Proposal

Submission Service

User Manual

28/05/2019

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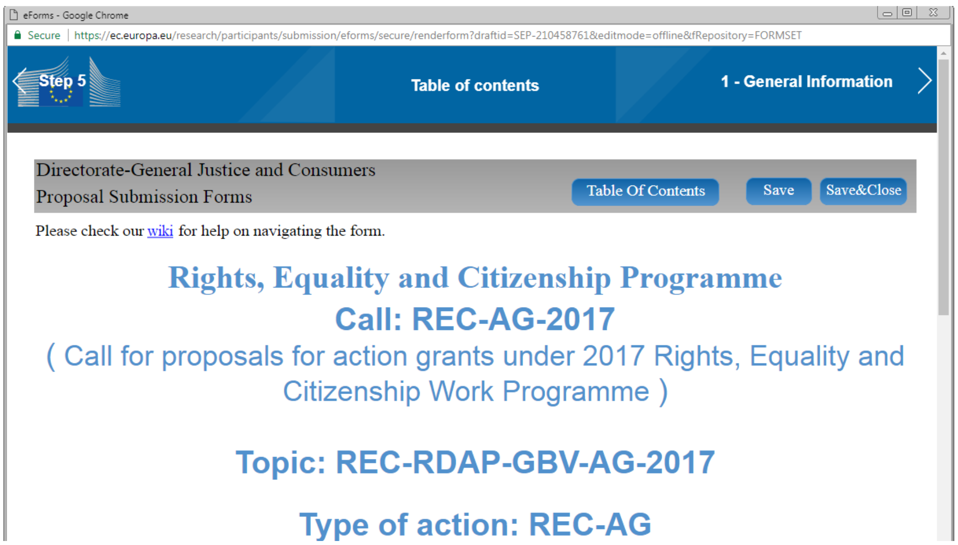
CHAPTER 1: INTRODUCTION

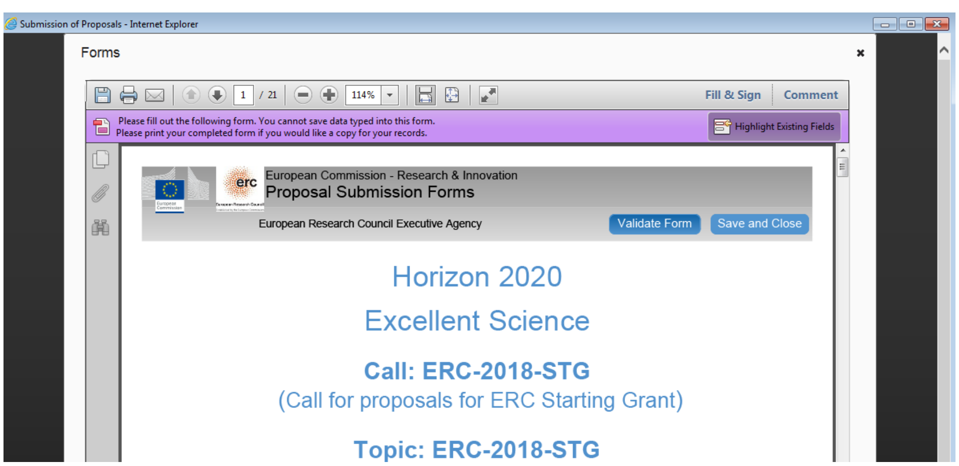
The European Commission's Online Submission Service (hereinafter referred to as 'Submission Service') is designed to automate the documentation submission process for organisations and individuals interested in submitting proposals for funding under various EC program initiatives.

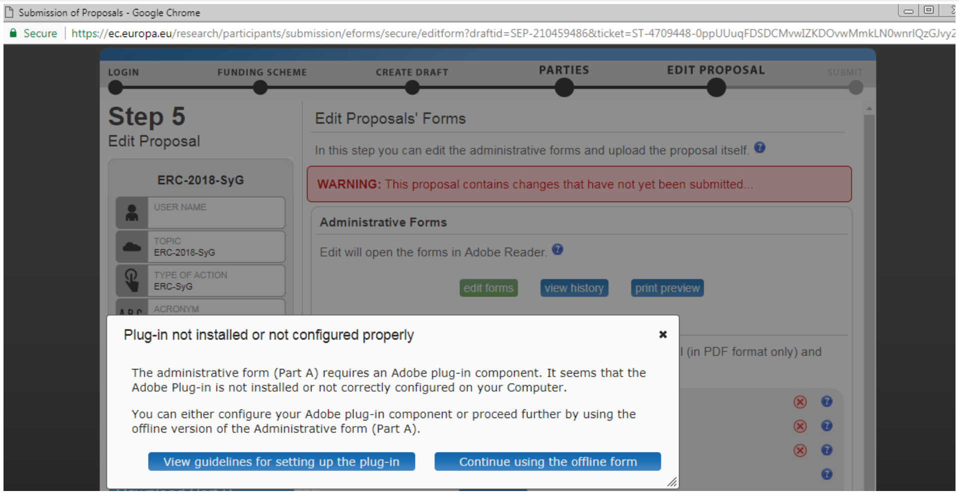
Document Scope

The purpose of the Proposal Submission Guide is to describe how Participants can prepare and submit a Proposal. Please note that there are two different Submission system technologies. This guide is applicable to calls which use a web-based administrative form. In Step 5 of the submission system, click on the **edit form** button. If the administrative looks like a webpage (i.e., you can read "eForms" on the top of the emerging window, like the one below), this guide is applicable to you.



On the contrary, if the form looks like an embedded pdf form, or you get the message requesting to open it with Adobe (see second image below), it means that the call uses a pdf-based administrative form. Please, use this other version of the submission manual, instead.





Document Structure

The following sections of information are available:

- *CHAPTER 1: INTRODUCTION* provides information and links to the relevant resources, a high level description of what you will need to prepare prior to your submission, a list of user actions, and contact and support information.

- *CHAPTER 2: SUBMITTING YOUR PROPOSAL THROUGH THE ONLINE SUBMISSION SYSTEM* provides step-by-step guidance on how to submit your information using the Commission's online system.

- *CHAPTER 3: REFERENCE GUIDE TO SCREENS, ROLES & ACCESS TO USER ACTIONS* describes the screens and the basic tasks you can perform using the system, as well as a description of the user roles in the system.

- *APPENDIX A: COMPATIBILITY & SYSTEM CONFIGURATION* provides general information on recommended system configuration to be used for the submission of your proposal.

- *APPENDIX B: REGISTRATION* provides instructions on how to register a new account with the European Commission Authentication Service (EU Login).

- The *GLOSSARY* section contains descriptions of the most common specialised terms that you might come upon in this document.

The Proposal Submission Process

Learning about the EC Grant Proposal Process

It is very important that you familiarize yourself with the overall research and innovation grant process by first consulting the HOW TO PARTICIPATE page on the Funding & Tenders Portal. There you will find a wealth of information including the Online Manual and numerous Reference Documents, the Participant register, and a comprehensive set of support documentation. Please read through all these resources prior to starting your Submission process.

Proposal Submission Preparatory Checklist

In preparation for your online application submission process, you must go through the following steps:

1. Decide on the funding opportunity that you want to apply for. Funding Opportunities are categorised as Work Programmes, Calls, Topics and Types of Actions. Programmes are listed under the Horizon 2020 title.
2. Select your Partners. Most calls require a consortium of three organisations (i.e. participants). Relevant information can be found on the Funding & Tenders Portal.
3. Register as a user in the European Commission Authentication Service (EU Login). For instructions also see Appendix B at the end of this document.
4. Your organisation and your Partner organisations must register in the Participant register through the Funding & Tenders Portal and receive a Participant Identification Code (PIC). Additional information is available in the Participant register Manual.

Quick Steps to the Online Submission Process

The following basic tasks summarize in the online submission process. Refer to Chapter 2 for the detailed step-by-step procedures.

1. Login to the Funding & Tenders Portal and Select your Topic
2. Create a draft for your proposal
3. Manage Your Related Parties (i.e. proposal consortium). Your *Partners* will be invited to the process by the system.
4. Edit the proposal draft form, download templates, complete all required information. Engage your partners to maintain their organization contacts and the details in the corresponding sections of the proposal form Part A
5. Upload Part B and the rest of annex files and submit your proposal.
6. Following submission, you can re-edit, download or withdraw your proposal until closure date is reached.

Accessing Your Draft and Submitted Proposals

You can access your saved proposal drafts as well as your submitted proposals at any time, from the My Proposals page in the Funding & Tenders Portal (you must be logged in). Alternatively, you can access your proposals from the My Organisations page in the Funding & Tenders Portal selecting '**View Proposals**' from the action drop-down menu next to your organisation name.

Contact and Support

For questions on any aspect of the research funding instruments and the EU Research Framework Programmes, including participant registration and data updates, please refer to the *Research Enquiry Service and Participant Validation*.

For any IT-related problems that you might experience with the Submission system, please contact the IT Helpdesk using the form below, and selecting the domain '**submission of proposals**':

IT Helpdesk contact form in the Funding & Tenders Portal.

Once you have started the submission process, additional contact information is available at the different screens of the wizard.

CHAPTER 2: SUBMITTING YOUR PROPOSAL THROUGH THE ONLINE SUBMISSION SERVICE WIZARD

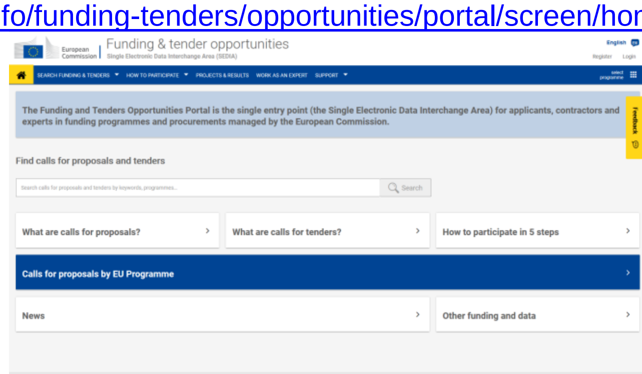
Once you have your EU Login username and password, your PIC and your Partners' PICs, you can start the submission process by logging in to the Funding & Tenders Portal and using the European Commission online Submission Service Wizard.

The submission process consists of 5 differentiated steps. Please, see below the different actions to be taken for each one of these steps.

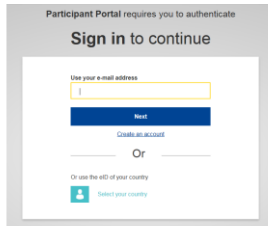
Steps 1 and 2: Log In & Select Your Topic

To log in, perform the following steps:

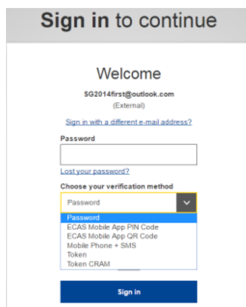
1. Go to the Funding & Tenders Portal (F&T Portal): https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home



2. Click the **Login** button. You will be prompted to authenticate through the **Sign in** screen:



3. Enter your EU Login (i.e. your registered email address, check [APPENDIX B: EU LOGIN REGISTRATION]() if you do not have an EU Login yet). Click **Next.**



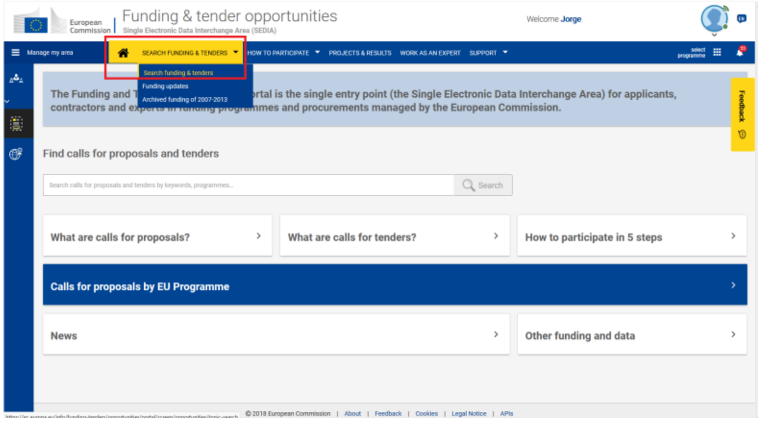
4. Enter your password; and then click the **Sign in** button (please note, "Password" is the authentication method by default, but under **Chose your verification method**, you will have the possibility to select different methods to authenticate. Please check [How to authenticate with EU Login]() to learn more).

To select a call topic in the Funding & Tenders Portal, perform the following steps:

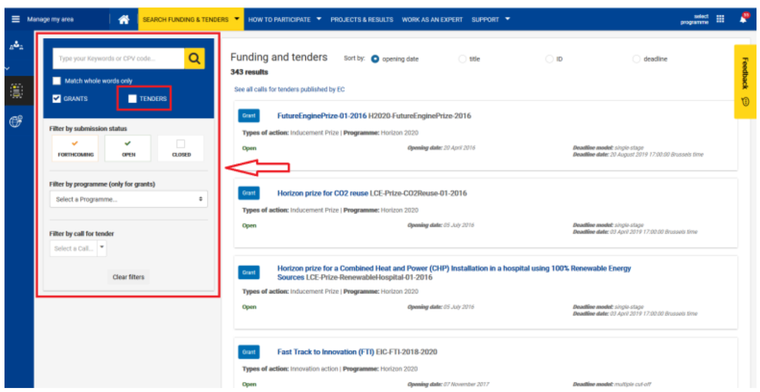
1. Once logged in to the Portal, you will need to select the Call Topic for which you will submit your proposal.

> **Note:** A Programme comprises many Calls and each Call can have one or more Topics. A submitted proposal is always for one Topic.

2. Click on **Search funding & tenders**.

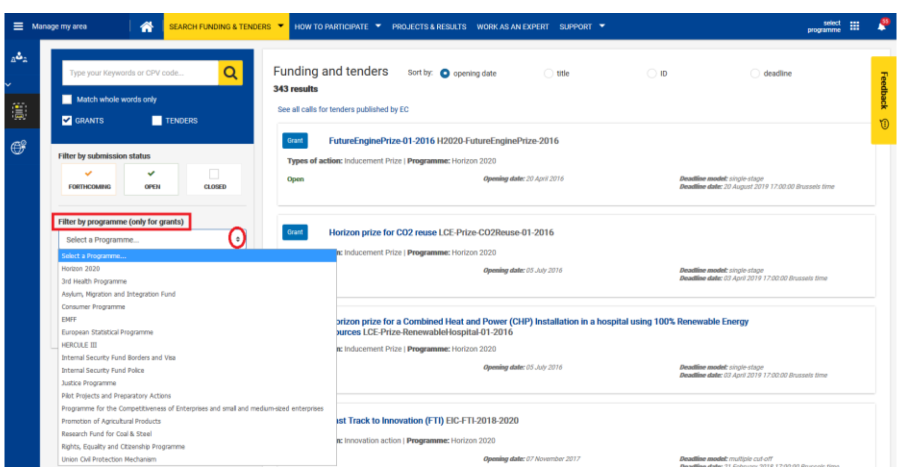


3. Filters are displayed on the left side, between the elements of Manage my area and the results, which are displayed on the right side.
   First, untick the **Tenders** box

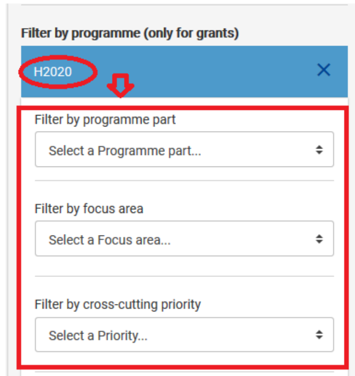


4. Then use the different filters. You can use one filter or combine several ones. This is a description of the different available filters:

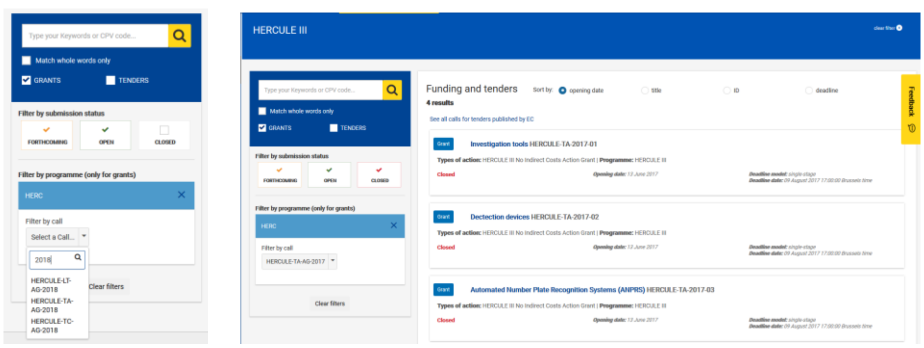
   Programme filter. Select a specific programme from the list (only one programme can be selected for each search).



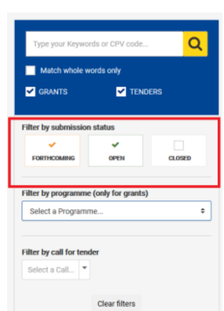
Some programmes, such as H2020, can contain further filtering options.



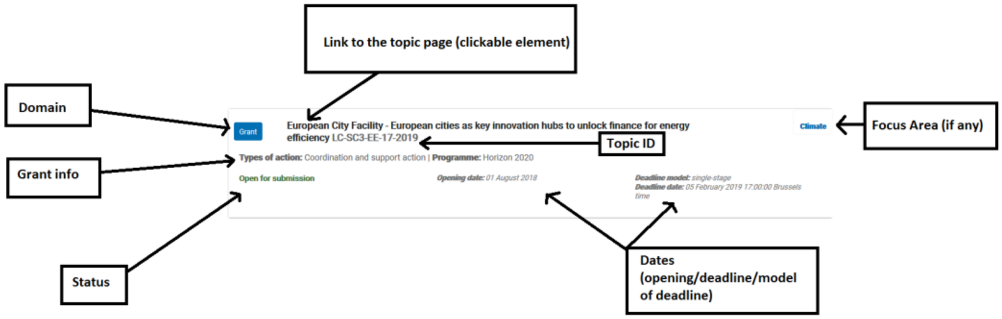
Other programmes do not contain any further filtering options, but whenever a programme has been selected, a new field appears (**Filter by Call**) where you can select by Call. Either scroll down in the list of calls or type part of the topic ID to set up the filter. The results on the right side of the screen show the Topics.



Status. To filter the results by status, tick the corresponding status under **Filter by submission status**. By default, **forthcoming** and **open** are already selected. A tick means that the status is included in the search. Click on it to select or unselect it.



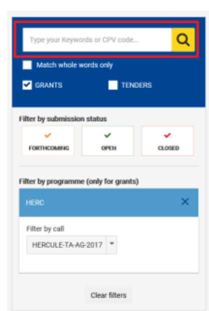
Text search. To search by a key word, type a relevant word in the box on the top of the **Filter menu** and click on the magnifier icon, or hit **Enter** in your keyboard, to perform the search. The results are shown as 'topic cards' on the right of the screen, which are overviews of each topic. Check this example where the different elements of topic cards are outlined:



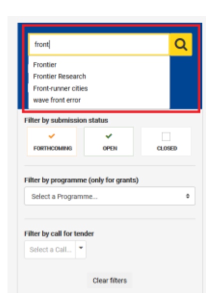
The input provided in the search box looks for two different types of matches.

- Matches for any text appearing in the topic card
- Matches for keywords.

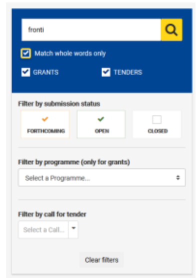
CPV code refers to keywords in the context of tenders. In the domain of funding opportunities, we use keywords.



When you start typing, a list of keywords matching what being typed will display, scroll down in the list to locate the exact keyword. These suggestions correspond only to keywords, not to any existing text in the topic card.



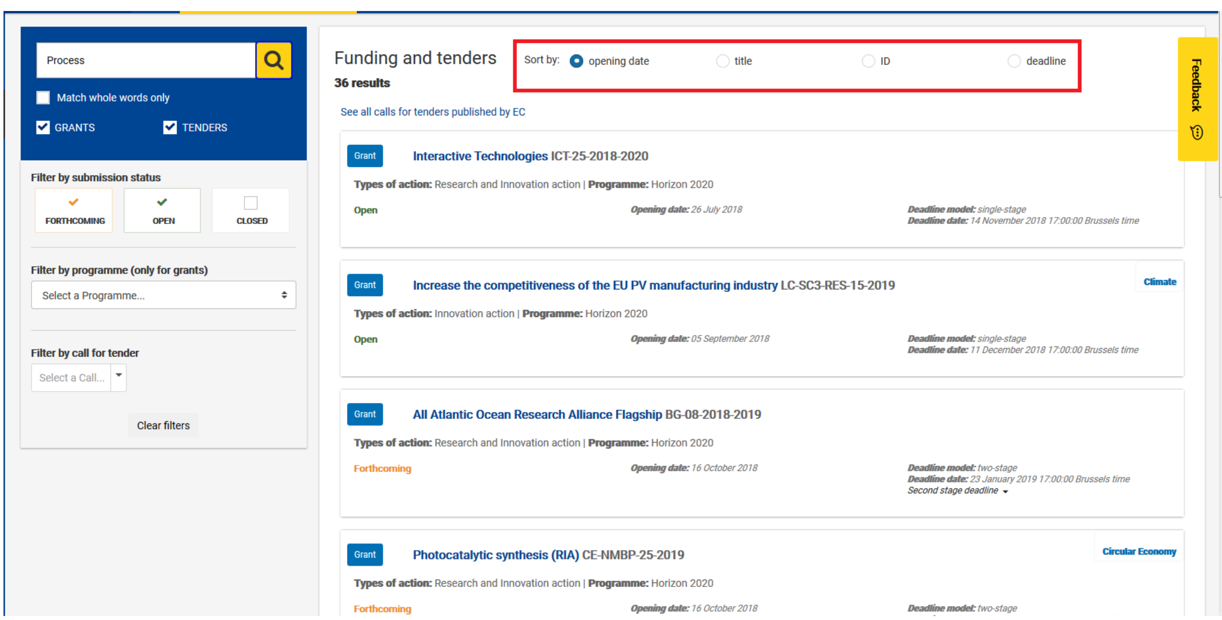
Please mind the **Match whole words only** checkbox. If ticked, it means that the results will exclude all potential matches which do not contain the exact word you typed.



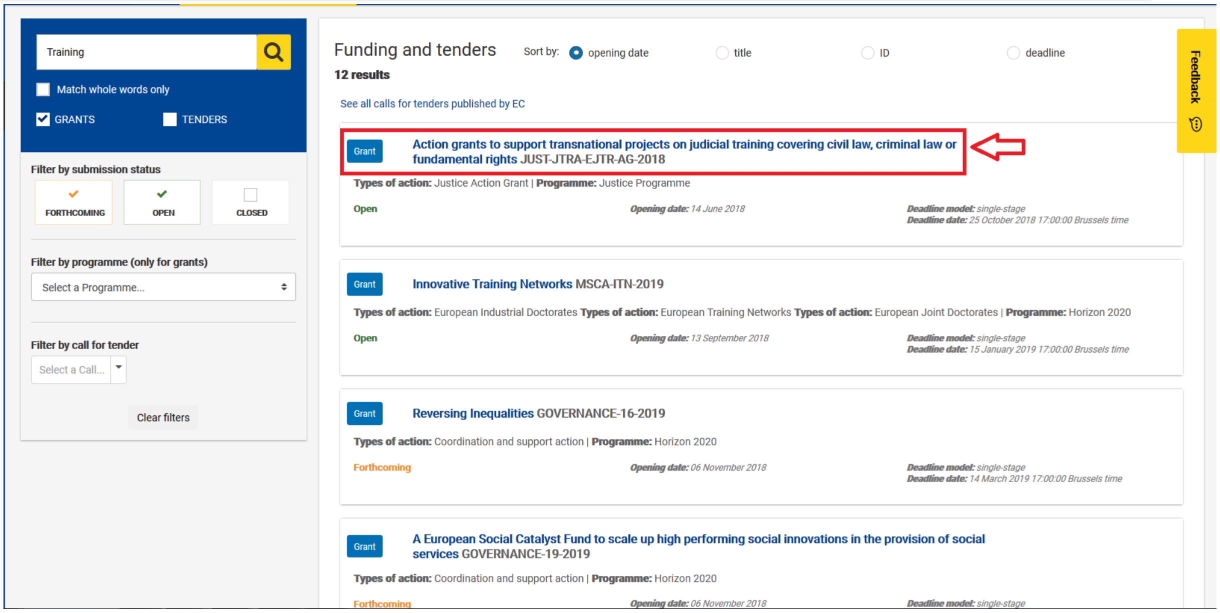
When you do not tick this checkbox, however, all topics containing keywords and text in the topic card which partially match what you typed will be given as results (i.e., in the case of "fronti" above the results would include "frontier" and "frontier research" keywords if you do not tick "**match whole words only**").

Also, please note that this field can be used to search not only on keywords, but on the text of the call page. Therefore, if you know the topic ID or the topic name, you can type it directly in the box without the need to select a programme first.

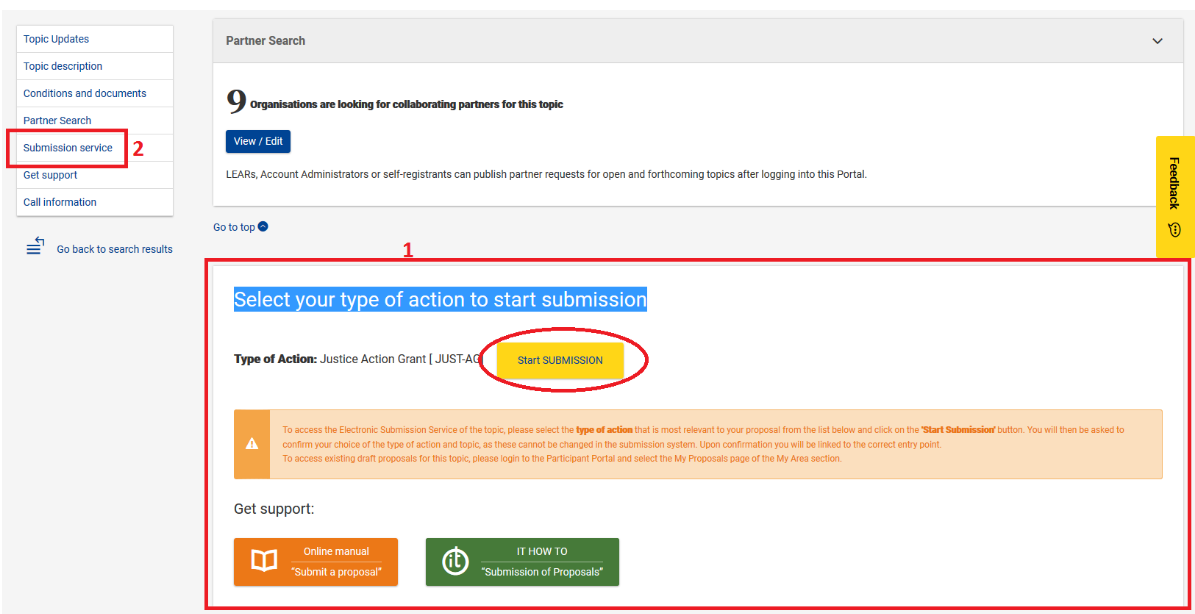
5. When you have obtained a list of results, you can use the **sort by** options on the top to display them by opening date, title, ID or deadline. By default, results are displayed by opening date.



6. Click on the Topic title to access the call description page.

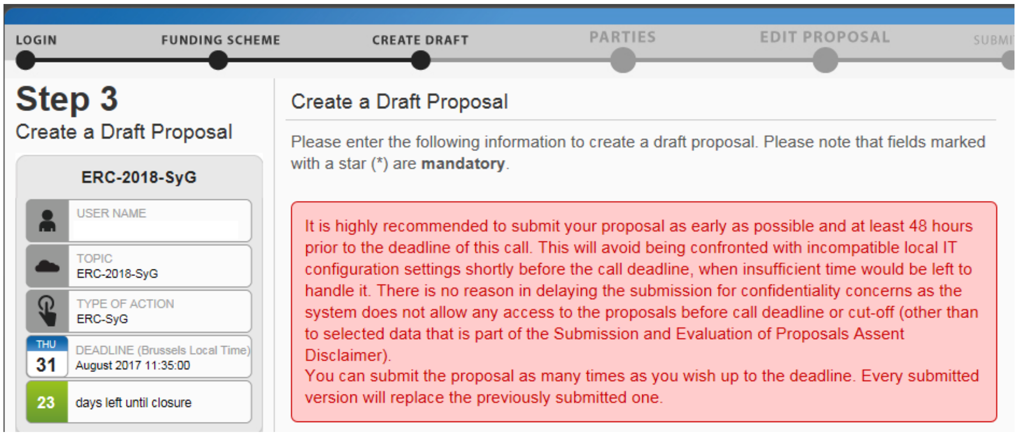


7. Either scroll down to the "Select your type of action to start submission" in the call page (1), or select Submission Service in the table of contents on the left (2). Then click on the **Start Submission** button next to the selected type of action.



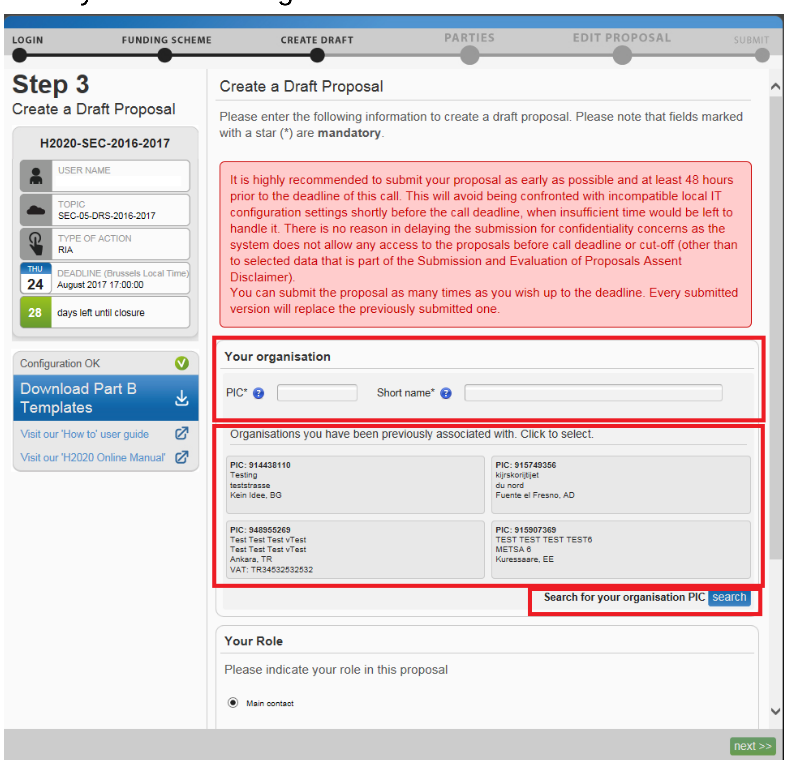
Step 3: Create a Draft of your Proposal

You are now in the [Online Submission Service wizard.](#) Carry out the following steps to create your call proposal. Please note, proposals coordinators are advised to submit their proposals at least 48 hours before call closure.

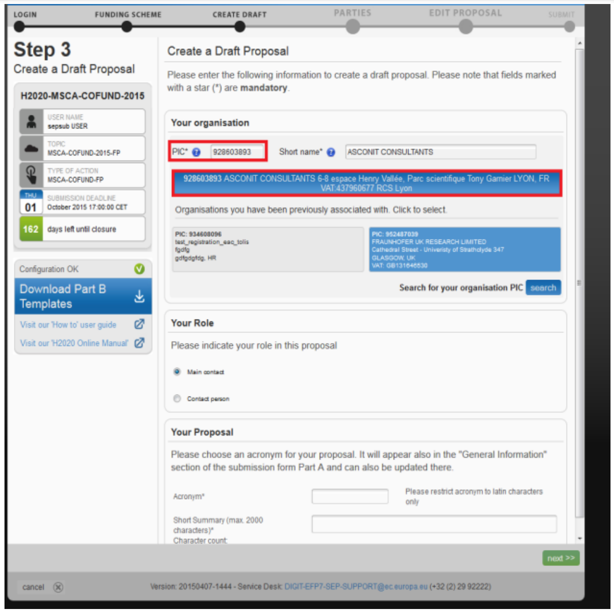


You can resubmit your proposal if needed until the closure of the call. Once the Call is closed, the last submitted version will be the one being evaluated.

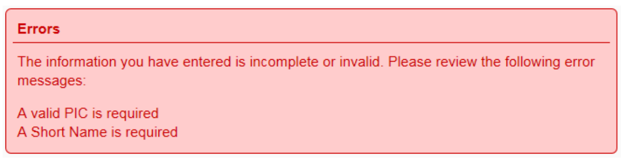
1. Enter your organisation's PIC. If you do not have the full PIC number, you can search by name or select from a previously associated organisation.



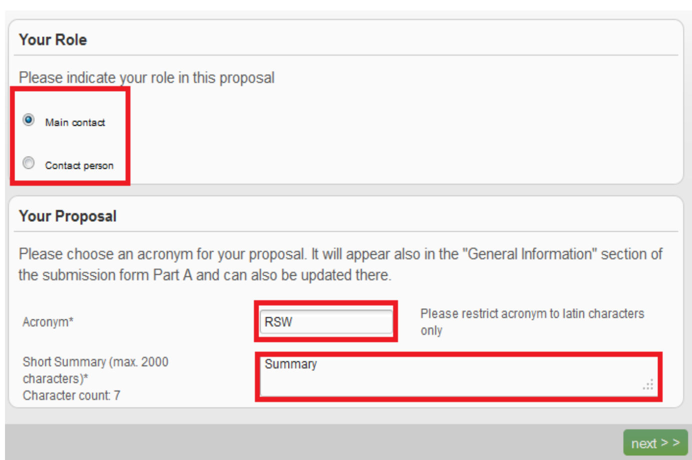
Entering the ***PIC*** will automatically populate the **Short name** field and highlight the address, as shown in the picture below.



Note: If the entered PIC is incorrect, the following error message appears:



2. Select your role: **Main contact** or **Contact person**:



You would typically select the top-level role (**Main contact** for most calls) for the Proposal Coordinator organisation during the initial proposal draft creation. If you select the **Contact person** role (or another role if the call uses specific roles), make sure to add the top-level role (**Main contact**) in the next steps **before you submit your proposal**.

Note: For more information about roles in the system, see section *Roles, Proposal Coordinator, Partner and Contact Person* at the beginning of chapter 3.

IMPORTANT: Most calls use the standard **Main contact** and **Contact person** roles for the Proposal Coordinator organisation. However, some calls (e.g. *H2020-MSCA-IF-2014* and *ERC-2014*) may require more specific roles, such as **Principal Investigator**, **Main Host Institution Contact**, **Researcher**, **Supervisor**, **Applicant**, etc. Calls of this type are pre-configured accordingly and their proposal submission forms contain special sections to address the specific roles and the respective data as needed. Likewise, the Proposal Submission Wizard for these calls will display the respective role options, as configured for each call.

3. Fill in the **Acronym** field. Acronyms can be changed later on by the proposal coordinator, by editing the Administrative form in part A (see Step 5 below), in the section A1 'content' within the form.

4. Fill in the **Summary** field.

5. Click on 
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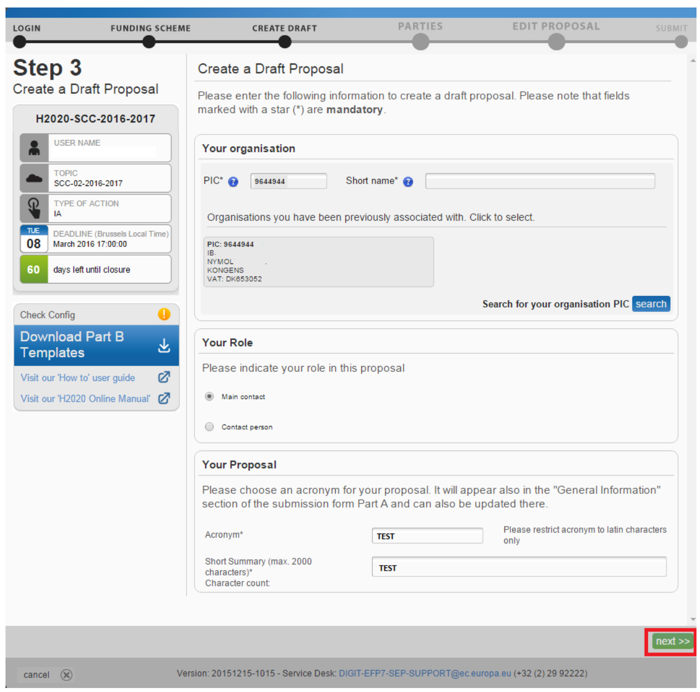
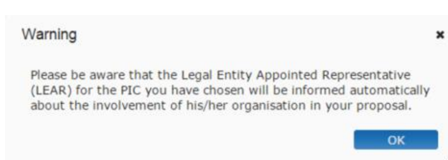
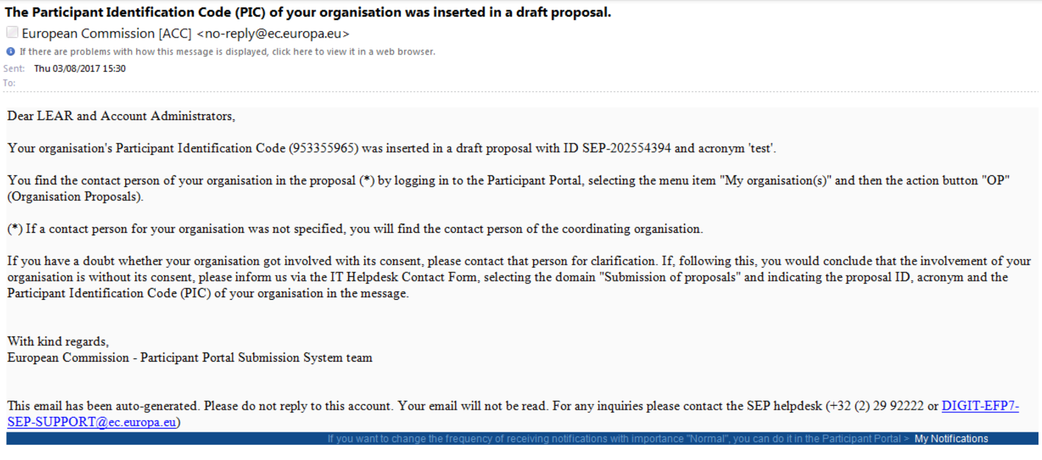


Note: When you select your organization and it is a validated PIC, this action will be communicated to the LEAR or/and Account Administrator via an email sent automatically to them. The same applies when removing a validated organization from a proposal. The following warning message will be shown when selecting a validated PIC:




The Participant Identification Code (PIC) of your organisation was inserted in a draft proposal.

European Commission [ACC] <no-reply@ec.europa.eu>

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 03/08/2017 15:30

To:

Dear LEAR and Account Administrators,

Your organisation's Participant Identification Code (953355965) was inserted in a draft proposal with ID SEP-202554394 and acronym 'test'.

You find the contact person of your organisation in the proposal (*) by logging in to the Participant Portal, selecting the menu item "My organisation(s)" and then the action button "OP" (Organisation Proposals).

(*) If a contact person for your organisation was not specified, you will find the contact person of the coordinating organisation.

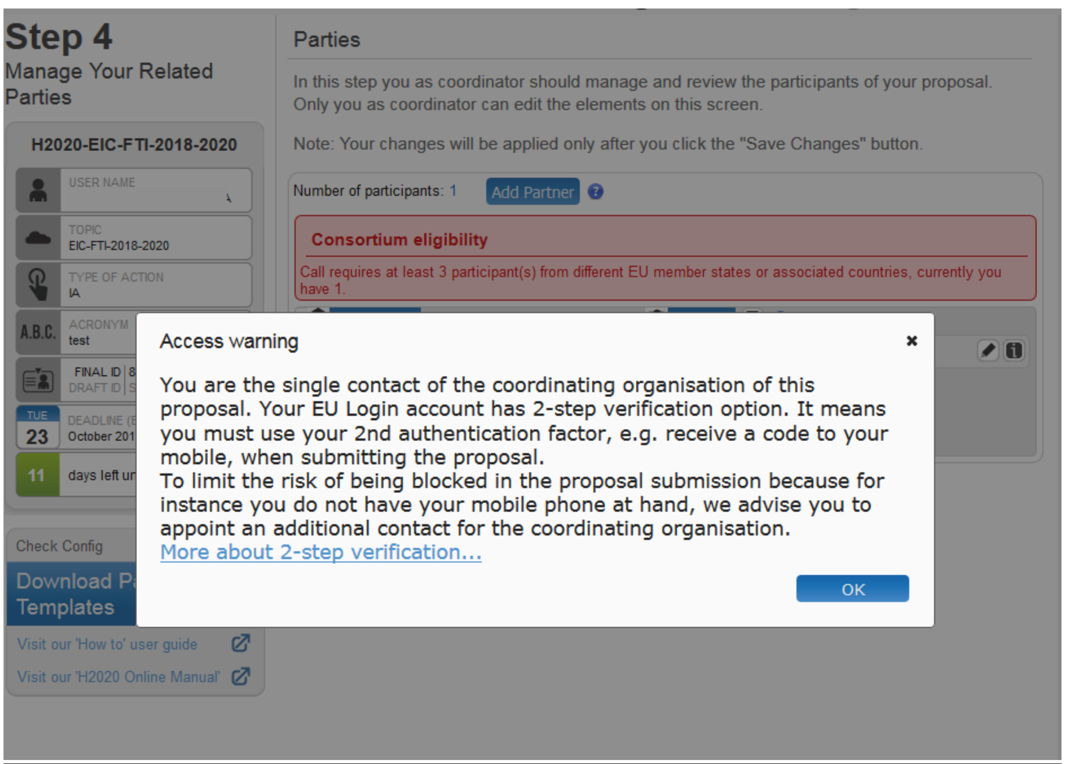
If you have a doubt whether your organisation got involved with its consent, please contact that person for clarification. If, following this, you would conclude that the involvement of your organisation is without its consent, please inform us via the IT Helpdesk Contact Form, selecting the domain "Submission of proposals" and indicating the proposal ID, acronym and the Participant Identification Code (PIC) of your organisation in the message.

With kind regards,
European Commission - Participant Portal Submission System team

This email has been auto-generated. Please do not reply to this account. Your email will not be read. For any inquiries please contact the SEP helpdesk (+32 (2) 29 92222 or DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu)

If you want to change the frequency of receiving notifications with importance "Normal", you can do it in the Participant Portal > My Notifications

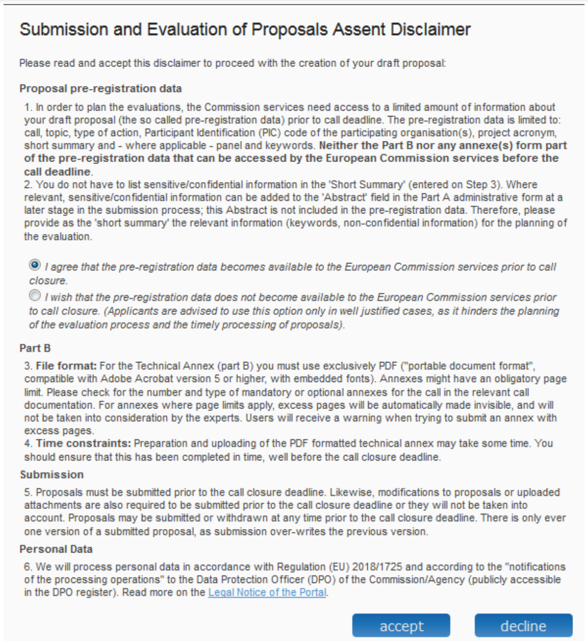
Also, if you have enabled the 2-step verification (see more details here: https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/2-step+verification+in+Funding+and+Tenders+Portal), you are strongly advised to appoint an additional contact for your organization to prevent being blocked in the proposal submission due to lack of your device to perform the second step of the verification.



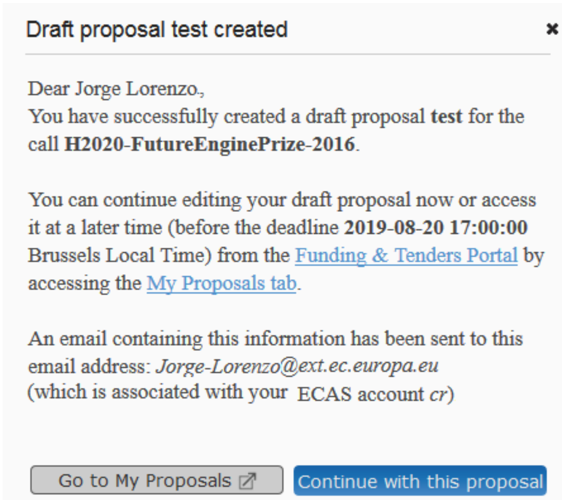
This warning will be shown always in step 4 if you are the only contact left for the coordinating organization and you enabled the 2-step verification in the security settings of the portal.

6. After clicking on **next**, you will be presented with the following **Disclaimer.** To **accept** click on accept and proceed.

   Click on decline to decline and to cancel the proposal submission.



7. The following message confirms that your draft proposal has been created, and your draft will be given a temporary Proposal ID. You will also receive a confirmation email.



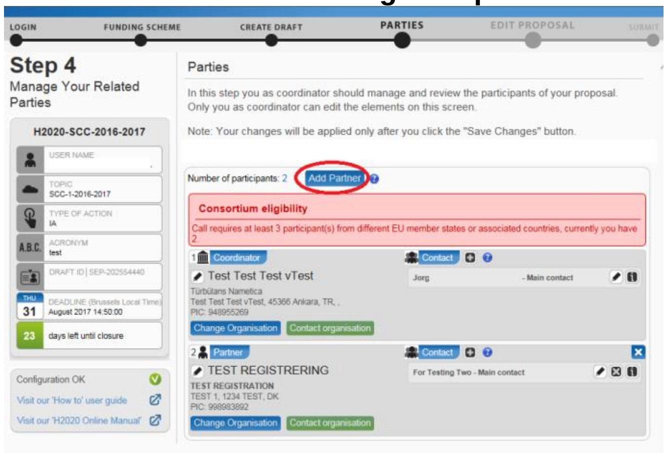
8. Click [Continue with this proposal] to proceed to the next step.

   To postpone this action for a later time and return to your list of proposals in the Funding & Tenders Portal, click on [Go to My Proposals].

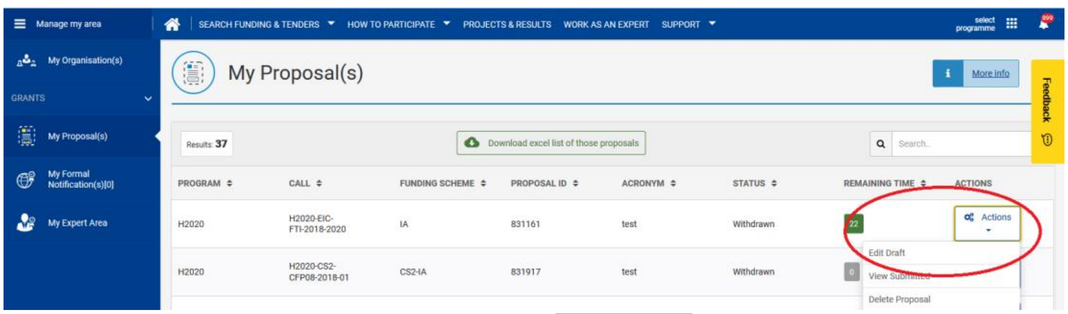
Step 4: Manage Your Related Parties and/or Edit Contact Details

In this step you can add, remove, and manage additional partner organisations and their contact persons (roles). You can also edit the contact person's details of the main organisation.

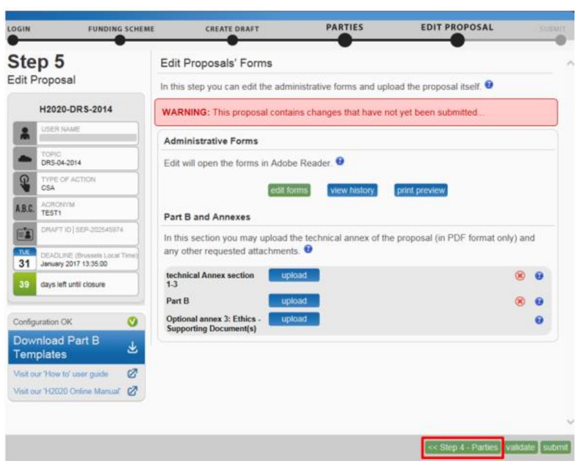
1. In order to manage your related Parties, click **Continue with the proposal** after **Step 3.** You will see the **Step 4 – Manage Your Related Parties** screen, similar to the following one. Click on **Add Partner** button to **add or change the partners for the proposal**:



Alternatively, you can also access this step from the list of your proposals from the Funding & Tenders Portal, click on the **Actions** button next to the proposal and select **Edit Draft**:



Once you are in the proposal, you will see the << Step 4 - Parties button; click it in order to display the **Step 4 screen** and the Add Partner button:

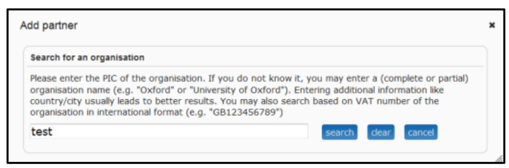


Note: Before you can invite a Partner, your partner must have a PIC (see the *Submission Preparatory Checklist* section above).

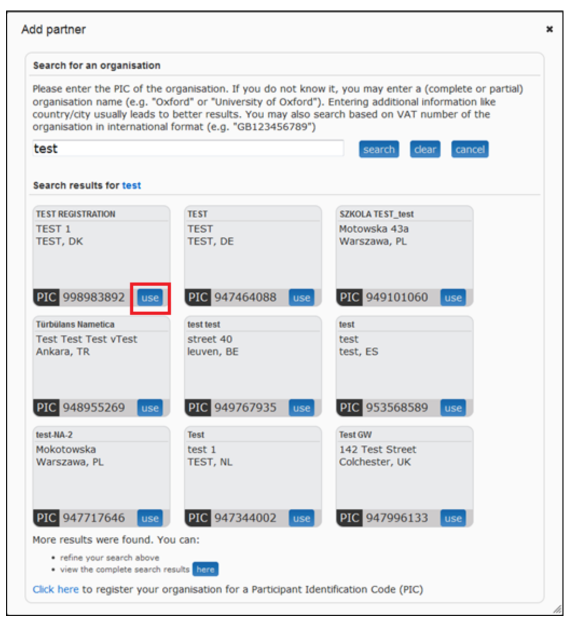
2. The requirements for a minimum number of participants are specific for each call. A message specifying the *Consortium Eligibility* requirements will be displayed under the Add Partner button, if applicable.

Note about eligibility: Eligibility problems indicated by the submission application are merely illustrative, and it is likely that not all applicable ones are indicated by the tool. Please check the topic page to get to know the exact eligibility conditions applicable to your proposal (see also the Work Programme, Annex D "Type of Action - Specific provisions and funding rates" or the Work Programme for ERC calls).

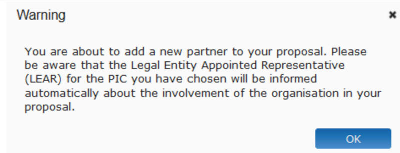
3. Click on Add Partner. The **Add partner** screen will be displayed:



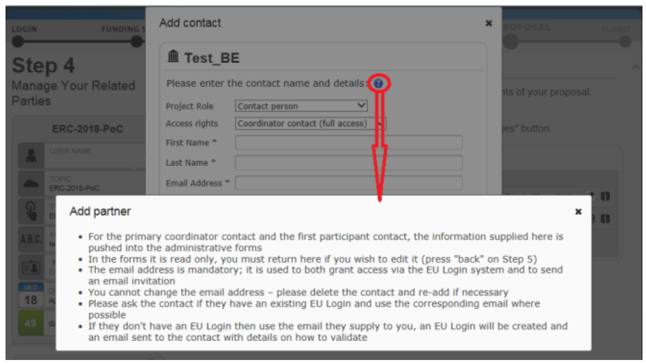
4. Enter your Partner organisation's name or PIC and click on search. This will give you a list of organisations matching the term in the search field: Make sure to select an organisation with a valid PIC from the list of search results. You can recognise validated organisations by the 'validated' status message displayed below the organisation's details.



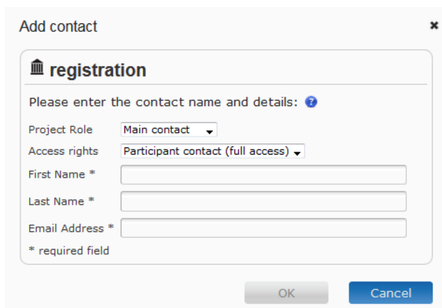
<u>Note:</u> When adding Partners which hold a validated PIC, a warning pops up informing that the LEAR and/or the Account Administator will be informed of their participation in the proposal. This does not apply for partners whose PIC is not validated yet.



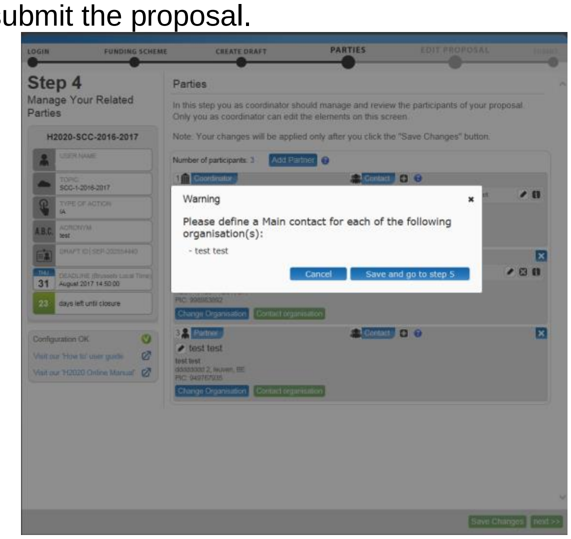
5. Find your Partner organisation and click the **Use** button. The **Add Contact** window will be displayed now. Click on the question mark to read the applicable rules for adding a contact:



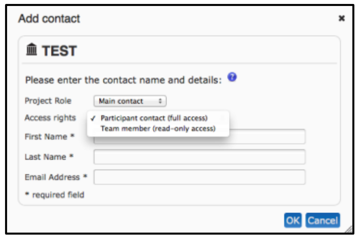
6. Select the appropriate project role of the Partner Contact:



7. Please note that at least one **Main contact** must be provided for each partner or following message will be displayed when trying to move to the following step. Please note, not specifying a main contact for each partner can require going back to the consortium structure in the wizard again (Step 4) and validating the Form A, even if already validated, before being able to submit the proposal.

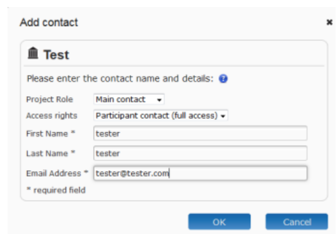


8. Select the access rights that you want to grant to your Partner contact. Only the person assigned the Main Contact role and having full access rights can submit an application.



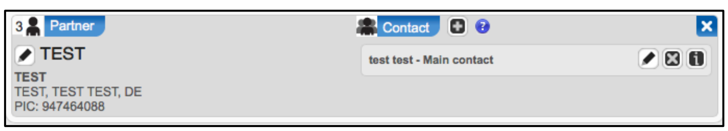
Note: Once you grant full access rights to a Contact person, he/she will not be allowed to alter their own access level to 'read-only'. This can only be done by you in your role of the Proposal Coordinator (or by another user with full access rights).

9. Fill in the fields and click **OK**.

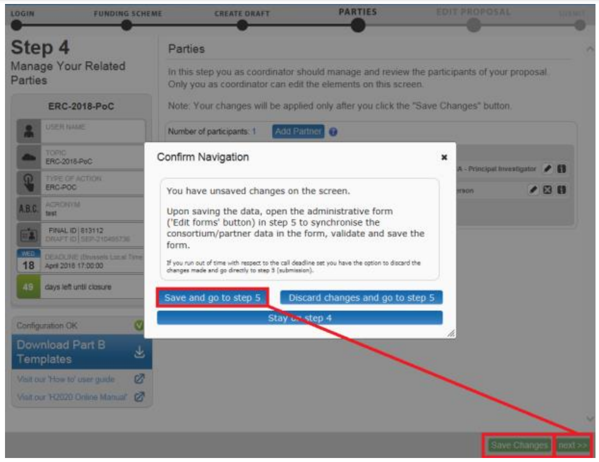


Note: If the Contact persons do not have an EU Login account yet, the system will use the provided email to send them an invitation and grant access to the application.

10. Repeat the same steps for the remaining Partner organisations. You will see the additional contacts appear in the Partner information section:

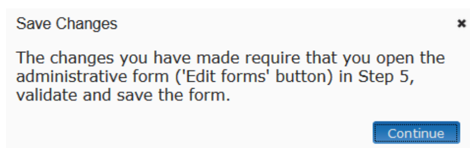


Please note that all the provided contacts are processed by the system when you click the Save Changes button at the bottom of the screen, or you move to step 5 saving the changes.

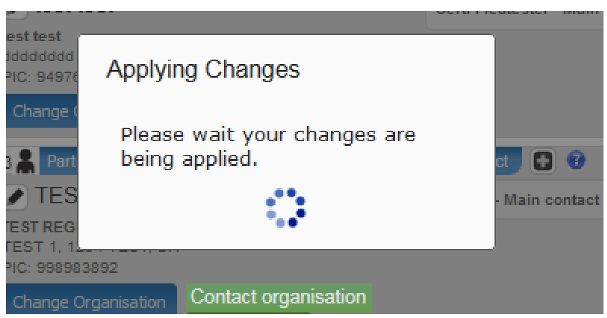


There is a limitation of the amount of new invitations sent per minute (i.e., contacts which will be invited to register an EU Login). To avoid any errors, if you are entering many contacts at the same time, you are advised to save from time to time, instead of saving all changes at once. For instance, click on the **Save Changes** button after entering about 10 contacts, then proceed entering another 10 contacts and save again, and so on.

11. Once you have completed this task, click on Save Changes. Following message will be displayed:



Click Continue to confirm that you want to save the changes. A window displays while saving.

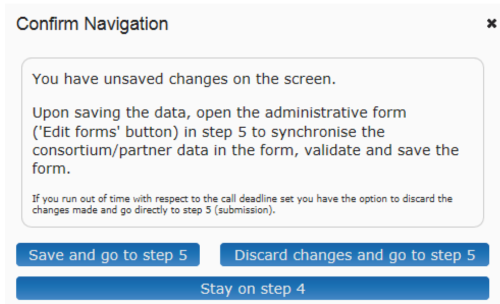


12. Once the changes have been saved, the 'applying changes' pop-up window disappears. You can click on next >> to go to **Step 5.**

Please note that, at this point, the system will automatically generate emails to all the Partner contacts provided in the wizard. The emails include all relevant information and links to access the proposal. The Access rights granted to each Partner contact will determine the level of access that the contact will have. If any of the contacts did not have an EU login, they will get an invitation to create one by clicking on a link in the participation email.

Once you performed the actions described above, you can always go back to the 'Step 4 – Manage Your Related Parties' screen in the wizard and change the consortium structure or the partner data. This will be done via the << Step 4 - Parties button. The changes can involve modifying contact details or even adding/removing organisations. When doing so, you will see a warning message after clicking next >>

without clicking on Save Changes first. In this warning message, you can choose to save the changes done and to move to Step 5; to discard the changes done to the consortium data; or to stay in the same screen in order to carry out additional changes before saving:

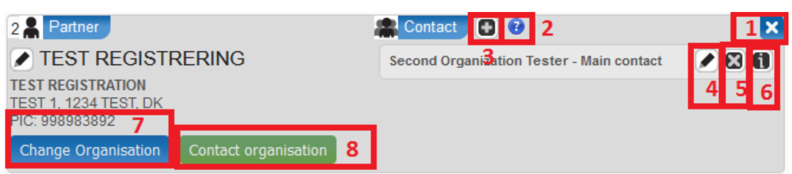


What this message really means is that you cannot submit a proposal if you made modifications in the consortium data, without opening and reviewing the form and clicking on the 'validate form' button to control possible errors and warnings. This needs to be done even if you already validated the form.

If you did not arrive to step 5 yet, and you clicked on next >> before clicking on Save Changes, just select Save and go to step 5 to continue preparing your draft proposal.

<u>Buttons in the Parties screen ('Step 4 – Manage Your Related Parties')</u>

You can perform the following actions for an existing partner organisation using the buttons described below:



1. **Delete participant**

   Click this button to delete any participant except the coordinator. Clicking this button for a given participant will remove the organisation from the partner list. This includes any contacts which were provided. Therefore, those contacts will lose their access to the proposal.

2. **Info**

   Click this button to display a help window explaining how you can manage the contact person(s) and what the **Main Contact person** role means, as well as what kind of access rights the contacts you provide will receive.

Add contact (where applicable):

- You can manage the list of organisations and access right of persons at Step 4. You may identify and give access to as many contact persons of the selected organisations as you wish. The identification is based upon the e-mail address of the person. When you add a contact person, you will be prompted to supply the contact details: name, e-mail, phone.
- **Main contact person:** Each organisation needs to have one main contact person identified; the main contact person will have to fill in full contact details in the administrative form. The 'Main Contact Person' for the coordinating organisation (Participant no. 1) will become the primary contact person for the Services. Other contact persons may also be identified and may receive read-only or full access rights. Contact persons with full access rights of the coordinator (Participant no. 1) will be called 'Coordinator contacts' in the Participant Portal, while for the other participants 'Participant Contacts'; contact persons with read-only rights will be called 'Team Members'. Other contact persons are listed with basic details in the administrative form.
- Access rights can be revoked by the Coordinating Organisation contacts. The person who created the proposal cannot be deleted.
- **Access rights:** The main contact person and contact persons of the coordinator with full access rights have the same level of rights: they can manage the list of participants and contacts, edit any part of the administrative part of the proposal and upload any attachments (eg. technical annex), and submit the proposal. Contact persons with read-only rights can only view/download the information. Participant contacts with full access rights can only edit their section of the administrative form and view all proposal data.
- **Invitation:** All contacts will receive an e-mail and a notification to the Portal about the invitation to the proposal upon saving the data at Step 4.

3. **Add contact**

   Click this button to add a new contact to an existing partner company.

4. **Edit existing contact.** Click this button to edit an existing contact.

5. **Delete existing contact**

   Click this button to delete an existing contact.

   Note: You cannot delete a contact when this user is currently logged in.

6. **Contact information**

   Click this button to see more information about that specific contact. The name field will expand showing the email address and access level of the contact within the proposal.

7. Change Organisation

   Click this button to replace the existing organisation (PIC). Upon clicking on this button, following message will be displayed:

   Confirm organisation change

   If you proceed, you will replace the current PIC number and the details of the organisation with a new one.
   All existing contact persons and their access rights will be kept, but under the new PIC number.

   Next steps following the changes:
   - Please review and manage the access rights linked to the new PIC number.
   - Open/re-open the Part A, administrative form to modify/save the new organisation and contact details.

   Are you sure you want to proceed?

   Yes No

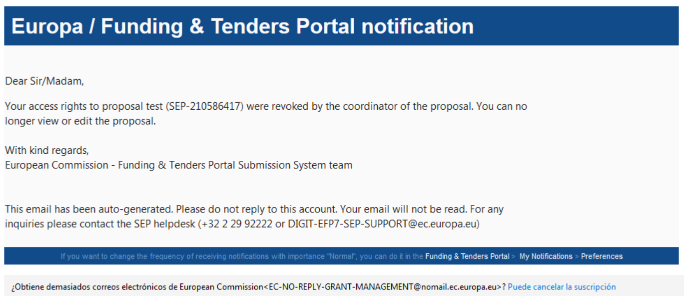
   After clicking **yes**, you will get the **PIC search** window.
   Coordinator contacts with full access rights can change the contacts for the new selected partner if needed.

8. Contact organisation

   Click this button to contact the LEAR or/and the Account administrator of an organisation.

Notification system for deleted contacts

When a contact is deleted from the list of contacts for an organisation, their access rights to a proposal will be revoked. As a result, this person will no longer be able to view or edit the proposal. If you can no longer view or edit proposals that you were previously able to work on then it is very likely that your profile was deleted from the list of contacts resulting in a revocation of access rights. If this happens, you will be informed by email that your access rights to a particular proposal have been revoked.



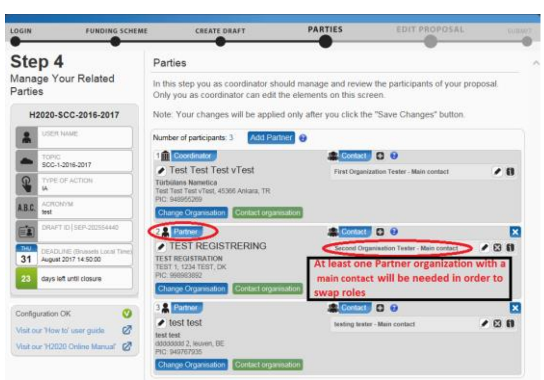
Promoting a Partner Organisation to Coordinator Status

Current coordinators (with full access rights) can now swap roles with a partner organisation. Any partner organisation can be promoted to the coordinator role provided that a main contact has been specified for it. Please note that swapping roles will not be possible if the call requires a fellow coordinating organisation.

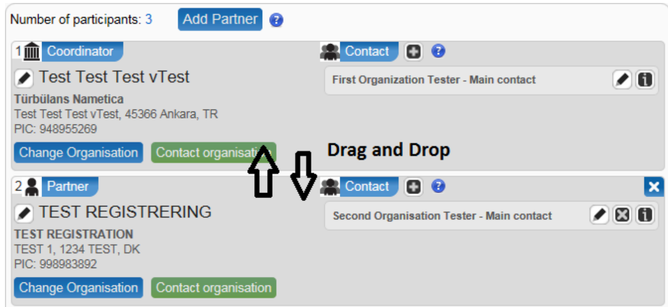
Step-by-step procedure:

1. Create a draft proposal. Your organisation will automatically hold the coordinator role for that proposal.

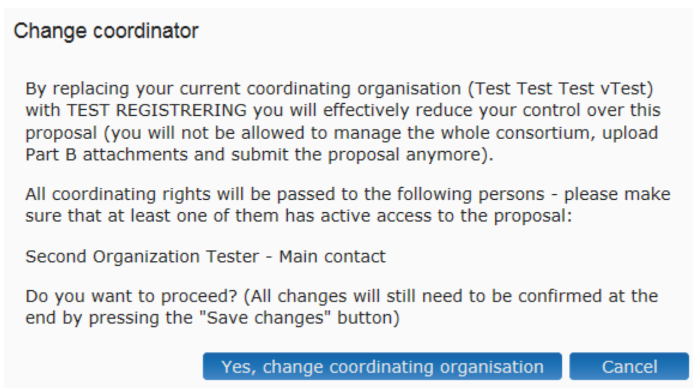
2. Ensure that at least one partner has been added, and that a main contact has been specified for that partner organisation.

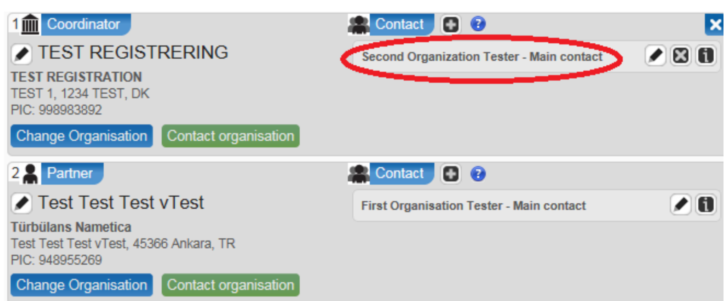


3. Drag and drop the partner organisation to the top of the list. This action will swap roles between the two organisations.



4. The following message will be displayed. Confirm the changes to both roles by clicking the Yes, change coordinating organisation button:





The former partner organisation has now been promoted to coordinator status. The contact persons of both organisations will also receive e-mails informing them that a transfer of access rights has taken place (as shown in the two figures below).

Other Eligibility Issues when Selecting a PIC ('SME' status, 'for profit' status, etc.)

In addition to the consortium eligibility criterion; there are also a set of criteria which must be met by the participating organisations depending on each call. For instance, sometimes the participants need to have been validated with specific values for their legal status, such as being 'for profit' or being registered as an SME, in order to participate. Otherwise, the error message below will be displayed and will block the organisation from submitting a proposal for those calls:

> **Errors**
>
> The information you have entered is incomplete or invalid. Please review the following error messages:
>
> [SME eligibility warning]
> SME status: each applicant to this call must be a small and medium-sized enterprise (SME) according to the SME Recommendation 2003. You received this warning message because your PIC does not fulfil this criterion. This could be due to one of the following reasons: (1) You did not complete the SME self-assessment, (2) your PIC was validated in the past as SME NO (SME definition criteria were not met), or (3) your self-assessment was filled in using financial data that date back to more than 2 years ago (taking into consideration the closing date of the accounts for the financial year on which the assessment of the SME status was based).
> By way of example, if a legal entity performs the self-assessment in the 'Participant Register', with closing date of its accounts for the financial year on March 31st 2016, confirmation of the SME status will be considered until March 31st 2018. Therefore, a legal entity which would like to submit a proposal for a cut-off date in April 2018, would need to perform a new self-assessment.
> For all these cases, either the self-registrant (if the PIC is still in a declared status), or the Legal Entity Appointed Representative (LEAR) or Account Administrators (if the PIC is already validated) should perform a new SME self-assessment via the Participant Register, 'My Organisations' section. Should you need to contact your LEAR, Self-Registrant or Account Administrator, a search functionality is provided on the Portal.
>
> [For profit organisations] For profit organisations: each applicant to this call has to be registered or validated as a for-profit entity in the Participant Portal. You received this warning message because your organisation does not fulfil this for-profit criterion. This could be due to one of the following reasons: (1) you did not register your entity as for-profit, (2) you registered your entity as a non-profit entity, (3) your validated entity is currently considered as a non-profit one. For cases 1 and 2, a self-registrant of the organisation should update the current data accordingly under the 'Programme specific information' menu item in the My Organisations section of the Participant Portal. For case 3, the Legal Entity Appointed Representative (LEAR) or Account Administrator of your entity has to request a revision of the non-profit status, which needs to be validated by the Validation Services for your entity to be considered eligible for this call.

The error is due to the registered information of the selected PIC. In order to participate with the selected PIC in those cases, the LEAR or the Self-registrant of the participant will need to update the participant's information, if applicable; and submit the supporting documentation to justify the change. They will have to run the SME Self-Assessment in Participant register in the case of SME instrument calls. Otherwise, the applicant will need to select a correct organization in order to participate.

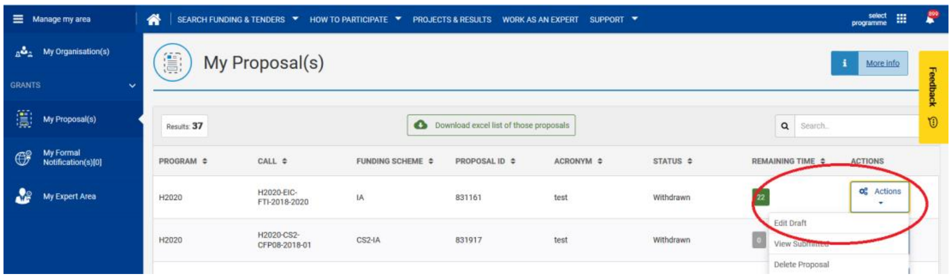
Please refer to the Participant register online documentation in order to learn how to maintain your organization data. Applicants are requested to carefully study the eligibility criteria of each call before actually trying to apply for a topic for which they are not eligible.

Note about eligibility: Eligibility problems indicated by the submission application are merely illustrative, and it is likely that not all applicable ones are indicated by the tool. Please check the topic page to get to know the exact eligibility conditions applicable to your proposal.

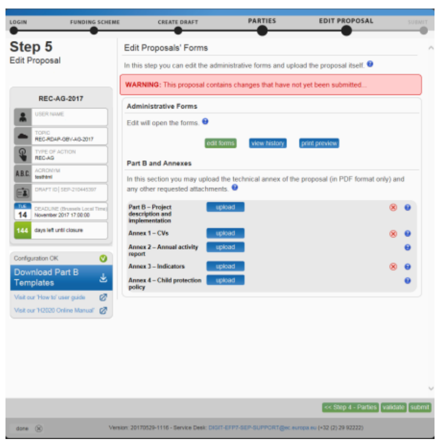
Step 5: Edit and Complete Proposal Draft Form, Download Templates and Complete all Required Information, Upload Files, Validate and Submit your Proposal

This step is the core of the submission process. Click on next >> in the submission wizard if you just created the draft proposal, or, to access a previously saved draft proposal form, take following steps:

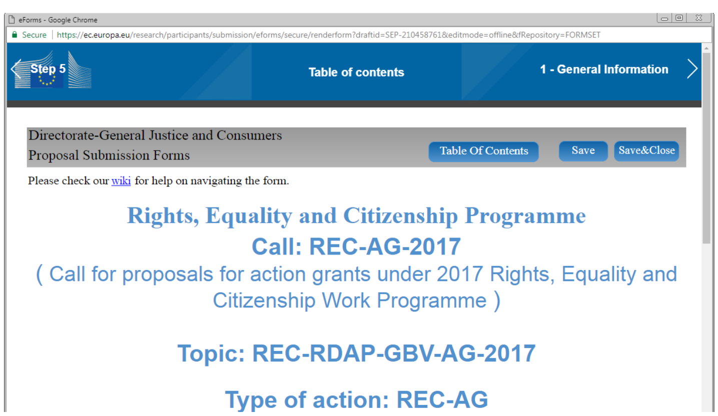
In the Funding & Tenders Portal, click on the **Actions** button next to the proposal and select **Edit Draft**:



The following picture shows **Step 5** of the Online Submission Wizard:



When clicking the **edit forms** button, make sure that your administrative form looks as a web site, (i.e., you can read "eForms" on the top of the emerging window, like in the example below), and that it does not look like an embedded pdf nor you are requested to edit it using Acrobat. If it looks as a pdf form or is opening using Acrobat, please use this other version of the submission manual, instead.



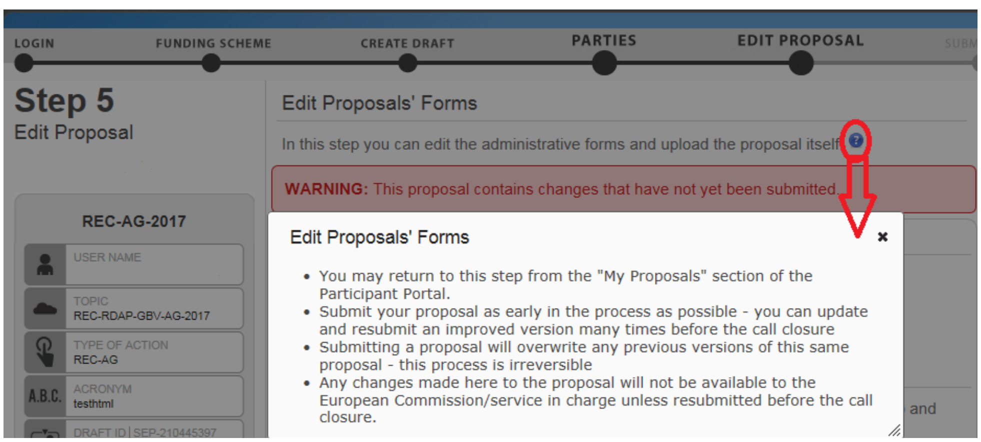
The Action Buttons of the Wizard

The action buttons shown in the step 5 of the submission wizard are:

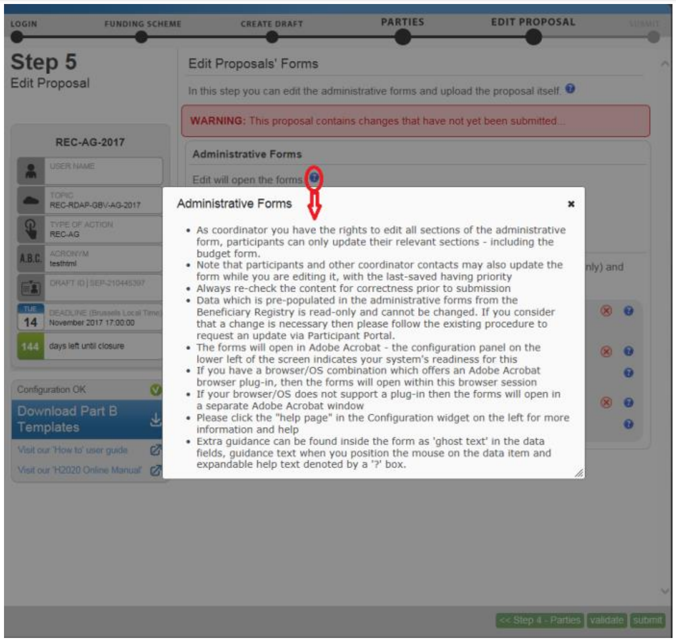
Button	***Description***
edit forms	*Click to open the form Part A that you need to complete.*
view history	*Click to view in detail the list of all system and user actions on the form. This function enables:* • *the Proposal Coordinator to verify that partners have updated their forms* • *Partners to verify that the coordinator has submitted the proposal in a timely fashion.*
print preview	*Click to **download** and save the Part A locally on your computer in pdf format. This pdf cannot be edited nor submitted, but it gives you an idea of what has been filled in so far and what the EC would see if you submit your proposal right now.*
Download Part B Templates	*Click this button to download all Part B templates at once before the draft proposal is created. The latest proposal requirements package will get downloaded, in a readily editable (RTF) template.* *Once completed, you must convert the proposal templates into PDF files.*
upload	*Click to upload the respective file.* *The upload process for the complete set of files can take between a few seconds and a few minutes, depending on the speed of your Internet connection. When the upload is complete, the system displays a confirmation message and creates the respective entry in the history log. Please check the requirements for uploading your files Part B.*

Familiarising Yourself with the Wizard and the Form.

Click the first button at the top of the screen to read the general help instructions for editing proposal forms, as shown in the picture below:



Click the button in the **Administrative Forms** section to read the help instructions for editing the administrative forms of the proposal, as shown in the picture below:



Click **edit forms** to start editing the forms. You can check Appendix A at the end of this manual for further information about the compatibility recommendations to work with the form

What You Need to Know about Completing the Form

Who Can Fill in the Form?

The Main Contact is the only person that can complete the form, including the budget table and all other administrative details. Partners can preview the form and edit their contact detail information.

Click the **edit forms** button to access the forms.

Read-only Fields

The list of participants and contact persons, the Participant Identification Code (PIC) and the respective summary data of the participants (shown in blue in the form) are read-only fields. To modify the list of participants or contact persons, please go back to **Step 4**. To modify the legal data of the organisation, please read more about it in this Data Update section.

Guidance in the Form

If you click on the question marks in blue, you can read more information about the sections.

Each box of the form contains a short text with guidance on the format, the length and required information. Guidance for the fields displays when you bring your cursor over the boxes. Once you click on the text or start editing the information, it disappears automatically.

Navigation in the Form

To view the different sections in the form, you may either use the scroll bar or click on the **Show** buttons of the table of contents.

Validation

The form has built in checks and gives error or warning messages in case fields are not completed.

Please click the Validate Form button to check your data. Errors and warnings will be listed at the end of the form. Error fields will be highlighted in red, whereas warnings will be highlighted in yellow.

Errors mean that mandatory information is missing (such as the **Proposal Title**). The proposal cannot be submitted until these errors are corrected.

Warning messages do not block submission, but they indicate missing information that may be important for the proposal. Ideally, these warning messages should be addressed by correcting the information provided.

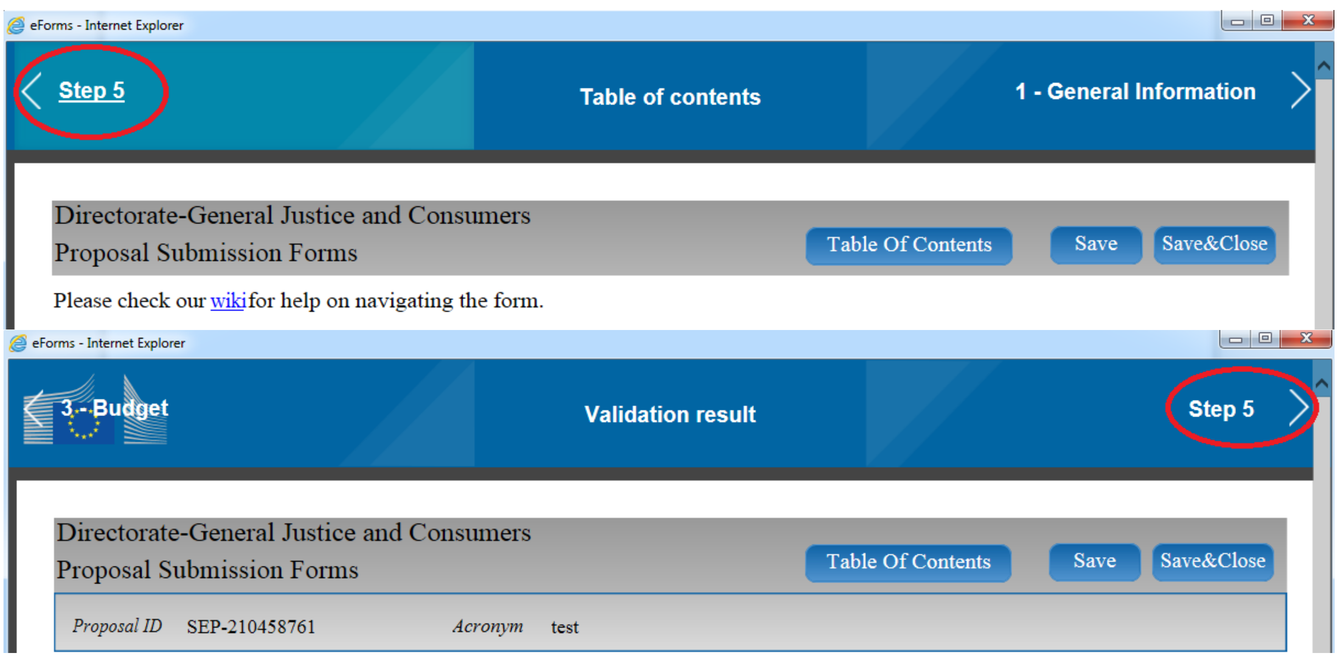
By clicking on the **Show** button, you can easily get back to the respective fields to correct them.

Saving the Data

Clicking the Save button saves your input at any moment. Please note that no data is actually saved until you perform the saving action. You can continue editing after clicking on **Save**.

Before closing the form, click the Save&Close button. It just saves the data and closes the form for further editing later on, but it does not mean that the proposal is submitted yet. This will take you back to **Step 5**, where you can upload the Technical Annex and any additional documents. You may return to edit the form as many times as you wish before the closing date of the call. However, remember that any changes saved in the form need to be <u>resubmitted</u> to actually save them into the proposal, if you already submitted the form once.

Please note, the eForm allows you to Go back to Step 5 in the Submission Wizard by either clicking the Step 5 button in the cover page of the proposal (backwards button) or the Step 5 button of the validation results page (forward button). In any of the two cases, leaving the form using these buttons does not save your changes, so please make sure save the form first.



Action Buttons within the Form

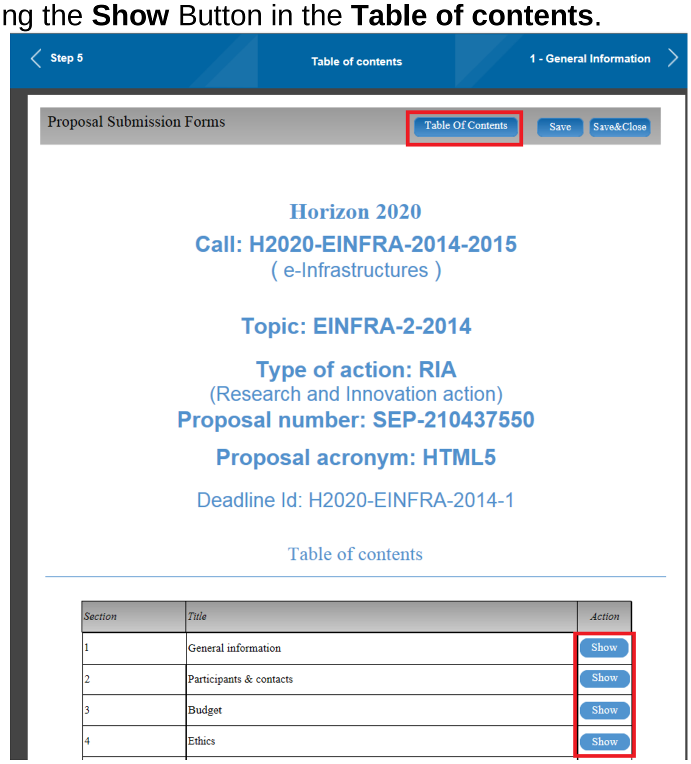
The action buttons in the form help you find and verify the information easily. Two of them correspond to saving actions, as explained above, the other one checks for errors in the form.

Button	***Description***

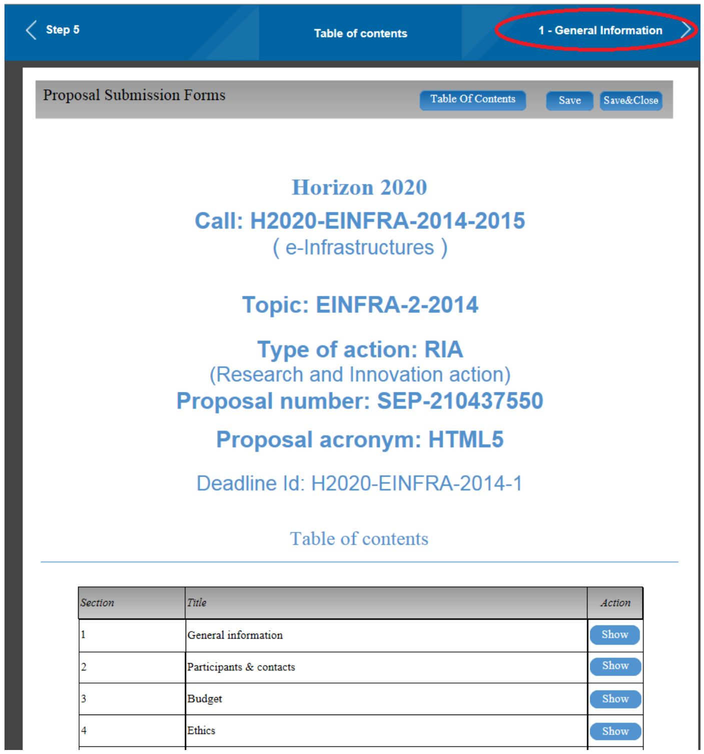
Button	Description
Validate Form	*When you click this button, all data fields in the form will be validated against a set of rules.* *The system assesses if the available data is valid, checks the data formats, performs computations, and checks interlinked data for consistency.* *Any issues found in the form are reported at the end of the form.*
Save&Close	*Click to save your input in the administrative form and close it for later editing.* *You can save your form data even if the form is not completely filled in - you can edit it at any moment prior to the deadline.* ***Save&Close*** *does not validate the data nor submit your proposal.*
Save	*Click to save your input until that moment, and continue entering new input afterwards.* *No data gets saved until the* ***Save*** *or the* ***Save&Close*** *buttons are clicked.*

Editing and Completing the Form

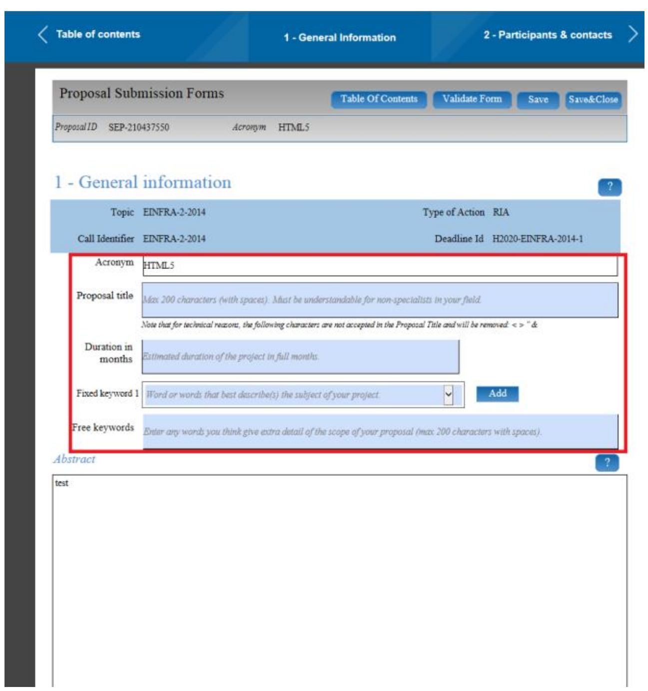
When clicking the edit forms in the Submission Wizard, **Step 5**; the form opens in the first page within your browser. This first page includes the **table of contents** and the **Call information**. You can return to this screen by clicking the Table Of Contents button at any moment, to be able to navigate to any of the sections in the form by clicking the **Show** Button in the **Table of contents**.



To start completing the form, use the navigation buttons on the banner in order to advance through the different sections:

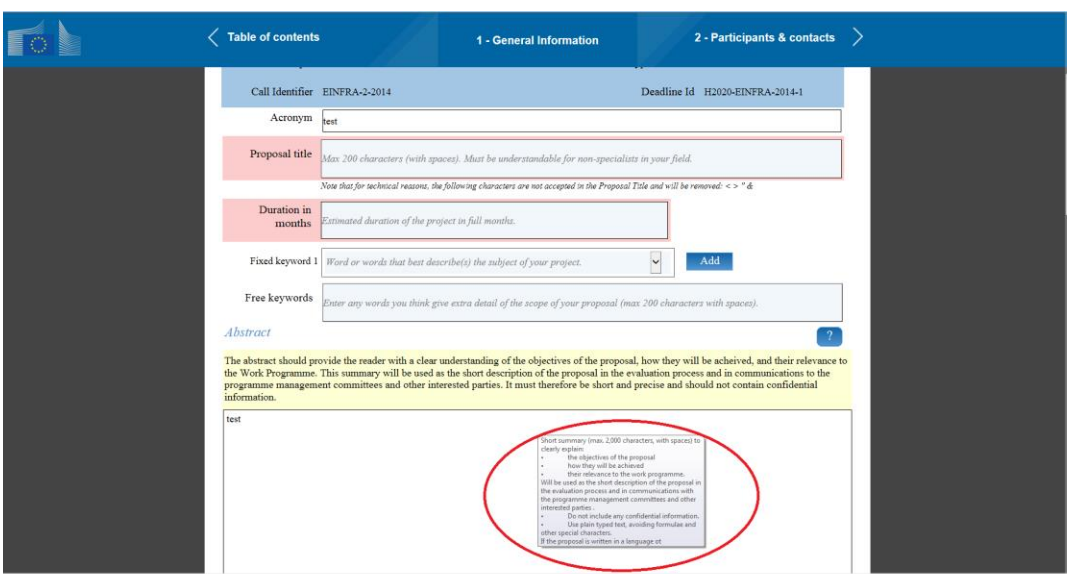


Then, fill in the corresponding fields for each section:

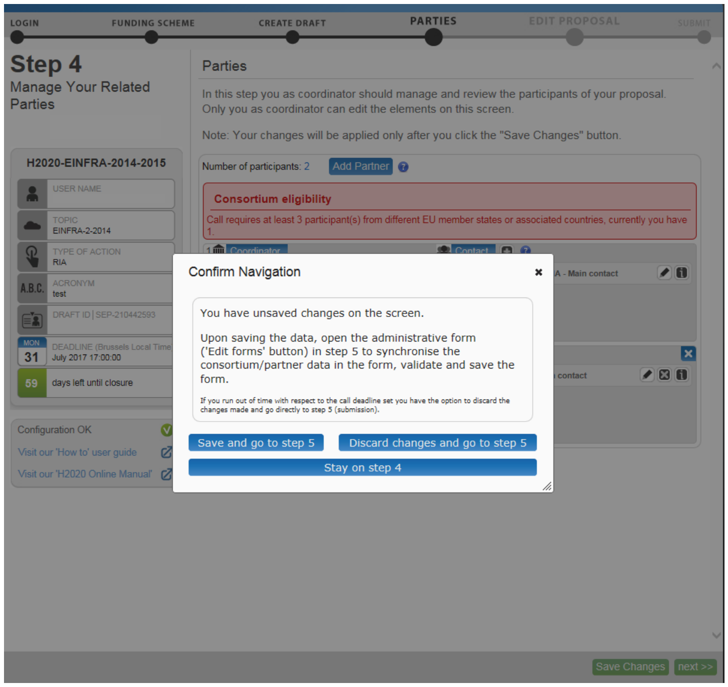


When filling the form, if you need a clarification about a section you can click on the question marks to get a text explaining about what to provide for that field/section:

Also, placing the mouse on the editable fields marked in blue displays a tip about the input you are expected to provide for that particular field:

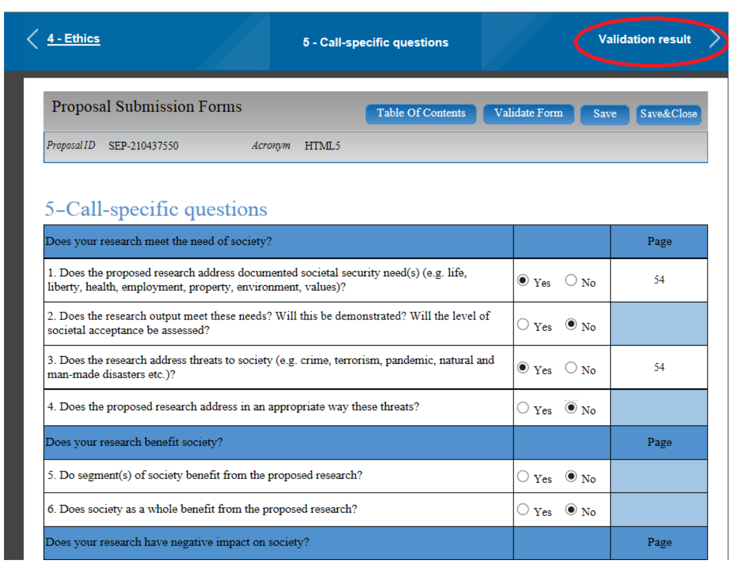


Important Note: If changes are applied to the consortium data (Step 4) while the form is open or after having been edited, you need to reopen the form and validate it before being able to submit your proposal. Check Validating, Saving and Closing the Form to know how to do so:

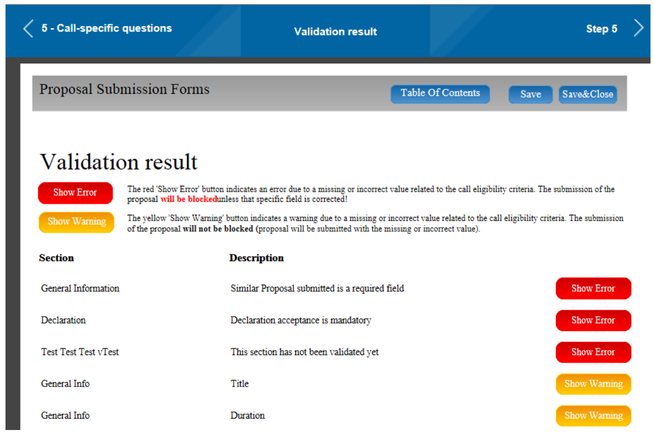


Validating, Saving and Closing the Form

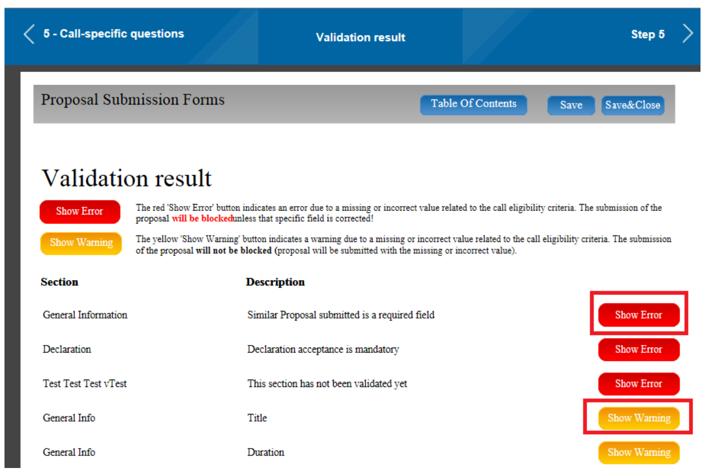
You can click the Validate Form button to make sure that your proposal form meets the administrative requirements. Validating the form must be done before being able to submit, if you do not run it via the **Validate Form** button, but you finish filling the form, you will automatically arrive to the validation step anyway, as the last step in completing the form.



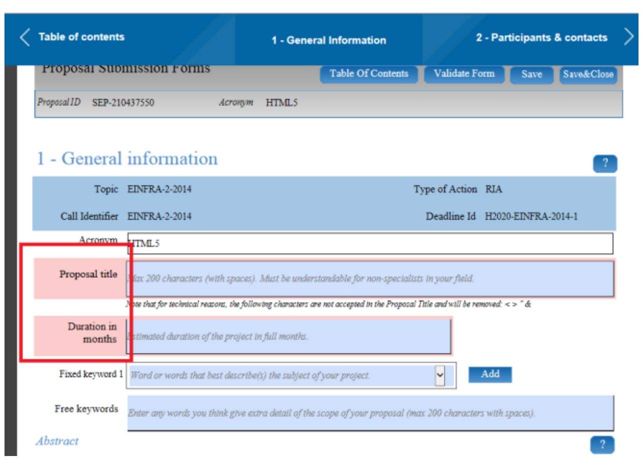
You will be presented with any Errors/warnings.



Validate your results by reviewing the indicated errors/warnings. Click on the **Show Error/ Show warning** buttons to go to the affected parts.



The error/warning will be highlighted for you in the form. Amend contents accordingly. Any errors must be corrected in order to be able to submit your proposal. Warnings will not prevent you from submitting:

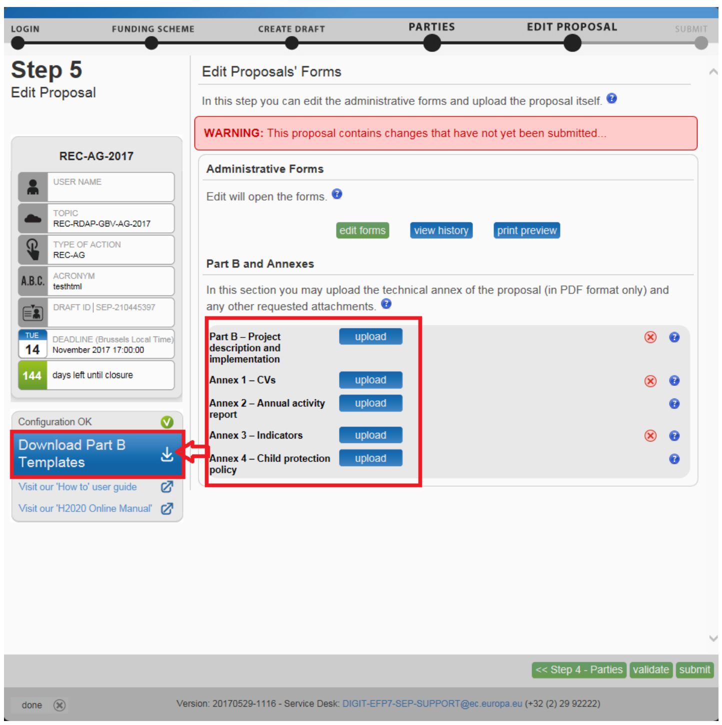


If the errors/warnings are related to missing data for the participating organisations or main contacts in the consortium, the **Show Error / Show Warning** buttons will take to the part in the form where you find those problems, but to fix this specific issues you need to **save and close** the form and go back to Step 4 in the wizard.

When all issues are fixed, click the Save&Close button. Your form has now been saved on the Commission servers, but it is not yet submitted. Your proposal submission takes place next.

Part B - Downloading and Completing the Annex Forms

Click on Download Part B Templates to download all the latest proposal requirements templates as readily editable files.



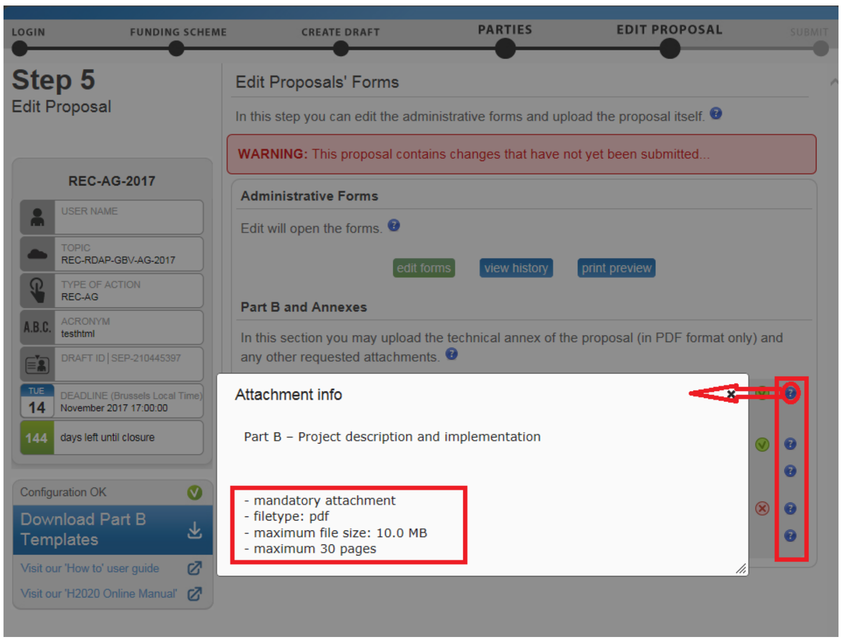
The template describes the information that must be included in your application and how to structure that information. You will need to complete this package as thoroughly as possible. You may want to also check with Enterprise Europe Network and your National Contacts Point for assistance (see the *Support* menu of the Funding & Tenders Portal). It is important that you remain within the file size and page limits that a proposal may have. Once you have completed your proposal based on the downloaded template, you must convert it into a PDF file, which you will then upload as an Annex form of the proposal. This is referred to as Part B of your proposal.

Part B - Uploading the Annex Forms

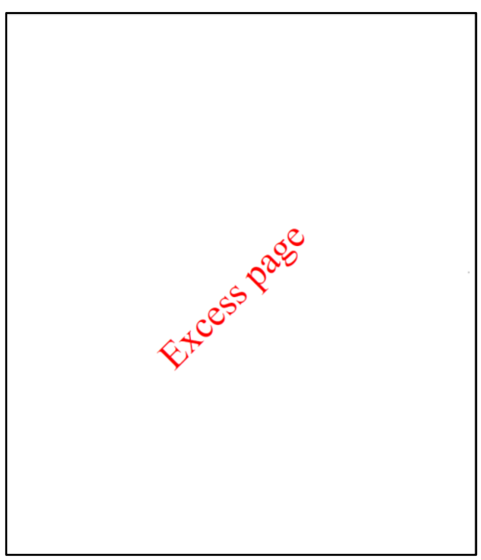
When you complete the annex forms, you must prepare them for uploading. Only the coordinator of the proposal can upload files in Part B. All annexes must be in PDF or ZIP format, and depending on the configuration of the calls, spread sheet (xls, xlsx and ods) can also be required.

A number of limitations and requirements are in place for each of the forms, depending on the call – such as, page size and page limit, document size limit, etc.

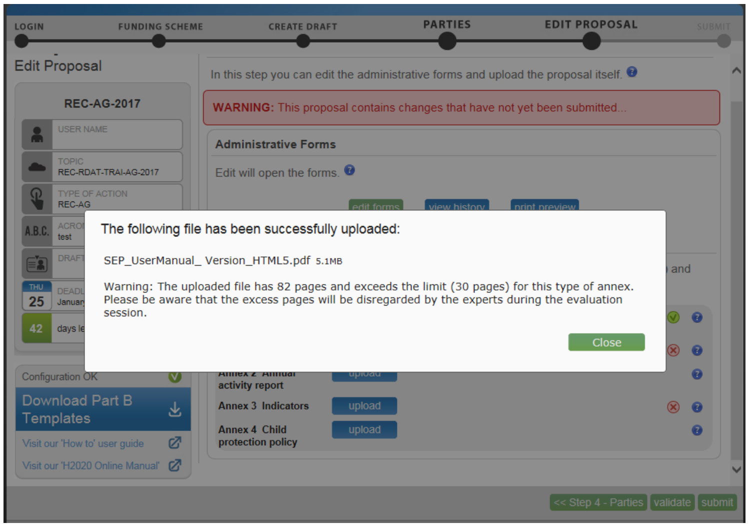
Note: Make sure that you first familiarize yourself with all the specific annex form limitations and requirements in the documentation available in the respective call information package on the Funding & Tenders Portal. <u>Your proposal will be considered ineligible if any of these formal requirements are not met. Click the question mark for each attachment in order to display the specific limitations applying to that specific attachment:</u>



The breach of certain limitations, such as document size limits, could result in failure to upload. As a result you may need to amend the documents and upload them again. If you exceed the page number limit, when applicable, you will be still able to upload the document but all of the excess pages will contain just a watermark as content.



You will also see the following warning, informing that the content of those water marked pages will be dismissed during the evaluation session.



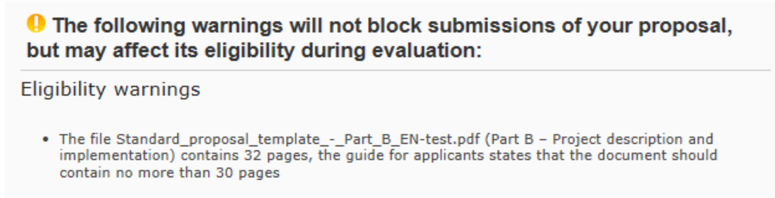
In the process of completing your annex forms, and prior to uploading them, make sure that your documents comply with the mentioned requirements and recommendations, as generally outlined below.

1. **PDF conversion issues and checks.**
   - Before you start the conversion to PDF, **clean up** your document - accept all tracked changes, delete internal review notes or comments, check for any formatting issues, and so on. The document to be converted into PDF must **only** contain the final, "clean" content.
   - Check that your PDF conversion software has successfully converted **all the pages** of your original document (e.g. check for any problems with page limits, tables, graphics or footnotes).
   - Check that your PDF conversion software has not cut down pages with **landscape** orientation to fit them into **portrait** orientation format.
   - Check that **captions** and **labels** have not been lost from your diagrams.
   - **Embed all fonts** in the PDF file (math symbols, non-Latin alphabet text, etc.).

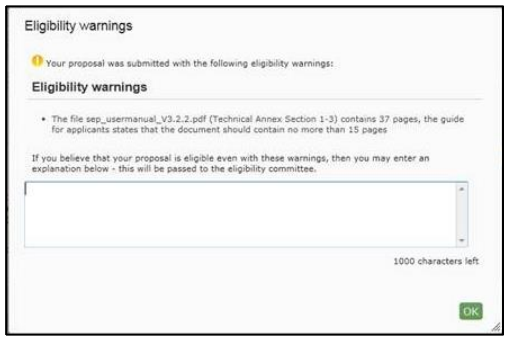
2. **Limitations in document page number, font size, and page margins.** Each form template, depending on the specific call, may impose certain limitations in the document formatting with regard to the maximum number of pages in the document, the minimum/maximum font size allowed, and/or the minimum margins you must allow for the page layout.

   Always make sure to check and apply the guidance for the specific call, available on the Funding & Tenders Portal,, as well as the instructions at the beginning of the annex form templates for each specific call.

   If you attempt to upload an annex form that contains more pages than the specified limit, you will **not** get an error message during the upload process. However, when you attempt to **validate** the uploaded document, the system will display a warning message, advising you to shorten and re-upload the proposal in order to allow for it to be qualified as eligible - as shown in the picture below:

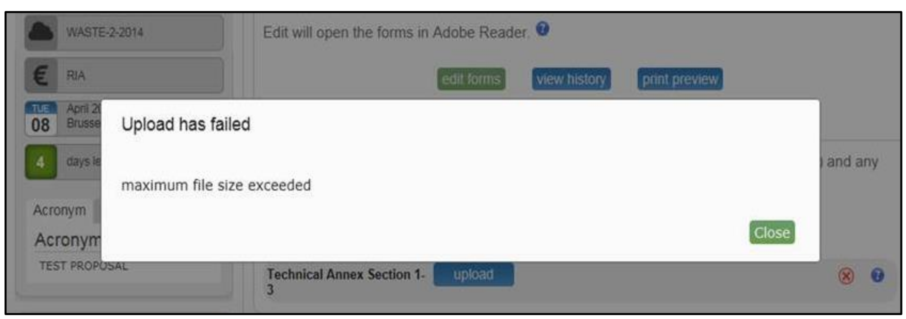


If the number of pages in one of the uploaded documents still exceeds the allowed limit and the deadline has not yet expired, you will receive an automatic Eligibility Warning advising you to shorten and re-upload the proposal, as shown in the picture below:



3. **Document files size.** The allowed file size of annex forms may be limited, too. Check the guidance documentation available in the Topic page information package on the Funding & Tenders Portal.

When the document file size exceeds the allowed limit, the system will display an error message immediately during the upload process, as shown in the picture below:



4. **Graphical resolution.** Use a **maximum resolution of 300 dpi** for all graphics and text (photocopy quality). This can dramatically reduce the PDF file size.

5. **Printer-friendliness.**
   - Proposals will be printed out in black-and-white colour on plain A4 paper. If you have used other colours in your annex forms, make sure that they are correctly interpreted and visible as nuances of grey in the output PDF file.
   - Ensure that printing is done at 300 dots per inch and that no scaling is applied to make the page "fit" the window. Print a test copy of your PDF files before uploading them.

6. **Documents file name and security.**
   - Ensure that the annex forms file names contain alphanumerical characters only (A-Z, 0-9).
   - Do not protect the uploaded files with a password.

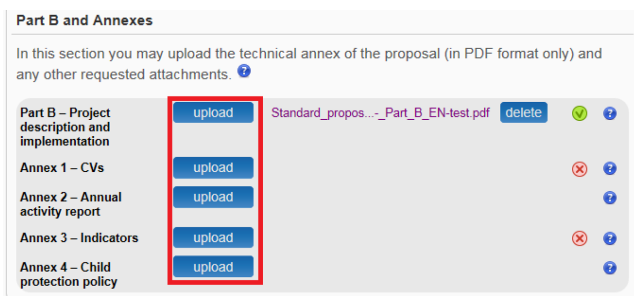
7. **Post-upload verification.** Once you upload your files, check their quality - download them to check whether the file transfer was successful and if the file is complete. If not, make the necessary corrections and upload again.

<u>**Note**</u>**:** Make sure that the files you upload can be opened and printed without any problems. If the Commission encounters a problem when opening or printing a file you have uploaded as part of a proposal, the complete proposal will be considered ineligible.

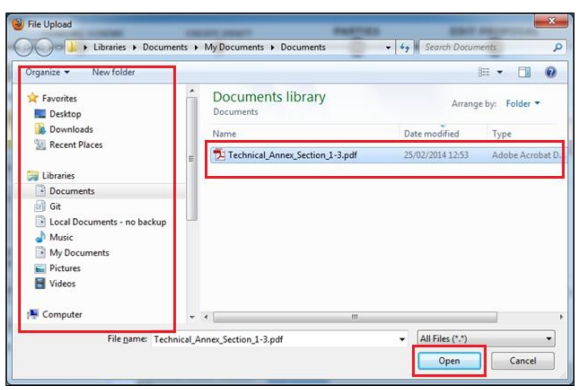
Also note that only one file per category can be uploaded. That means that if you have several documents (e.g. CVs) they need to get merged in a single PDF file with a maximum size of up to 10MB

Once the downloaded templates have been completed and are ready to upload, follow these steps to upload them:

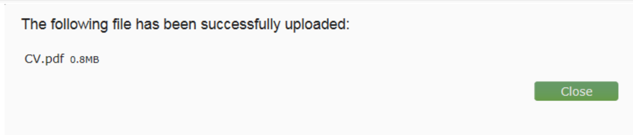
1. Click the upload button for the respective document in Step 5 of the Submission Wizard.



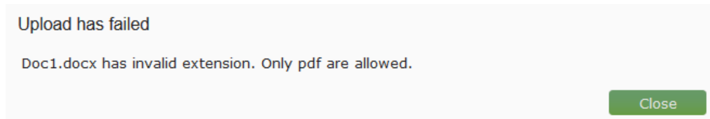
2. Select the file to upload from the **File Upload** window. If your file has blank spaces in its name, the system will upload it filing the blank spaces with "_".



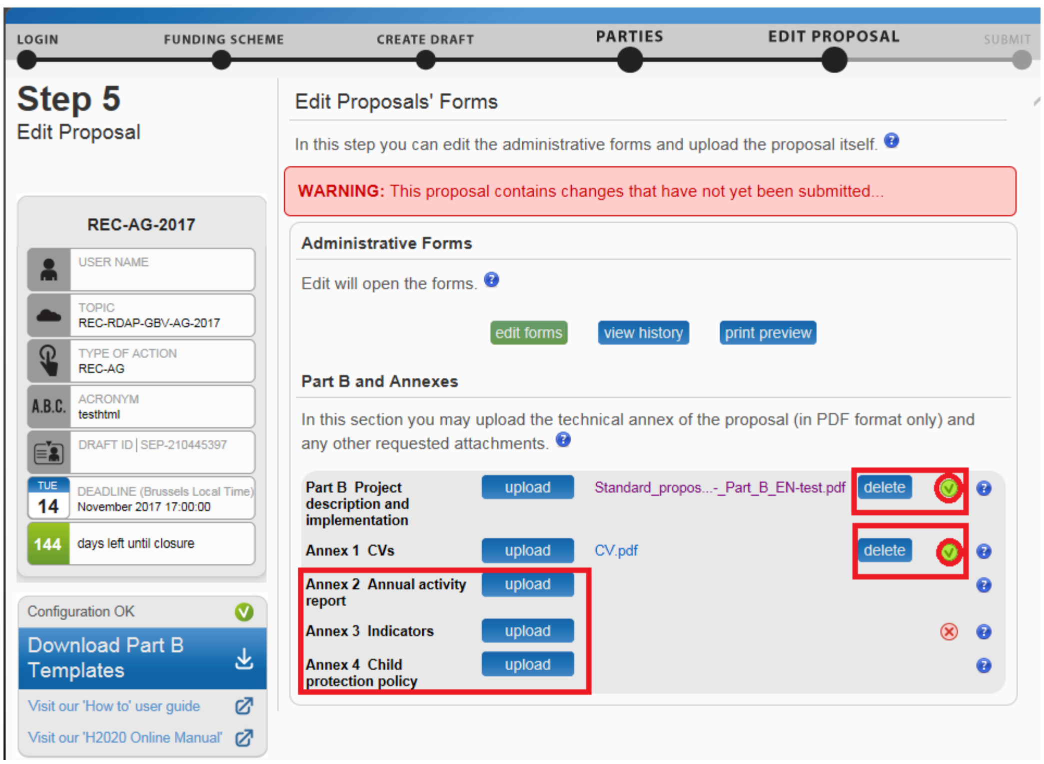
3. Click on Open. A confirmation message will be displayed:



Note: If the file uploaded is not in a valid PDF format, an error message will appear instead of the confirmation message.



4. Click on Close. The uploaded file will be shown in the list and a green check mark will appear next to it, as shown in the picture below:

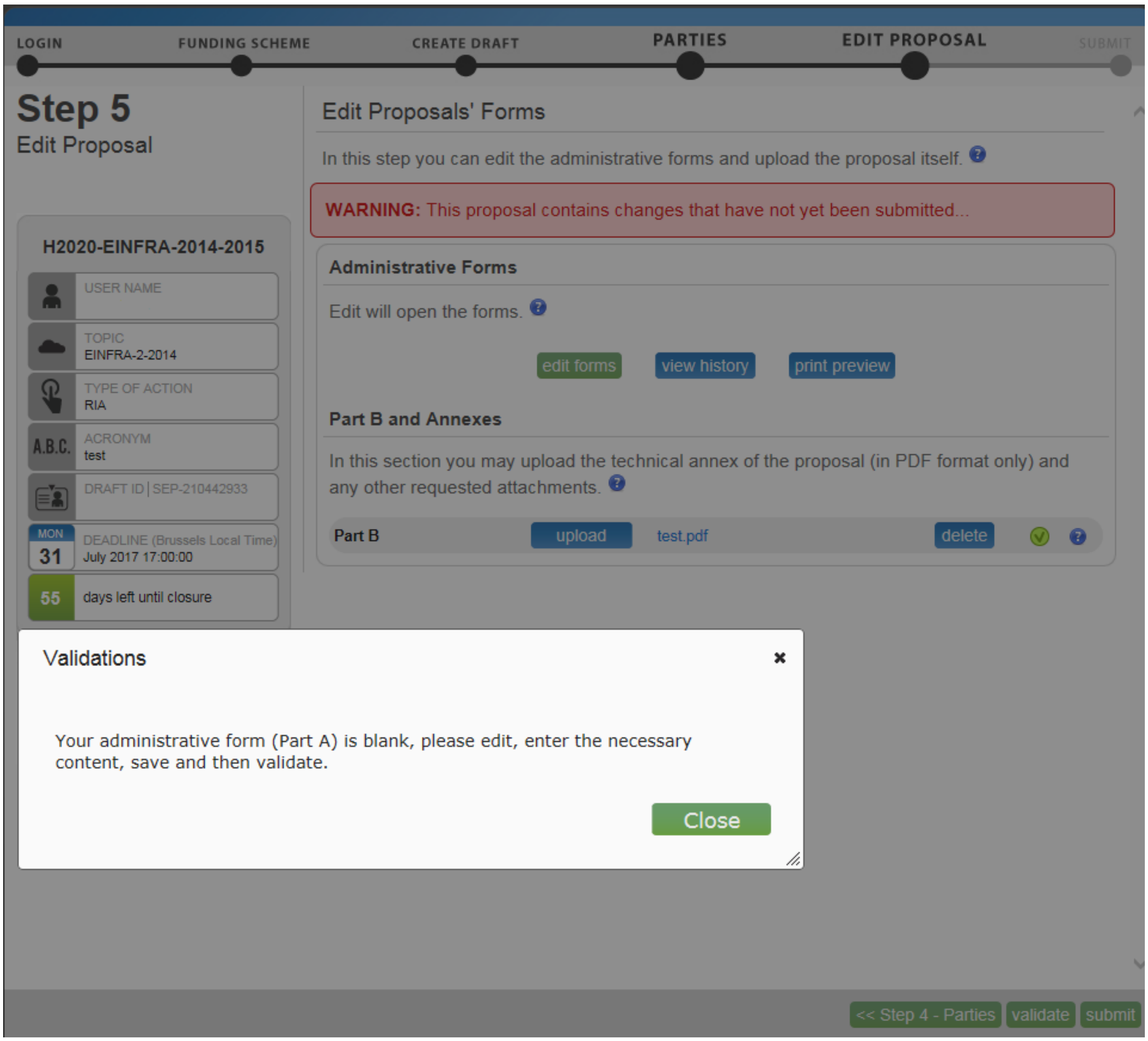


5. Optionally, you can click on delete an uploaded file to remove it and replace it with a new file.

Validate and Submit your Proposal

To make sure that your application meets the requirements run a validation of your draft proposal. To do so, you click on the validate button at the bottom of the submission application:

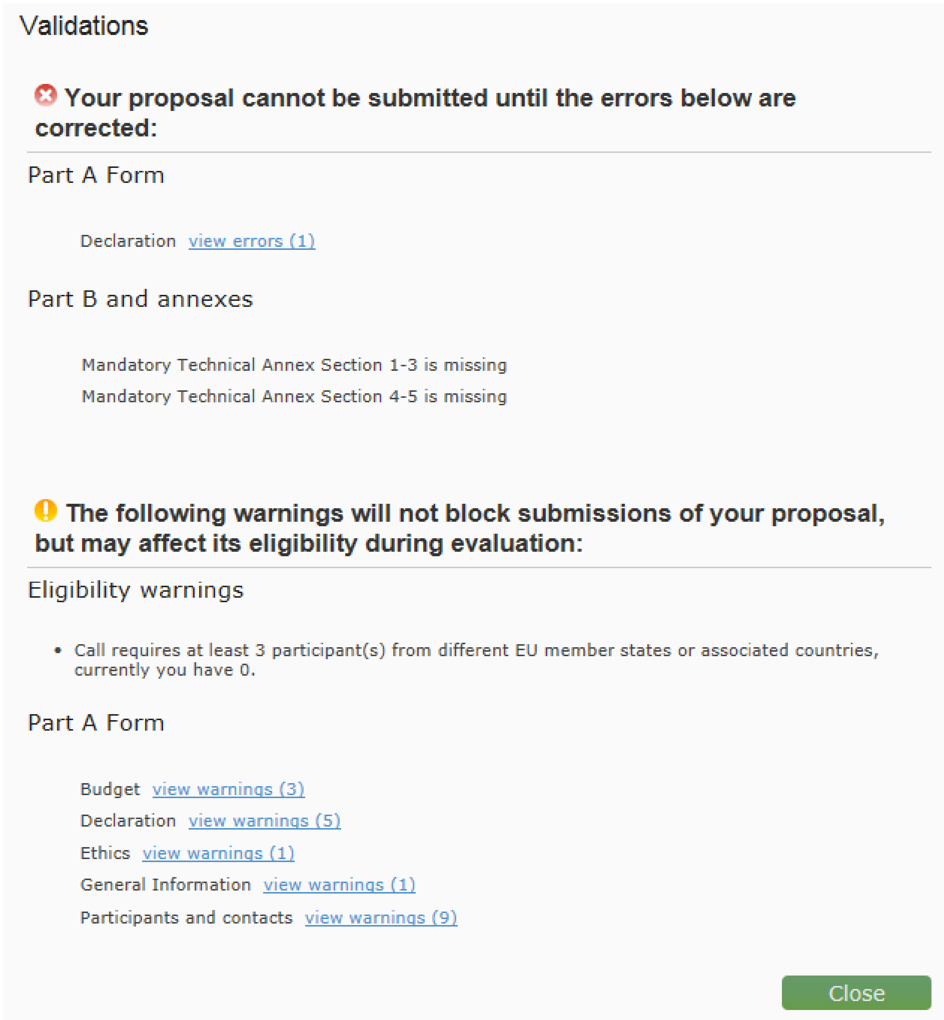
In order to make your application meet the requirements of partners, file sizes, number of pages, etc., you will be prompted to correct any errors that have been detected in the forms. Any errors will be displayed as indicated below:



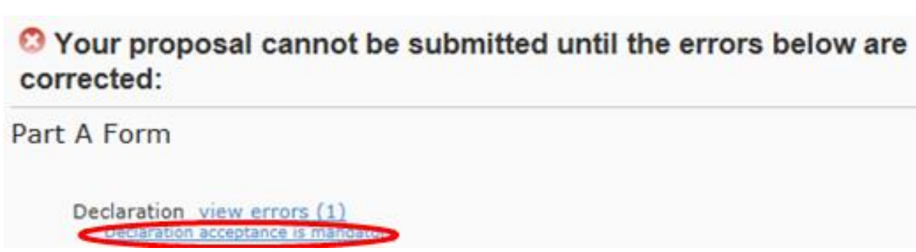
Please note that this action is not exactly the same as clicking on **Validate Form** within the form. When you run a validation from within the form, the validation checks only the content of the form, i.e. the administrative form in **part A**.

When you run a validation from the submission application via **validate**, you run a validation of your whole draft proposal. This includes all documents both in **Part A** and **Part B**.

The following screen shows the results of validating the whole draft proposal.

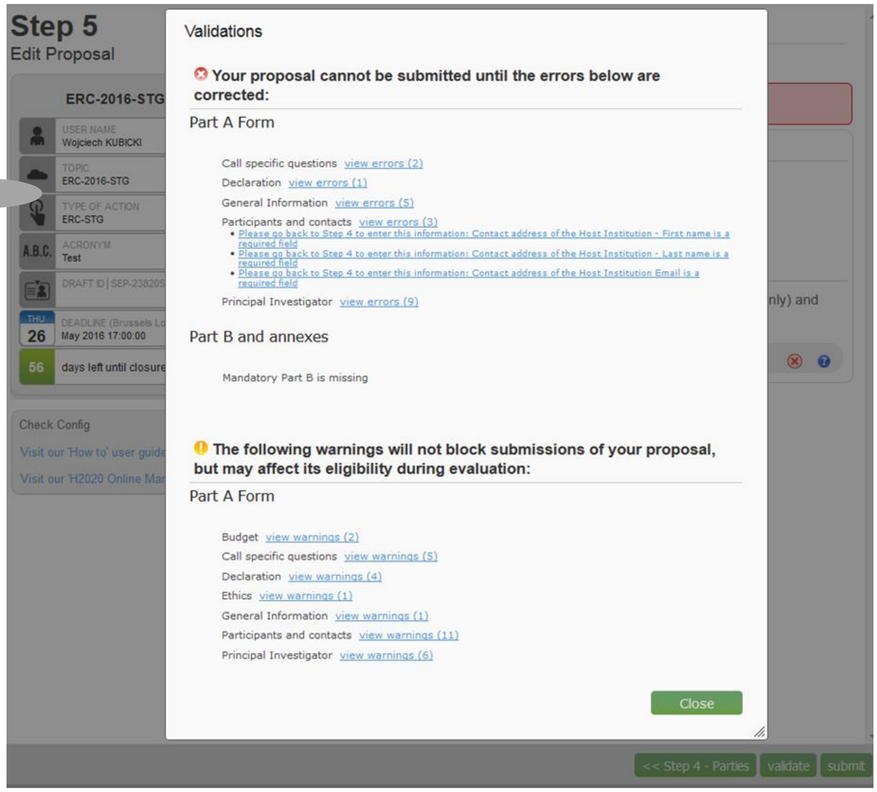


You have blue links for the errors and warnings. Clicking on them will expand the details for the error with new links. By clicking on these new links, you will access the affected parts in the form.



However, the affected items will not be highlighted anymore. You are advised to run both validations in different moments. When filling in the form, use the **validate form** functionality within the form. Before submitting your proposal, run a validation from the submission application to check if your application is ready to be sent by clicking on the action button **Validate**.

Part of the validation can include reviewing previous steps, such as the Step 4 for managing related parties:



When this is the case, clicking the link "Please go back to STEP 4" above will take you back to the administrative form, where you cannot actually apply amendments. Please go to **STEP 4** by clicking the << Step 4 - Parties button in order to correct this kind of warnings/errors.

When all errors and warnings are corrected, click the validate button again to make sure you have not missed anything. Once you get the No Errors validation screen, click on submit. Your proposal has now been submitted and the system displays a message to confirm that the proposal has been received.

The Submitted status will also be shown on the **My Proposals** page of the Funding & Tenders Portal. The Proposal Coordinator will also receive a submission confirmation e-mail, including details about the submitted proposal. Note that the e-mail could end up in the spam folder or get blocked by the anti-spam software of your organisation, so make sure that you check your inbox regularly.

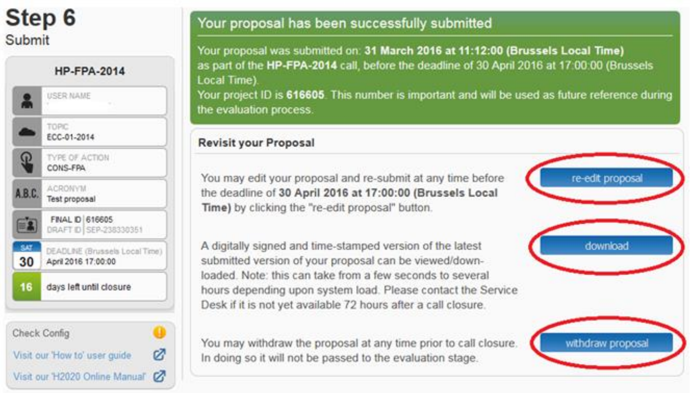
The submission is completed when the Proposal Coordinator clicks on submit, and the confirmation email has been received. Uploading the Annex documents only, does not finalise the submission process. Therefore, we advise you to upload your proposal as early as possible, and if possible, to submit at least 48 hours before deadline. Otherwise, there is a serious risk that you will not be able to submit it on time.

You can upload your Annex documents or submit your proposal as many times as you wish prior to the call deadline, but it is strongly advised not to wait until the last few days to do so. Each time you upload a new Annex document, you **must** click submit to save your changes.

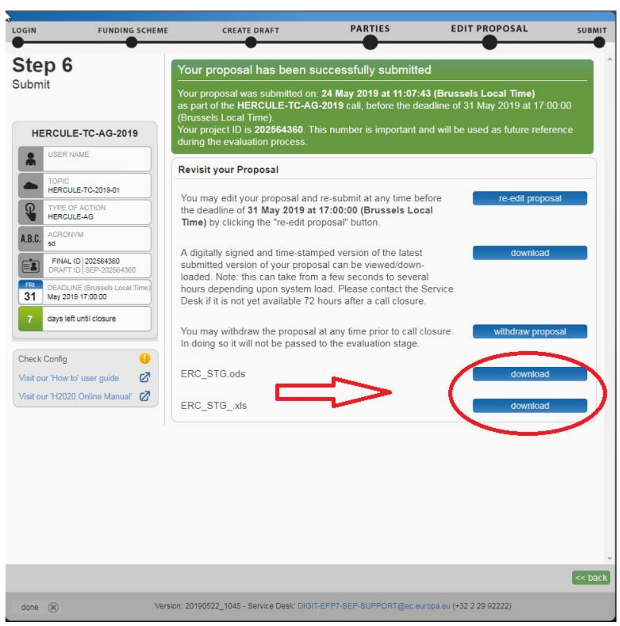
Step 6: The 'Proposal Submitted' Page

Reaching Step 6 means that your proposal has been successfully submitted and therefore sent to the European Commission services for evaluation.

In Step 6, you can carry out the following actions, as indicated in the picture below:



If the call has been configured to add spread sheet as part of the annexes, they will appear listed in this screen. You can also download them via the **Download** button.



Revise (Re-edit) the Proposal

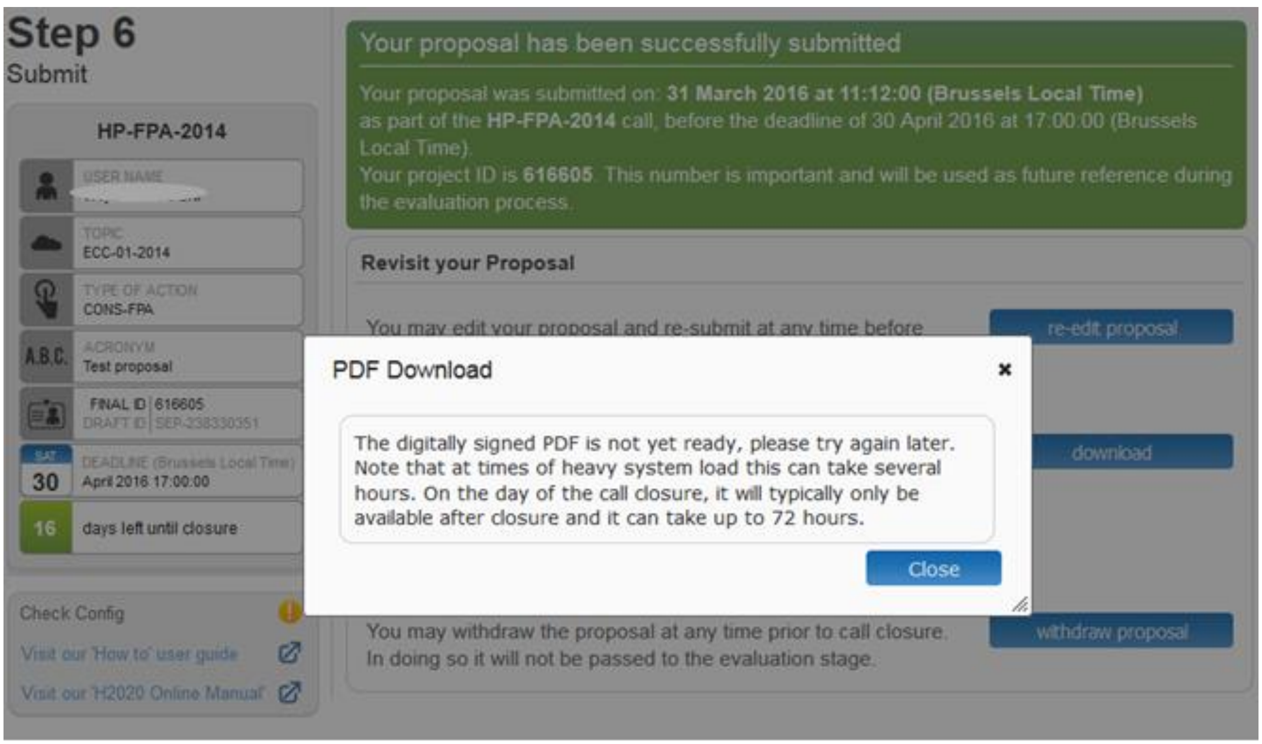
If you need to revise your proposal, click the re-edit proposal button to go back to **Step 5**. The Proposal Coordinator may continue to modify the proposal and submit revised versions overwriting each preceding one right up until the deadline.

Note: This option will not be available to you if you attempt to revise a proposal which was submitted for a **'continuously open call'**. It will not be possible to edit proposals for calls which are already closed.

EReceipt. Download the Submitted Proposal Package

After submission of the proposal, it is advised to download your proposal in order to check that it has been correctly submitted.

A digitally signed and time-stamped version of the latest submitted version of your proposal can be viewed / downloaded.



Click the download button to download your proposal.

Note: Depending on the volume of proposals submitted, this signed and time stamped version can take from a few seconds up to several hours to be visible in the submission application. If you cannot wait, alternatively you can go back to the Step 5 and use the print-preview button to download the form A, except if the call has reached already the deadline and the status is closed.

Withdraw a Submitted Proposal

If your proposal is withdrawn, it will not be considered for evaluation. However, the system will keep the proposal draft and the withdraw action may be reversed by re-submitting the proposal before the call deadline. You will have to enter a reason for the withdrawal.

When a proposal is withdrawn, a message is displayed on the screen informing that the proposal currently holds that status. An e-mail is also sent to the Proposal Coordinator, including the details of the withdrawn proposal. Note that the e-mail might get lost in your spam folder or get blocked by the anti-spam system of your organisations, so make sure that you check for it as needed.

To complete this action, click on the withdraw proposal button.

Partners

To be added, a partner must have both an EU login and a PIC for his/her organization. When the Proposal Coordinator clicks Save Changes in **Step 4**, an automatic email will be sent to all the Partner contacts with the proposal related links.

A partner contact without an EU Login will be prompted in the proposal notification email to register in the application.

> Dear Manolo SCHMIDT,
>
> has invited you to register to EU Login in order to access "PPW".
>
> To accept the invitation, follow the link below:
> <accept invitation>
>
> If this email reached you in error, you can disregard it or decline the invitation:
> <decline invitation>
>
> Sent to you by EU Login

Once the Partners enter the electronic submission system, they will launch into the **Step 5** of the submission process where the edit forms button enables them to access the electronic administrative forms and the rest of the proposal package and maintain the parts related to their organisation, only.

To access the consortium contact details, they will need to click the << back button – thus going back to **Step 4** of the submission process.

Completing the forms

When the form is opened, the partner will have to verify or fill in their administrative form and make sure to correct any validation errors. To check for validation errors, partners must use the **VALIDATE FORM** button located at the top of the form. The process is the same as explained under the section Validating, Saving and Closing the Form above

Please note that only the proposal coordinator will be able to upload files for the Part B.

CHAPTER 3: REFERENCE GUIDE TO ROLES, SCREENS & TASKS

Roles, Proposal Coordinator, Partner and Contact Person

The roles that are available in the system are the Proposal Coordinator, Partners, and Contact Persons (optionally). The Proposal Coordinator and each of the Partners have a Main Contact and can optionally have one or more additional Contact Persons. Depending on the proposal you participate in, you might act on behalf of one or more of these roles and your current role will determine the actions you will be able to carry out, as well as determine the information that you will be required to provide.

- **Proposal Coordinator**. The Proposal Coordinator acts as the single point of contact between the participants and the Commission for any given proposal. The Proposal Coordinator is generally responsible for the overall planning of the proposal; for building up the consortium that will do the work, and (s)he is always the first participant. Note that for some calls, only one participant is needed and the participant will be the Proposal Coordinator of the given proposal by default.

  Note: A Proposal Coordinator can **promote a partner organisation** to **Coordinator** status via a drag-and-drop function as long as this partner organisation provided details of a main contact. Once this change has been implemented, all contacts of both organisations will be notified of the **change in access rights**. When swapping roles with a partner, the **original coordinator contact(s) lose(s) their full editing and submission rights** for the proposal. This functionality is not available for ERC/MSCA calls.

- **Partner**. If you are a Partner to a proposal, you will be invited by the Proposal Coordinator to fill the administrative forms that contain the contact and address details. Most of the fields will be pre-filled with information already provided to the Commission services in order to save time and to ensure better data quality.

- **Contact Person**. Optionally, a Proposal Coordinator or a Partner may decide to delegate some of the work involved in filling in or reviewing parts of the proposal submission forms to one or more additional Contact Persons. You can grant each Contact Person full access rights or read-only access to the forms data. A Contact Person will only be entitled to edit/view the parts of the proposal that his/her organisation is responsible for.

  Note: A Contact Person with full access rights cannot change their own access rights level to 'read-only' – this can only be done by the Proposal Coordinator or another user with full access rights.

  However, a **contact person with access rights to a proposal** will be **notified** whenever they are **deleted from the list of contacts** pertaining to an organisation. When an entire organisation (including all of their contacts) is deleted, all contact persons will receive an email informing them that their access rights to this particular proposal have been revoked.

- **Calls with Specific Contact Roles.** Most calls use the standard **Main contact** and **Contact person** roles for the Proposal Coordinator organisation. However, some calls (e.g. *ERC-2019-COG*) may require more specific roles, such as **Principal Investigator**, **Main Host Institution Contact, Researcher**, **Supervisor**, **Applicant**, and so on. Calls of this type are pre-configured accordingly so that the proposal submission forms for them contain special sections to address the specific roles and the respective data as needed. Likewise, the Proposal Submission Wizard for these calls will display the respective role options, as configured for each call.

Changing Main Contact Information

Only one **Main Contact** is allowed for each organisation. However, for business reasons, you may need to change the **Main Contact** person details after the initial **Main Contact** assignment. For example, you can edit the **Main Contact** details of the existing person, or you can assign an existing **Contact Person** as the **Main Contact** replacing the original one, or you can first delete **the Main Contact** and then add a new one, etc.

When the information about the existing **Main Contact** changes (or when you delete it), the system will display a confirmation prompt warning you that you would lose the previous **Main Contact** data. If you change an existing **Contact Person** as a **Main Contact**, or if you add a new contact person in the Main Contact role, the previous **Main Contact** will automatically become a **Contact Person** – the two roles will be reversed.

In addition, all changes in the **Main Contact** details will be automatically reflected in the Administrative Form.

Role Rights

The following table highlights the differences between a Proposal Coordinator's and a Partner's actions:

Action	Proposal Coordinator	Partner
Select the call	Yes	No
Add, Invite Participants	Yes	No
Submit the proposal	Yes	No
Read complete proposal	Yes	Yes
Define the budget tables	Yes	Yes, with full rights to fill in only the row for his/her organisation.
Create Contacts for a Partner	Yes	Yes, with full rights to fill in only the information for his/her organisation.

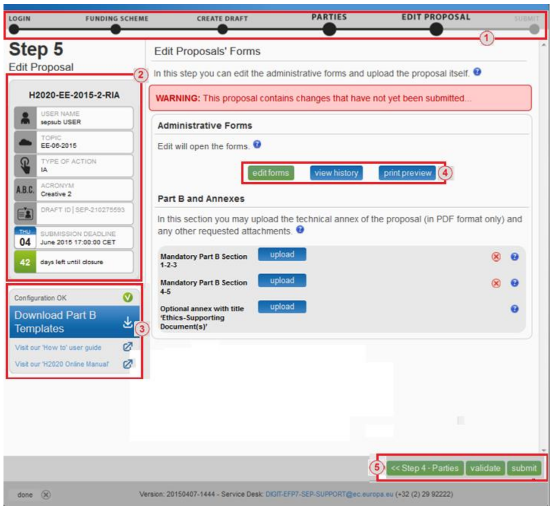
The Timeline around the Deadline

Proposals can be submitted multiple times before the call deadline specified in the information package of the call, available from the Funding & Tenders Portal. Calls deadlines are fixed and will normally not be extended. Only the most recently submitted version will be evaluated, whereas each newly submitted version overwrites the previous one. After the call deadline, the proposal can no longer be modified and no further participants can be invited. Practise the proposal submission procedure well before the deadline to ensure a risk-free submission of your proposal and proper correction of errors and warnings.

After the deadline, the proposal remains available in read-only mode and can be accessed by the coordinator and the proposal participants before the deadline.

The Online Submission Wizard: Screens and Access to User Actions

The electronic submission system screen is composed of different elements. See below to get familiar with them:



1. Progress bar

   A progress bar banner which shows the proposal completion progress. It shows in which step of the process you are right now.

2. Proposal information panel

   Displayed on the left hand side of the screen, it is the ID card of your proposal. The information displayed there is completed as the user progresses. It also shows useful information such as the submission deadline for the corresponding call.

3. Configuration status check tool

   It is displayed at the bottom left part of the screen. In the visual example above, the configuration complies with the minimum requirements.

   This part also allows downloading the Part B templates in RTF format, and it includes links to the help wiki site and the Online manual.

4. Action buttons

Buttons for the available actions. They will be different depending on the step in which you are. The ones above, corresponding to **Step 5**, are connected to editing the administrative form Part A and uploading the Part B documentation. In Step 4, they will consist of actions to add/remove partners, etc.

5. Proposal navigation buttons.

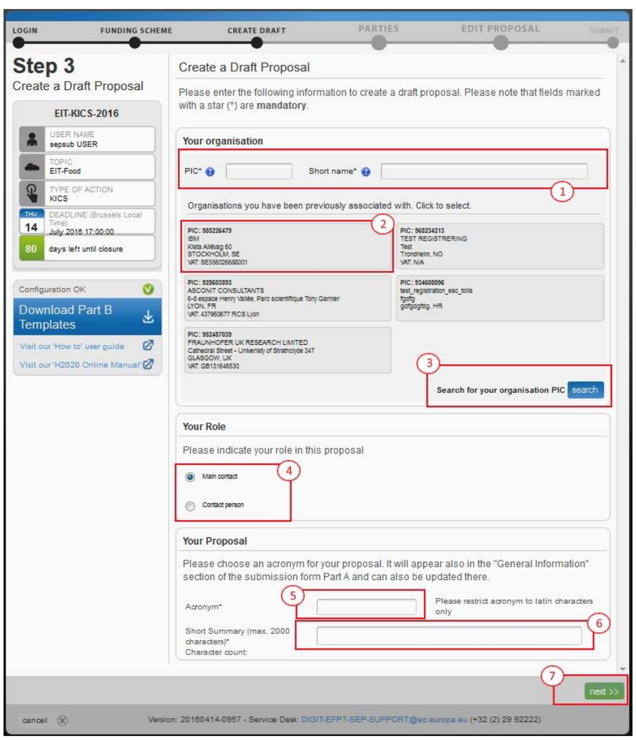
   Available at the bottom right corner, they allow you to go from one step to another, validate the content of the proposal and to submit your proposal.

   There are no more navigation buttons in **Step 6**, where only action buttons will be available as explained in Step6: The 'Proposal Submitted' Page.

Wizard Step 3: CREATE DRAFT

The picture below shows the Create a Draft Proposal screen of the wizard. You will have to perform 7 actions, each one indicated below with a number shown in the image which follows:

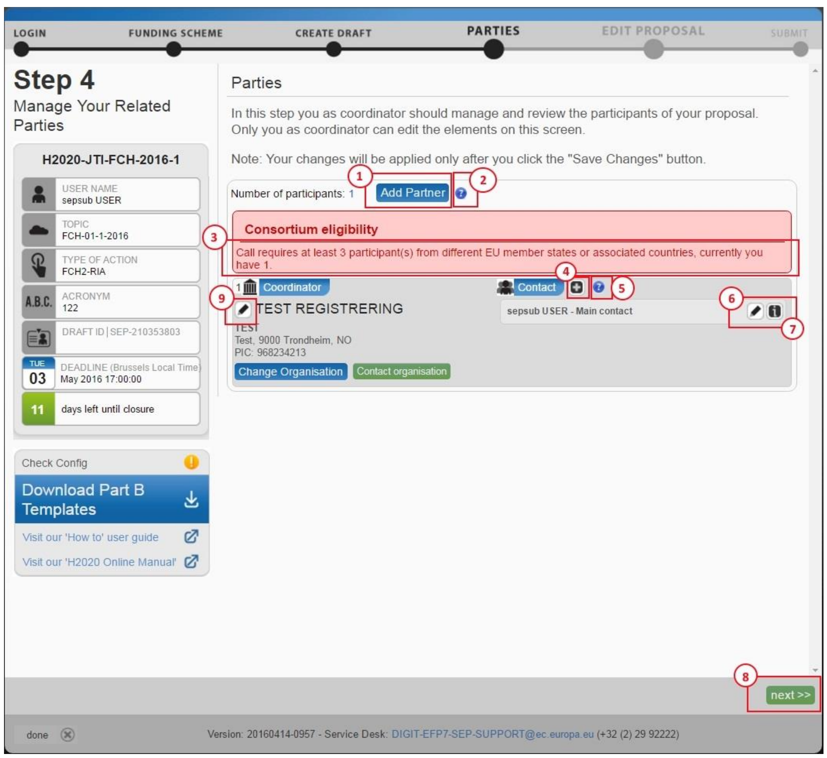
1. Enter your organisation Search criteria.
2. Alternatively, select a previously associated organisation
3. Click on the **Search** button to start the organisation Search procedure
4. Select your role , either **Main contact** or **Contact person**
5. Enter a proposal acronym
6. Enter a proposal short summary
7. Click the **Next** button



Wizard Step 4: PARTIES

The picture below shows the **Parties** screen within the wizard. You will be able to perform these 8 actions, indicated on the picture via a number:

1. Click on the **Add Partner** button to add a new Partner
2. Click to display guidance on the Parties section of proposals
3. Warning on the required number of participants. It will be different from call to call
4. Add contact. It will allow you to specify a contact for that organization
5. Displays information about Main contacts, access rights and invitation sent by the system
6. Edit contact, allowing you to modify the contact details (i.e. name, access right and project Role)
7. Displays the email address and access rights in the project for a given contact
8. **Next** button, allowing you to move into Step 5
9. Edit participant name within the project

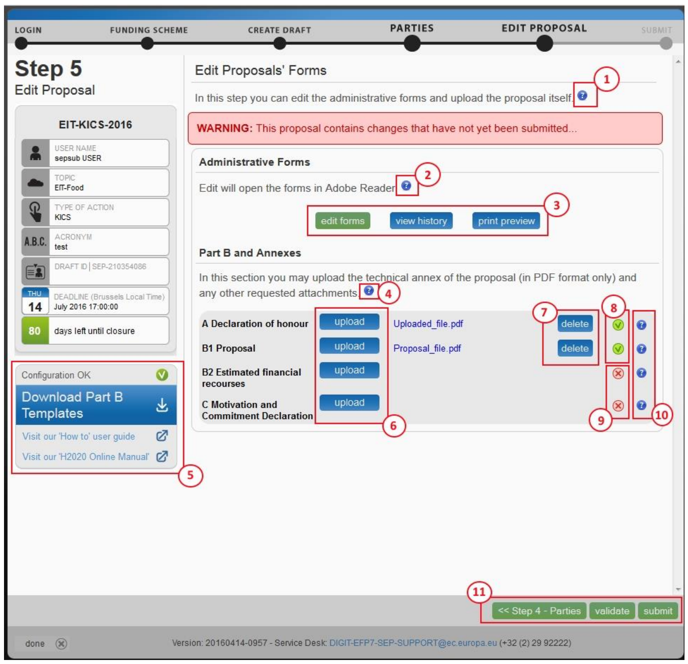


Wizard Step 5: EDIT PROPOSAL

The picture below shows the EDIT PROPOSAL screen of the wizard:

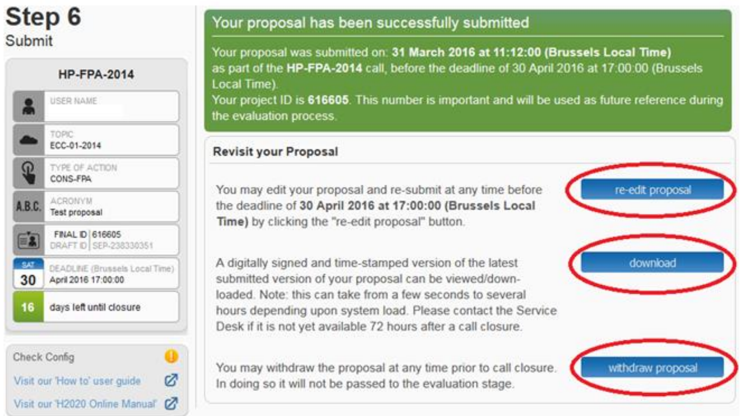
1. Click to open guidance on editing the proposal forms
2. Click to open guidance on editing the Administrative forms (Part A)
3. Action buttons for the Administrative forms in Part A

4. Click to open guidance on annexes and Part B forms
5. Click to download latest proposal requirements package (i.e. Part B)
6. Click to upload required Part B document
7. Click to delete an uploaded document
8. Indication if the required document was uploaded
9. Indication if a required document is missing
10. Attachment info including whether mandatory, maximum allowed size, maximum number of pages and type of file to be uploaded (i.e. pdf)
11. Navigation buttons



Wizard Step 6: SUBMIT

The picture below shows the SUBMIT screen of the wizard. There are basically 3 actions you can take in this screen:



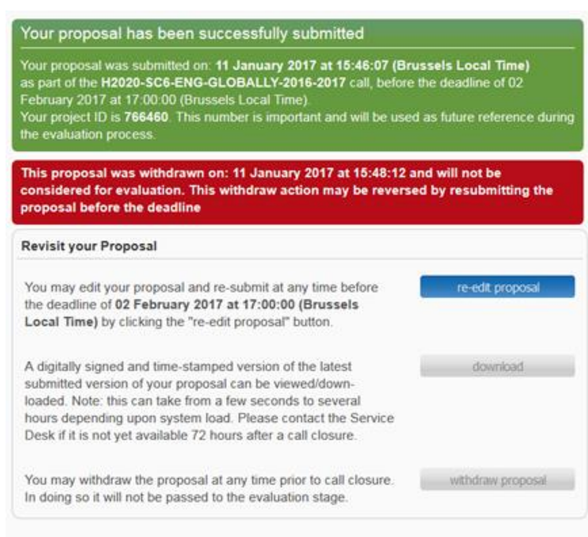
1. Re-edit proposal: allowing you to change the content of your proposal. Please note that you will need to submit again for the changes to be reflected. Also, this action is available only until the call closure date/time is reached.

2. Download: allowing you to download a digitally signed copy of your proposal. This will not be available immediately after submission. If the copy is not available yet, you will get a message asking you to wait a bit longer.

3. Withdraw proposal: This allows you to withdraw your proposal so that it does not go to the validation phase.

   If the call is still open when withdrawing, the entered data will be available and you will able to edit and submit again. The button **re-edit proposal** will be active for such an aim.

   If withdrawn, a message in red will appear in the screen, just below the submission confirmation, informing that the proposal will not be consider for evaluation.



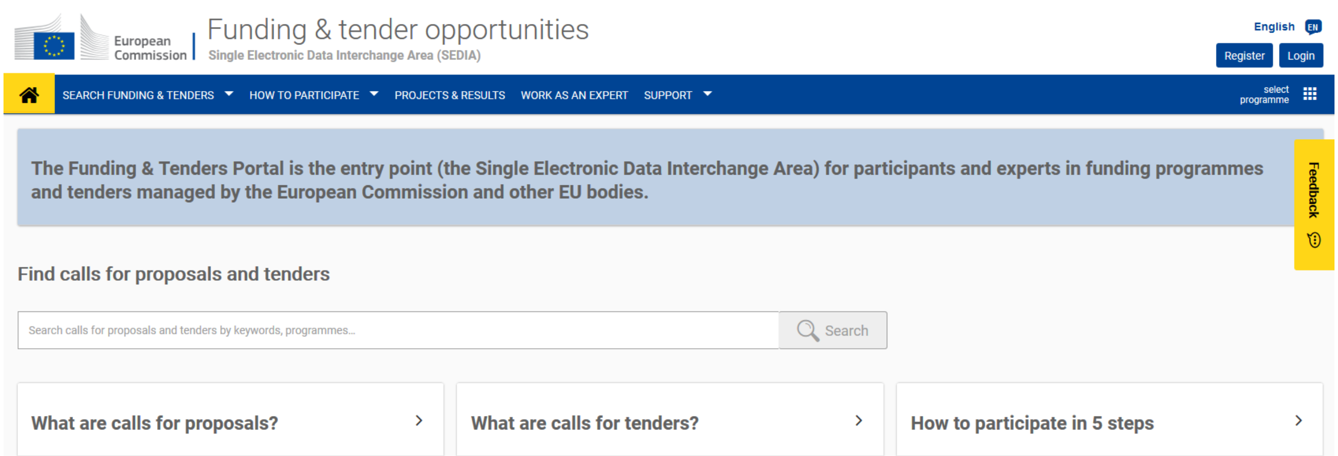
The Funding & Tenders Portal: Screens and Access to Submission Tasks

The Funding & Tenders Portal is your entry point to the Online Submission Service. It allows you to carry out the following actions:

- Familiarize yourself with the overall research and innovation grant process by first consulting the **How to participate** tab on the Portal.
- Decide on the funding opportunity that you want to apply for.
- Select your Partners – check Partner information in the **Participant register** section.
- Register as a user for the EU Services by creating an EU Login
- Register your organisation and your Partner organisations in the Participant register section.
- Log into the Funding & Tenders Portal and *Select* your *Topic* to access the Online Submission Service.
- Use the *MY AREA* > *My Proposals* / *My Organisations* pages to access your draft and submitted Proposals.

Funding & Tenders Portal: Before You Log In

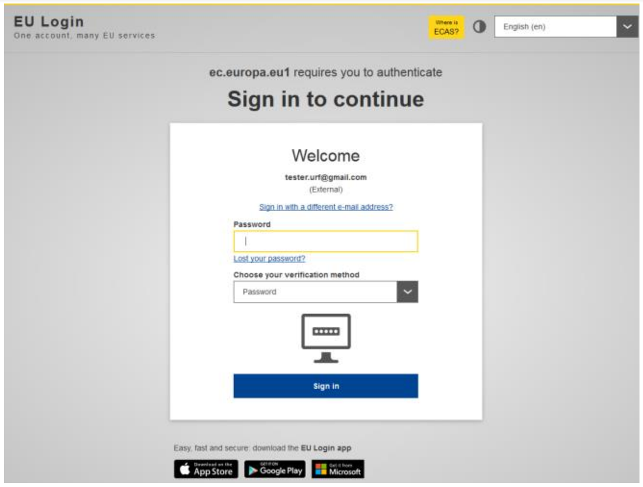
Create an EU Login or, if you already have an account, log in with your registered email address. Before logging in, familiarize yourself with the grant process, the funding opportunities and check the Partner information.



Funding & Tenders Portal: The EU Sign in Screen

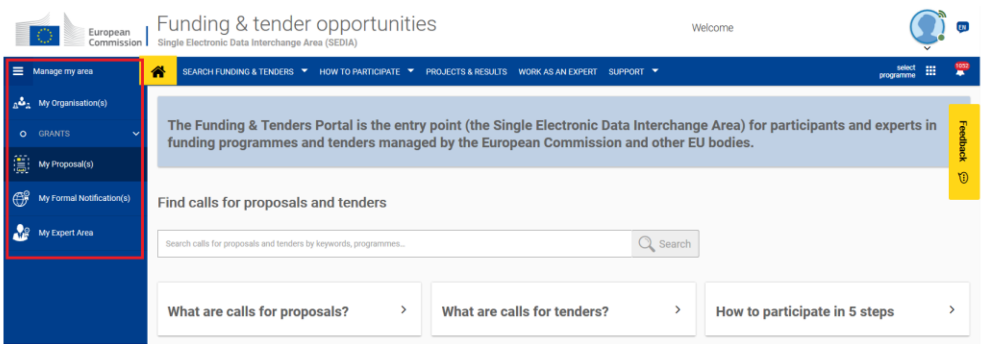
When you click 

, you will be prompted to log in through the EU login screen, as shown in the picture below. This screen appears in the same window. After entering your credentials and logging in, you will be redirected to the Home page of the Funding & Tenders Portal.



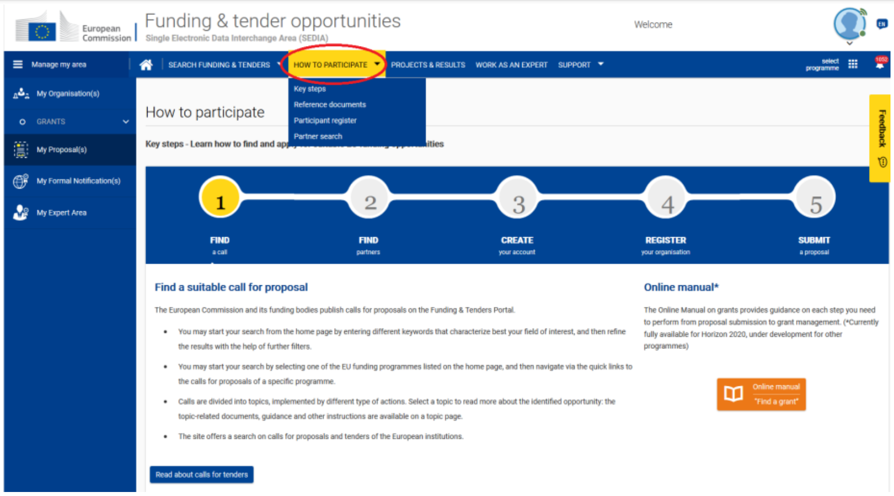
Funding & Tenders Portal: The EU Login and "Manage my area"

Once logged in, your personalised **MY AREA** displays on the left, under **Manage my area**. Here you can access your Organisations, Proposals, Projects, Notifications, etc. Please note, **Manage my area** shows only the section for which there is existing data. For instance, if you do not have any proposals yet, you will not see "**My proposals**" on the left.



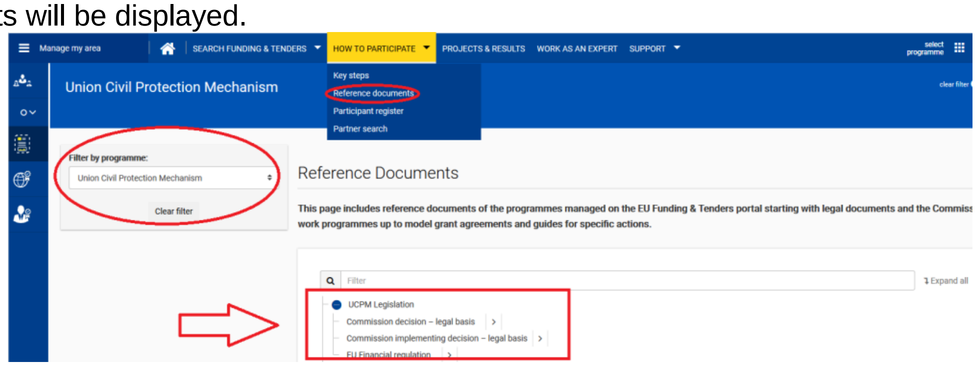
Funding & Tenders Portal: The **HOW TO PARTICIPATE** Page

Select How to Participate from the upper menu. This page is your main source of information as you prepare for submitting your proposal.



From this page, you may:

- Have an overview of the submission process by clicking on "**key steps**".
- Access the Reference documents for each funding programme by selecting "Reference Documents". Then select a funding programme and the different available reference documents will be displayed.

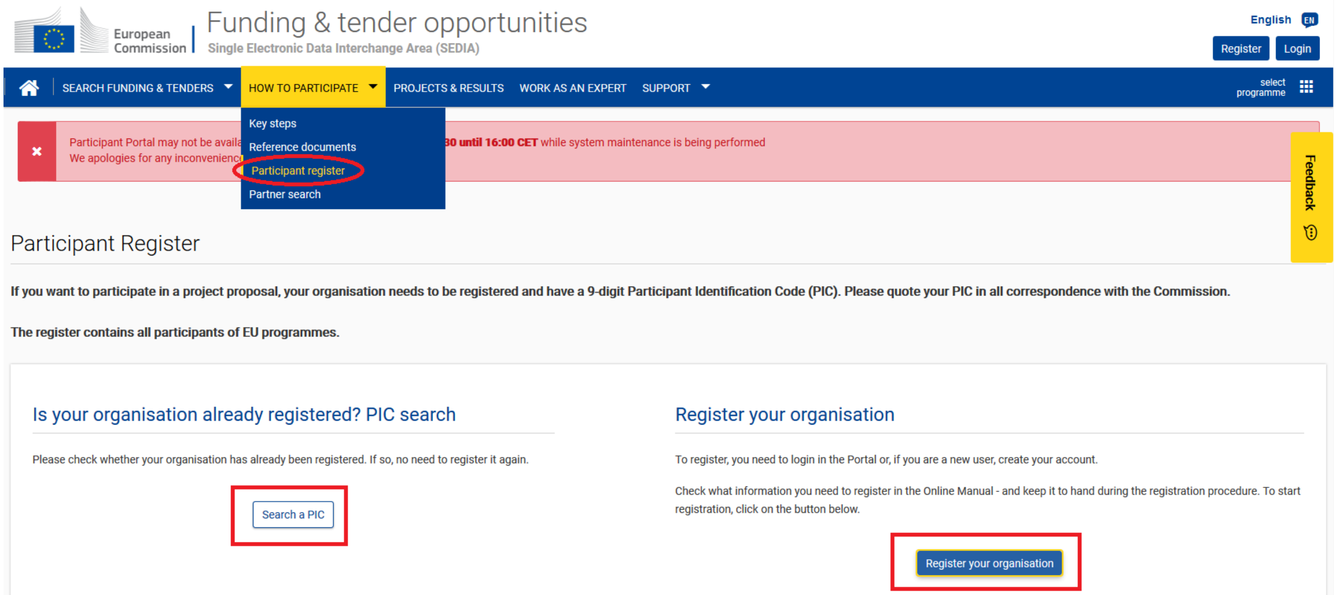


- Register an organisation via the **[Participant register]()** section, by selecting **Participant register** under **How to participate**.
- Look for potential partners using the [Partner Search]() functionality.

Funding & Tenders Portal: The Participant Register Page

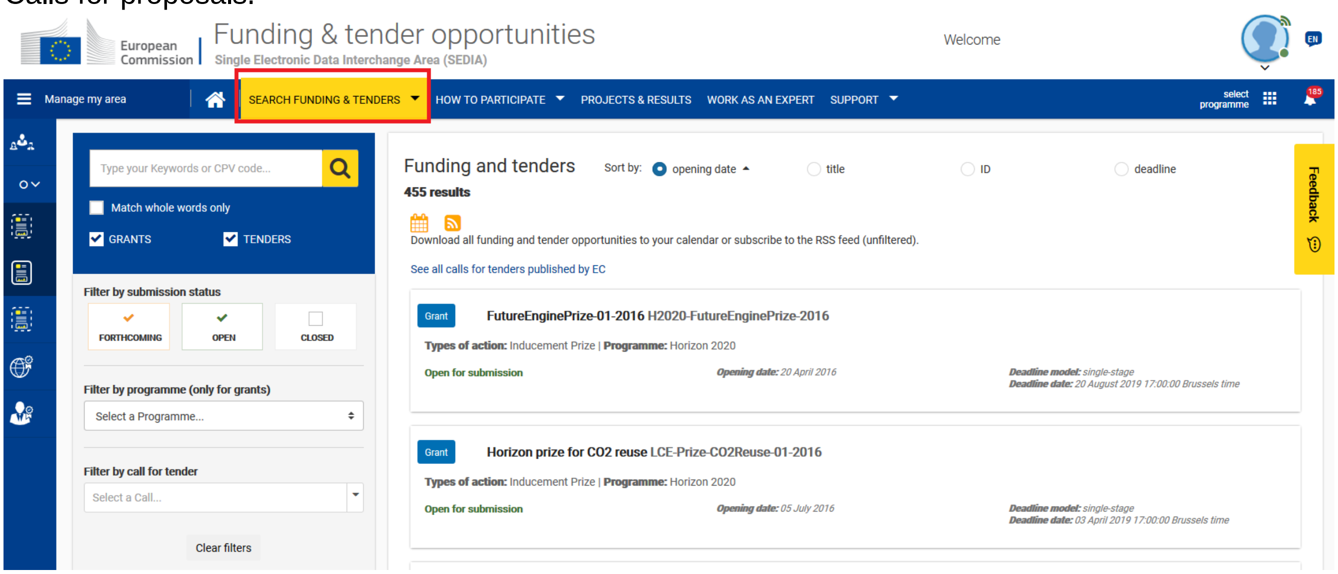
The Participant register page is accessible via the **How to participate** tab. It allows you to:

- **Search** the registered organisations database and check if your desired Partners' organisations are already registered with the European Commission.
- **Start** (or **Resume**) your organisation registration process via the **Participant register** application.



Funding & Tenders Portal: Search for Funding Opportunities

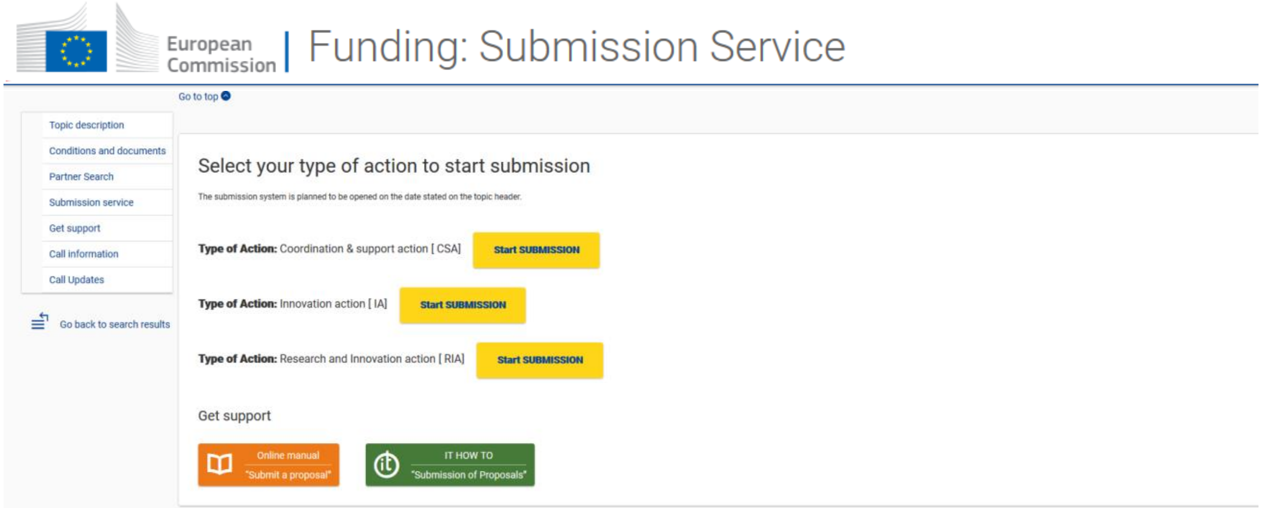
The **Search Funding & Tenders** section on the menu is your access point for searching and selecting Calls for proposals.



Use the filters on the left to look for funding opportunities. The results display on the right. Once you have selected a specific topic, click on the topic name to access the topic page:

If you wish to see the other topics of the call, click on "see all topic of this call", you will be taken back to the search funding & tenders search screen, where all the topics will be listed for you.

Click on the name of the Topic for which you want to submit a proposal, and scroll down to submission service section, or access via the menu on the left. To start the submission wizard click on the **Start Submission** button.


European Commission
Funding: Submission Service
Go to top
Topic description
Conditions and documents
Partner Search
Submission service
Get support
Call information
Call Updates
Go back to search results
Select your type of action to start submission
The submission system is planned to be opened on the date stated on the topic header.
Type of Action: Coordination & support action [CSA]
Start SUBMISSION
Type of Action: Innovation action [IA]
Start SUBMISSION
Type of Action: Research and Innovation action [RIA]
Start SUBMISSION
Get support
Online manual
"Submit a proposal"
IT HOW TO
"Submission of Proposals"

APPENDIX A: COMPATIBILITY & SYSTEM CONFIGURATION

Recommended System Configuration

The electronic submission system of the European Commission is a web application. Therefore, a working Internet connection is needed in order to use it. Although the system has been tested with a set of typical reference configurations, it is not guaranteed that the application will be fully functional on your computer. The system provides a diagnostic window that will warn you about some possible incompatibilities.

To use the electronic submission system, ensure that your computer configuration complies with the following mandatory system requirements:

Component	Recommended configuration
Internet connection	DSL Line, 2.0 Mb/s or faster
Memory	RAM – 4 GB or more
Screen resolution	Minimum 1680 x 1050 of higher
JavaScript	JavaScript must be enabled
Cookies	Cookies must be enabled
Pop-up blocker	Website should be white-listed in the pop-up blocker
User ID	Valid user ID with the Commission (EU Login)
PDF Reader	A PDF reader application will be needed in order to use the functionality of print preview, as well as being able to check the annexes in Part B, since they have to be uploaded in pdf format.

Recommended Browsers

The following table shows the operating systems and browsers actively supported by the system. This configuration will provide you with a fully enhanced experience.

Operating system	**Internet browser**
Windows 7, 8 & 10	Chrome 54 Firefox 45 Internet Explorer 11 Microsoft Edge 13-14
Mac OS X from 10.10	Safari 10 Chrome 54 Firefox 45
Linux	Firefox 45

Note: The use of mobile devices for online submission of research proposals is not supported**.**

Other Recommended Browsers

The following configuration will provide you with an acceptable performance. Any other versions of internet browsers are out of scope for support:

Operating system	**Internet browser**
Windows Vista & 8	Firefox 40-44 Chrome from 49-53
Mac OS X	Safari 8-9
Linux	Chrome 49-53

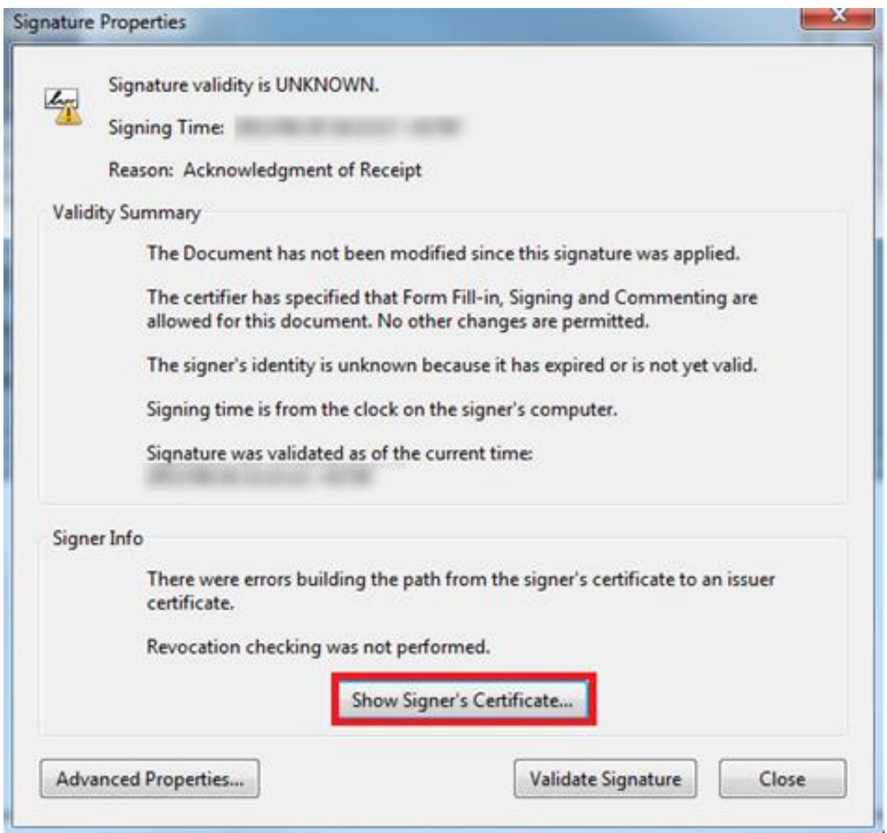
Troubleshooting Document Structure (E-Receipt: *Signature not verified* message)

You receive the following message: "The European Commission digital signature (eReceipt) of the submitted proposal is not validated" after downloading your submitted proposal.

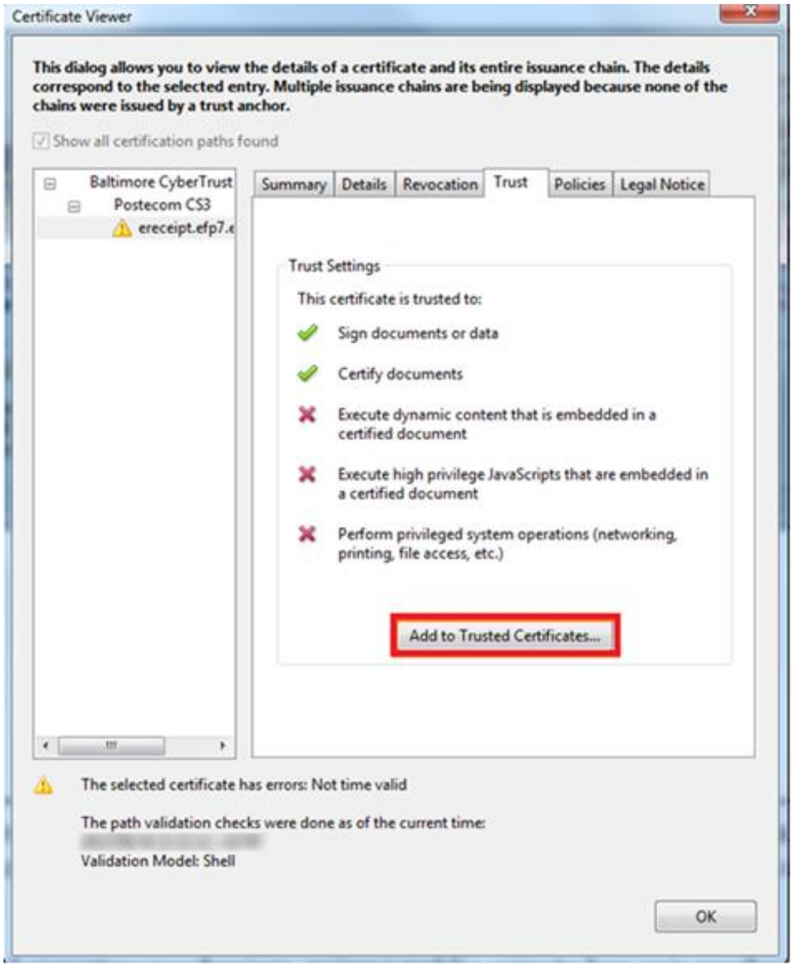
The following procedure is only applicable for Windows operating systems. After downloading the submitted proposal:

1. Click **signature** located at the table of contents page
2. Click **Signature Properties…** in the Signature Validation Status window

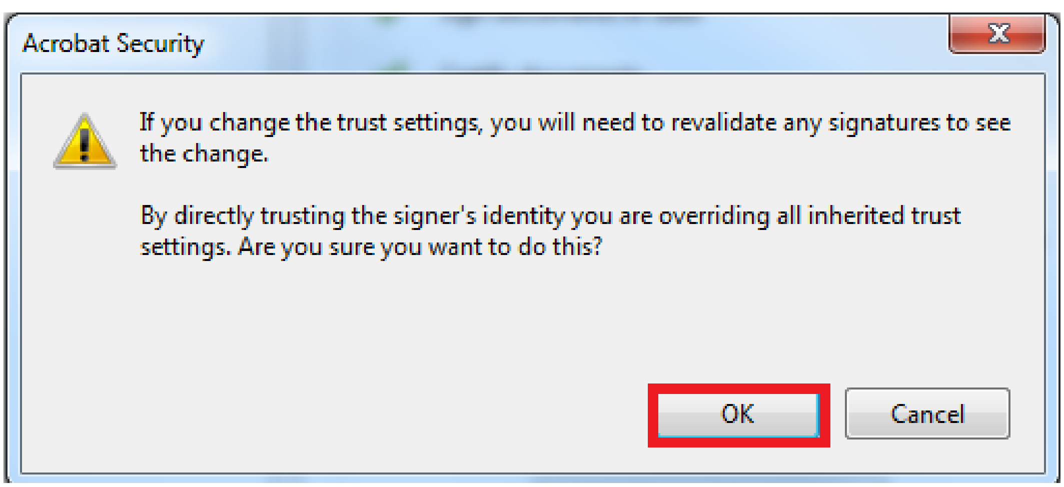
3. In the Signature Properties window click **Show Signer's Certificate…**



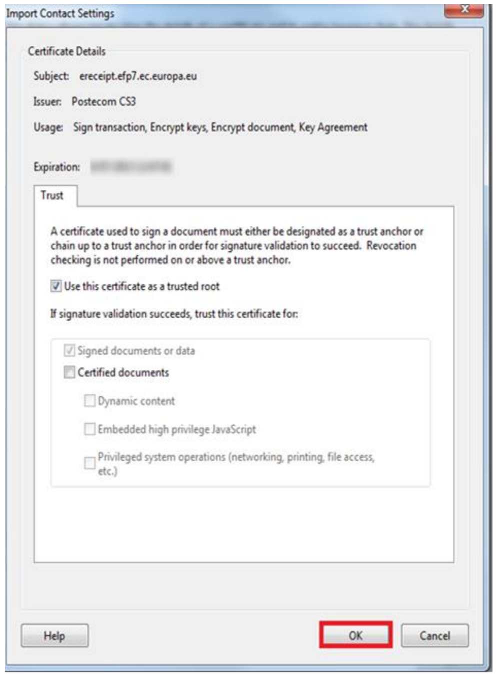
4. Select the **Trust** tab and Click **Add to Trusted Identities** in the Certificate Viewer window.



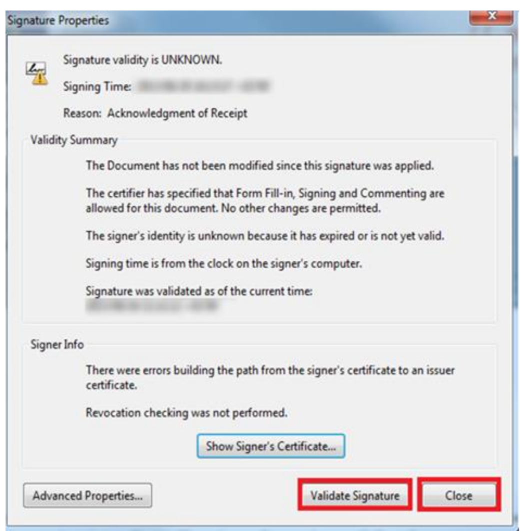
5. Click **OK** in the Acrobat Security pop-up window to confirm.



6. The **Import Contact Settings** window should be displayed



7. Tick **Use this certificate as a trusted root;** and then click **OK.**
   Note: ticking **Certified documents** is not required.
8. In the **Signature Properties** window click first **Validate Signature** and then **Close**.



9. The Commission digital signature or eReceipt should be validated now


European Commission
RESEARCH AND INNOVATION PARTICIPANT PORTAL E-RECEIPT
Signature valid
Digitally signed by ereceipt.efp7.ec.europa.eu
Date:
Reason: Acknowledgment of Receipt

APPENDIX B: EU LOGIN REGISTRATION

To use the Online Submission Service, you need to have a personal user account with the European Commission Authentication Service (i.e. an EU Login).

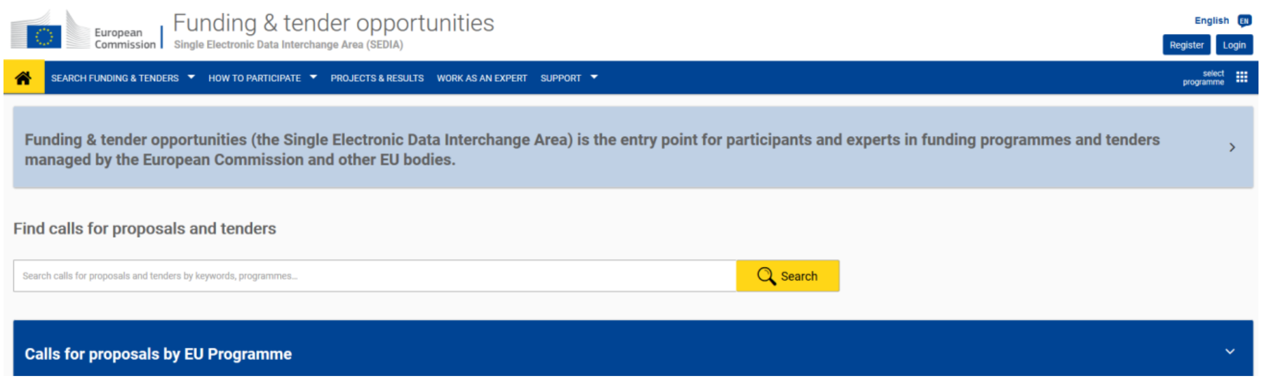
To create an EU login, follow the instructions below.

Note: For additional information, see the Online Manual.

EU Login registration steps:

1. Go to the Funding & Tenders Portal:

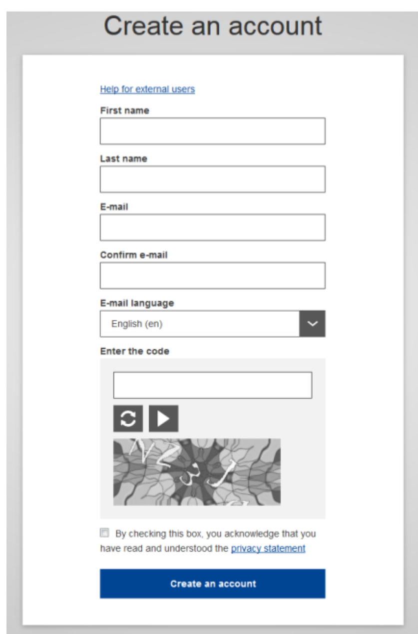
   https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home



2. Click 

.

3. The **EU Login – Create an Account** screen will be displayed, fill in the fields accordingly:

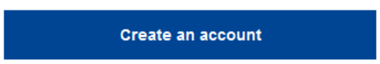


   All fields in the registration form are mandatory.

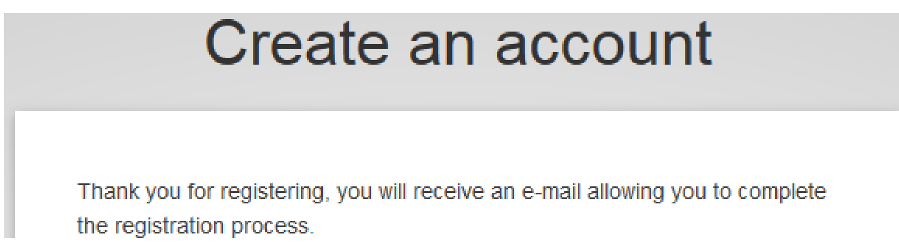
4. Optionally, click the link **[Help for external users]** if you need additional instructions.
5. Enter your **First name** and your **Last name**.
6. Enter your **E-mail**. When registration is complete, a confirmation email will be sent to this email address.
7. Enter your e-mail address again in the **Confirm e-mail** field. You will receive an error message and you will have to enter the email again if it does not match the e-mail address provided in Step 6 above.
8. Select the **E-mail language** that you want the European Commission to use in the e-mail communications sent to you.
9. In the **Enter the code** field, enter the five characters shown in the blue box above the field. For security reasons, the characters are not displayed clearly and may not be copied from the blue box.

   If you cannot read the characters in the blue box or if you are entering them but you are receiving an error message, try the following:

   a. Click  to reload a different character combination and enter it in the **Enter the code** field.

   b. Alternatively, click on  to hear an audio recording of the characters in English. You will need to use your computer speakers or headphones – make sure you have adjusted the volume to a comfortable level.
10. Read the privacy statement by clicking on the link. If you agree with it, close the privacy statement window and tick the privacy statement box acceptance under the **Enter the code** field.
11. Click 

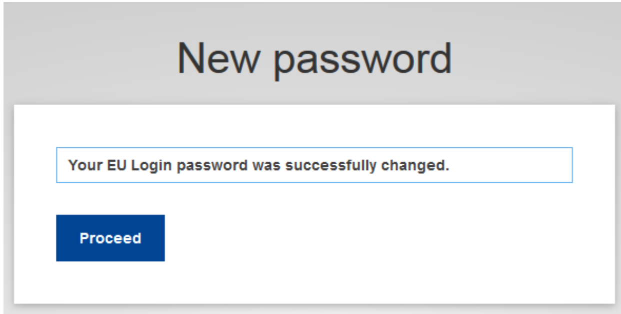
.
12. If you have not provided the required information in the fields, or you have entered a wrong code or an email address in an incorrect email format, the system will prompt you to go back and correct the errors before you can sign up.
13. The following message will appear to confirm that your account has successfully been created:



14. The system will send you a confirmation email to the email address you provided in the sign-up form. Open the email and click the activation link provided to activate your account. You have a maximum of 24 hrs, starting from the time the message was sent, to create your password.

Note: Make sure to check your spam folder if you cannot find the confirmation email in your inbox.

15. Enter a valid password following the instructions on the screen.
16. The following message confirms the creation of your account:



17. Click on **Proceed** to log in automatically to your new account, or go back to the Funding & Tenders Portal:

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

Then click 

.

GLOSSARY

This is a glossary concerning the current document; check here the Funding & Tenders glossary for more terminology:

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/glossary

<table>
<tr><th>Term</th><th>Definition</th></tr>
<tr><td>Applicant

Back to text</td><td>Generic term for any person/organisation that prepares and/or submits a proposal. There are two types of applicants:
• The proposal coordinator
• The partner
The "Proposal Coordinator" role is allowed to register and to submit the proposal, while the 'Partner' role is only involved in the preparation of the proposal.
Synonyms: Partner</td></tr>
<tr><td>Beneficiary/ Participant

Back to text</td><td>A beneficiary or "beneficiary of the European Union funds" refers to the legal entity that signs a grant agreement and/or procurement contract (i.e. the grant beneficiary and/or contractor) with an "entity managing EU funds". Depending on the management mode this entity may be the European Commission, a beneficiary country, an international organisation, or a Community or national agency.
Subcontractors or suppliers as well as partners/consortia members of the beneficiaries are not concerned (http://ec.europa.eu/europeaid/work/funding/beneficiaries_en.htm)
Synonyms: participant
Broader term: partner</td></tr>
<tr><td>Call

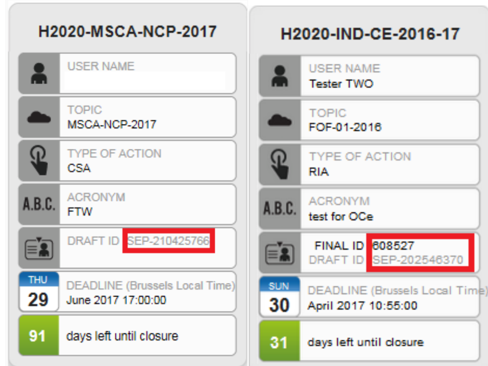
Back to text</td><td>An invitation for third-parties to submit a proposal in order to get funding. Calls cover specific research areas and are always issued in the context of a Work Programme.
Call for proposals
Procedure to invite applicants to submit project proposals with the objective of receiving funds from the European Union.
The European Commission publishes calls for proposals. It is an official invitation to submit a project proposal for a specific area of a framework programme by a specific date. Calls specify very clearly what is required in the Work Programme. Calls for proposals are officially published in the European Union Official Journal and on the Funding & Tenders Portal.</td></tr>
<tr><td>Consortium

Back to text</td><td>A Consortium is a group of Participants, one of which is identified as the Proposal Coordinator in the proposal submission. A nominated Proposal Coordinator Contact will represent the Consortium to the Commission, who is normally an employee of the Proposal Coordinator Organisation, but acting on behalf of all for most aspects of the project. In the context of a running project, the following constraints shall hold:
• There shall be exactly one Proposal Coordinator Contact within each Project Consortium.
• The Coordinator Contact identified in the Project proposal shall be a person, nominated from within the Coordinator Organisation, to be recognised by the Commission as the primary point of contact between it and the Consortium.
• Each Partner in the Consortium shall nominate a Partner Contact as its representative in the Project, who shall also be identified to the Commission.
• LEARs in the Consortium may revoke the Partner Contact representing their organisation in the Project.</td></tr>
<tr><td>Deadline

Back to text</td><td>For each particular call, this is the moment after which proposals cannot be submitted to the Commission. At this point the Submission system closes for the respective call. Deadlines are fixed and strictly enforced.</td></tr>
</table>

Term	Definition
ECAS	The Old name for the European Commission's Authentication Service. Its name has been changed into "EU Login", but you could encounter some documents or screens still referring to the "EU Login" as "ECAS". See **EU Login** below for more information.
ERC	European Research Council
EU Login *Back to text*	It is the system for logging into a whole range of web sites and online services run by the European Commission. Once you use your EU Login to enter the Commission website, you will not need to identify yourself again for other Commission websites until you browser session expires (i.e. single sign-on). To stop the automatic single sign-on you need to click **Logout** or close all your open browser windows.
Legal Entity Appointed Representative ***LEAR*** *Back to text*	The LEAR is a person nominated in each legal entity participating in Research programmes. This person is the contact for the Commission related to all questions on legal status. He/she has access to the online database of legal entities with a possibility to view the data stored on his/her entity and to initiate updates and corrections to these data.
Part A *Back to text*	This is the part of a proposal dealing with administrative data. It is completed using the web-based electronic Submission system.
Part B – Template *Back to text*	This is the part of a proposal that explains the work that must be carried out, and the roles and aptitudes of the participants in the consortium. This part is uploaded to the electronic Submission system as a PDF file. The template documents are intended to provide you the topics needing development as part of the proposal. They are supplied by the Commission and downloadable in **step 5** of the Submission wizard. They are provided in RTF format, consisting of a template of all chapter headings, forms and tables required to prepare a proposal Part B.
Participant *Back to text*	The **Participant** (short form of **'Participating Legal Entity'**) is a legal entity that has registered, or has a registration application pending, in order to participate in current or future proposals for research projects. A Participant must be validated (corporate) as a legal entity, uniquely identified within the Participant database by its Participant Identification Code (PIC). Participant registration is made through the Participant register on the Funding & Tenders Portal and subject to a rigorous validation process that may last several weeks. Ideally, a LEAR is identified to be responsible for provision and maintenance of the Participant's legal and financial data. However, until a LEAR is identified and validated, this data may be maintained by the person who initially registered the organisation.
Participant register *Back to text*	An electronic system that enables organisations to register their details once and then use this registration for one or more participations, thus eliminating the need to provide the same information for multiple proposal submissions. The Web interface of the Participant register is accessible from the **Participant register** page of the Funding & Tenders Portal: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register The Participant register also provides an organisation search tool where you can check if your organisation has already been registered as a participant.
Partner *Back to text*	Individuals and legal entities such as companies, consortia, universities, university departments, etc. are allowed to submit proposals requesting financial support. The 'Proposal Coordinator' leads the submission process of the proposal and is the only applicant recognised by the Commission. To avoid the existing confusion, a difference is made between a **Proposal Coordinator Contact** and a **Proposal Coordinator Organisation**. See **Proposal Coordinator** below for more information.
Participant Identification Code	The Participant Identification Code (PIC) is a 9-digit unique identifier for every validated organisation. Participants will not have to submit their legal and financial information (and supporting documents) each time

Term	Definition
PIC Back to text	they submit a proposal or negotiate a grant agreement, but just their PIC. However, if there has been a substantial change in the legal or the financial information since validation took place, they could be requested to provide supporting documents for the change via the **Participant register**.
Funding & Tenders Portal **F&T Portal** **Participant Portal** **PP** Back to text	The Funding & Tenders Portal, substituting the Research and Innovation Participant Portal as from 2019, is the single entry point for interaction with the research Directorates-General of the European Commission, it hosts a full range of services that facilitate the monitoring and the management of proposals and projects throughout their lifecycle, including calls for proposals, and access to the submission and evaluation of proposals service. If you want to participate in a project proposal, your organisation needs to be registered with the Commission. Registration is available from the Funding & Tenders Portal via the Participant register page, where you can check if your organisation is already registered. If not registered, you can start the registration process on the same page and you will be redirected to the Participant register to complete the process. The same process applies for participant registration data updates – you access your organisation from the Portal /My Organisations page and from there you can go to the Participant register to update your organisation data. If your proposal is successful, you will also need to know about the following (see the Online Manual available from the Portal under the **Support** Section): • the checks carried out on the information you provide on registering • appointing a representative (LEAR) The checks that may be carried out on your organisation's financial viability
Proposal Back to text	A set of documents submitted by third-parties in response to a particular call, in an effort to get funded by the EC after evaluation. The main elements of a proposal are the administrative forms and the proposal text. A proposal is a proposed project. Proposals are submitted following a call for proposals by consortium/partners with the goal to be selected and get funded by the Commission Proposal In order to get EC funding for a project, applicants have to write a complete and detailed proposal describing the objectives, planned activities and relevance with the corresponding Call's Activity(-ies). Proposals are individually evaluated by a team of independent experts. Only the very best project proposals will get funding. A description of the planned research activities, information on who will carry them out, how much they will cost, and how much funding is requested should be included in the proposal description.
Proposal Coordinator Back to text	Individuals and legal entities such as companies, consortia, universities, university departments, etc. are allowed to submit proposals requesting financial support. The 'Proposal Coordinator' leads the submission process of the proposal and is the only applicant recognised by the Commission. To avoid the existing confusion, a difference is made between a Proposal Coordinator Contact and a Proposal Coordinator Organisation. The **Proposal Coordinator** Contact is either an individual or empowered individual of an organisation having the responsibility to request financial support via the submission of a proposal. The **Proposal Coordinator Organisation** is the organisation to which the Proposal Coordinator Contact belongs or is linked to, and/or that has given the Proposal Coordinator Contact the responsibility to submit a proposal to request financial support. Broader Term: Beneficiary, Partner
Proposal ID Back to text	An identifier assigned to a proposal after it was submitted. Once a proposal is funded, its Proposal ID becomes its Project ID. Drafts of proposals are also assigned a Proposal ID, different from the final one when submitting. Both of them display on the left side in the tool.

Term	Definition
	 The Proposal ID can be provided to the helpdesk for troubleshooting purposes.
REA	Research Executive Agency
Submission *Back to text*	The formal act to submit a proposal to the Commission via a web based application. Proposals can be modified and submitted several times as long as the call has not been closed. After call closure the submission is prohibited and proposals are locked. Eligible proposals are thereafter made available to the evaluation system. The **Submission System** is the tool used for sending a proposal for an open call. It is accessible via de Funding & Tenders Portal, and it is often referred as **SEP IT System**.
SEP IT System	The Funding & Tenders Portal Proposal Submission and Evaluation System.
Types of Action *Back to text*	Horizon 2020 calls can have different types of action (funding schemes). The type of action specifies: ✓ the scope of what is funded ✓ the reimbursement rate ✓ specific evaluation criteria to qualify for funding See the Online Manual for more information.
Topic *Back to text*	Horizon 2020 calls for proposals (as defined in the bi-annual work programmes) are subdivided into topics. A topic defines a specific research and innovation subject or area for which applicants are invited to submit proposals. The description of a topic comprises its specific scope and expected impact of the projects to be funded, and also the type of project, evaluation criteria and deadline for submission of proposals.
Work Programmes *Back to text*	The document adopted by the European Commission for the implementation of the specific programme in accordance with Regulation (EU) No 1291/2013 of the European Parliament and of the Council of 11 December 2013 Check the Online Manual for more information.