

**Index**

Effective cooperation through  
live data exchange

# Interact Data Exchange User Manual

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# Introduction

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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.

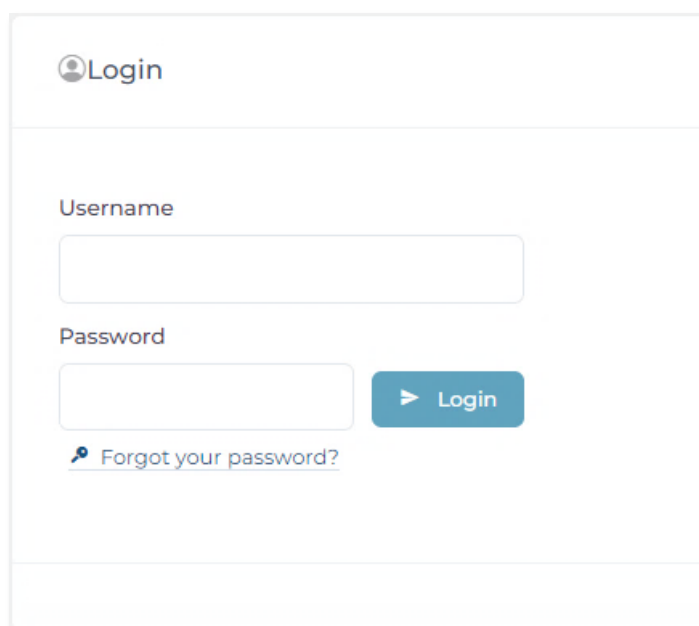
Last but not least, INDEX comes with a continuous data synchronization procedure from any source and data structure (Rest API's, JSON, etc.) as well as the option for a completely manual data upload process. Monitoring all the above, a logging process keeps track on any transaction made for debugging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

# Login to the System

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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

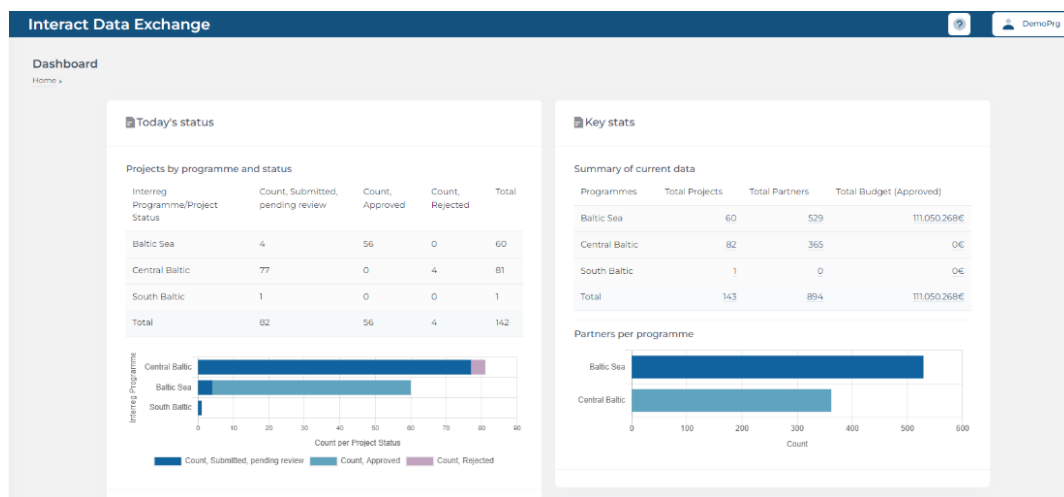


The screenshot shows a login form with a header section containing a user icon and the word "Login". Below this, there are two input fields: "Username" and "Password". To the right of the "Password" field is a blue button with a right-pointing arrow and the text "Login". Below the "Password" field is a link that says "Forgot your password?" with a key icon.

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

## 1. Dashboard

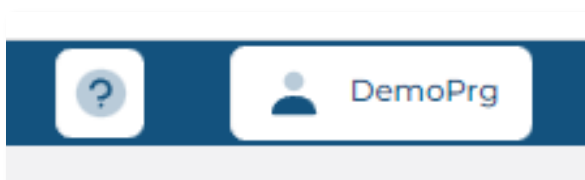
Upon entering the System, you will be presented with the INDEX Dashboard screen.




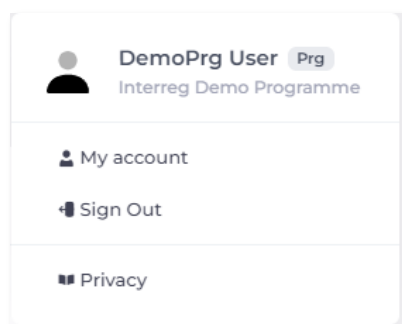
In this page you will come across the following sections:


## 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:

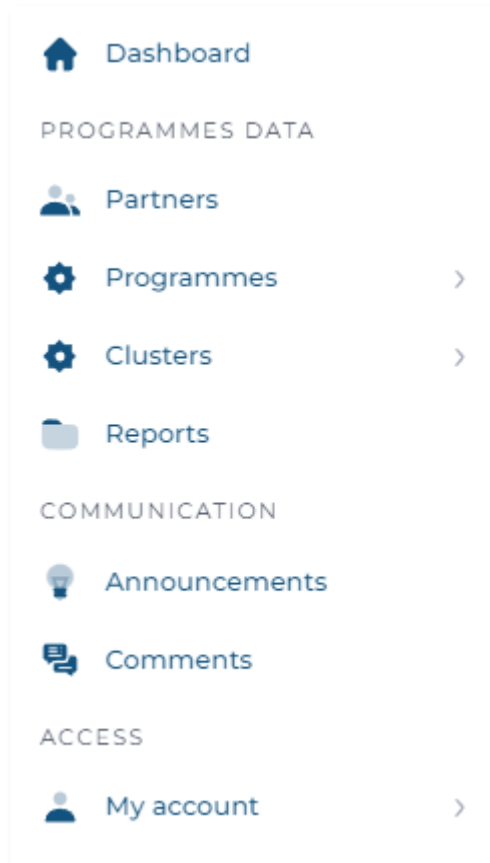
**My account:** Overview or manage the details of your Essence Account.

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

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

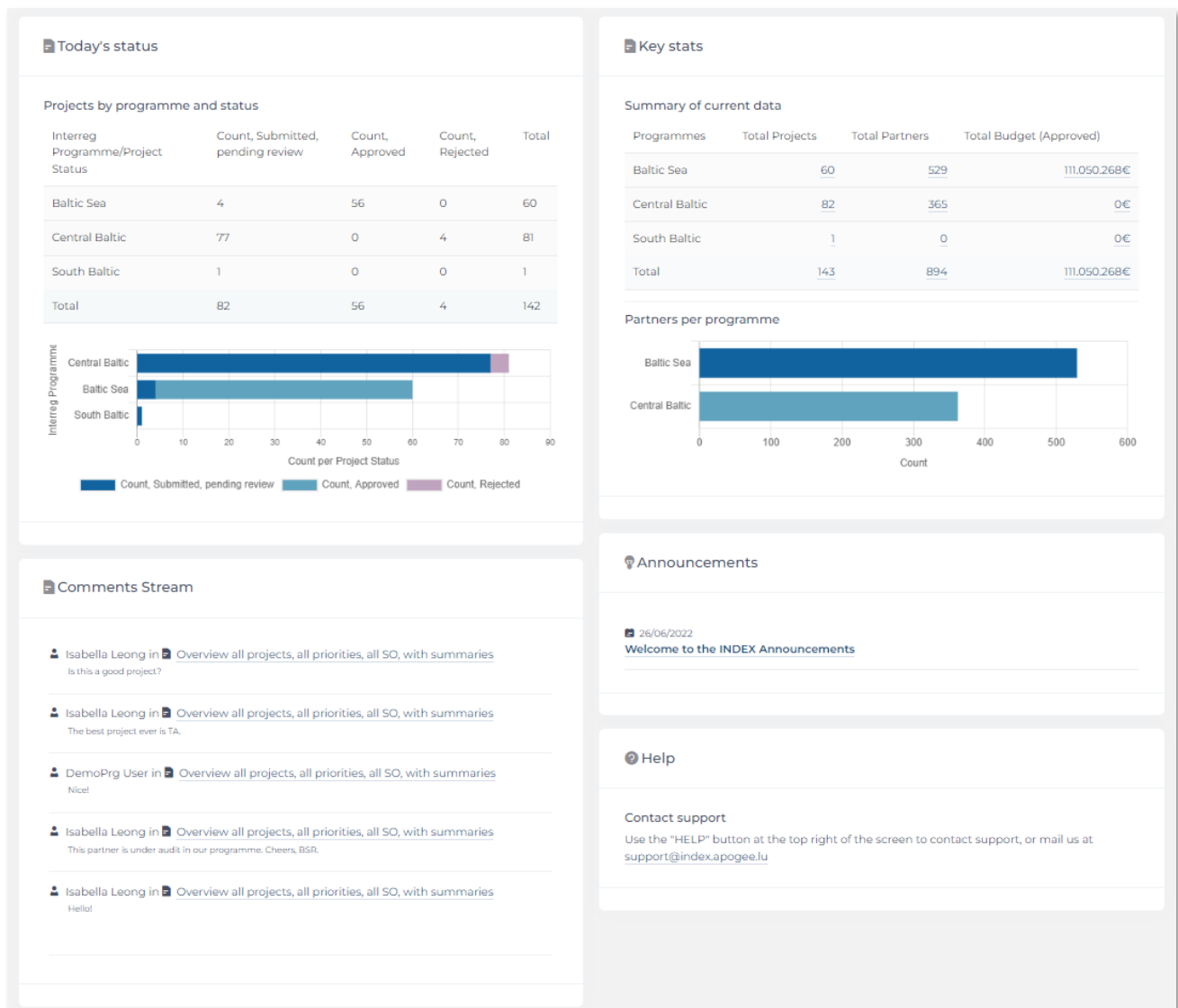
### 3. Main Menu

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



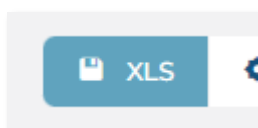
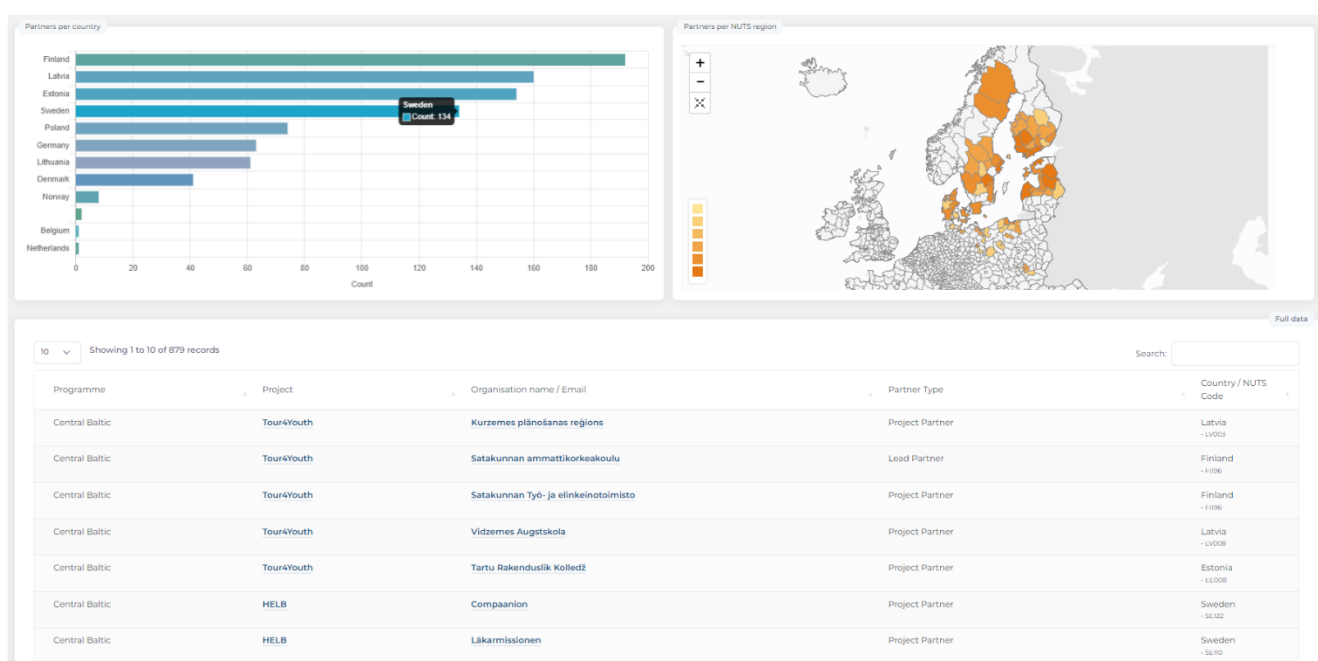
## 4. Dashboard Contents

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

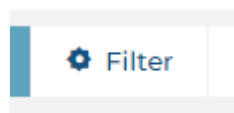


# Partners

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.



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.

Programme

Countries

Projects

Calls

Type

Programme

Interreg  
Programme

Select an option

Save

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

Programme

Countries

Projects

Calls

Type

Countries

Countries

× Denmark

Save

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

Programme

Countries

Projects

Calls

Type

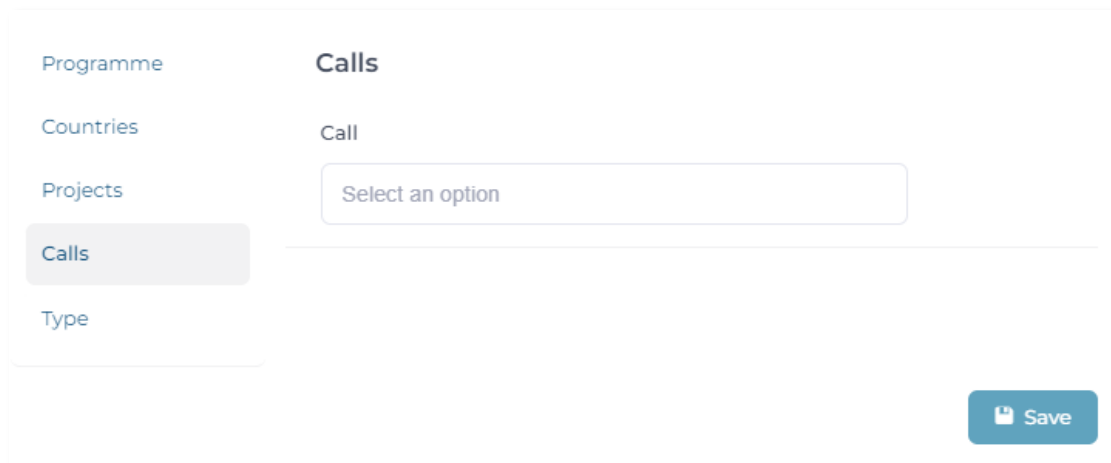
Projects

Projects

Select an option

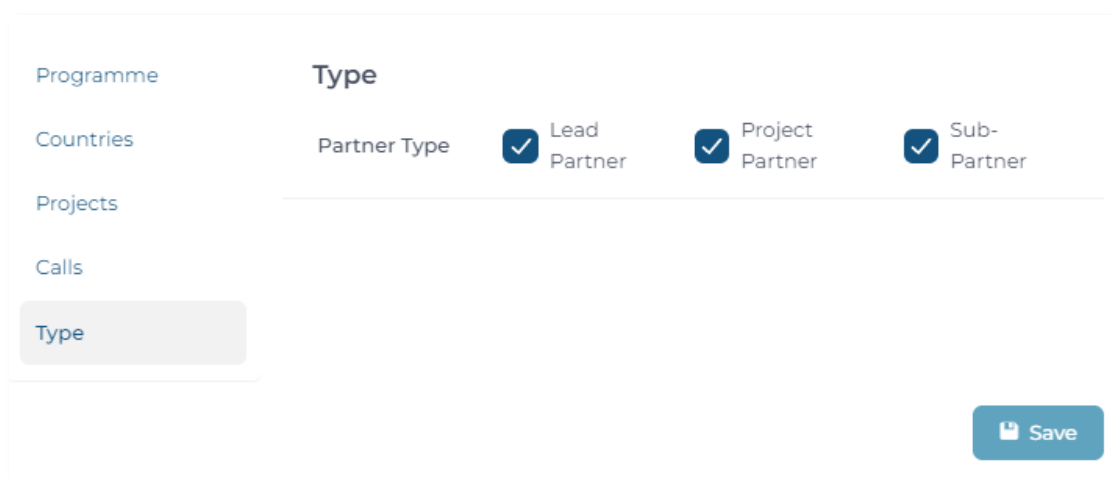
Save

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

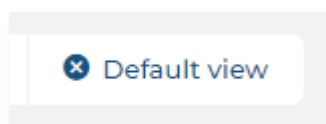


The screenshot shows a sidebar on the left with a vertical list of filter categories: Programme, Countries, Projects, Calls, and Type. The 'Calls' category is highlighted with a grey background. The main content area is titled 'Calls' and contains a single dropdown menu with the placeholder text 'Select an option'. A blue 'Save' button with a floppy disk icon is located in the bottom right corner.

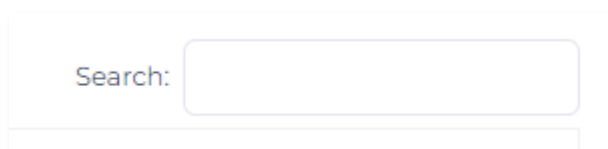
5) Filter by Type clicking on the appropriate checkbox.



The screenshot shows the same sidebar as the previous image, but now the 'Type' category is highlighted. The main content area is titled 'Type' and displays three checkboxes under the heading 'Partner Type'. All three checkboxes are checked: 'Lead Partner', 'Project Partner', and 'Sub-Partner'. A blue 'Save' button is in the bottom right corner.



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



A search interface consisting of the label 'Search:' followed by a text input field.

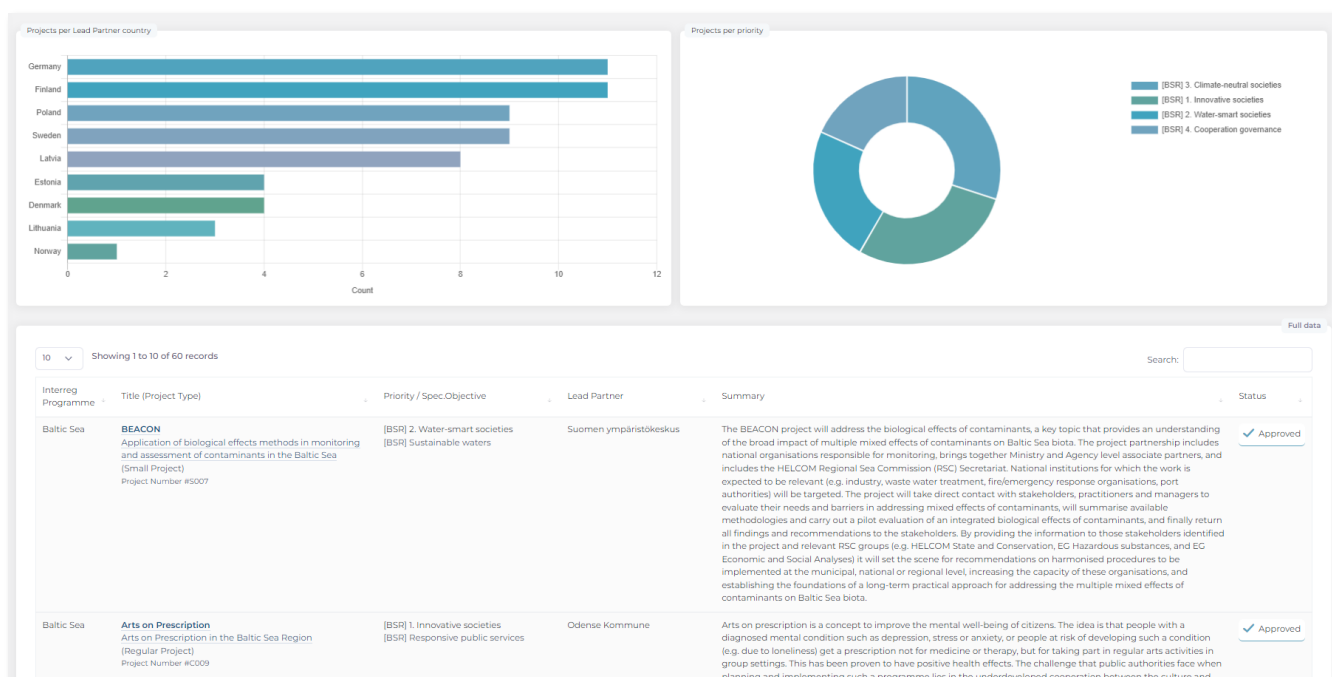
On the other hand, you can narrow down the results shown on the data table by searching some terms in the “Search” box. The result of the filtering is immediate as the engine performs a search each time you type any character in the search box.

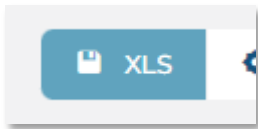
# Programmes

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.

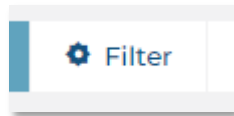


When you select a region a dashboard page with the region data will be presented. You can adjust the data presented by accessing the filter button in the upper right toolbar and also export the data in XLS form.





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.

The interface shows a sidebar on the left with a list of filter categories: 'Programme' (selected), 'Calls/Types', 'Priorities', 'Objective', and 'Report'. The main area is titled 'Programme' and contains a dropdown menu with 'Interreg' and 'Programme' as options. Below the dropdown is a text box containing 'Central Baltic' with a close button. A 'Save' button is located at the bottom right.

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

The interface shows a sidebar on the left with a list of filter categories: 'Programme', 'Calls/Types' (selected), 'Priorities', 'Objective', and 'Report'. The main area is titled 'Calls/Types' and contains two sections. The first section is labeled 'Call' and has a dropdown menu with 'Select an option'. The second section is labeled 'Type' and also has a dropdown menu with 'Select an option'. A 'Save' button is located at the bottom right.

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

The screenshot shows a sidebar on the left with five filter categories: 'Programme', 'Calls/Types', 'Priorities' (which is highlighted with a grey background), 'Objective', and 'Report'. The main area is titled 'Priorities' and contains a label 'Priority' above a dropdown menu with the text 'Select an option'. At the bottom right of the main area is a blue 'Save' button with a floppy disk icon.

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

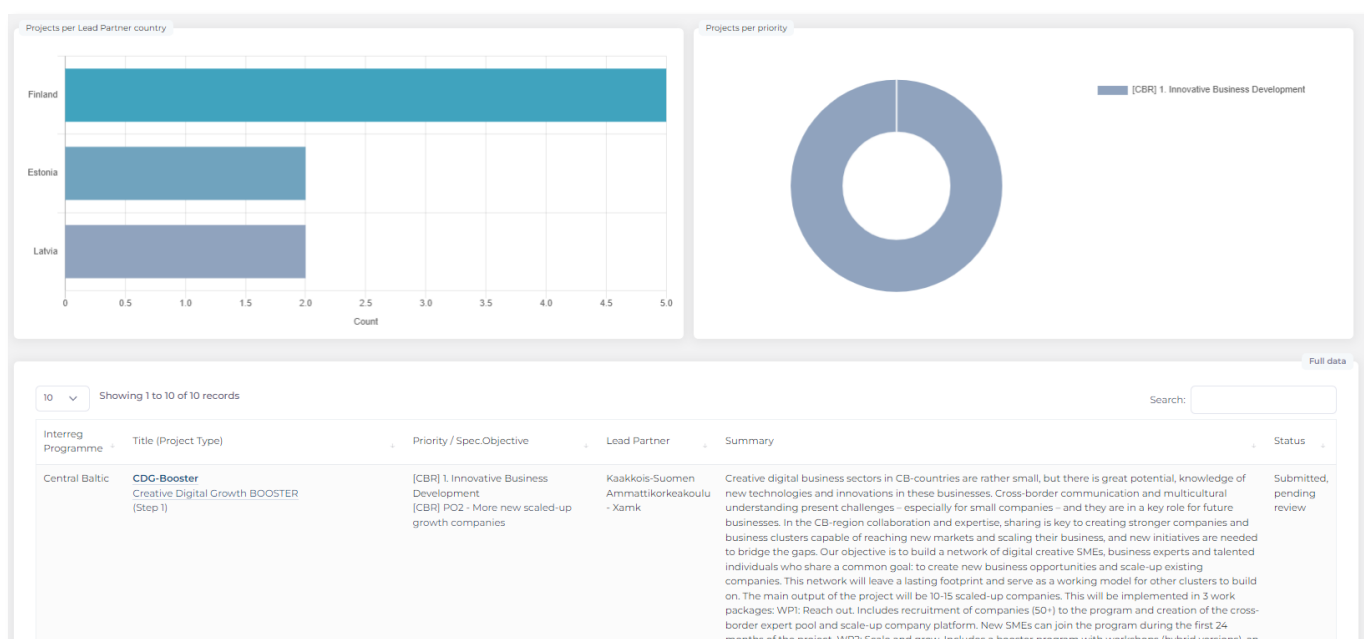
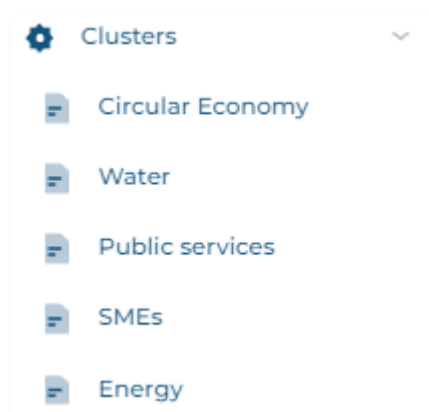
The screenshot shows the same sidebar as the previous image, but 'Objective' is now highlighted. The main area is titled 'Objective' and contains a label 'Spec. Objective' above a dropdown menu with the text 'Select an option'. A blue 'Save' button is at the bottom right.

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.

The screenshot shows the sidebar with 'Report' highlighted. The main area is titled 'Report' and contains several options: 'Report type' with two radio buttons, 'Full list' (selected) and 'Grouped entries'; 'Group by' with a dropdown menu and a note 'Only valid if Grouped entries is chosen.'; 'Group by (2nd column)' with a dropdown menu and a note 'Choose a second column to group by the filtered results'; and 'Group result/calculation' with a checkbox labeled 'Count'. A blue 'Save' button is at the bottom right.

# 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.



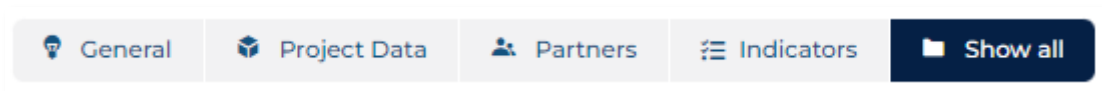
# Reports

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:

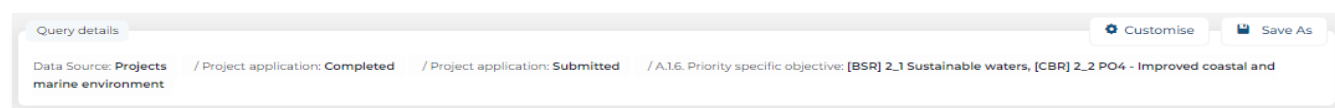
A search bar with the label "Search:" followed by a text input field.

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

A filtering bar with five buttons: "General" (lightbulb icon), "Project Data" (cube icon), "Partners" (people icon), "Indicators" (list icon), and "Show all" (folder icon). The "Show all" button is highlighted in dark blue.

## 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.

A query details bar with a tab labeled "Query details". On the right, there are "Customise" and "Save As" buttons. The main text area displays: "Data Source: **Projects** / Project application: **Completed** / Project application: **Submitted** / A.1.6. Priority specific objective: **[BSR] 2.1 Sustainable waters, [CBR] 2.2 PO4 - Improved coastal and marine environment**".

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.

Cancel Customise

Columns

Columns

Custom report

Programme

A.1.1 Project title

A.1.2 Project acronym

Project Type

Project Number

A.1.4 Start Date

[PR3] A.1.4 End Date

Priority

A.1.6. Priority specific objective

Call

L.P. Country

A.2 Project Summary

[D1] Total Eligible Budget

Year of submission

Status

Save

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

Cancel Customise

Columns

Priorities

Priority

Spec.Objective

Filter by Priority

Filter by Specific Objective

Save



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

Cancel

Customise

Columns

Priorities

Prj. Submission

Adv. Filter

Calls/Types

Report

Dates

Prj. Submission

Application: Submitted

No

Yes

Both

Project Status

Not submitted

Submitted, pending review

Approved

Rejected

Closed

Unknown

Save

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

Cancel

Customise

Columns

Priorities

Prj. Submission

Adv. Filter

Calls/Types

Report

Dates

Adv. Filter

Programme

Select an option

Baltic Sea

Central Baltic

South Baltic

Save

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

Cancel

Customise

Columns

Priorities

Prj. Submission

Adv. Filter

Calls/Types

Report

Dates

Calls/Types

Call

Select an option

Filter by Call for Applications

Type

Select an option

Filter by Applications Type

Save

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.

Cancel

Customise

Columns

Priorities

Prj. Submission

Adv. Filter

Calls/Types

Report

Dates

Report

Report type

Full list

Grouped entries

Group by

Select an option

Only valid if *Grouped entries* is chosen.

Group by (2nd column)

Select an option

Choose a second column to group by the filtered results

Group result/ calculation

Count

Save

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

Cancel

Customise

Columns

Priorities

Prj. Submission

Adv. Filter

Calls/Types

Report

Dates

Dates

[PRJ] Date of submission (From)


[PRJ] Date of submission (Up to)

[PRJ] A.1.4 End Date (From)

[PRJ] A.1.4 End Date (Up to)

Save

### 3. Application Details

#	Programme	A.1.1 Project title
	Baltic Sea	Application of biological effects methods in monitoring and assessment of

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

Application Details Page View:


A.1 Identification	A.1 Identification	
A.2 Summary	Programme	Baltic Sea
B.1 Partners	Project Type	Small Project
C.1 Indicators	API Project Type	Small Project
	Call	SI
	A.1.1 Project title	Application of biological effects methods in monitoring and assessment of c
	A.1.2 Project acronym	BEACON
	A.1.3 Lead Partner	Suomen ympäristökeskus
	A.1.4 Start Date	01/10/2022
	A.1.4 End Date	30/09/2024
	A.1.4 Project duration	24 months
	A.1.5. Priority	[BSR] 2. Water-smart societies
	A.1.6. Priority specific objective	[BSR] Sustainable waters



# Announcements

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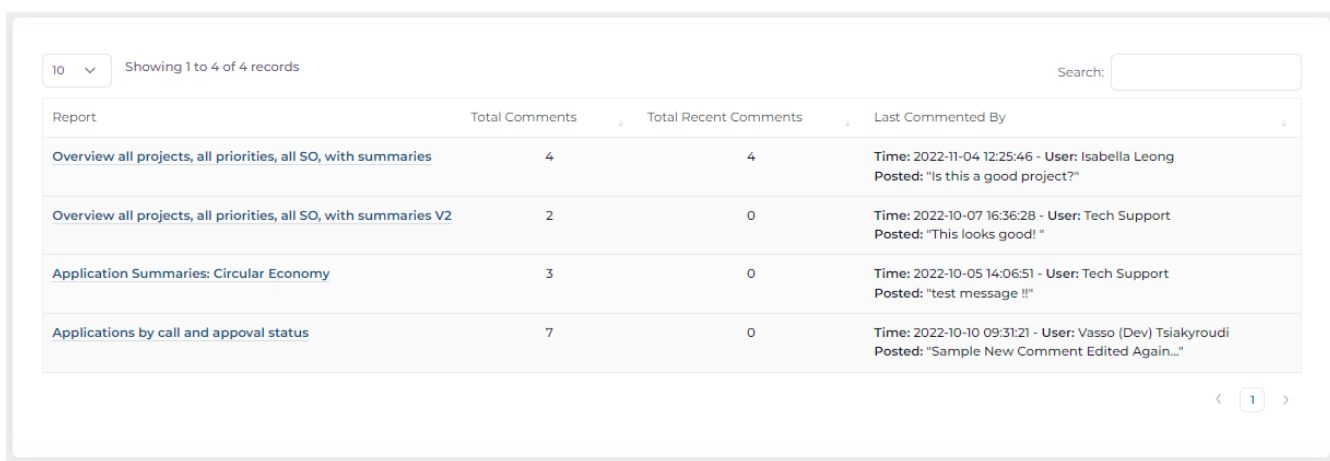
This is the INDEX Announcements section. You can browse through the different entries to get updates on new functionality or other changes.

 26/06/2022

[Welcome to the INDEX Announcements](#)

# Comments

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

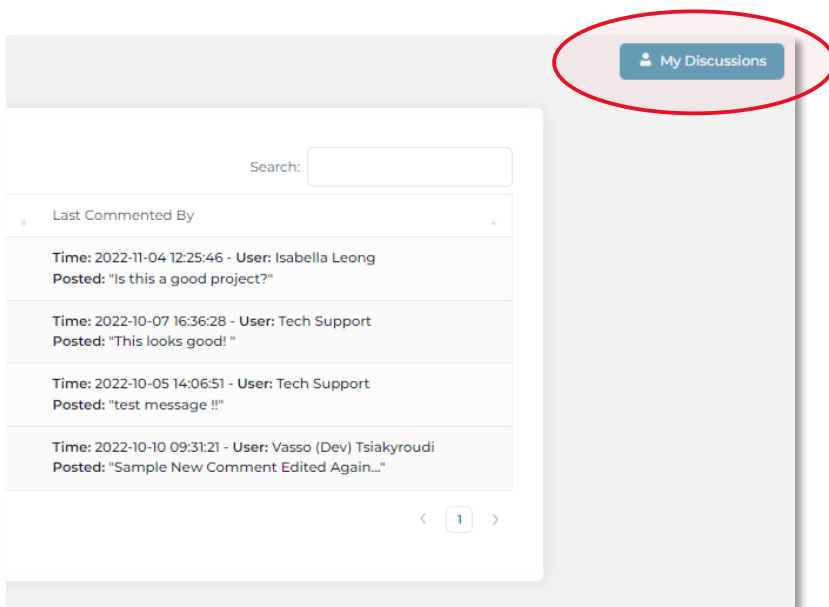


10 ▾ Showing 1 to 4 of 4 records Search:

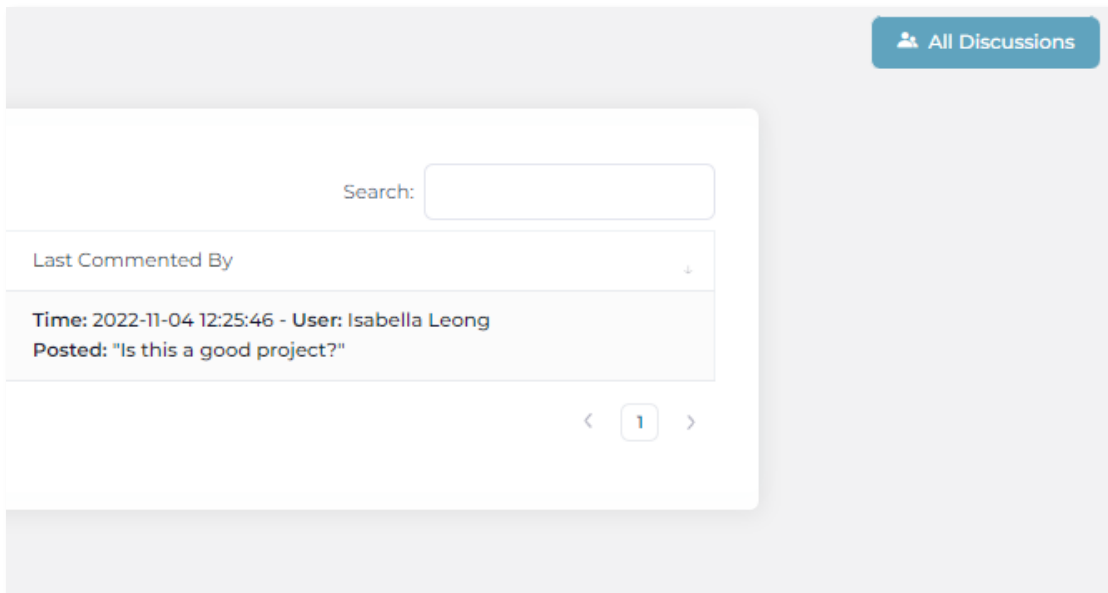
Report	Total Comments	Total Recent Comments	Last Commented By
<a href="#">Overview all projects, all priorities, all SO, with summaries</a>	4	4	Time: 2022-11-04 12:25:46 - User: Isabella Leong Posted: "Is this a good project?"
<a href="#">Overview all projects, all priorities, all SO, with summaries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

< 1 >

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

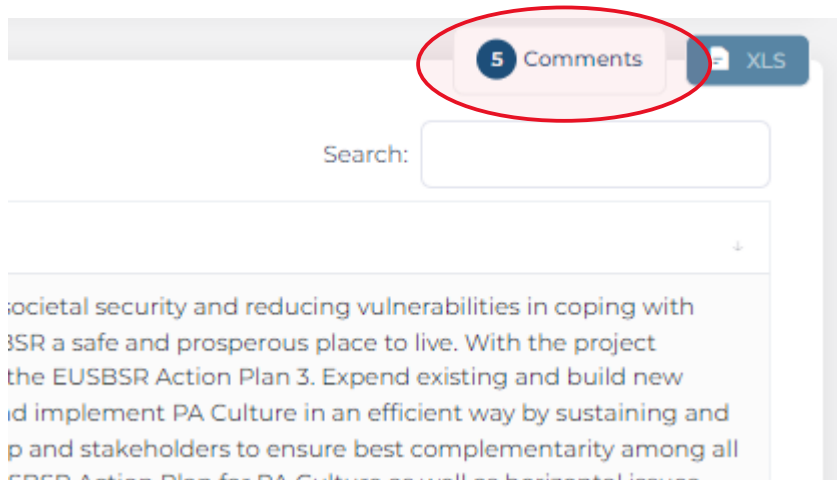


To return to the general overview of comments just click on the “All Discussions” button.

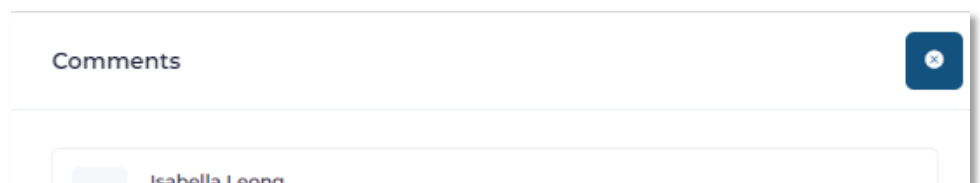


## 1. Commenting on a Report

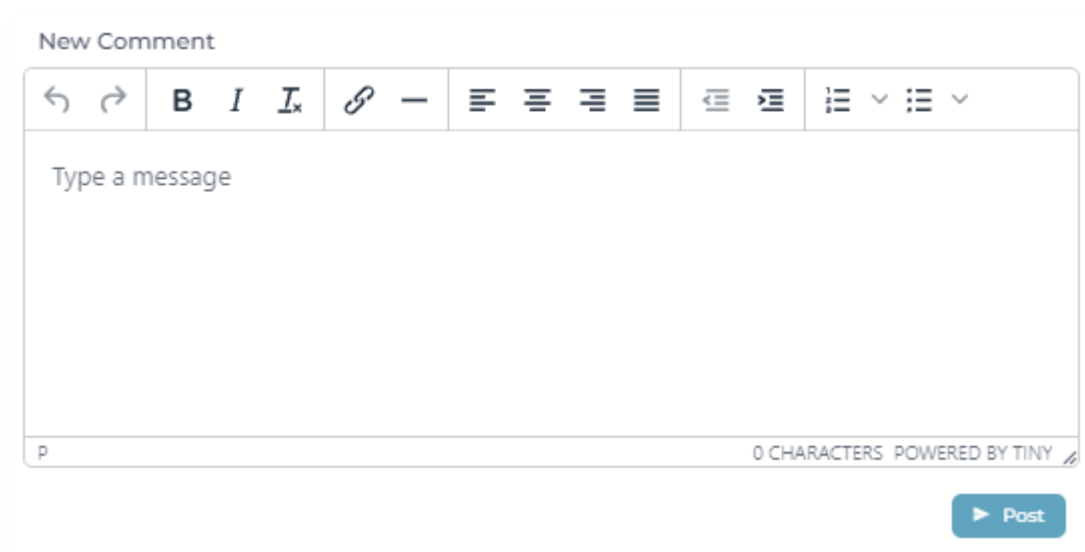
If you want to participate in a conversation by commenting on a report the first step is to click on the “Comments” button located on the top right of the report applications segment on the Reports page.



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.



The screenshot shows a 'New Comment' form. At the top, it says 'New Comment'. Below this is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, link, unlink, bulleted list, numbered list, decrease indent, increase indent, and a dropdown menu. The main text area contains the placeholder text 'Type a message'. At the bottom left of the text area is a small 'P' icon. At the bottom right, it says '0 CHARACTERS POWERED BY TINY'. Below the text area is a blue button with a right arrow and the text 'Post'.

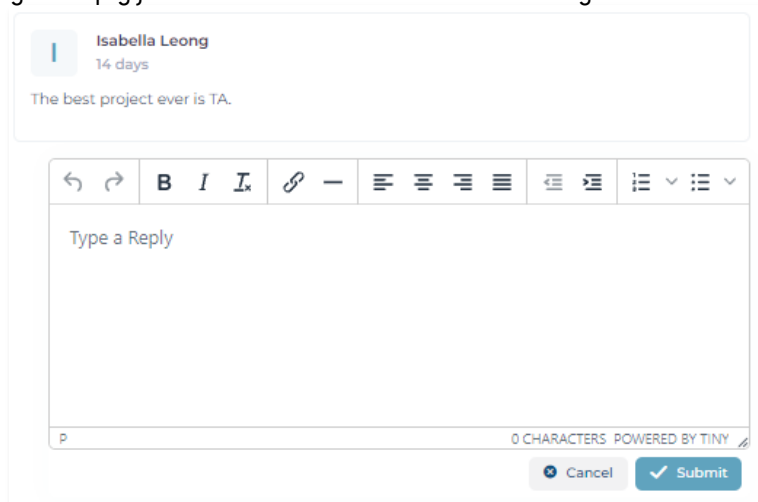
## 2. Reply, Edit and Delete

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.



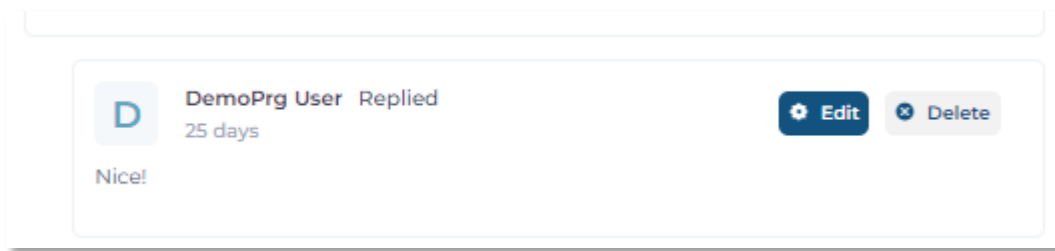
The screenshot shows a comment from 'Isabella Leong' posted '14 days' ago. The comment text is 'The best project ever is TA.'. To the right of the comment is a blue button with a right arrow and the text 'Reply'.

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.

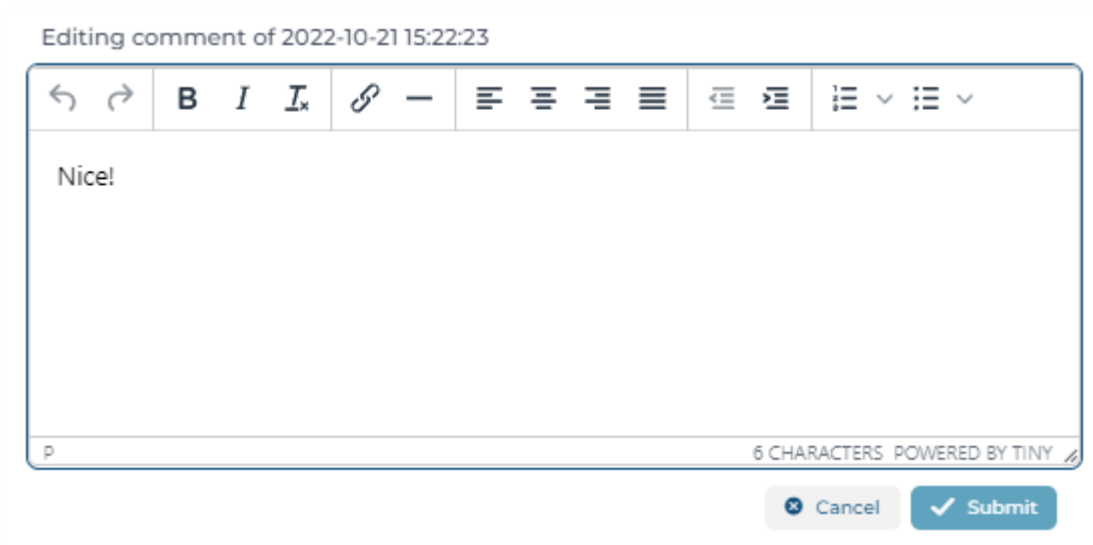


The screenshot shows the reply editor. At the top, it shows the comment from 'Isabella Leong' posted '14 days' ago with the text 'The best project ever is TA.'. Below this is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, link, unlink, bulleted list, numbered list, decrease indent, increase indent, and a dropdown menu. The main text area contains the placeholder text 'Type a Reply'. At the bottom left of the text area is a small 'P' icon. At the bottom right, it says '0 CHARACTERS POWERED BY TINY'. Below the text area are two buttons: a grey button with a left arrow and the text 'Cancel', and a blue button with a checkmark and the text 'Submit'.

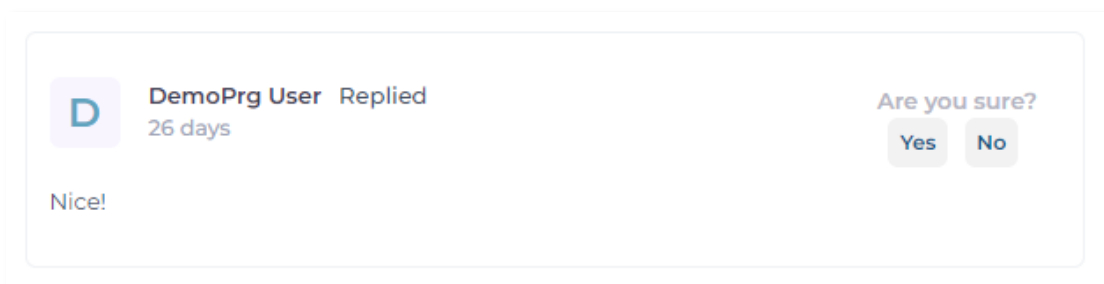
If you wish to edit or delete a comment or a reply to a comment that you have made you can click to the appropriate button hovering over the specific comment.



Clicking on edit the bottom editor will be set up with the comment's content so that you will be 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.



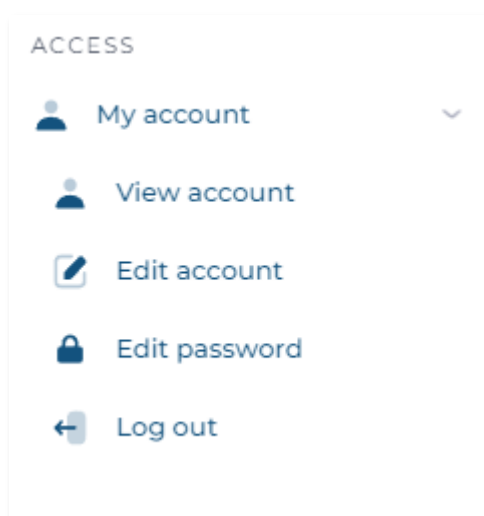
To delete a comment or a reply just click on the "Delete" button and immediately a confirmation prompt will appear so that you either confirm the deletion or abort it.





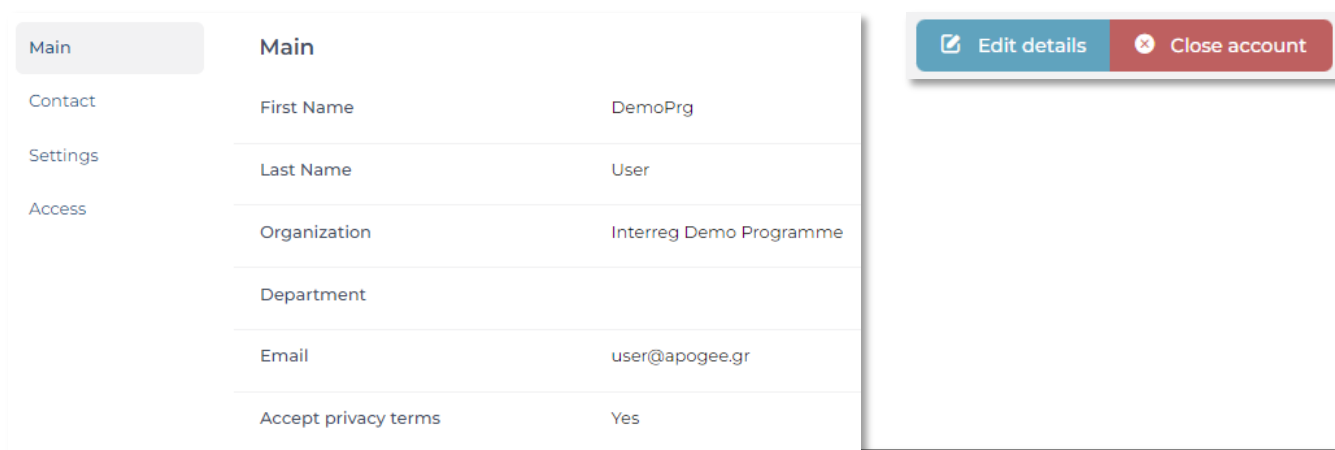
# My account

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.

Main

Contact

Settings

Main

First Name \*

DemoPrg

Last Name \*

User

Organization \*

Interreg Demo Programme

Department

Email \*

☒

user@apogee.gr

Save

## 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.

Username

Programme-User

Setup New Password

Enter a new password

.....

☐ Show Password

Use 10 or more characters with a mix of letters, numbers & symbols.

Confirm the password

Save

#### 4. Log out

Use this option to exit the Essence CMS.

## Support

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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](mailto:support@index.apogee.lu)

39 Rue Eduard Grenier, L1642 Luxembourg, Luxembourg  
Email [info@apogee.lu](mailto:info@apogee.lu) • Web <http://apogee.lu>