Agreement partially co-financed by the European Union funds

Beneficiary's Instruction

SL2021 - Correspondence

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Introduction

The Correspondence module is responsible for managing the correspondence between Users of the SL2021 application. It allows you to exchange correspondence under the specific project.

Access to the Correspondence is available to Users holding the relevant rights after logging in to the SL2021 application via SSO. The exchange of correspondence (two way) is possible between:

- Beneficiaries and employees of the contracting institution (MA);
- Beneficiaries and employees of the project clearing institution (JS);
- Beneficiaries and employees of the Interreg controller's institution assigned to the specific beneficiary;
- Project beneficiaries and partners;
- Partners and employees of the Interreg controller's institution assigned to the specific partner.

In the manual the terms: system, application are used alternatively.

1. Authorisation of the User-Beneficiary

You will receive access to individual functionalities of the Correspondence module, after you have been granted the relevant authorisation.

The "Correspondence" group comprises the following types of authorisation:

- ***Message management*** - including creating, modifying, saving, sending messages, adding attachments to messages as well as deleting draft messages and managing the message footer;
- ***Viewing messages*** - including viewing the list of messages, viewing message details and exporting messages to PDF;
- ***Deleting sent*** *messages* - comprising deleting of sent messages;
- ***Deleting attachments from sent messages*** - comprising deleting of attachments from sent messages.

The first two authorisation types are basic rights that can be granted to any User who should have access to the correspondence. These rights apply not only to the functionalities indicated in their names, but also to a number of additional functionalities associated with creating or viewing messages.

The other two authorisation types (to delete sent messages and to delete attachments from sent messages) are specialised rights that may be assigned to so-called Technical Administrators in Institutions (MA, JS and Interreg Controllers).

2. Access to correspondence with SL2021

2.1. Correspondence under the project

You can navigate to the project correspondence screen in two ways:

1) From the ***Project List*** by selecting three dots next to the project number and then by selecting ***Correspondence*** from the list.

Navigating to project correspondence from the project list

2) From **Project Details** by expanding the **Project Implementation** button and then selecting **Correspondence** from the list of items.

Navigating to project correspondence from project details

Selecting **Correspondence** by default redirects to the list of messages in the **Incoming** tab.

Moreover, from the project correspondence area you can also navigate to other areas of SL2021 indicated in the application side menu (for example, to the **List of Projects** or **Tasks**), or to project details and other modules within the project (the "Project Implementation" menu).

3. Home screen

3.1. Correspondence under the project

3.1.1. Grouping of messages

You can view a list of messages in the context of a particular project regardless of their status. The system groups messages in three folders: **Incoming, Sent** and **Draft Copies**, where:

- in the **Incoming** directory, the system displays messages sent to the User's organisation;
- in the **Sent** folder, the system displays messages sent by the User or other Users from the organisation of the User viewing the folder;
- in the **Draft Copies** folder, the system displays messages under the "In preparation" status, created by the User or other Users from the organisation of the User viewing the folder.

The Incoming, Sent, Draft copies folders are presented as tabs above the list of messages. After navigating to correspondence under the project, the system displays the **Incoming** tab by default.

PROJECT IMPLEMENTATION ▾

REFRESH

CREATE MESSAGE   MANAGE FOOTER

Search for messages

Filtering and sorting panel   ▾

INCOMING   SENT   WORKING COPIES

Findings in the payment claim   ⋮

FROM:Ministerstwo Funduszy i Polityki
Regionalnej, Departament Współpracy
Terytorialnej

                                          ANSWER

                    2024-05-24 14:11:14

TITLE: Findings in the payment claim
FROM:Ministerstwo Funduszy i Polityki Regionalnej, Departament Współpracy Terytorialnej

Correspondence category:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Fermentum posuere urna nec tincidunt praesent semper. Proin libero nunc consequat interdum varius sit amet. Congue quisque egestas diam in. Nascetur ridiculus mus mauris vitae ultricies. Feugiat in fermentum posuere urna nec tincidunt praesent semper feugiat. Eget dolor morbi non arcu risus quis varius quam quisque. Ultrices vitae auctor eu augue ut lectus arcu bibendum at.

‹   1   ›

Main screen - non-serial correspondence

3.1.2. List of messages

From the List of messages, you can access the message details. To that end, select the tab where the desired message is posted, then search for the message in the list and select it by clicking on its tile. The system will then display its preview it on the right-hand

side of the list (in the case of the **Draft Copies** tab, the system will display the message in the edit mode). Both the preview and the edit mode of each message displays audit data containing the following information:

- Who created the message;
- Date of creating the message;
- Who modified the message;
- Date of the message modification.

Each message entered in the message list contains basic information about the message, such as:

- Subject of the message;
- Information on the Sender/Recipient;
    - the **Incoming** tab displays the full name of the sender of the message ("From");
    - the full name of the recipient of the message ("To") is displayed in the **Sent** tab of the project correspondence;
    - in the **Draft copies** tab, the full name of the recipient of the message ("To") is displayed in the project correspondence - if no Addressee is specified, the field remains blank;
- Date and time of sending/receiving the message concerned in the format YYYY-MM-DD HH:MM:SS (in the case of messages in the **Draft copies** directory, the status "In preparation" is displayed instead of this information);
- Information on the number of attachments added to the message in the form of an icon, including the number of attached files.

Moreover, in the **Incoming** tab, if a response to the message has been given, the ↖ icon (arrow) is displayed in the top right-hand corner of the message tile. The icon is also visible in the **Sent** tab when a reply has been given to the sent message.

Note: After navigating to a message included in the list, full information on the subject of the message, the Sender/Recipient and the date and time of receipt/sending of the message is displayed shortly (in the case of messages in the **Draft copies** folder, the status "In preparation" is displayed instead of information on the date and time of receipt/sending of the message).

The sequence of the messages displayed in the list under each tab is as follows:

- in the ***Incoming*** tab, the last message received is positioned on the top of the list by default;
- in the ***Sent*** tab, the last message sent is positioned on the top of the list by default;
- in the ***Draft copies*** tab, the last draft created is positioned on the top of the list by default.

The Incoming tab in the project correspondence

Filtering and sorting panel ⌄

INCOMING   **SENT**   WORKING COPIES

ODP: Findings in the payment claim ⋮

TO:Ministerstwo Funduszy i Polityki Regionalnej,
Departament Współpracy Terytorialnej

2024-05-24 14:13:12

< **1** >

TITLE: ODP: Findings in the payment claim
TO:Ministerstwo Funduszy i Polityki Regionalnej, Departament Współpracy Terytorialnej

Correspondence category:

Massa id neque aliquam vestibulum. Eleifend donec pretium vulputate sapien nec. Augue neque gravida in fermentum et sollicitudin. Justo laoreet sit amet cursus. Nam libero justo laoreet sit. A erat nam at lectus. Nisi quis eleifend quam adipiscing vitae proin sagittis nisl. Vel facilisis volutpat est velit egestas dui id ornare.

In day2024-05-24 14:11:14 Michał Stępniewski I am writing:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Fermentum posuere urna nec tincidunt praesent semper. Proin libero nunc consequat interdum varius sit amet. Congue quisque egestas diam in. Nascetur ridiculus mus mauris vitae ultricies. Feugiat in fermentum posuere urna nec tincidunt praesent semper feugiat. Eget dolor morbi non arcu risus quis varius quam quisque. Ultrices vitae auctor eu augue ut lectus arcu bibendum at.

Audit data ⌄

The Sent tab in the project correspondence

Filtering and sorting panel   ⌄

INCOMING   SENT   WORKING COPIES

Questions   ⋮

TO:Wspólny Sekretariat PB

                                    In preparation

Addressee
Wspólny Sekretariat PB   ▾

< **1** >

Message subject
Questions

9 / 500

Correspondence category   ▾

Mi ipsum faucibus vitae aliquet nec ullamcorper sit amet. Malesuada fames ac turpis egestas maecenas. Diam ut venenatis tellus in metus vulputate eu scelerisque felis. |

168 / 30000

SEND   SAVE   ATTACH FILE   CANCEL

The Draft copies in the project correspondence

You can refresh the list of incoming messages manually by clicking the ***Refresh*** button above the filtering and sorting panel.

3.1.3. Filtering and sorting of messages in the list

You have the option of sorting (with the additional option of specifying the ascending or descending order) and filtering the messages in all lists by specific criteria.

Filtering of messages is possible by using either the quick search or the filtering and sorting panel. The quick text filtering function (Message Search) enables filtering by the name of the sender or addressee (depending on the tab), the subject of the message and the text of the message. Filtering is possible across the entire text or a part thereof and it operates on a case-insensitive basis.

Quick search field

On the other hand, when filtering in the panel, you must first indicate the field you want to filter from the drop-down list, then specify the condition (e.g. equal, contains, larger, smaller) and indicate the value by which you want to search.

Window with the filtering panel

Note: In case of text fields, the search is case-insensitive.

Moreover, you can filter the messages in the list by several fields or by several separate conditions for a single field. To that end, complete the first condition and then select the *Add Filter* button that will appear once all the fields for the previous condition have been completed. If you resign from filtering by an added field, you can remove the filter by selecting the *Delete* button next to the specific condition. In addition, you can delete any items you have added in the filter by clicking the *Clear Filters* button.

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If you have indicated all the fields by which you want to filter the list of messages in the filtering panel, select the **Search** button which is activated when all the fields for condition one have been completed. Consequently, the system will display messages in the list that comply with the restricting conditions provided.

Note: The maximum number of search restriction conditions that can be added for the filtering panel is 20.

The filtering and sorting options for the fields in the message list are as follows:

- In case of correspondence incoming (**Incoming** tab) to the Institution/Interreg Controller/Beneficiary/Partner:

FILTERING PARAMETERS					
Field name	**Condition: equal to**	**Condition: contains**	**Condition: smaller**	**Condition: greater**	**Field type**
Sender	-	+	-	-	list (multiple choice)
Subject of correspondence	+	+	-	-	text
Correspondence category	-	+	-	-	list (multiple choice)
Correspondence content	+	+	-	-	text
Received date	+	-	+	+	calendar
Who created (login)	+	+	-	-	text
When created	+	-	+	+	calendar
Who modified (login)	+	+	-	-	text
When modified	+	-	+	+	calendar

SORTING PARAMETERS	
Field name:	Subject of correspondence, Correspondence category, Date received, Who created, When created, Who modified, When modified

- In case of correspondence sent (**Sent** tab) by the Institution/Interreg Controller/Beneficiary/Partner:

FILTERING PARAMETERS					
Field name	**Condition: equal**	**Condition:**	**Condition: smaller**	**Condition: greater**	**Field type**

	to	contains			
Addressee name	-	+	-	-	list (multiple choice)
Subject of correspondence	+	+	-	-	text
Correspondence category	-	+	-	-	list (multiple choice)
Correspondence content	+	+	-	-	text
Date of sending	+	-	+	+	calendar
Sending person (login)	+	+	-	-	text
Who created (login)	+	+	-	-	text
When created	+	-	+	+	calendar
Who modified (login)	+	+	-	-	text
When modified	+	-	+	+	calendar

SORTING PARAMETERS	
Field name:	Subject of correspondence, Correspondence category, Date of sending, Sending person, Who created, When created, Who modified, When modified

- In the case of messages with the "In preparation" status (***Draft copies*** tab) created by the Institution/Interreg Controller/Beneficiary/Partner:

FILTERING PARAMETERS					
Field name	**Condition: equal to**	**Condition: contains**	**Condition: smaller**	**Condition: greater**	**Field type**
Subject of correspondence	+	+	-	-	text
Correspondence category	-	+	-	-	list (multiple choice)
Correspondence content	+	+	-	-	text
Who created (login)	+	+	-	-	text
When created	+	-	+	+	calendar
Who modified (login)	+	+	-	-	text
When modified	+	-	+	+	calendar

SORTING PARAMETERS	
Field name:	Subject of correspondence, Correspondence category, Who created, When created, Who modified, When modified

4. Creating a message

4.1. Creating a message under the project

You can create and send messages to authorised persons under the project from the "Contract in preparation" status occurring in SL2021. The exchange of correspondence can take place between (it can be initiated by both parties):

- Beneficiary and the contracting institution (MA);
- Beneficiary and the project clearing institution (JS);
- Beneficiary and the assigned Interreg Controller;
- Beneficiary and partner;
- Partner and the assigned Interreg Controller.

To create a message, select the **Create Message** button above the filtering and sorting panel. You will then see a blank template to fill in on the right-hand side of the message list, and the **Send**, **Save**, **Attach File**, **Cancel** buttons will appear below the text window. The newly created message assumes the status "In preparation" until it is sent.

| Addressee | ▼ |

| Message subject |
| 0 / 500 |

| Correspondence category | ▼ |

| Message content |
| 0 / 30000 |

SEND **SAVE** **ATTACH FILE** CANCEL

New message template

The message template contains the following fields to be filled in:

- ***Addressee*** - a list type field used to specify the recipient of the message (mandatory field). The values available for selection within the list are adjusted according to the sender and the project. If only one value to choose from is included in the list, the field is automatically completed by entering this value.
  - For the Beneficiary in Interreg partnership projects, where the contracting institution and the project clearing institution are different institutions:

- Name contracting institution (MA)
- Name of project clearing institution (JS)
- Partners (names of individual Partners)
- Name of Controller - if assigned to the Beneficiary
    - o For Partners in Interreg projects:
        - Name of Beneficiary
        - Controller name
- ***Subject*** - text field used to specify the subject of the message with a maximum number of 500 characters (optional field);
- ***Correspondence category*** - a list-type field (single-choice) used to specify the category to which the message relates. Items in the list are completed based on values from the non-horizontal dictionary from the Administration (mandatory field);
- ***Content of the message*** - text field used to enter the of the content of the message with a maximum number of 30,000 characters (mandatory field).

In addition, you can add attachments to the message by selecting the ***Attach File*** button - attaching and detaching attachments to a message is described in detail in the "Attachments" section.

4.1.1. Saving of a message under the project

The message you create does not have to be sent immediately, as you can save it as a draft copy. To that end, from the buttons below the message text window, select the ***Save*** button. You will then see the message stating "*Message has been saved*" and the message will be saved in the **Draft *Copies*** tab.
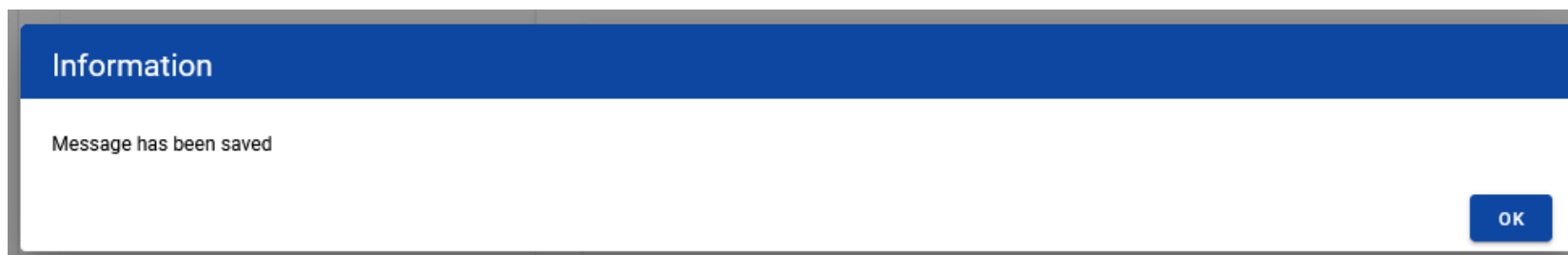
Information

Message has been saved

OK

Message confirming message saving

Saving the message results in:

- Closing the message form from which the function was initiated;
- Saving the message in the **Draft Copies** tab;
- Leaving the status of the message as "In preparation".

Note: When the **Save** button is selected, the system does not trigger validation of the message fields.

4.1.2. Sending messages under the project

If you want to send the created message immediately, select the **Send** button. The system will then check the validity of completing the fields and, in the event of validation errors, the system will present messages about the fields required, while preventing the message from being sent.

Addressee
Enter a field value Addressee

Message subject
0 / 500

Correspondence category

Message content
Enter a field value Message content
0 / 30000

SEND   SAVE   ATTACH FILE   CANCEL

Field requirement messages

On the other hand, if everything is in order, the message is sent and a message "*Message has been sent"* will appear on the screen*.*
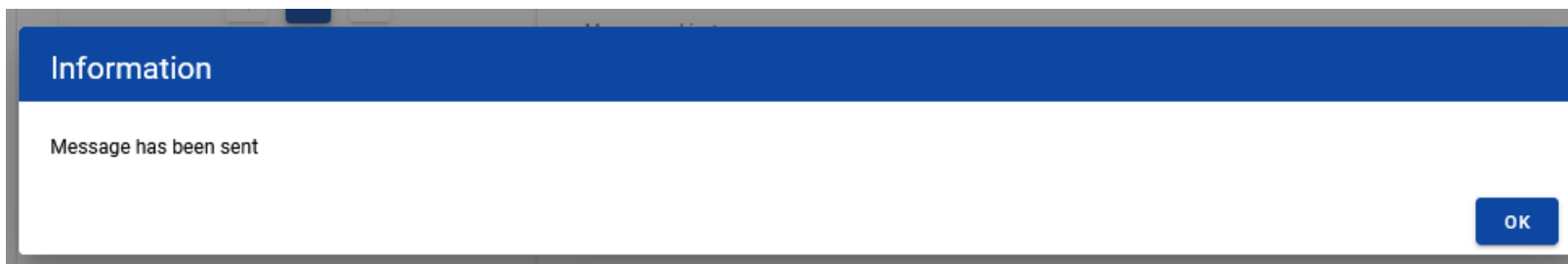
Message confirming sending the message

Sending the message results in:

- Closing the message form from which the function was initiated;
- Saving the message in the **Sent** tab;
- Change in the message status from "In preparation" to "Sent";
- Blocking the possibility to edit messages (with the exception of detaching the attachments);
- Sending an email notification to the addressee informing that a new message has been received in the system.

4.1.3. Cancelling the creation of a message under the project

You can also cancel the creation of a new message, thereby resigning from both its sending and its saving. To that end, select the **Cancel** button from the buttons below the message content window. Consequently, the system will display a message *"The data has not been saved and will be lost. Are you sure you want to leave the form*?", warning of a possibility of losing the data after leaving the message creation form.
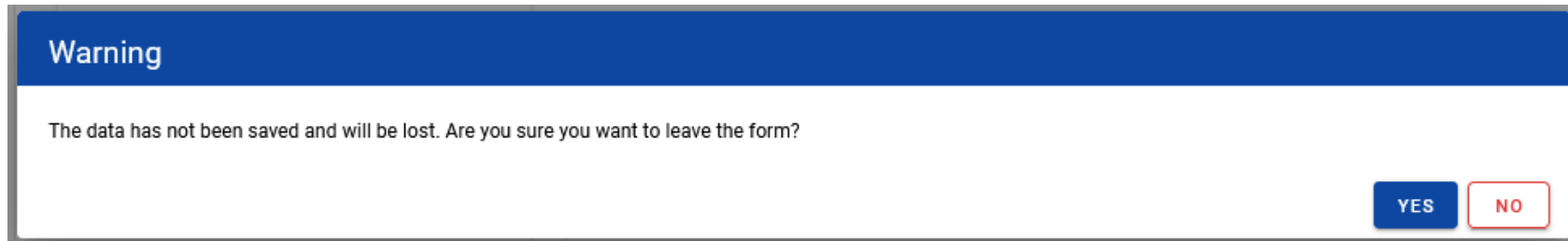
Message creation cancellation message

Cancelling of the message results in:

- Closing the message form from which the function was initiated;
- Losing the data entered in the message.

5. Attachments

If you create a message, you can link a file/ files to the unsent message. To that end, select the **Attach file** button located below the content window of the message you are creating/modifying. The **Attachments** window will then appear on the screen, allowing you to:

1) Link a file that already exists in the system (the **Documentation** tab);

2) Adding and linking a new file from the local drive that is not yet entered in the system (the **Local Disk** tab).

In the case of project messages, the **Documentation** tab is displayed by default in the **Attachments** window.

Added attachments are presented within the message in the "Attachments" section, as collapsed tiles. You can select the number of attachments displayed on the page. To that end, click the "Items per page" field and select a number from the list that reflects how many attachments will be displayed on the page.

List of attachments

Moreover, you have the option of sorting (with the additional option of specifying the ascending or descending order) and filtering the list of displayed attachments by specific criteria. When filtering, you must first indicate the field you want to filter from the drop-down list, then specify the condition (e.g. equal, contains, larger, smaller) and indicate the value by which you want to search.

The filtering and sorting options for the list of Attachments are as follows:

FILTERING PARAMETERS					
Field name	Condition: equal to	Condition: contains	Condition: smaller	Condition: greater	Field type
Attachment name	+	+	-	-	text
File name	+	+	-	-	text

Attachment type	-	+	-	-	list (multiple choice)
Who added (login)	+	+	-	-	text
Date added	+	-	+	+	calendar
Made available for partners	+	-	-	-	slider: YES/ NO
Visible for Beneficiary	+	-	-	-	slider: YES/ NO
Owner	+	+	-	-	text

SORTING PARAMETERS	
Field name:	Attachment name, File name, Attachment type, File size , Made available for partners, Visible for beneficiary

Note: In case of text fields, the search will take place on a case-insensitive basis. When the attachment tile is expanded, the system presents information divided into three sections with fields, respectively:

- Main part
    - Name of attachment
    - File name
    - Attachment format
- Particular Information part:
    - Abbreviation
    - Owner
    - Made available for partners
    - Visible for beneficiary
    - File size
- Audit data part:
    - Who added (User) - indicating the person adding the file to the message
    - Date added

Attachment added

Note: Linking attachments with messages is not mandatory.

5.1. Linking the existing file in the system to a message

Selecting the ***Documentation*** tab results in displaying a list of files that have been added to the system, broken down into the following columns:

- File name,
- Attachment name,

- Attachment type,
- Abbreviation,
- Size.

Attachments window - Documentation tab

You have the option of sorting (with the additional option of specifying the ascending or descending order) and filtering the list of displayed of files by specific criteria. When filtering, you must first indicate the field you want to filter from the drop-down list, then specify the condition (e.g. equal, contains, larger, smaller) and indicate the value by which you want to search.

The filtering and sorting options for the fields in **Documentation** tab are as follows:
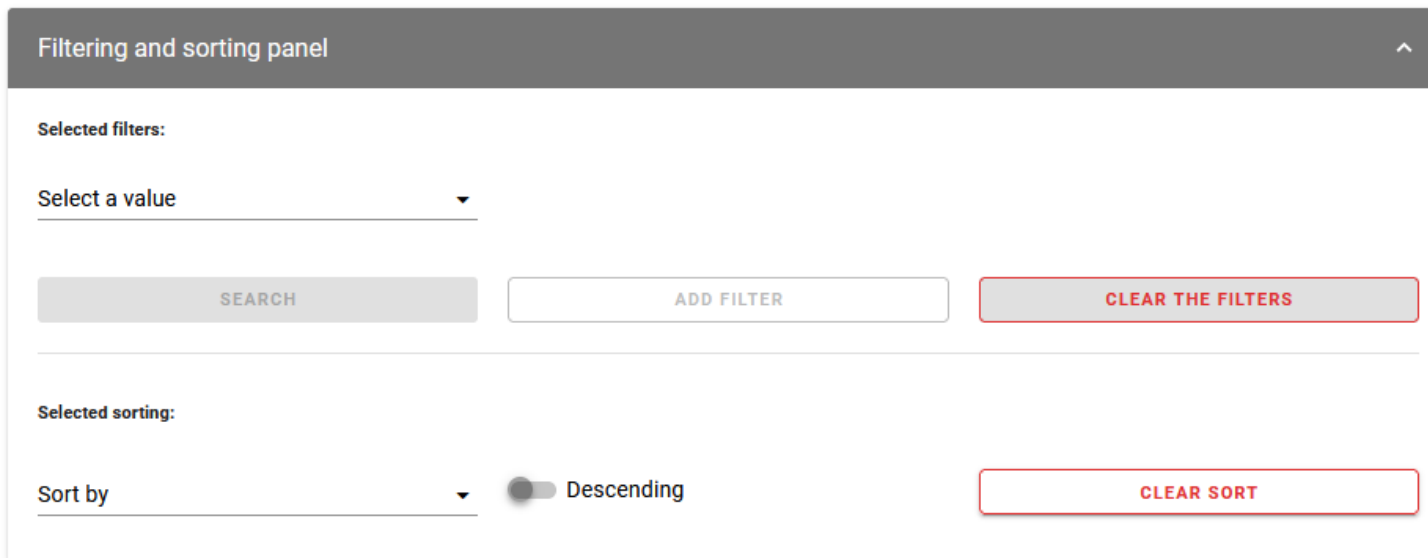
FILTERING PARAMETERS					
Field name	**Condition: equal to**	**Condition: contains**	**Condition: smaller**	**Condition: greater**	**Field type**
Attachment name	+	+	-	-	text
File name	+	+	-	-	text
Attachment type	-	+	-	-	list (multiple choice)
Size	+	+	-	-	text
Shortcut	+	+	-	-	text
Made available for partners	+	-	-	-	slider: YES/ NO
Visible for Beneficiary	+	-	-	-	slider: YES/ NO
Owner	+	+	-	-	text

SORTING PARAMETERS	
Field name:	Attachment name, File name, Attachment type, File size, Made available for partners, Visible for beneficiary, Attachment format

Note: In case of text fields, the search will take place on a case-insensitive basis.

Moreover, you can filter the list of attachments by several fields or by several separate conditions for a single field. To that end, complete the first condition and then select the **Add Filter** button that will appear once all the fields for the previous condition have been completed. If you resign from filtering by an added field, you can remove it by selecting the **Delete** button next to the specific condition. In addition, you can delete any items you have added in the filter by clicking the **Clear Filters** button.

If you have indicated all the fields by which you want to filter the list of attachments in the filtering panel, select the **Search** button which is activated when all the fields for condition one have been completed. You will only see the messages that are interesting for you.

Filtering attachments

Note: The maximum number of search restriction conditions that can be added for the filtering panel is 20.

From the list of files displayed, you can select the attachments you wish to link to the message. To that end, in the first column of the list, tick the checkbox next to the attachments you wish to add to the message. Then select the **Save** button in the bottom right-hand corner of the window, as a result of which the system will link the selected files to the message and create message links for the selected file from the system.

In addition, you can resign from adding attachments to your messages at any time. To that end, select the **Cancel** button in the bottom right-hand corner of the displayed window. Consequently, the system will close the **Attachments** window, and the data entered will be lost.

5.2. Linking a new file from the local disk to a message

Selecting the **Local Disk** tab redirects you to a screen allowing you to add a new file to the system. When adding a new file, you should complete the following attributes of the attachment:

- Name of attachment - text field;
- Attachment type;
- Visible to Beneficiaries - values Yes/No, field visible only to Institution's Employees (by default marked "Yes"). The logic for presenting attachments depending on the selected value is the same as in the Project Domain.
- Shared with partners - values Yes/No, a field visible regardless of the type of User, occurring only in projects with more than 1 partner (marked "No" by default). The logic for presenting attachments depending on the selected value is the same as in the Project Domain;

Moreover, select a file from the disk, whereby:

- The file can have xml, pdf, jpg, jpeg, png, xls, xlsx, doc, docx, xades, pades format;
- The addition of executable files is not permitted;
- The maximum size of a single file must not exceed 50Mb.

After adding the attachment, click the **Save** button in the bottom right-hand corner of the window, as a result of which the system will add a new file to the list of attachments, link the files to the message and create message links for the selected file from the system.

Attachments window - local drive tab

In addition, you can resign from adding attachments to your messages at any time. To that end, select the **Cancel** button in the bottom right-hand corner of the displayed window. As a result, the system will close the **Attachments** window.

5.3. Detaching an attachment from the message

If a message has not been sent ("In preparation" status) and has attachments linked, you can detach them. To that end, select the Attach file function again and check the attachments you wish to detach from the message.

Note: An attachment detached from a message is not automatically removed from the system, only the link of such an attachment with the message is removed.

However, once a message has been sent, only Institution Administrators or Interreg Controller Administrators of the addressee in the case of incoming messages or of the sender institution in the case of sent messages, and a User with an individual role holding the appropriate authorisation, are able to detach attachments from the message.

Detaching an attachment from a message sent will have the following results:

- Such an attachment will no longer be visible from the level of this message (neither to the sender nor to the addressee).
- There will be no information next to the message indicating that the attachment was previously attached to it.
- Next to the attachment, the information about linking the attachment with the message will no longer be presented.

6. Modification of the message

You can modify most of the attributes in a created and saved message, both in a serial correspondence and a message within a project, with the exclusion of attributes completed automatically by the system.

To start editing in the ***Draft copies*** tab, select the message to be modified from the list of messages. The content of the message will then be displayed in edit mode on the right-hand side of the list, and the ***Send***, ***Save***, ***Attach File***, ***Cancel*** buttons will appear below the text window.

Window for editing a saved message

The following fields are available for editing:

- Subject
- Correspondence category
- Content of the message

Moreover, you can introduce changes in the Addressee field. In the case of a non-serial message, the addressee field is only available for editing to:

- Beneficiary in partnership projects

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- Partner in Interreg projects
- Interreg controller (in the case of at least two partners or a Beneficiary and at least one partner)

In each message modified, you can also delete attachments or link them by selecting the **Attach File** button - linking and detaching attachments to a message is described in detail in the "Attachments" section.

Note: When the message is displayed in the **Draft Copies** tab, the other tabs are locked. On the other hand, when the displayed message is closed by saving/cancelling it, the tabs are activated. Moreover, the wish to view the next message from the **Draft copies** tab must also be confirmed by accepting the message.

6.1. Saving a modified message

You do not have to send the modified message immediately, as the system allows you to re-save it as a draft copy. To that end select the **Save** button from the buttons below the message text window. Then the system displays the "*Message has been saved*" message on the screen and the message will be saved in the **Draft Copies** tab.
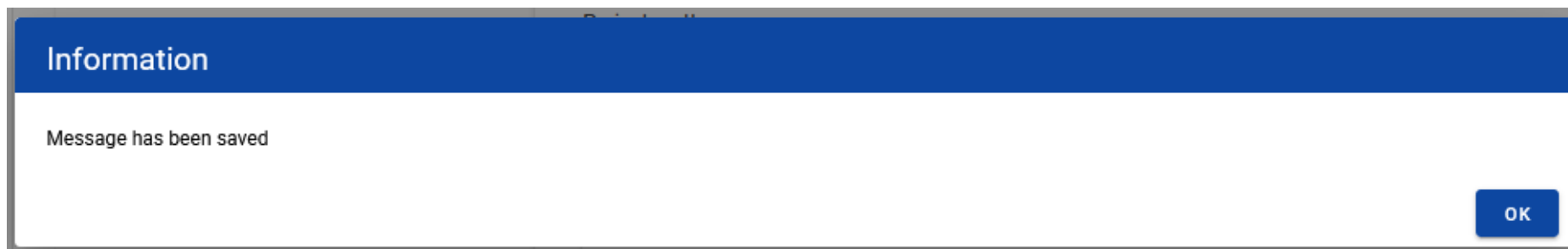
Message confirming message saving

Saving the message results in:

- Closing the message form from which the function was initiated;
- Saving the message in the **Draft Copies** tab;

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- Leaving the status of the message as "In preparation".

Note: When the *Save* button is selected, the system does not trigger validation of the message fields.

6.2. Sending a modified message

If you want to send the modified message, select the *Send* button from the buttons below the message content window. The system will then check the validity of completing the fields and, in the event of validation errors, the system will present messages about the fields required, while preventing the message from being sent.

Field requirement messages

On the other hand, if the validation is successful, the message is sent and a message "*Message has been sent*" will be displayed on the screen.
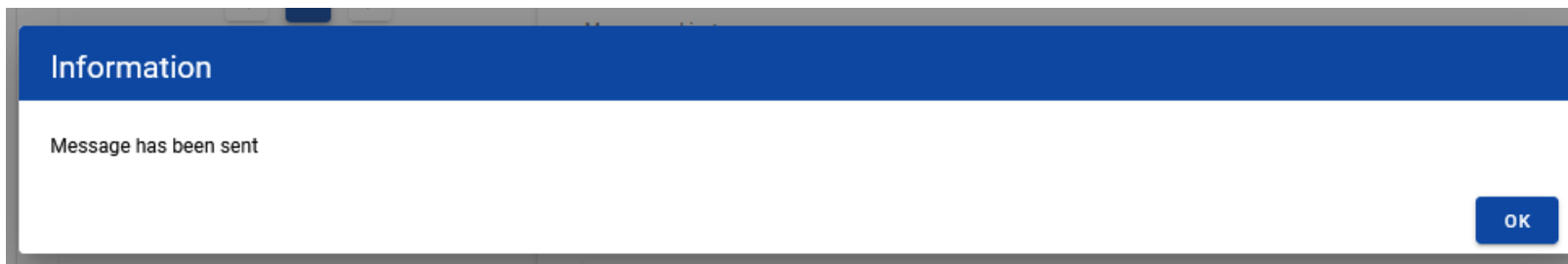
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Message confirming sending the message

Sending the message results in:

- Closing the message form from which the function was initiated;
- Saving the message in the **Sent** tab;
- Change in the message status from "In preparation" to "Sent";
- Blocking the possibility to edit messages (with the exception of detaching the attachments by administrators);
- Sending an email notification to the addressee informing that a new message has been received in the system.

6.3. Cancelling the modification of a message

You can also cancel the modification of a message, thereby resigning from both its sending and its re-saving. To that end, select the **Cancel** button from the buttons below the message content window. Consequently, the system will display a message *"The data has not been saved and will be lost. Are you sure you want to leave the form*?"*, warning of a possibility of losing the data after leaving the message creation form.
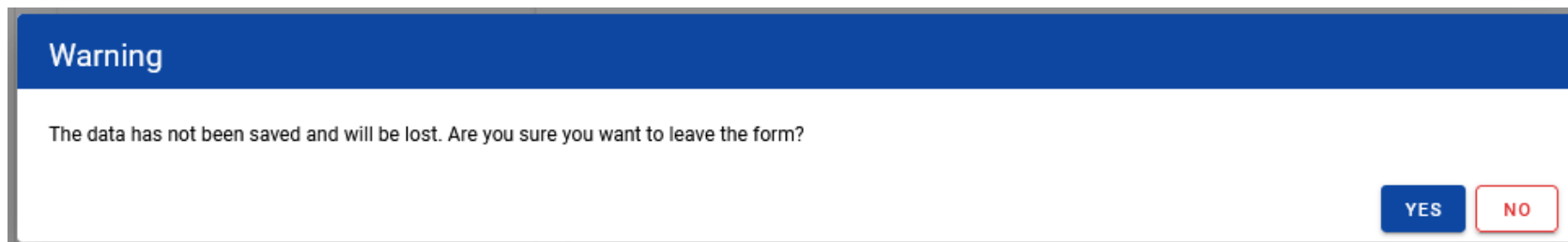
Message creation cancellation message

Cancelling of the message results in:

- Closing the form from which the function was initiated;
- Losing the data entered in the message;
- Leaving the status of the message as "In preparation".

7. Creating a response

You can reply to a message stored in the **Incoming** folder. To that end, select the message you wish to reply to from the message list and then, when the preview window appears, select the **Reply** button located in the top right-hand corner of the message window.

Creating and sending a reply is analogical to creating and sending a message in a non-serial correspondence, as described in the section "Creating a project message", except that:

- the **Subject** field is automatically completed with the value "REP:" (ODP) and the value of the "Subject" field of the aforementioned message;
- the **Correspondence Category** field assumes by default the same value as in the message to which the reply is made.

You can introduce changes to both the **Subject** and **Correspondence Category** fields. In addition, the content of the last message is visible below the reply creation window.

Addressee

Ministerstwo Funduszy i Polityki Regionalnej, Departament Współpracy Terytorialnej

82 / 500

Message subject

ODP: Findings in the payment claim

34 / 500

Correspondence category ▾

Message content

Enter a field value Message content   0 / 30000

SEND   **SAVE**   **ATTACH FILE**   CANCEL

TITLE: Findings in the payment claim
FROM:Ministerstwo Funduszy i Polityki Regionalnej, Departament Współpracy Terytorialnej

Correspondence category:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Fermentum posuere urna nec tincidunt praesent semper. Proin libero nunc consequat interdum varius sit amet. Congue quisque egestas diam in. Nascetur ridiculus mus mauris vitae ultricies. Feugiat in fermentum posuere urna nec tincidunt praesent semper feugiat. Eget dolor morbi non arcu risus quis varius quam quisque. Ultrices vitae auctor eu augue ut lectus arcu bibendum at.

Creating a response

Messages and replies are presented in the form of a "tree" showing all related messages (i.e. the original message and all messages that are replies to it and replies to those replies, etc.).
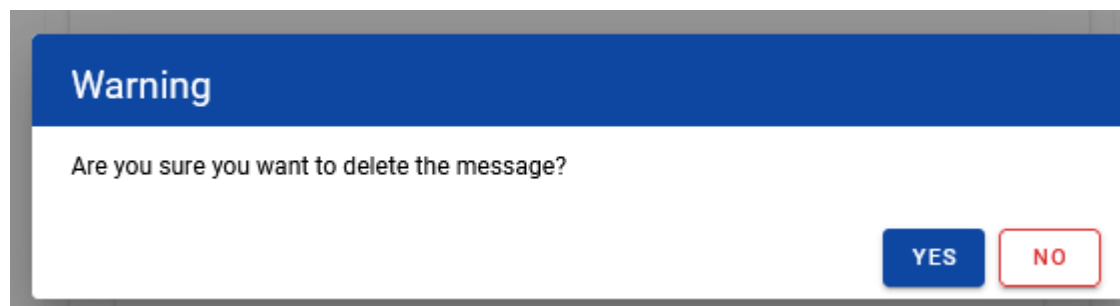
8. Deleting the message

Any User with access to the project correspondence has the option of deleting messages with the "In preparation" status. On the other hand, in the case of both sent and incoming messages, only Technical Administrators belonging to the institution which is the addressee or the sender of the message have this possibility.

To delete a message, locate it in the list and then select the three dots shown next to its subject line. A list will then be displayed with the **Delete** function available.
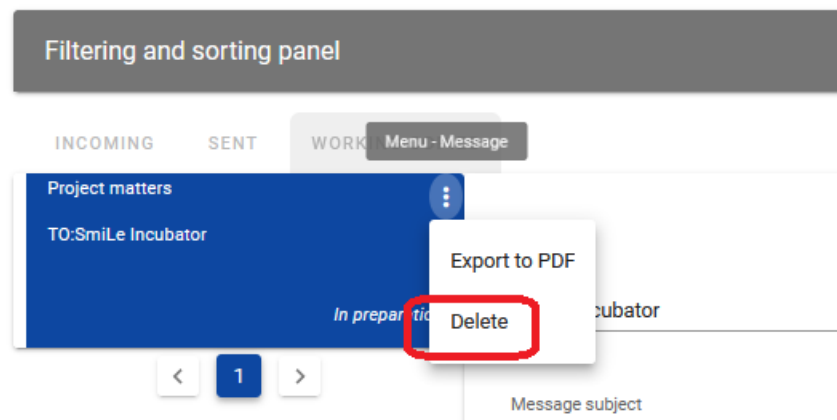
Delete function

When you select the **Delete** button in a message with the "In preparation" status, the system displays the message "*Are you sure you want to delete the message?".* You can confirm that you wish to delete the message by selecting the **YES** button or cancel the process with the **NO** button. Once the deletion has been confirmed, the system will display a message successfully completing the process stating *"The message has been deleted".* Cancelling of the process, on the other hand, will result in the return to the List of messages.

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Message for deleting the "In preparation" status messages

*Message confirming deleting of the message*

Deleting of a message with the "In preparation" status results in:

- disappearance of messages from the list of messages in the **Draft copies** folder;
- complete deletion of entered message data (also from the database);
- detaching this message from the attachments area (from the attachments area you can no longer see the attachment link to the message).

9. Exporting messages to PDF

You can export messages to the PDF file. To that end, go to the message to be exported and select the three dots shown next to the message subject. A list will then be displayed with the ***Export to PDF*** function available. Once you have selected the ***Export to PDF*** item, the system will start downloading the file.
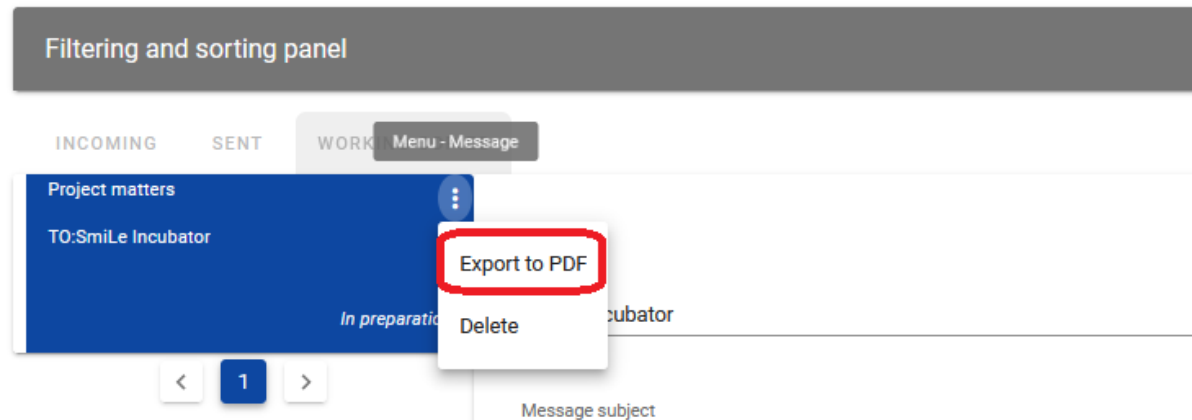
Export to pdf function

The exported file contains, in addition to the message itself:

- Information on the application from which the data was exported;
- number of pages;
- date and time when the PDF was generated;
- list of attachments;
- watermark: "Draft version" - only in messages with the "In preparation" status.

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Numer projektu: FESL.02.02-IZ.02-KH15/22

Wiadomość

Data wysłania	2022-08-11 12:56:00
Od	Urząd Marszałkowski Województwa Śląskiego
Do	Fundacja Szczęśliwa
Temat	Aktualizacja informacji
Kategoria korespondencji	Harmonogram płatności

Velit laoreet id donec ultrices tincidunt. Felis donec et odio pellentesque diam volutpat commodo sed egestas. Purus ut faucibus pulvinar elementum integer enim neque. Arcu ac tortor dignissim convallis aenean et. Nullam vehicula ipsum a arcu cursus vitae. Convallis convallis tellus id interdum velit laoreet id donec. Ipsum a arcu cursus vitae congue. Laoreet sit amet cursus sit amet dictum sit amet. Faucibus nisl tincidunt eget nullam non nisi est sit amet. Elementum tempus egestas sed sed risus pretium quam. Purus in mollis nunc sed. Nisl pretium fusce id velit ut tortor. Aliquam sem fringilla ut morbi tincidunt augue interdum. Semper viverra nam libero justo laoreet sit amet.

Pozdrawiam,
XYZ

Załączniki

1. Test załącznika.docx
2. CST2021 Korespondencja - założenia dot. uprawnień użytkowników - 27.04.2022.docx

Preview of exported message

10. Change in the message reading status

You can change the reading status of a message, located in the *Incoming* folder. To change the reading status of a message from the "unread" to "read" you should:

1) Navigate to the message for which you wish to change the status and select the three dots shown next to the message subject. A list will then be displayed with the *Mark as read* function available. After selecting the *Mark as read* item, the system will change the status of the message to "read";

or

2) From the list of messages, select the message for which you wish to change the status and then, when the preview window appears, select the *Reply* button to create a reply (following the steps described in the "Creating a reply" section). As a result of replying to the message, the system will change the status of the message to "read".

On the other hand, to change the status of a message from "read" to "unread", go to the message for which you want to change the status and select the three dots shown next to the message subject. A list will then be displayed with the *Mark as read* function available. After selecting the *Mark as read* item, the system will change the status of the message to "read".
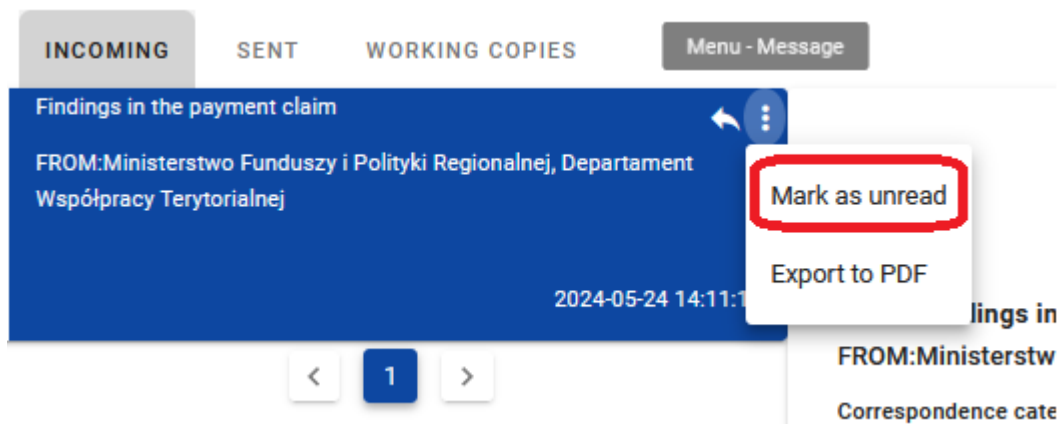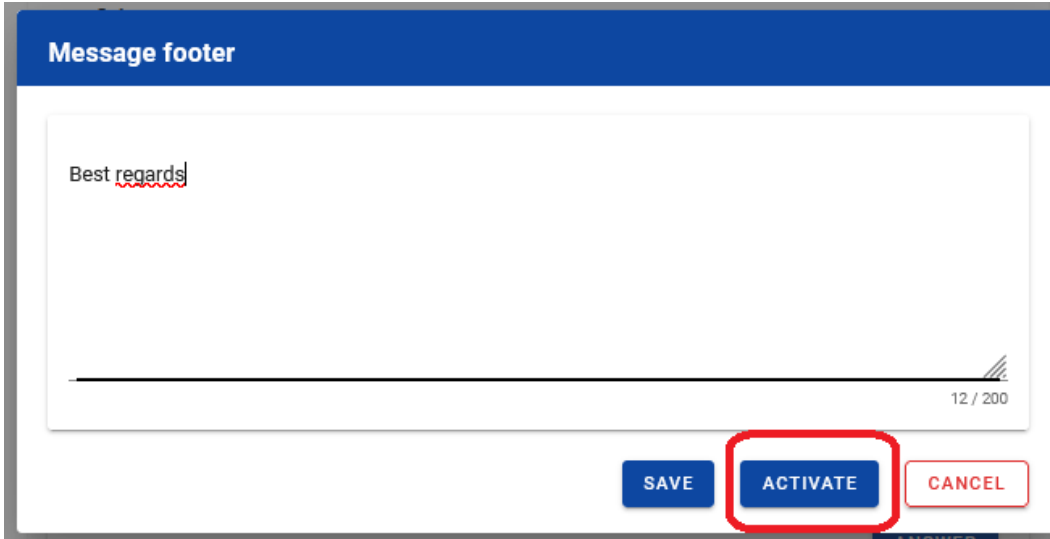
Message with the "unread" status

11. Message footer

11.1. Creating and activating a message footer

You can activate the footer, which will be automatically added each time you create messages within various projects (including the message replies you create). To that end, select the ***Manage footer*** button located above the message filtering and sorting panel. The system will then display the ***Message Footer*** window, in which the footer text must be entered.

You can resign from adding the footer at any time. To that end, select the ***Cancel*** button in the bottom right-hand corner of the displayed window. If any unsaved changes occur in the window, the system will display a message stating "*The data has not been saved and will be lost. Are you sure you want to leave the form*?". When the ***YES*** button is selected, the ***Message Footer*** window will be closed, and the data entered will be lost.

On the other hand, to save your changes and activate the footer, select **Activate**. Consequently, the system will display the message "*Message footer has been activated*" and from that moment, the system will add the footer entered to each message/reply created.
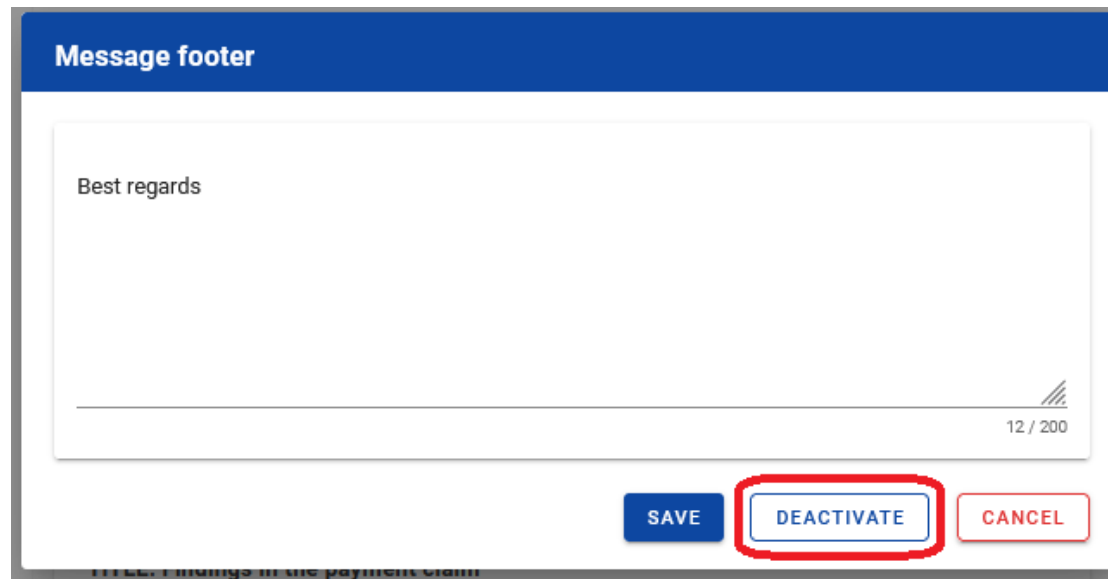

Message footer window before activation

Note: When activating a footer, you must specify its content (text) - it is not possible to activate an empty footer.

You can also activate a deactivated footer. To that end, select the **Manage footer** button, located below the message filtering and sorting panel (in both serial and project correspondence). The system will then display the **Message Footer** window by default with the same content as entered before the footer was deactivated (unless it has been changed and saved in the meantime, without activation). To activate the footer, select the **Activate** button. Confirming the activation of the footer, the system will display the message "*Message footer has been activated*" and from that moment, the system will add the footer entered to each message/reply created.

11.2. Deactivating the message footer

You can deactivate the active message footer. To that end, select the ***Manage footer*** button located above the message filtering and sorting panel. The system will then display the ***Message Footer*** window, in which the message footer text is entered. To deactivate the footer, select the **Deactivate** button. As a result, the system will display the message "*The message footer has been deactivated*" and from then on, the system will not add the footer to newly created messages/replies, while the footer will not disappear from messages that were created before deactivation.


Message footer window before deactivation

11.3. Modification of the message footer

You can modify the content of the message footer, regardless of its activity status. To that end, select the ***Manage footer*** button located above the message filtering and sorting panel. The system will then display the ***Message Footer*** window, in which the

message footer text will be entered. In the window displayed, make your changes and then select the **Save** button. As a result, the system will save the data entered and display a message stating "*Changes have been saved*".
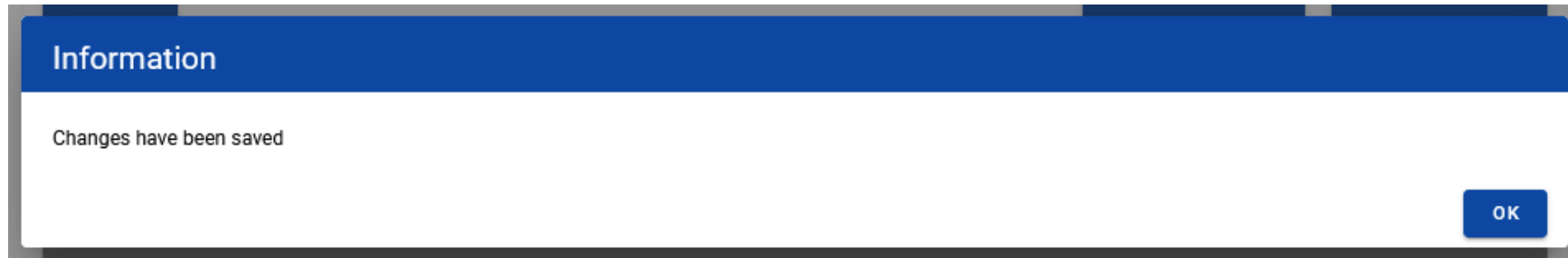
Confirmation of saving changes in the message footer

Note: Changing the footer content does not affect footers introduced in messages previously created.