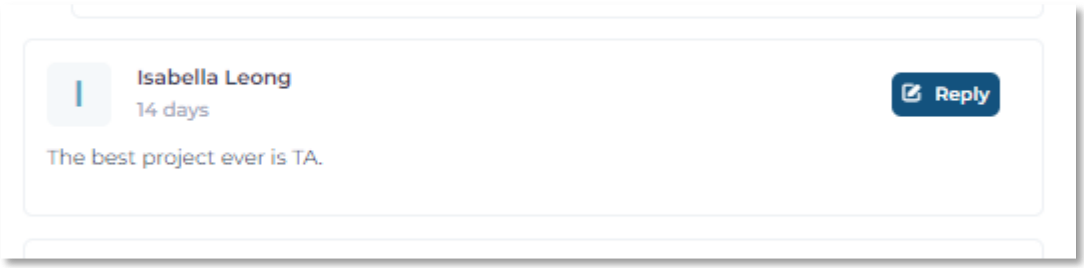


To post your own comment head to the bottom of the comments sidebar and start typing your text into the editor. When you are ready to comment click to the "Post" button just below the editor to the right.

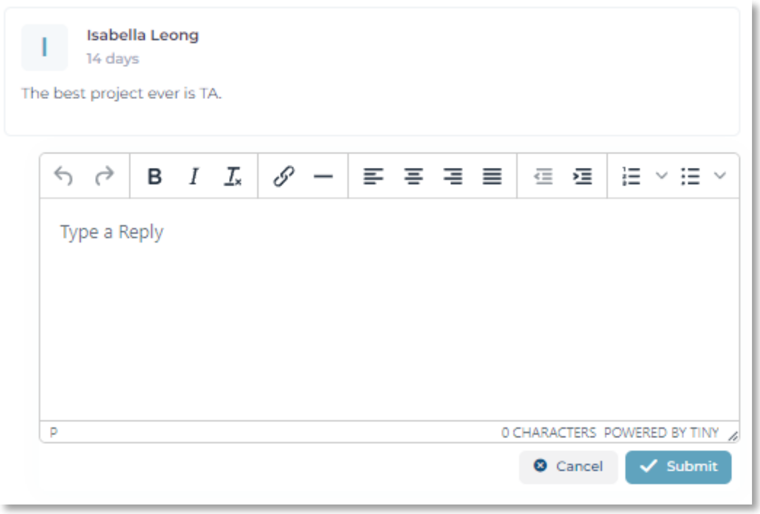


2. Reply, Edit and Delete

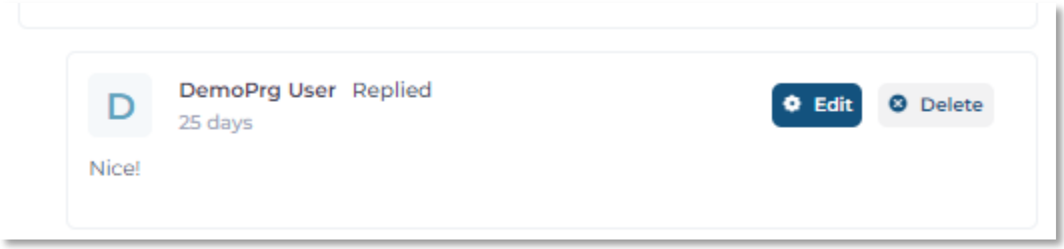
Hovering on any of the comments in the comment's sidebar a series of action buttons appear. One of them is the "Reply" button the gives you the ability to leave a reply to a specific comment.



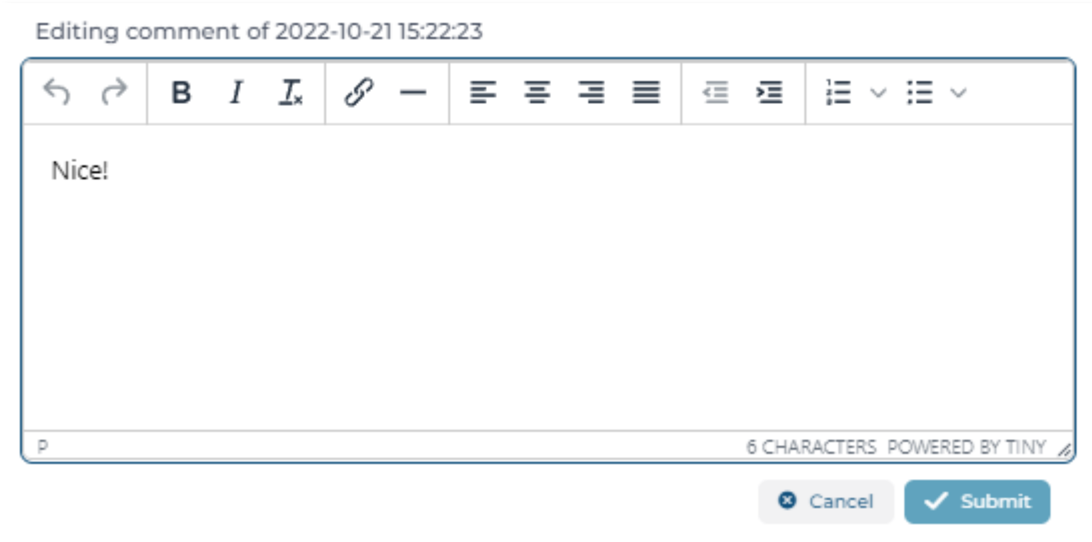
After clicking reply a new editor will appear under the comment you wish to reply to. When you are ready to submit your reply just click on the "Submit" button or if you want to discard the reply just click on the "Cancel" button.



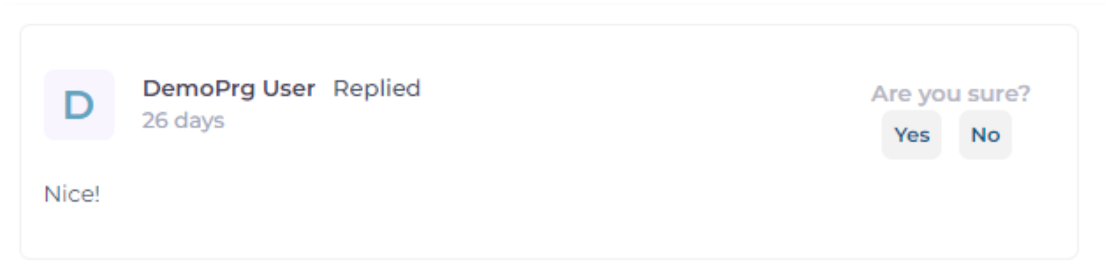
If you wish to edit or delete a comment or a reply to a comment that you have made you can click to the appropriate button hovering over the specific comment.



Clicking on edit the bottom editor will be set up with the comment's content so that you will able to make the desirable changes. You can then apply your changes clicking on "Submit" button or discard any changes made with the "Cancel" button.



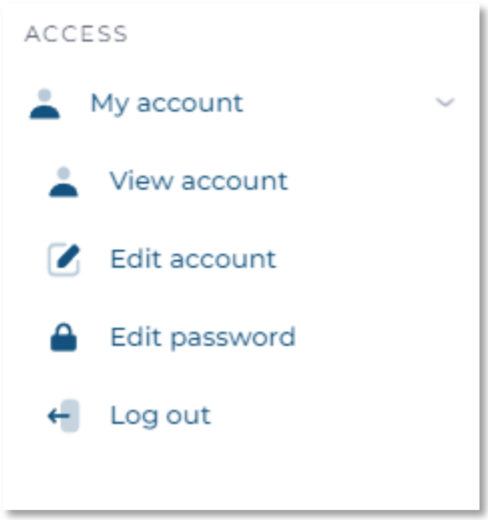
To delete a comment or a reply just click on the "Delete" button and immediately a confirmation prompt will appear so that you either confirm the deletion or abort it.



9

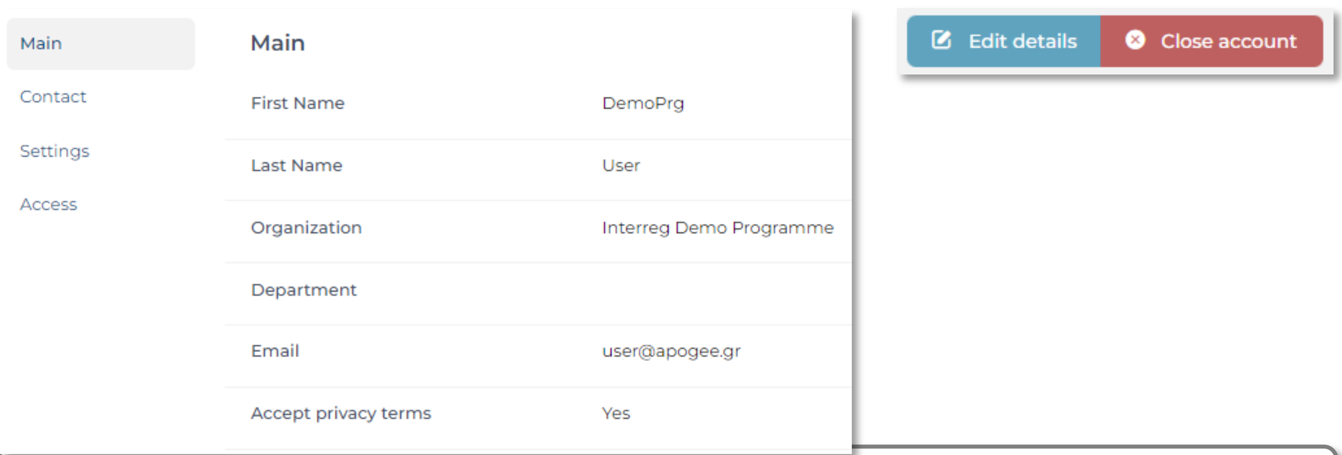
My account

This menu section is dedicated to the User's account management.



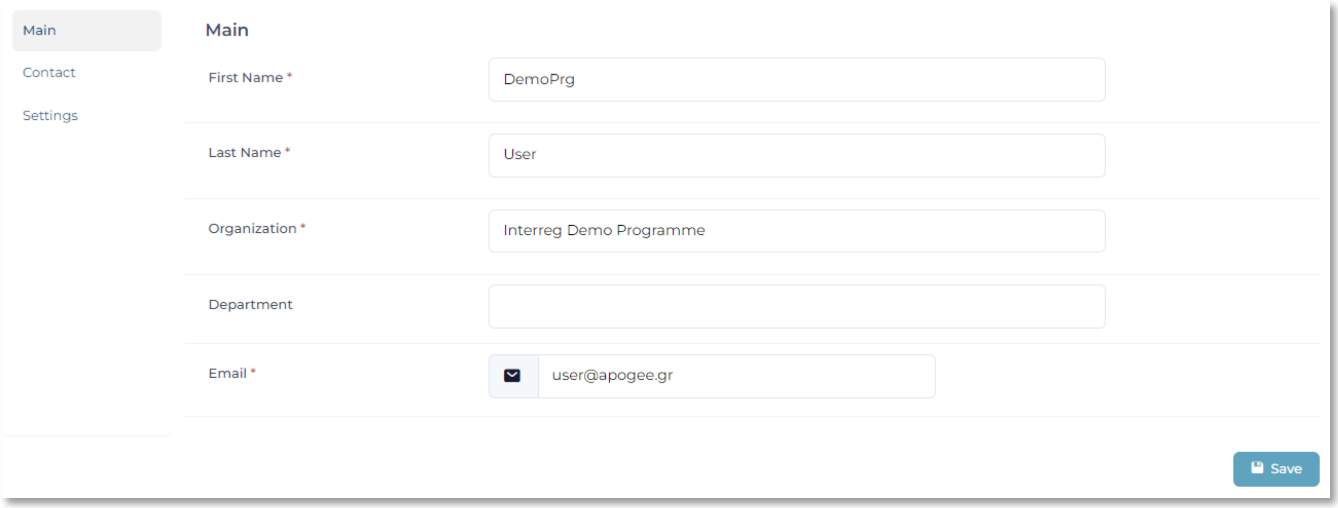
1. View account

Preview all your account details with the ability to directly edit them or even close your account using the top right buttons.



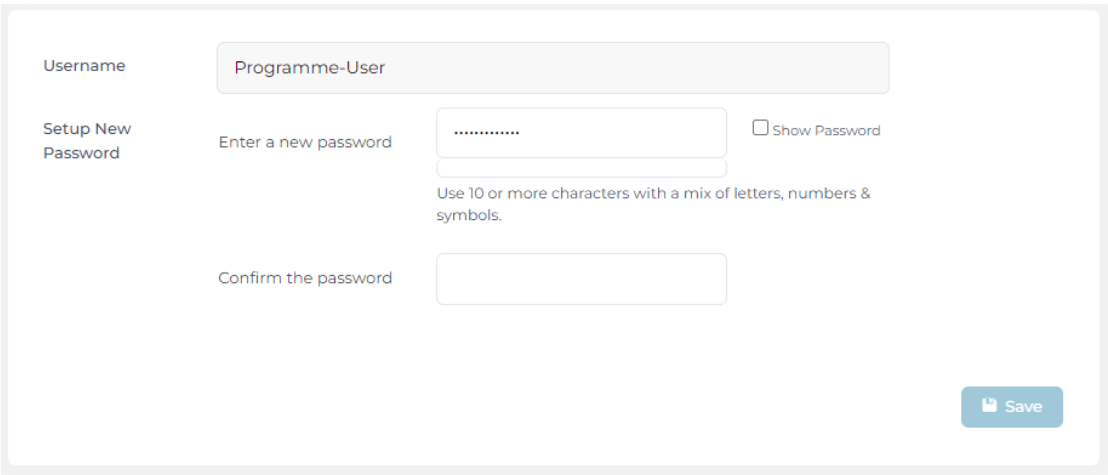
2. Edit account

This section allows the user to edit all of his info. You can submit any changes made using the "Save" button at the bottom right corner.



3. Edit password

This feature allows the user to change his password. You have to type the new password in both the base input field and the confirmation one. You can always click the Show Password check box to reveal types characters if you are uncertain of what have you been typing.



4. Log out

Use this option to exit the Essence CMS.

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Support

You can always contact our support department if there is an inquiry of yours or to troubleshoot anything out of the ordinary using the application, just click the "Support" text located to the bottom right of any view that you are currently on or directly mail us to **support@index.apogee.lu**

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