

# Proposal Submission Service User Manual

28/05/2019





## European Commission



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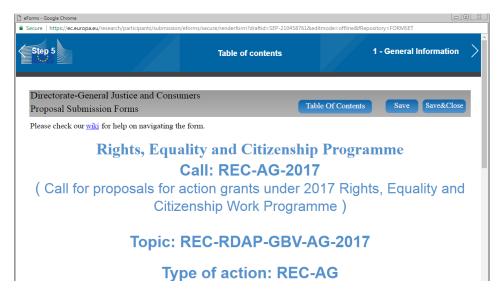


#### **CHAPTER 1: INTRODUCTION**

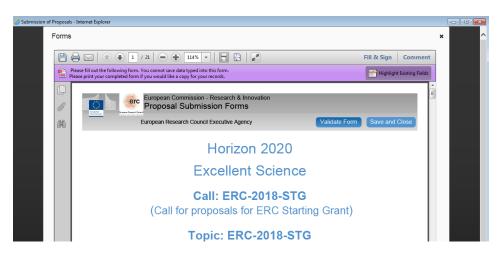
The European Commission's Online Submission Service (hereinafter referred to as 'Submission Service') is designed to automate the documentation submission process for organisations and individuals interested in submitting proposals for funding under various EC program initiatives.

#### **Document Scope**

The purpose of the Proposal Submission Guide is to describe how <u>Participants</u> can prepare and submit a <u>Proposal</u>. Please note that there are two different <u>Submission system</u> technologies. This guide is applicable to calls which use a web-based administrative form. In <u>Step 5</u> 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 <u>other version of the submission manual</u>, instead.



Submission of Proposals - 0 Secure https://ec.eu	2	mission/eforms/secure/editform?draf	tid=SEP-210459486&ticke	et=ST-4709448-0ppUUuqFDSDCMvwIZKDOvwMmkLM	I0wnrlQzGJ
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	TOPIC ERC-2018-SyG	Administrative Forms Edit will open the forms in Adot	e Reader. 😨		
9	ERC-SyG	edit f	orms view history	print preview	
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#### 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 (<u>EU Login</u>).
- 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 <u>HOW TO PARTICIPATE</u> page on the <u>Funding & Tenders Portal</u>. There you will find a wealth of information including the <u>Online Manual</u> and numerous <u>Reference Documents</u>, the <u>Participant register</u>, 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:

- Decide on the funding opportunity that you want to apply for. <u>Funding Opportunities</u> are categorised as <u>Work Programmes</u>, <u>Calls</u>, <u>Topics</u> and <u>Types of Actions</u>. Programmes are listed under the Horizon 2020 title.
- 2. Select your <u>Partners</u>. Most calls require a <u>consortium</u> of three organisations (i.e. <u>participants</u>). Relevant information can be found on the <u>Funding & Tenders Portal</u>.
- 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 <u>Participant register</u> through the <u>Funding & Tenders Portal</u> and receive a Participant Identification Code (<u>PIC</u>). Additional information is available in the <u>Participant register Manual</u>.

#### **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 <u>Partners</u> 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 <u>My Proposals</u> page in the Funding & Tenders Portal (you must be logged in). Alternatively, you can access your proposals from the <u>My Organisations</u> 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 <u>Research Enquiry</u> <u>Service and Participant Validation</u>.

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 <u>PIC</u> 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

European Commission Single Electronic Data Interchange Area (	pportunities		- +	sh 🗊 Login
SEARCH FUNDING & TENDERS 👻 HOW TO PARTICIPATE 💌 PROJECT	S & RESULTS WORK AS AN EXPERT SUPPORT *		sala pagaara	: =
The Funding and Tenders Opportunities Portal is experts in funding programmes and procurement			rchange Area) for applicants, contractors and	Feedback
Find calls for proposals and tenders				13
Search calls for proposals and tenders by keywords, programmes		Q Search		
What are calls for proposals?	What are calls for tenders?	>	How to participate in 5 steps	>
Calls for proposals by EU Programme				>
News		>	Other funding and data	>
go: (isc.europa.eu/efs/Tunding-tenders) apportunities/portal/zonen/horea	2018 European Commission   About   Reedback   Cookie	Legal Notice   A	Pu	

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 <u>APPENDIX B: EU LOGIN</u> <u>REGISTRATION</u> if you do not have an EU Login yet). Click **Next.** 



4. Enter your password; and then click the authentication method by default, but under **Chose your verification method**, you will have the possibility to select different methods to authenticate. Please check <u>How to authenticate</u> with <u>EU Login</u> 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.



#### European Commission | Funding: Submission Service

	European Commission United States (1980)	Ô,	Ø
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	The Funding and T contractors and experts an ensuing programmes and procurements managed by the European Commission.	ants,	Feedback 💬
ŧ	Find calls for proposals and tenders		U U
	Eesrch calls for proposals and tenders by keywords, programmes		
	What are calls for proposals? > What are calls for tenders? > How to participate in 5 step	ps	>
	Calls for proposals by EU Programme		>
	News > Other funding and data		>
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 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

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		Auditate adds (1 / 6 / 2011 / 2018) from     Auditate adds (1 / 6 / 2011 / 2018) from     Fast Track. In Innovation (FTI) ELC FTI-2018-2020     Types of addites movements without 2019     Gen     Gen     Gen	ses ime	

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).

≡ Ma	nage my area 🛛 🕋 SEARCH FUNDING & TENDERS 🔻 HOW TO PA	RTICIPATE 👻 PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT 👻	programme 🗰 🧩
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	Avers in Application and antigration hand Communit Programme BMP Emotional Statistical Programme = kREALSLIE bitmetal Security Fund Brahes Junice Programme	prizon prize for a Combined Heat and Power (CHP) Installation in a hospital using 100 success LCF. Prizz-RenewableHospita-01-2016 K Inducement Prize (Poggamme: Horizon 2020 Generality Address 25.Ap 2016	<ol> <li>Renewable Energy</li> <li>Anothine study: Tright-study doubline state: (27,407 202) 17 00100 Brussels Imm</li> </ol>
	Plat Projects and Preparatory Actions Programme for the Connectiveness of Distoprises and amail and medium-sized enterprises Promotion of Aground Products Reason found for Caul & Statel Repts, Cossilar and Clarande Programme Dation Child Protection Hechanism	st Track to Innovation (FTI) EIC-FTI-2018-2020 te Innovation action   Programme: Horizon 2023 Opening state: 57 November 2017	Destilier ander mitjble of off



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

Filter by programme (only for grants)		
H2020 <b>J</b>	<	
Filter by programme part		
Select a Programme part \$		
Filter by focus area		
Select a Focus area		
Filter by cross-cutting priority		
Select a Priority \$		

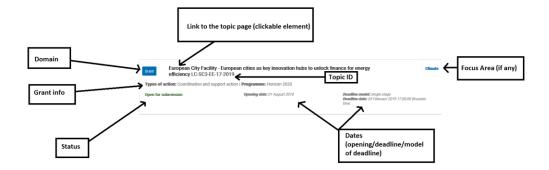
Other programmes do not contain any further filtering options, but whenever a programme has been selected, a new field appears (**Filter by Call**) where you can select by Call. Either scroll down in the list of calls or type part of the topic ID to set up the filter. The results on the right side of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

Type your Keywords or CPV code Q	HERCULE III		cher that 🕑
Match whole words only			
GRANTS TENDERS	Type your Keywords or CPV code Q. Match whole words only	Funding and tenders sort by O opening date the 4 results See all calls for tenders published by EC	0 O deadline
Filter by programme (only for grants)	Filte by submission status Formcourse over CLEEP	Investigation tools HERCILE: FA 2017 01           Types of action: HERCILE: IN to indirect Costs Action Gurd: Programme: HERCILE: IN           Closed         Opening date: 12 Absr 2017	Desailline modelt single stags Besailline didar 19 August 2017 17.0000 Brussen Bene
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HERCULF-LT- AG-2018 Clear filters HERCULF-TA AG-2018 HERCULF-TC- AG-2018	Clear filters	Types of addies: HOROLLE No Indext Casts Action Guidt (SUPERS) HEROLLE 1A 2017 40           Types of addies: HOROLLE No Indext Casts Action Guidt (Programmer HOROLLE 1)           Cased         @www.guidte: 12.80.207	possible anota: skylv-styp possible date (H Aspiri 2017 17.2000 Brown New

**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.

Type your Keywo Match whole v		<mark>Q</mark>	
GRANTS	M TEN	IDERS	
Filter by submission	n status		
FORTHCOMING	OPEN	CLOSED	
Filter by programme	e (only for grant	s)	
Select a Program	me	:	•
Filter by call for ten Select a Call	der		
	Clear filters		

**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.

front			Q
Frontier			
Frontier Research			
Front-runner cities			
wave front error			
Filter by submission	status		_
~	~		
FORTHCOMING	0991	0.05	IED
Filter by programme Select a Programm			
Filter by call for tend	ler		
Select a Call			



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.

	ands only	
GRANTS	TEND	ERS
Filter by submission	status	
FORTHCOMING	OPEN	CLOSED
Filter by programme	(only for grants)	
Select a Programm	e	•
Filter by call for tend	er	

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.

Process Q Match whole words only GRANTS TENDERS	Funding and tenders     Sort by: • opening date     title     ID     deadline       36 results       See all calls for tenders published by EC	i contractor
Filter by submission status FORTHCOMING OPEN CLOSED	Grant         Interactive Technologies ICT-25-2018-2020           Types of action: Research and Innovation action   Programme: Horizon 2020         Description of the single-stage Descrip	
Filter by programme (only for grants) Select a Programme  Filter by call for tender Select a Call	Grant         Increase the competitiveness of the EU PV manufacturing industry LC-SC3-RES-15-2019           Types of action: Innovation action   Programme: Horizon 2020         Penning date: 05 September 2018           Open         Opening date: 05 September 2018         Decaditive model: single-stage Decaditive date: 11 December 2018 (Trade to the section of the section o	Climate
Clear filters	Grant         All Atlantic Ocean Research Alliance Flagship BG-08-2018-2019           Types of action: Research and Innovation action   Programme: Horizon 2020         Description of the model: No-stage Description of the model:	ssels time
	Grant Photocatalytic synthesis (RIA) CE-NMBP-25-2019  Types of action: Research and Innovation action   Programme: Horizon 2020  Forthcoming Opening date: 16 October 2018 Deadline mode: https://doi.org/10.1000/1000/1000/1000/1000/1000/1000/	Circular Economy

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

Training Q	Funding and tenders sort	by: opening date title	O ID O deadline
Match whole words only	12 results		
GRANTS TENDERS	See all calls for tenders published by EC		
	Grant Action grants to suppor fundamental rights JUS	t transnational projects on judicial training covering T-JTRA-EJTR-AG-2018	civil law, criminal law or
Filter by submission status	Types of action: Justice Action Grant   P	rogramme: Justice Programme	
FORTHCOMING OPEN CLOSED	Open	Opening date: 14 June 2018	<b>Deadline model:</b> single-stage <b>Deadline date:</b> 25 October 2018 17:00:00 Brussels tir
Filter by programme (only for grants)			
Select a Programme \$	Grant Innovative Training Netwo		
			of action: European Joint Doctorates   Programme: Horizon 20
Filter by call for tender	Open	Opening date: 13 September 2018	<b>Deadline model:</b> single-stage <b>Deadline date:</b> 15 January 2019 17:00:00 Brussels ti
Select a Call			
Clear filters	Grant Reversing Inequalities G	OVERNANCE-16-2019	
	Types of action: Coordination and support	ort action   Programme: Horizon 2020	
	Forthcoming	Opening date: 06 November 2018	Deadline model: single-stage Deadline date: 14 March 2019 17:00:00 Brussels time

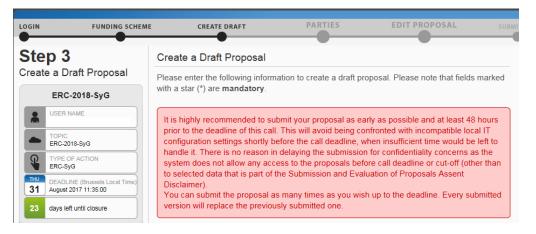
7. Either scroll down to the "Select your type of action to start submission" in the call page (1), or select Submission Service in the table of contents on the left (2). Then click on the **Start Submission** button next to the selected type of action.

Topic Updates	Partner Search	~
Topic description Conditions and documents	2	
Partner Search	9 Organisations are looking for collaborating partners for this topic	
Submission service 2 Get support Call information	View / Edit LEARs, Account Administrators or self-registrants can publish partner requests for open and forthcoming topics after logging into this Portal.	Feedback
Go back to search results	Go to top 🔍	T)
	Select your type of action to start submission Type of Action: Justice Action Grant [ JUSTAG Start SUBMISSION	
	To access the Electronic Submission Service of the topic, please select the <b>type of action</b> that is most relevant to your proposal from the list below and click on the <b>"Start Submission"</b> buttor. You will then be asked to confirm your choice of the type of action and topic, as these cannot be changed in the submission system. Upon confirmation you will be linked to the correct entry point. To access existing draft proposals for this topic, please login to the Participant Portal and select the My Proposals page of the My Area section.	
	Get support:	



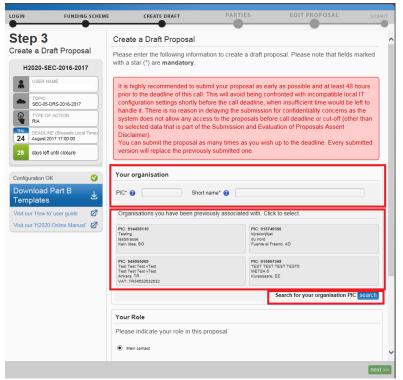
#### Step 3: Create a Draft of your Proposal

You are now in the <u>Online Submission Service wizard</u>. 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.



#### European Commission | Funding: Submission Service

Proposal	Create a Draft Proposal			
COFUND-2015			proposal. Please note that fields	marked
R	Your organisation			
IND-2015-FP	PIC* 😝 928603893 Sh	ort name* 😧 ASCONIT CO	INSULTANTS	
IND-FP	928603893 ASCONIT CONSU			DN, FR
5 17:00:00 CET	Organisations you have been	previously associated with	Click to select.	
fil closure	PIC: 934608096 tect_registration_eac_tolis fotfo gottgdptig. HR	GLAS	drail Street - University of Strathcryde 347 GOW, UK	
0		VAT: O		
art B 🕹			Search for your organisation PIC	search
iser guide 🛛 🖉	Your Role			
nline Manual' 🧭	Please indicate your role in t	his proposal		
	Main contact			
	Contact person			
	Your Proposal			
				ation"
	Acronym*		Please restrict acronym to latin char only	acters
	Short Summary (max. 2000 characters)*			
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	R NG-2015-FP TOTO TOTO ND-FP DEACL NE IF 750000 CLT NE dosume	CPUND-2015     Prease endicate your role in the solowing min     what as an '(') are mandatory     Your organisation     Pro:          20000383     S          Crisalisation     Pro:          20000383     S          Crisalisation     Pro:          20000383     S       Crisalisation     Pro:          20000383     S       Crisalisation     Pro:      Solowing     The Prose indicate your role in the submission for     Section of the sub	Presse ethers a activity information to cleane a dual     with a star (1) are madatory.     Your organisation     Your organisation     Prove organistation	Prease enter the following information to create a dual proposal. Prease more that news     indicate your organisation     Construction     Construction

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



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

Your Role		
Please indicate your role in this pro	posal	
Main contact		
Contact person		
Your Proposal		
Please choose an acronym for you the submission form Part A and ca		so in the "General Information" section of
Acronym*	RSW	Please restrict acronym to latin characters only
Short Summary (max. 2000 characters)* Character count: 7	Summary	.:
		next > >

You would typically select the top-level role (**Main contact** for most calls) for the <u>Proposal</u> <u>Coordinator organisation</u> 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 <u>Roles, Proposal</u> <u>Coordinator, Partner and Contact Person</u> at the beginning of chapter 3.



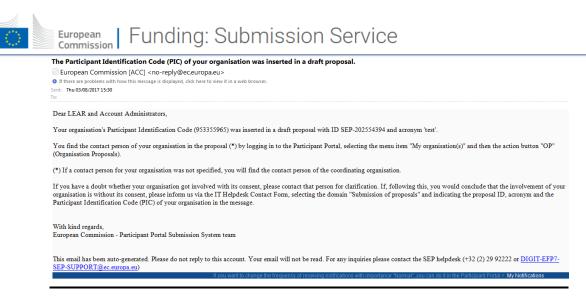
**IMPORTANT:** Most calls use the standard **Main contact** and **Contact person** roles for the Proposal Coordinator organisation. However, some calls (e.g. *H2020-MSCA-IF-2014* and *ERC-2014*) may require more specific roles, such as **Principal Investigator**, **Main Host Institution Contact**, **Researcher**, **Supervisor**, <u>Applicant</u>, etc. Calls of this type are preconfigured 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 <u>part A</u> (see <u>Step 5</u> below), in the section A1 'content' within the form.
- 4. Fill in the **Summary** field.
- 5. Click on next >>

DGIN FUNDING SCHEME	CREATE DRAFT	PARTIES	EDIT PROPOSAL SU
Step 3	Create a Draft Proposal		Ū.
reate a Draft Proposal	Please enter the following info	ormation to create a draft p	roposal. Please note that fields
H2020-SCC-2016-2017	marked with a star (*) are ma	ndatory.	
USER NAME	Your organisation		
COPIC SCC-02-2016-2017	PIC* 🕜 9644944	Short name* 👔	
	Organisations you have been	previously associated with. C	lick to select.
08 DEADLINE (Brussels Local Time) March 2016 17:00:00	PIC: 9644944		
60 days left until closure	NYMOL KONGENS VAT: DK653052		
Check Config			Search for your organisation PIC search
Download Part B	Your Role		
ïsit our 'How to' user guide 🛛 🗭	Please indicate your role in the	his proposal	
/isit our "H2020 Online Manual" 🗭	Main contact		
	Contact person		
	Your Proposal		
	Please choose an acronym section of the submission for		pear also in the "General Information" updated there.
	Acronym*	TEST	Please restrict acronym to latin characters only
	Short Summary (max. 2000 characters)* Character count:	TEST	
			Ine
cancel (x) Ver	sion: 20151215-1015 - Service Desk: D	IGIT-EFP7-SEP-SUPPORT	uropa.eu (+32 (2) 29 92222)

**Note:** When you select your organization and it is a validated PIC, this action will be communicated to the <u>LEAR</u> 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:

Narning	×
Please be aware that the Legal Entity Appointed Representative (LEAR) for the PIC you have chosen will be informed automatically about the involvement of his/her organisation in your proposal.	ł.
ок	



Also, if you have enabled the 2-step verification (see more details here: https://webgate.ec.europa.eu/fpfis/wikis/display/ECResearchGMS/2-

<u>step+verification+in+Funding+and+Tenders+Portal</u>), 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.

Step 4		Parties
Manage Your F Parties	Related	In this step you as coordinator should manage and review the participants of your proposal. Only you as coordinator can edit the elements on this screen.
H2020-EIC-FTI	-2018-2020	Note: Your changes will be applied only after you click the "Save Changes" button.
USER NAME	4	Number of participants: 1 Add Partner 🕑
TOPIC EIC-FTI-2018-2	020	Consortium eligibility
	ом	Call requires at least 3 participant(s) from different EU member states or associated countries, currently you have 1.
A.B.C. ACRONYM test	Access warn	ing × / 0
FINAL D 8 DRAFT D S TUE 23 DEADLINE (6 October 201 11 days left un Check Config	proposal. Y you must u mobile, whe To limit the instance yo appoint an	e single contact of the coordinating organisation of this our EU Login account has 2-step verification option. It means ise your 2nd authentication factor, e.g. receive a code to your en submitting the proposal. e risk of being blocked in the proposal submission because for ou do not have your mobile phone at hand, we advise you to additional contact for the coordinating organisation. : 2-step verification
Download Pa Templates		ок
Visit our 'How to' us Visit our 'H2020 Onl	-	

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 and to cancel the proposal submission.



#### Submission and Evaluation of Proposals Assent Disclaimer

Please read and accept this disclaimer to proceed with the creation of your draft proposal

#### Proposal pre-registration data

Toppoar pre-registration data 1. In order to plan the evaluations, the Commission services need access to a limited amount of information about your draft proposal (the so called pre-registration data) prior to call deadine. The pre-registration data is limited to: call, bpic, type of action, Participant Identification (PC) code of the participating organisation(s), project acronym, short summary and – where applicable – panel and keywords. Neither the Part B nor any annexe(s) form part of the pre-registration data that can be accessed by the European Commission services before the call deadline. 2. You do not have to list sensitive/confidential information in the "Short Summary" (entered on Step 3). Where relevant, sensitive/confidential information can be added to the "Abstract field in the Part A administrative form at a later stage in the submission process, this Abstract is not included in the pre-registration data. Therefore, please provide as the "short summary" the relevant information (layvords, non-confidential information) for the planning of the evaluation I agree that the pre-registration data becomes available to the European Commission services prior to call

#### Part B

3. File format: For the Technical Annex (part B) you must use exclusively PDF ("portable document format", compatible with Adobe Acrobat version 5 or higher, with embedded fonts). Annexes might have an obligatory page limit. Pease cleak for the number and type of mandatory or optional annexes for the call in the relevant documentation. For annexes where page limits apply, excess pages will be automatically mode invisible, and will not be taken into consideration by the experts. Users will receive a warning when trying to submit an annex with the set of the annex with the experts. Users will receive a warning when trying to submit an annex with the set of the set of the experts. Users will receive a warning when trying to submit an annex with the set of the set of the experts. Users will receive a warning when trying to submit an annex with the set of the set of the experts. Users will receive a warning when trying to submit an annex with the set of the set excess pages. 4. Time constraints: Preparation and uploading of the PDF formatted technical annex may take some time. You should ensure that this has been completed in time, well before the call closure deadline.

Submission

5. Proposals must be submitted prior to the call closure deadline. Likewise, modifications to proposals or uploaded attachments are also required to be submitted prior to the call closure deadline or they will not be taken into account. Proposals may be submitted or withdrawn at any time prior to the call closure deadline. There is only ever one version of a submitted proposal, as submission over-writes the previous version. Personal Data

6. We will process personal data in accordance with Regulation (EU) 2018/1725 and according to the "notifications of the processing operations" to the Data Protection Officer (DPO) of the Commission/Agency (publicly accessible in the DPO register). Read more on the Leagl Notice of the Portal.

accept

decline

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.

Dear Jorge Lore	nzo.,
	ssfully created a draft proposal <b>test</b> for the <b>ureEnginePrize-2016</b> .
You can continu	e editing your draft proposal now or access
it at a later time	(before the deadline 2019-08-20 17:00:00
Brussels Local 7	Fime) from the Funding & Tenders Portal by
accessing the $\underline{M}$	y Proposals tab.
An email contai	ning this information has been sent to this
email address: J	orge-Lorenzo@ext.ec.europa.eu
(which is associa	ated with your ECAS account cr)

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.



 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:

Ste	p 4	Parties			
	ge Your Related	In this step you as coordinator should Only you as coordinator can edit the			oposal.
н	2020-SCC-2016-2017	Note: Your changes will be applied o	nly after you click the	"Save Changes" button.	
*	USER NAME		~		
	TOPIC SCC-1-2016-2017	Number of participants: 2 Add Partner	9		
£	TYPE OF ACTION	Consortium eligibility			
10000		Call requires at least 3 participant(s) from d			
A.B.C.	ACRONYM	2			nity you have
A.B.C.	ACRONYM test DRAFT ID   SEP-202554440	2 1 Coordinator Test Test Test vTest	Long	- Main contact	
_	test	Contraction of the second s		0 0	
THU	test DRAFT ID   SEP-202554440 DEADLINE (Brussels Local Time)	Test Test Test vTest     Tubilians Nametica     Test Test Test vTest, 45386 Ankara, TR, ,     PIC: 948955269     Change Organisation     Contact organisation	Jorg	C 😧	2.0
<b>THU</b> 31	test DRAFT ID   SEP-202554440 DEADLINE (Brussels Local Timo) August 2017 14:50:00	Test Test Test VTest     Turbidams Nametica     Test Test Viset, 45306 Ankara, TR, ,     Pic: 543955299     Change Organisation     Contact organisation     2    Partner	Jorg on A Contact	- Main contact	2 O
<b>1</b> 11 23	test DRAFT ID   SEP-202554440 DEADLINE (Brussels Local Timo) August 2017 14:50:00	Test Test Test vTest     Tubilians Nametica     Test Test Test vTest, 45386 Ankara, TR, ,     PIC: 948955269     Change Organisation     Contact organisation	Jorg on A Contact	C 😧	2 O
THU 31 23 Config	test DRAFT ID  SEP-202554440 DEADLINE (Brussels Local Timo) August 2017 14:50:00 days left until closure	Test Test Test VTest     Turbilans Namelca     Test Test Test VTest 450     Seatescool     Clauge Organisation     Control Content organisat     P Carlson     TEST REGISTRERING	Jorg on A Contact	- Main contact	

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**:

Manage my area	SEARCH FUND	NG & TENDERS 👻 HOW 1	TO PARTICIPATE 👻 PROJEC	TS & RESULTS WORK A	S AN EXPERT SUPPORT		select III	
പ്പ് My Organisation(s)	() My	Proposal(s)					i More info	
	~	1 (7						Feedback
My Proposal(s)	Results: 37		<b>6</b> D	ownload excel list of those	proposals		Q Search.	*
My Formal Notification(s)[0]	PROGRAM ¢	CALL ¢	FUNDING SCHEME \$	PROPOSAL ID ¢	ACRONYM ¢	STATUS ¢	REMAINING TIME + ACTIONS	
My Expert Area	H2020	H2020-EIC- FTI-2018-2020	IA	831161	test	Withdrawn	22 OG Actions	)
	H2020	H2020-CS2- CFP08-2018-01	CS2-IA	831917	test	Withdrawn	Edit Draft View Submittee	/
							Delete Proposal	

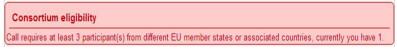
Once you are in the proposal, you will see the <u>step 4 - Parties</u> button; click it in order to display the **Step 4 screen** and the <u>Add Partner</u> button:

-		-				-
Ste	p 5		Edit Proposals' Forms			
dit F	Proposal		In this step you can edit the adm	inistrative forms and up	load the proposal itself. 🙂	
	H2020-DRS-2014		WARNING: This proposal conta	iins changes that have r	not yet been submitted	
*	USER NAME		Administrative Forms			_
-	TOPIC DRS-04-2014		Edit will open the forms in Adob	e Reader. 😌		
P	TYPE OF ACTION CSA		erti 8	mis view history	print preview	
A.B.C.	ACRONVM TEST1		Part B and Annexes			
-	DRAFT ID   SEP-302545	1974		the technical annex of th	ne proposal (in PDF format only) a	and
TUE 31	DEADLINE (Brussels Los January 2017 13:35:00	cal Time)	any other requested attachmen	ts. 🛛		
39	days left until closure		technical Annex section	load	0	0
			Part B	load	6	
	uration OK	O	Optional annex 3: Ethics - up Supporting Document(s)	load		0
Config						
Dow	mload Part B plates	4				
Dow Tem		2 2				

**Note:** Before you can invite a Partner, your partner must have a PIC (see the <u>Submission</u> <u>Preparatory Checklist</u> 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 <u>Work Programme</u>, <u>Annex D "Type of Action - Specific provisions and funding rates"</u> or the <u>Work Programme for ERC calls</u>).

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

Please enter the PIC of the organisation. If you do not know it, you may enter a (complete or partial) organisation name (e.g., "Oxford" or "University of Oxford"). Entering additional information like country/city usually leads to better results. You may also search based on VAT number of the					
organisation in international format (e.g. "GB123456789")	nisation name (e.g. "Oxford" or try/city usually leads to better i	University of Oxform sults. You may also	rd"). Entering addition search based on V	onal inform	ation like

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.

Search for an organisation		
organisation name (e.g. "C country/city usually leads t	xford" or "University of Oxfor	now it, you may enter a (complete or partial) d"). Entering additional information like b search based on VAT number of the ")
test		search dear cancel
Search results for test		
TEST REGISTRATION	TEST	SZKOLA TE ST_test
TEST 1 TEST, DK	TEST TEST, DE	Motowska 43a Warszawa, PL
PIC 998983892 use	PIC 947464088 use	PIC 949101060 use
Türbülans Nametica	test test	test
Test Test Test vTest Ankara, TR	street 40 leuven, BE	test test, ES
PIC 948955269 use	PIC 949767935 use	PIC 953568589 use
test-NA-2	Test	Test GW
Mokotowska Warszawa, PL	test 1 TEST, NL	142 Test Street Colchester, UK
PIC 947717646 use	PIC 947344002 use	PIC 947996133 use
More results were found. Y • refine your search above	'ou can:	

<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.



Warning

You are about to add a new partner to your proposal. Please be aware that the Legal Entity Appointed Representative (LEAR) for the PIC you have chosen will be informed automatically about the involvement of the organisation in your proposal.

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:

LOGIN FUNDING S	Add contact	* ROPOSAL SUBMIT	
Step 4	Test_BE		
Manage Your Related Parties	Please enter the contact name and details:	Its of your proposal.	
ERC-2018-PoC	Access rights Coordinator contact (full access)	jes" button.	
USER NAME	First Name *		
<ul> <li>pushed into t</li> <li>In the forms</li> <li>The email adding an email inti</li> <li>You cannot d</li> <li>Please ask this possible</li> <li>If the yon't</li> </ul>	ry coordinator contact and the first participant contact, the informatio he administrative forms It is read only, you must return here if you wish to edit it (press "back frees is mandatory; it is used to both grant access via the EU Login yo	" on Step 5) stem and to send essary email where	

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

l registra	tion	
lease enter t	he contact name and details: 😧	
roject Role	Main contact 👻	
ccess rights	Participant contact (full access) 🗸	
rst Name *		
st Name *		
ail Address *		
required field		

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.

LOGIN	FUNDING SCHEME	CREATE DRAFT	PARTIES		THE O
Ste Mana Partie	ge Your Related	Parties In this step you as coordinator s Only you as coordinator can ed			roposal
H	2020-SCC-2016-2017	Note. Your changes will be appl	ied only after you click the	"Save Changes" button.	
2		Number of participants: 3 Add R	etiet e		
	10HC \$00-12046-2017 TYPE OF ACTION 64	1 Coordealor Warning	Canada Canada	× #	. 0
AB.C.	ACRONOM Sel	Please define a Main c organisation(s): - test test	ontact for each of th	ne following	×
31 23	DEADLINE (Brussels Lace Time) August 2017 14 50:00 days left unfil closure	PIC sources? Charge Organisation		nd go to step 5	.88
	uration OK 🥑 a' Thine ta' uner guide 🧭 a' Th'0020 Online Manual 🗭	Partner     Institus     I	Contact	a e	13
				Save C	Thangos Next >>



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.

ITEST		
Please enter	r the contact name and details: 🔨	
Project Role	Main contact 0	
Access rights	✓ Participant contact (full access)	
First Name *	Team member (read-only access)	
Last Name *		
Email Address	*	
* required fiel	и	

**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**.

🏛 Test	
Please enter th	e contact name and details: 😧
Project Role	Main contact 👻
Access rights	Participant contact (full access) 🕶
First Name *	tester
Last Name *	tester
Email Address *	tester@tester.com
* required field	

**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:

3 Partner	Sontact 🕑 🕑	×
TEST TEST TEST, TEST, DE PIC: 947464088	test test - Main contact	
PIC: 947464088		

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.



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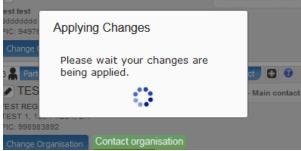
Step 4 Manage Your Related Parties		Parties			
		In this step you as coordinator should n Only you as coordinator can edit the ele		inticipants of your propos	al.
	ERC-2018-PoC	Note: Your changes will be applied only	after you click the "Save	Changes" button.	
*		Number of participants: 1 Add Partmer	9		
	TOPIC ERC-2018-PeC	Confirm Navigation		X A - Principal Investigator	
2	TYPE OF ACTION ERC-POC	You have unsaved changes on the scr	een.		88
A.B.C.	B.C. ACRONIM	Upon saving the data, open the admir	istrative form		
1	FINAL ID 013112 DRAFT ID SEP-210495736	('Edit forms' button) in step 5 to syncl consortium/partner data in the form, form,			
18	DEADURE (Drussels Local Time April 2018 17:00:00	IGTT1. If you run out of time with respect to the call deadline set yo changes made and go directly to step 3 (submission).	u have the option to discard the		
49	days left until closure		nanges and go to step 5		
Config	unation OK	Stay on step 4			
	nload Part B 🕁				
	ur 'How to' user guide 🛛 🧭 ur 'H2020 Online Manual' 🖉			~	
					-

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 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



without clicking on see 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:

Confirm Navigation	×
You have unsaved changes on the screen.	
Upon saving the data, open the administrative form ('Edit forms' button) in step 5 to synchronise the consortium/partner data in the form, validate and save the form.	
If you run out of time with respect to the call deadline set you have the option to discard the changes made and go directly to step 5 (submission).	
Save and go to step 5 Discard changes and go to step 5	
Stay on step 4	

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 before clicking on swe changes, just select save and go to step 5 to continue preparing your draft proposal.

#### Buttons in the Parties screen ('Step 4 - Manage Your Related Parties')

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

2 🛔 Partner		🏩 Contact 💽 💽 2	1×
✓ TEST REGIST	RERING	Second Organiation Tester - Main contact	💌 🗷 🖬
TEST REGISTRATION TEST 1, 1234 TEST, DK PIC: 998983892 7			456
Change Organisation	Contact organisation 8		

#### 1. Z Delete participant

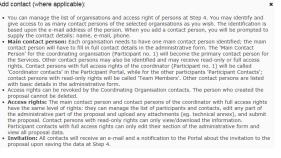
Click this button to delete any participant except the coordinator. Clicking this button for a given participant will remove the organisation from the partner list. This includes any contacts which were provided. Therefore, those contacts will lose their access to the proposal.

#### 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):



×

#### 3. **Add contact**

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

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

#### 5. Solution 5. Delete existing contact

Click this button to delete an existing contact.

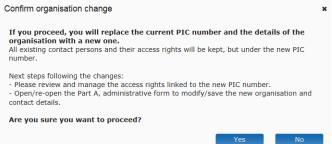
**Note:** You cannot delete a contact when this user is currently logged in.

#### 6. 1 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:



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.

Europa / Funding & Tenders Portal notification
Dear Sir/Madam,
Your access rights to proposal test (SEP-210586417) were revoked by the coordinator of the proposal. You can no longer view or edit the proposal.
With kind regards,
European Commission - Funding & Tenders 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 D/GIT-EFP7-SEP-SUPPORT@eceuropa.eu)
If you wait to change the frequency of receiving notifications with importance "Normal", you can do it in the Funding & Tenders Portal > My Notifications > Preferences
¿Obtiene demasiados correos electrónicos de European Commission <ec-no-reply-grant-management@nomail.ec.europa.eu>? Puede cancelar la suscripción</ec-no-reply-grant-management@nomail.ec.europa.eu>

#### 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.



European Funding: Submission Service

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

Number of participants: 3 Add Partner ?	
1 m Coordinator	Contact 💽 😨
<ul> <li>Test Test vTest</li> </ul>	First Organization Tester - Main contact
Türbülans Nametica Test Test Test vTest, 45366 Ankara, TR PIC: 948955269	
Change Organisation Contact organisation	Drag and Drop
2 Reartner	🆀 Contact 💽 😨 🗶
✓ TEST REGISTRERING	Second Organisation Tester - Main contact 🖉 🔀 🚺
TEST REGISTRATION TEST 1, 1234 TEST, DK PIC: 998983892	
Change Organisation Contact organisation	

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

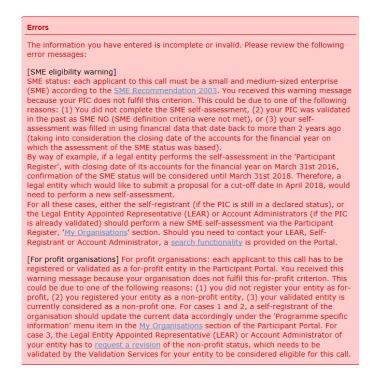
Change coordinator	
with TEST REGISTRERING you will ef	ig organisation (Test Test Test vTest) fectively reduce your control over this manage the whole consortium, upload roposal anymore).
All coordinating rights will be passed sure that at least one of them has a	to the following persons - please make tive access to the proposal:
Second Organization Tester - Main co	ontact
Do you want to proceed? (All change end by pressing the "Save changes"	s will still need to be confirmed at the button)
Yes, change o	oordinating organisation Cancel
	Contact 💽 😨 🗙
✓ TEST REGISTRERING	Second Organization Tester - Main contact
TEST REGISTRATION TEST 1, 1234 TEST, DK	
PIC: 998983892	
Change Organisation Contact organisation	
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🖉 Test Test Test vTest	First Organisation Tester - Main contact
Türbülans Nametica Test Test Test vTest, 45366 Ankara, TR PIC: 948955269	
Change Organisation Contact organisation	

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).

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#### 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:



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 <u>SME Self-Assessment</u> in <u>Participant register</u> 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 <u>Participant register online documentation</u> 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 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**:

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My Proposal(s)	Results: 37		<b>6</b> D	ownload excel list of those	proposalis		Q Search	ack T
My Formal Notification(s)[0]	PROGRAM ¢	CALL ©	FUNDING SCHEME \$	PROPOSAL ID ©	ACRONYM ©	STATUS ¢	REMAINING TIME \$ ACTIONS	
My Expert Area	H2020	H2020-EIC- FTI-2018-2020	IA	831161	test	Withdrawn	22 OC Actions	
	H2020	H2020-CS2- CFP08-2018-01	CS2-IA	831917	test	Withdrawn	Edit Draft View Subfricted	1

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

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	ownload Part B Annex 3 - Indicators upload 8	Θ
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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 <u>other version of the submission manual</u>, instead.



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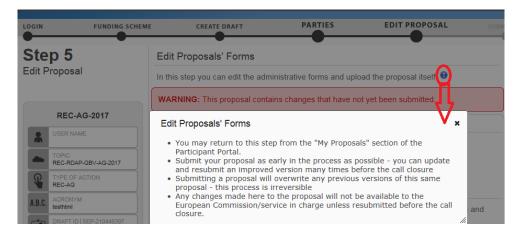
#### The Action Buttons of the Wizard

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:
	<ul> <li>the Proposal Coordinator to verify that partners have updated their forms</li> <li>Partners to verify that the coordinator has submitted the proposal in a timely fashion.</li> </ul>
print preview	Click to <b>download</b> 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 <u>requirements</u> for uploading your files Part B.

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

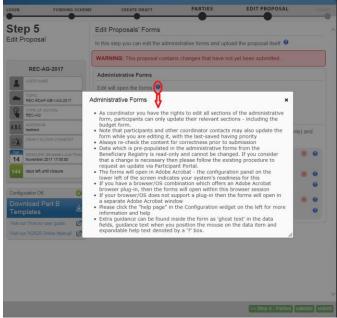
#### Familiarising Yourself with the Wizard and the Form.

Click the first **3** 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 **3** 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 <u>Appendix A</u> 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 <u>Data Update</u> section.

#### Guidance in the Form

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

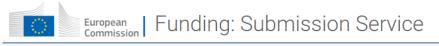
Each box of the form contains a short text with guidance on the format, the length and required information. Guidance for the fields displays when you bring your cursor over the boxes. Once you click on the text or start editing the information, it disappears automatically.

#### 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 <sup>Save&Close</sup> 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.

C eForms - Internet Explorer			
Step 5	Table of contents		1 - General Information >
Directorate-General Justice and Consumers Proposal Submission Forms		Table Of Contents	Save Save&Close
Please check our <u>wiki</u> for help on navigating the form.			
CeForms - Internet Explorer			
3-Budget	Validation result		Step 5
Directorate-General Justice and Consumers Proposal Submission Forms		Table Of Contents	Save Save&Close
Proposal ID SEP-210458761 Acronym	test		

#### 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

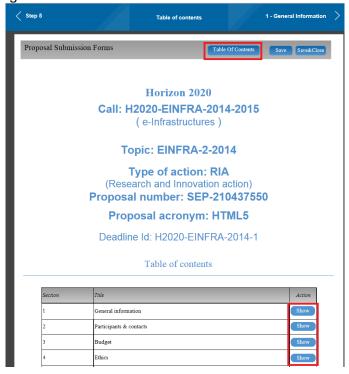


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Button	Description
Validate Form	When you click this button, all data fields in the form will be validated against a set of rules.
	The system assesses if the available data is valid, checks the data formats, performs computations, and checks interlinked 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. <b>Save&amp;Close</b> 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.

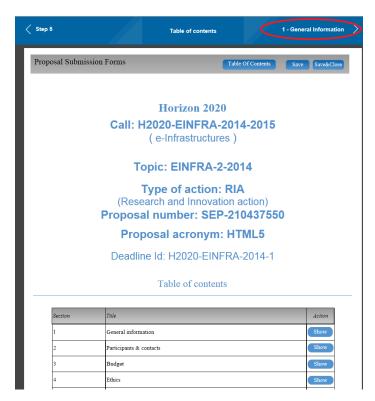
#### **Editing and Completing the Form**

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**.

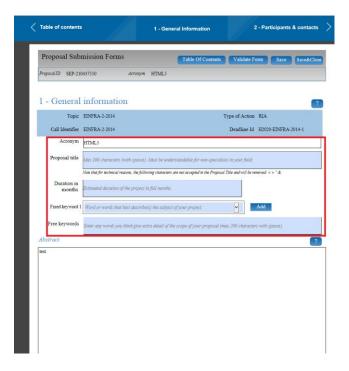


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To start completing the form, use the navigation buttons on the banner in order to advance through the different sections:



Then, fill in the corresponding fields for each section:



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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:

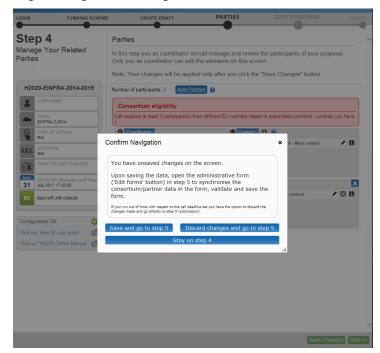
2 - Participants & contacts	select a participant			3 - Budge	• >
Proposal Submission Forms		Table Of Contents	Validate Form	Save Save&Clos	)
Proposal ID SEP-210440830 Acronym	test	Short name	kijrskorijtijet		
2 - Administrative data o	f participatii	ng organisat	ions		
PIC Legal name 915749356 Test PIC (never to be v	alidated)				
Short name: kijrskorijtijet					
Address of the organisation					
2 - Participants & contacts           Proposal Submission Forms	select a participant	Table Of Contents	Validate Form	3 - Budge Save Save&Clos	
ProposalID SEP-210440830 Acrony	m test	Short name	kijrskorijtijet		
2 - Administrative data of The section shows the administrative data of the the European Commission, linked to the given Pl information on how to modify this information, p	participating organisati C number. Data in blue i	on as registered and/or v is read-only, modification	alidated in the central n is not possible in the		
PIC Legal name					
915749356 Test PIC (never to be	validated)				
Short name: kijrskorijtijet					
(					

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:

Table of contents		- General Information	2 - Participants & contacts	>
Call Identifier	EINFRA-2-2014		Deadline Id H2020-EINFRA-2014-1	
Acronym	test			
Proposal title	Max 200 characters (with spaces). Must	be understandable for non-specialists	s in your field.	
	Note that for technical reasons, the following cl	haracters are not accepted in the Proposal I	Title and will be removed: < > " &	
Duration in months	Estimated duration of the project in full	montha.		
Fixed keyword 1	Word or words that best describe(s) the	subject of your project.	Add	
Free keywords	Enter any words you think give extra de	tail of the scope of your proposal (ma	x 200 characters with spaces).	
Abstract			?	
the Work Programme.	This summary will be used as the short	description of the proposal in the ev	reportal end on programme. Tenn of the propries in momitations with momentations with momentations and other differential information, ording formulate and	

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**Important Note:** If changes are applied to the consortium data (<u>Step 4</u>) 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 <u>Validating</u>, <u>Saving and Closing the Form</u> to know how to do so:



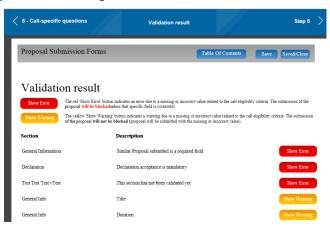
#### Validating, Saving and Closing the Form

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.

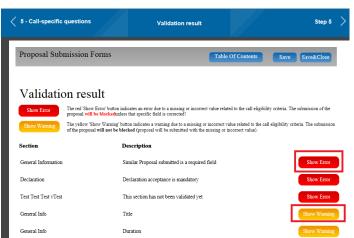
4 - Ethics 5 - Call-specific questions		alidation result					
Proposal Submission Forms Table Of Contents Va	lidate Form Sav	c Save&Close					
ProposalID SEP-210437550 Acronym HTML5							
5-Call-specific questions							
Does the proposed research address documented societal security need(s) (e.g. life, liberty, health, employment, property, environment, values)?	● Yes ○ No	Page 54					
2. Does the research output meet these needs? Will this be demonstrated? Will the level of societal acceptance be assessed?	⊖ Yes ● No						
3. Does the research address threats to society (e.g. crime, terrorism, pandemic, natural and man-made disasters etc.)?	● Yes ○ No	54					
4. Does the proposed research address in an appropriate way these threats?	⊖ Yes ® No						
Does your research benefit society?		Page					
5. Do segment(s) of society benefit from the proposed research?	⊖ Yes ● No						
6. Does society as a whole benefit from the proposed research?	⊖ Yes ⊛ No						
Does your research have negative impact on society?		Page					



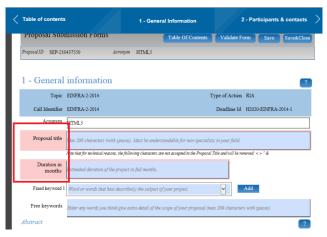
You will be presented with any Errors/warnings.



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 <u>Step 4</u> 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 Templates to download all the latest proposal requirements templates as readily editable files.

SIN	FUNDING SCHEME	CREATE DRAFT	PARTIES	EDIT PROPOSAL		S
tep 5		Edit Proposals' Forms				
it Propos	al	In this step you can edit the admi	nistrative forms and upl	oad the proposal itself. 😢		
		WARNING: This proposal contai	ns changes that have n	ot yet been submitted		
NUSER N	-AG-2017	Administrative Forms				
m i i i i i i i i i i i i i i i i i i i		Edit will open the forms. 😨				
	AP-GBV-AG-2017	edit fo	view history	print preview		
REC-AG		Part B and Annexes				
.B.C. ACRONY	M	In this section you may upload th		e proposal (in PDF format on	ly) and	1
- <b>A</b>	D SEP-210445397	any other requested attachments			_	
	IE (Brussels Local Time) ar 2017 17:00:00	Part B – Project upl description and implementation	oad		$\otimes$	0
44 days left	until closure		oad		۲	0
onfiguration O	к 🔇	Annex 2 – Annual activity upl report	oad			0
)ownload		-	oad		Ŭ	0
emplates		Annex 4 – Child protection upl policy	oad			0
fisit our 'How to	oʻuser guide 🛛 🖉					

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 <u>Enterprise Europe Network</u> and your <u>National Contacts Point</u> 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. 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:

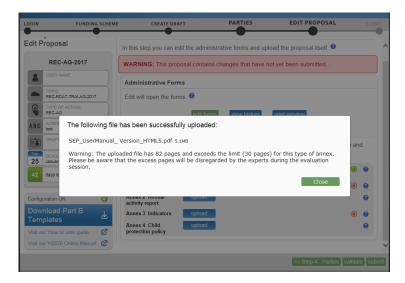
	FUN	IDING SCHEME	CREATE DRAFT	PARTIES	EDIT PROPOSAL		SUBMIT
Ste	р 5		Edit Proposals' Forms	•	•		
Edit P	roposal		In this step you can edit the adminis	trative forms and u	pload the proposal itself. 🔞		
			WARNING: This proposal contains	changes that have	not yet been submitted		
	REC-AG-201	7	Administrative Forms				
	USER NAME		Edit will open the forms.				
	TOPIC REC-RDAP-GBV-AG	3-2017	edit forms	view history	print preview		
Ŷ	TYPE OF ACTION REC-AG		Part B and Annexes				
A.B.C.	ACRONYM testhtml		In this section you may upload the	echnical annex of t	the proposal (in PDF format onl	y) and	
		445397	any other requested attachments.	9			
TUE 14	DEADLINE (Brussels November 2017 17:0		Attachment info		×		2
144	days left until closur	e	Part B – Project description and i	mplementation		<b>I</b>	
				_		•	9
	uration OK nload Part B		<ul> <li>mandatory attachment</li> <li>filetype: pdf</li> </ul>			⊗ (	
		不	- maximum file size: 10.0 MB - maximum 30 pages				9
Visit ou	ır 'How to' user gui	de 🖉	P-9-1		//		
	ur 'H2020 Online M	anual' 💋					

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:



Ine following warnings will not block submissions of your proposal, but may affect its eligibility during evaluation:

Eligibility warnings

 The file Standard\_proposal\_template\_-\_Part\_B\_EN-test.pdf (Part B - Project description and implementation) contains 32 pages, the guide for applicants states that the document should contain no more than 30 pages

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:

Your proposal was submitted with the following elight	gibility warnings:
Eligibility warnings	
<ul> <li>The file sep_usermanual_V3.2.2.pdf (Technical A for applicants states that the document should co If you believe that your proposal is eligible even with explanation believe in this will be passed to the eligiblic</li> </ul>	ontain no more than 15 pages these warnings, then you may enter an
	*
	1000 characters le

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:

WAST	E-2-2014	Edit will open the forms in Adobe Reader. 9	
E RIA		edit forms view history print preview.	
Tue         April 20           08         Brusse	Upload has failed	1	
4 days le	maximum file size	exceeded	and any
Acronym Acronym		Close	
TEST PROP	USAL	Technical Annex Section 1- upload	80

- 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.



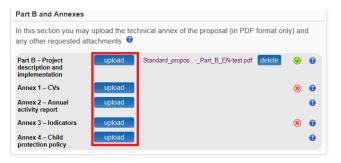
- 6. **Documents file name and security.** 
  - Ensure that the annex forms file names contain alphanumerical characters only (A-Z, 0-9).
  - Do not protect the uploaded files with a password.
- 7. **Post-upload verification.** Once you upload your files, check their quality download them to check whether 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:

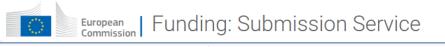
1. Click the upload button for the respective document in Step 5 of the Submission Wizard.



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 "\_".

Irganize 🔻 New folder				= • 🔟 🔞
🛊 Favorites 💻 Desktop	ŕ	Documents library	Arrang	e by: Folder 🔻
〕 Downloads		Name	Date modified	Туре
S Recent Places		Technical_Annex_Section_1-3.pdf	25/02/2014 12:53	Adobe Acrobat
Libraries			and an all the second sec	
Documents				
Git Git				
Local Documents - no backup Music				
My Documents				
E Pictures				
🗑 Videos				
I VIDEOS				

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



The following file has been successfully uploaded:		
CV.pdf 0.8MB		
	Close	

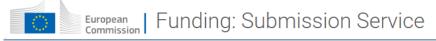
**Note:** If the file uploaded is not in a valid PDF format, an error message will appear instead of the confirmation message.

Upload has failed	
Doc1.docx has invalid extension. Only pdf are allowed.	
	Close

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

		CREATE DRAFT	r	PARTIES	EDIT PROPOSAL	SUBMI
Step 5		Edit Proposals' For	ms	•	•	
Edit F	Proposal	In this step you can edit	the administrati	ive forms and up	load the proposal itself. 😨	
		WARNING: This propos	sal contains cha	anges that have	not yet been submitted	
	REC-AG-2017	Administrative Forms	;			
	USER NAME	Edit will open the forms	s. 🕑			
	TOPIC REC-RDAP-GBV-AG-2017		edit forms	view history	print preview	
Ŷ	TYPE OF ACTION REC-AG	Part B and Annexes	California			
A.B.C.	ACRONYM testhtml		upload the tech	unical annex of th	he proposal (in PDF format o	nly) and
	DRAFT ID   SEP-210445397	any other requested at				ing) and
TUE 14	DEADLINE (Brussels Local Time) November 2017 17:00:00	Part B Project description and implementation	upload	Standard_propos	Part_B_EN-test.pdf	•
144	days left until closure	Annex 1 CVs	upload	CV.pdf	delete	0
Config	uration OK	Annex 2 Annual activity report	upload			•
	inload Dart P	Annex 3 Indicators	upload			🗵 😢
Tem	plates	Annex 4 Child protection policy	upload			0
	ur 'How to' user guide 🛛 🖉					
Visit o	ur 'H2020 Online Manual' 🛛 🖉					

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

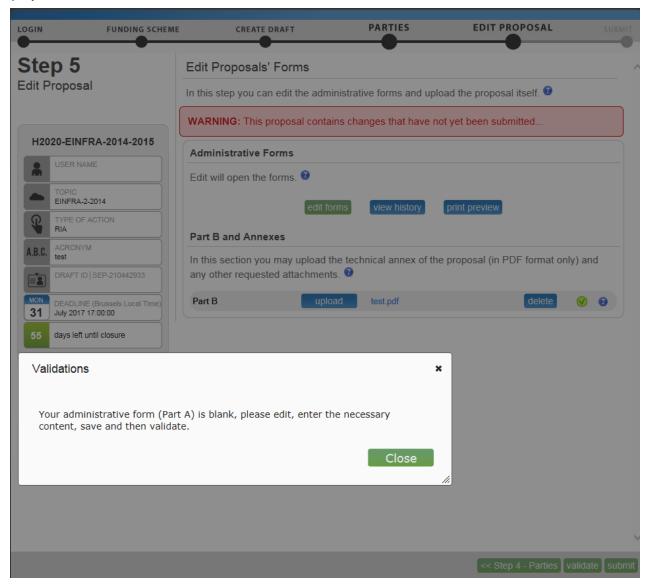


#### Validate and Submit your Proposal

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:

		~
<< Step 4 - Parties	validate	submit

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:

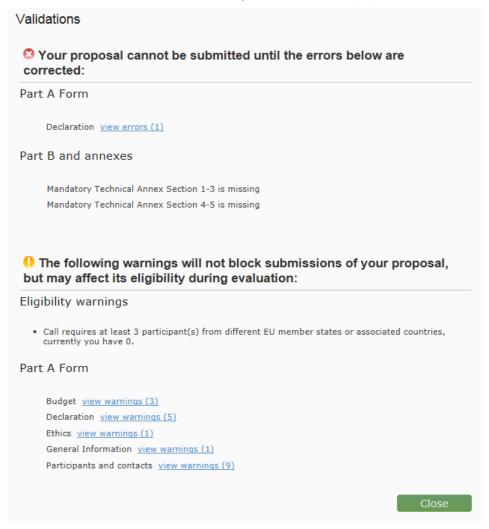




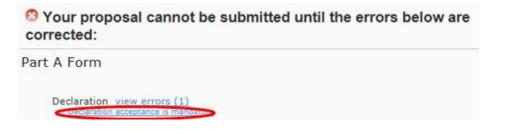
Please note that this action is not exactly the same as clicking on **Validate Form** within the form. When you run a validation from within the form, the validation checks only the content of the form, i.e. the administrative form in **part A**.

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.



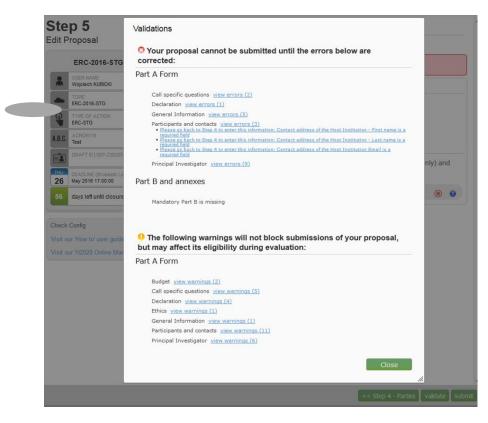
You have blue links for the errors and warnings. Clicking on them will expand the details for the error with new links. By clicking on these new links, you will access the affected parts in the form.





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.

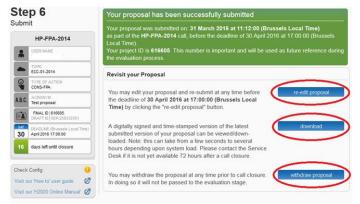
You can upload your Annex documents or submit your proposal as many times as you wish prior to the call deadline, but it is strongly advised not to wait until the last few days to do so. Each time you

upload a new Annex document, you <u>must</u> click save your changes.

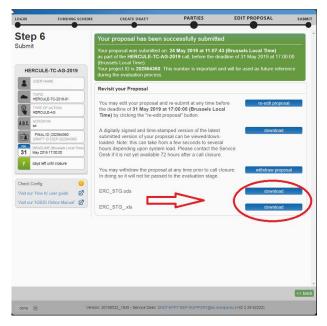
## Step 6: The 'Proposal Submitted' Page

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.

Step 6 Submit HP-FPA-2014		Your proposal has been successfully submitted					
		Your proposal was submitted on: 31 March 2016 at 11:12:00 (Brussels Local Time) as part of the HP-FPA-2014 call, before the deadline of 30 April 2016 at 17:00:00 (Brussels					
		Local Time). Your project ID is 616605. This number is important and will be used as future reference during the evaluation process.					
TOPC ECC-01-2014		Revisit your Proposal					
R	TYPE OF ACTION CONS-FPA		-	and all and a second			
A.B.C.	ACRONVM Test proposal	You may edit your proposal and re-submit at any time before PDF Download	×	re-edit proposal			
	FNAL D 616605 DRAFT D 569-238330351		5				
30	DEADLINE (Brussels Local Time) April 2016 17:00:00	The digitally signed PDF is not yet ready, please try again later. Note that at times of heavy system load this can take several hours. On the day of the call closure, it will typically only be		download			
16	days left until closure	available after closure and it can take up to 72 hours.					
Check	Carlia	Close					
Visit o	ur Haw to' user guide 🛛 🖉	You may withdraw the proposal at any time prior to call closure. In doing so it will not be passed to the evaluation stage.		withdraw proposal			
Vane o	ur H2020 Online Manual 🧭						

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.

European Funding: Submission Service

#### 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: <<u>accept invitation</u>>

If this email reached you in error, you can disregard it or decline the invitation: <<u>decline invitation</u>>

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 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 <u>Validating, Saving and Closing the Form</u> 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.



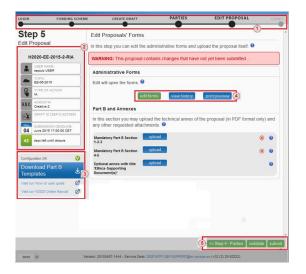
#### The Timeline around the Deadline

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 <u>Step6: The 'Proposal Submitted' Page</u>.

#### 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:

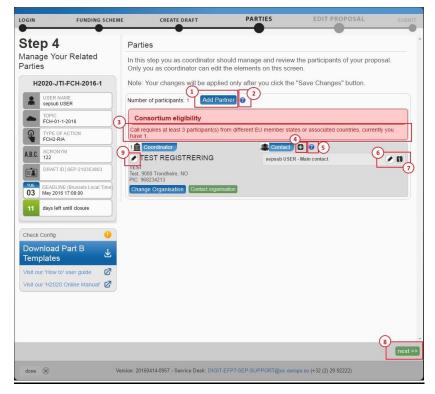
- 1. Enter your organisation Search criteria.
- 2. Alternatively, select a previously associated organisation
- 3. Click on the Search button to start the organisation Search procedure
- 4. Select your role , either Main contact or Contact person
- 5. Enter a proposal acronym
- 6. Enter a proposal short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

DGIN	FUNDING SCHEME	CREATE DRAFT	PARTIES	EDIT PROPOSAL	
Step 3		Create a Draft Proposal			
	raft Proposal	Please enter the following inform	nation to create a draft or	nnosal Please note that fields	marked
EIT-	KICS-2016	with a star (*) are mandatory.			manted
	NAME 6 USER	Your organisation			
	bod	PIC* 😧 Sho	ort name* 😧		
KICS	OF ACTION	Organisations you have been prev	iously associated with. Clic	k to select.	)
14 Time) July 21	off until closure	PIC: 955226479 IBM Kitat Alleing 60 STOCKHOLM, SE VHT: SE55602668301	2 PIC: 9682 TEST REC Toondheim VAT: NA	ISTRERING	
Configuration	iPart B 🔒	PIC: 92960393 ASCONIT CONSULTANTS 6-9 espace Henry Vallée, Parc scientifique Tony G LYON, FR VRT: 437960677 RCS Lyon	iamier PIC: 83480 test, regiet tgdtg gdtgsgttg	ration_eac_tolls	
	to' user guide 🛛	PIC: 832437030 PRAUNHOPER UK RESEARCH LIMITED Cambeiral Street - University of Stratholyde 347 GLASGOW, UK VAT. GB131646530	Ģ	)	
				Search for your organisation PIC	search
		Your Role			
		Please indicate your role in this	proposal		
		Main contact     4			
		Contact person			
		Your Proposal			
		Please choose an acronym for y section of the submission form			ation"
		Acronym*		Please restrict acronym to latin ch only	0
		Short Summary (max. 2000 characters)* Character count:			
				7	ned
		: 20160414-0957 - Service Desk: DIGIT		L	_

#### 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



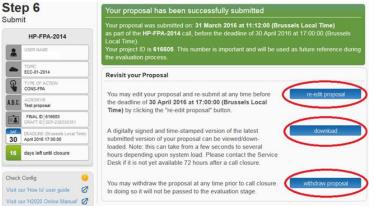
- 4. Click to open guidance on annexes and Part B forms
- 5. Click to download latest proposal requirements package (i.e. Part B)
- 6. Click to upload required Part B document
- 7. Click to delete an uploaded document
- 8. Indication if the required document was uploaded
- 9. Indication if a required 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

GIN	FUNDING SCHEME	CREATE DRAFT	PARTIES	EDIT PROPOSAL SUB
tep 5	-	Edit Proposals' Forms	•	
an ropos		In this step you can edit the admin	istrative forms and uploa	ad the proposal itself.
EIT-K	ICS-2016	WARNING: This proposal contain	s changes that have not	yet been submitted
USER NA. sepsub U		Administrative Forms		
EIT-Food		Edit will open the forms in Adobe	Reader 2	100
TYPE OF KICS	ACTION	edit form	s view history	print preview 3
A.B.C. ACRONY	М		view motory	print preview
	SEP-210354086	Part B and Annexes	a taabaiaal aanay of the	proposal (in PDF format only) and
	E (Brussels Local Time) 17:00:00	In this section you may upload the any other requested attachments		proposal (in PDF format only) and
80 days left	until closure	A Declaration of honour uploa		delete 🔞 🔞
Configuration OF	< Ø	B1 Proposal uploa		
Download		C Motivation and	d.	
lemplates		Commitment Declaration		
fisit our 'How to			0	
/isit our H2020	Online Manual'	2		
	C	9		
			0	n
			C.	Step 4 - Parties validate sub
				-

#### 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:

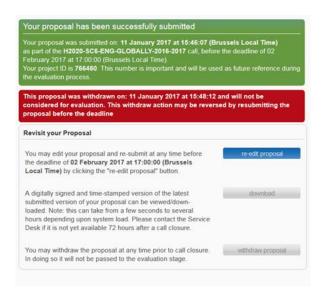




- 1. Re-edit proposal: allowing you to change the content of your proposal. Please note that you will need to submit again for the changes to be reflected. Also, this action is available only until the call closure date/time is reached.
- 2. Download: allowing you to download a digitally signed copy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



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

The <u>Funding & Tenders Portal</u> 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 > <u>My Proposals</u> / <u>My Organisations</u> pages to access your draft and submitted Proposals.

#### Funding & Tenders Portal: Before You Log In

<u>Create</u> 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.

European Commission Funding & tender op Single Electronic Data Interchange Area (S			Eng Register	lish 🔊
SEARCH FUNDING & TENDERS - HOW TO PARTICIPATE - PROJECTS	S & RESULTS WORK AS AN EXPERT SUPPORT 🔻		sei program	ect 👥
The Funding & Tenders Portal is the entry point ( and tenders managed by the European Commissi		rea) for part	icipants and experts in funding programmes	Feedback
Find calls for proposals and tenders				(1)
Search calls for proposals and tenders by keywords, programmes		Q Search		
What are calls for proposals?	What are calls for tenders?	>	How to participate in 5 steps	>

#### Funding & Tenders Portal: The EU Sign in Screen

When you click Login, 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.



EC	AS?	English (en)	~
ec.europa.eu1 requires you to authenticate			
Sign in to continue			
Welcome search untigenal.com (Edward) Sign nith a diffuent e nat address? Passed I			
Losi your password? Choose your verification method Password			
sign in			

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

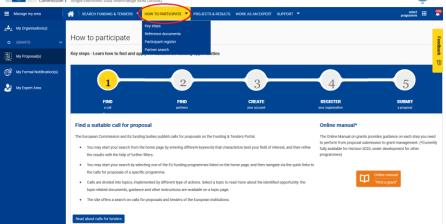
Once logged in, your personalised **MY AREA** displays on the left, under **Manage my area**. Here you can access your Organisations, Proposals, Projects, Notifications, etc. Please note, **Manage my area** shows only the section for which there is existing data. For instance, if you do not have any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

European Commission	Funding & tender opportunities welcome	U)
Manage my area	🛠 SEARCH FUNDING & TENDERS 👻 HOW TO PARTICIPATE 🍷 PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT 👻 programme 🌐	
ది <b>ర్జి</b> My Organisation(s)		
o grants 🗸 🗸	The Funding & Tenders Portal is the entry point (the Single Electronic Data Interchange Area) for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.	Feedba
My Proposal(s)		₽ ¥
My Formal Notification(s)	Find calls for proposals and tenders	Ŭ
My Expert Area	Search calls for proposals and tenders by keywords, programmes	
	What are calls for proposals?       >         What are calls for tenders?       >         How to participate in 5 steps       >	

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.

≡ м	lanage my area	A SEARCH FUNDING & TENDERS	F ▼ HOW TO PARTICIPATE ▼ PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT ▼	select III
ه <sup>ي</sup> .	Union Civil Pro	otection Mechanism	Key steps Reference documents	clear filter (
۰~			Participant register	
<b>.</b>	Filter by programme:		Partner search	
()	Union Civil Protection	n Mechanism 🔶 🖡	Reference Documents	
&			his page includes reference documents of the programmes managed on the EU Funding & Tenders portal starting with legal documents and ork programmes up to model grant agreements and guides for specific actions.	I the Commiss
			Filter     Ormitission decision - legal basis >     Commission inglementing decision - legal basis >     FILTerror translation >	1 Expand all

- Register an organisation via the <u>Participant register</u> section, by selecting **Participant** register under How to participate.
- Look for potential partners using the <u>Partner Search</u> 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 <u>Participant register</u> application.

**()** 

European Commission Funding	: Submission Service
European Commission Funding & tender op	
A SEARCH FUNDING & TENDERS V HOW TO PARTICIPATE V PROJECTS &	RESULTS WORK AS AN EXPERT SUPPORT 👻 select 🗰
Key steps     Participant Portal may not be availa Reference documents     We apologies for any inconvenience Participant register	until 16:00 CET while system maintenance is being performed
Participant Register	
If you want to participate in a project proposal, your organisation needs to be The register contains all participants of EU programmes.	registered and have a 9-digit Participant Identification Code (PIC). Please quote your PIC in all correspondence with the Commission.
Is your organisation already registered? PIC search	Register your organisation
Please check whether your organisation has already been registered. If so, no need to re	gister it again. To register, you need to login in the Portal or, if you are a new user, create your account. Check what information you need to register in the Online Manual - and keep it to hand during the registration procedure. To start registration, click on the button below.

#### Funding & Tenders Portal: Search for Funding Opportunities

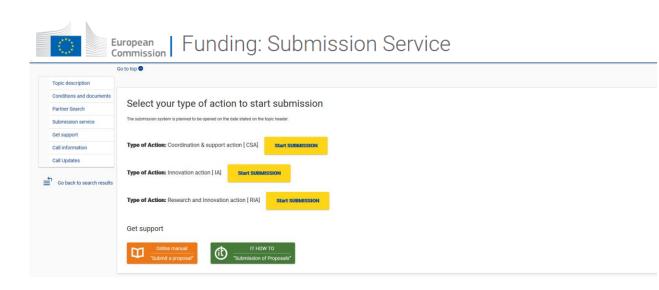
The **Search Funding & Tenders** section on the menu is your access point for searching and selecting Calls for proposals.

ि	European Commission	Funding & te Single Electronic Data Inter	nder opportunitie	S	Welcome	<b>O</b>	EN
🗮 Mana	ge my area	SEARCH FUNDING & TEN	NDERS 🔻 HOW TO PARTICIPATE 👻 I	PROJECTS & RESULTS WORK AS AN EXPERT SUPF	Port 🔻	select programme	185
a <b>*</b> ₁ ○ ~	Type your Keywords of Match whole words		Funding and tenders 455 results  Main Solution Download all funding and tender op See all calls for tenders oublished t	oportunities to your calendar or subscribe to the RSS fee	O ID	C deadline	Feedback 💬
	Filter by submission sta	OPEN CLOSED		ze-01-2016 H2020-FutureEnginePrize-2016	Deadline model: :: Deadline date: 20	ingle-stage August 2019 17.00.00 Brussels time	
	Select a Programme Filter by call for tender Select a Call	¢ ear filters	Grant Horizon prize for Types of action: Inducement Pri Open for submission	r CO2 reuse LCE-Prize-CO2Reuse-01-2016 ize   Programme: Horizon 2020 Opening date: 05 July 2016	Deadline model: : Deadline date: 03	ingle-stage April 2019 17.00.00 Brussels lime	

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.





# **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...** 

	Signature validity is UNKNOWN.
r!	Signing Time:
	Reason: Acknowledgment of Receipt
alid	ity Summary
	The Document has not been modified since this signature was applied.
	The certifier has specified that Form Fill-in, Signing and Commenting are allowed for this document. No other changes are permitted.
	The signer's identity is unknown because it has expired or is not yet valid.
	Signing time is from the clock on the signer's computer.
	Signature was validated as of the current time:
igne	er Info
	There were errors building the path from the signer's certificate to an issuer certificate.
	Revocation checking was not performed.
	Show Signer's Certificate
, els ce	anced Properties Validate Signature Close

Signature Properties...

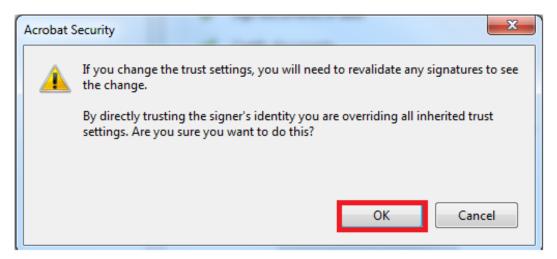
Close



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

Baltimore CyberTrust	Summary	Details	Revocation	Trust	Policies	Legal Notice
Postecom CS3	1 1 1 2 3 3 3 3	Sign doo Certify d Execute certified Execute a certifie Perform	is trusted to: cuments or da locuments dynamic cont document high privilege d document privileged sys file access, et Add to Trus	ent that JavaScri tem ope (c.)	pts that are	e embedded in

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

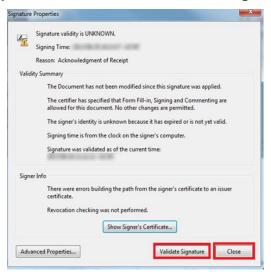




6. The Import Contact Settings window should be displayed

	Details
ubject:	ereceipt.efp7.ec.europa.eu
suer:	Postecom CS3
lsage:	Sign transaction, Encrypt keys, Encrypt document, Key Agreement
xpiratio	n:
Trust	
chair	tificate used to sign a document must either be designated as a trust anchor or up to a trust anchor in order for signature validation to succeed. Revocation king is not performed on or above a trust anchor.
V	se this certificate as a trusted root
If sig	nature validation succeeds, trust this certificate for:
R	Signed documents or data
E	Certified documents
	Dynamic content
	Embedded high privilege JavaScript
	Privileged system operations (networking, printing, file access, etc.)

- 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







## **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

European Commission Funding & tender opportunities Single Electronic Data Interchange Area (SEDIA)	English 😝 Register Login
🛠 SEARCH FUNDING & TENDERS 🔻 HOW TO PARTICIPATE 🔻 PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT 👻	select programme
Funding & tender opportunities (the Single Electronic Data Interchange Area) is the entry point for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.	>
Find calls for proposals and tenders	
Calls for proposals by EU Programme	~

- 2. Click Register
- 3. The EU Login Create an Account screen will be displayed, fill in the fields accordingly:

Create an account
Help for external users First name Last name
E-mail
Confirm e-mail
E-mail language English (en)
Enter the code
By checking this box, you acknowledge that you have read and understood the <u>privacy statement</u>
Create an account

All fields in the registration form are mandatory.

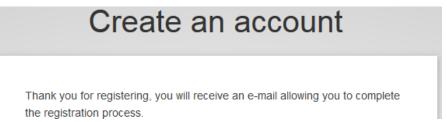
- 4. Optionally, click the link <u>Help for external users</u> if you need additional instructions.
- 5. Enter your **First name** and your **Last name**.
- 6. Enter your **E-mail**. When registration is complete, a confirmation email will be sent to this email address.
- 7. Enter your e-mail address 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 Control to reload a different character combination and enter it in the Enter the code field.
- b. Alternatively, click on <sup>▶</sup> 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 <u>privacy statement</u> box acceptance under the **Enter the code** field.



- 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.

Create an account



**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:

Your EU Login password was successfully changed.	
Proceed	

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 Login

## 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

Term		Definition
Applicant	<u>Back to text</u>	<ul> <li>Generic term for any person/organisation that prepares and/or submits a proposal. There are two types of applicants: <ul> <li>The proposal coordinator</li> <li>The partner</li> </ul> </li> <li>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.</li> <li>Synonyms: Partner</li> </ul>
Beneficiary/ Participant	<u>Back to text</u>	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
Call	Back to text	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. <b>Call for proposals</b> 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.
Consortium	Back to text	<ul> <li>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: <ul> <li>There shall be exactly one Proposal Coordinator Contact within each Project Consortium.</li> <li>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.</li> <li>Each Partner in the Consortium shall nominate a Partner Contact as its representative in the Project, who shall also be identified to the Commission.</li> <li>LEARs in the Consortium may revoke the Partner Contact representing their organisation in the Project.</li> </ul> </li> </ul>
Deadline	Back to text	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.



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 <u>EU Login</u> below for more information.
ERC	European Research Council
EU Login <u>Back to text</u>	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 <b>Logout</b> or close all your open browser windows.
Legal Entity Appointed Representative <i>LEAR</i>	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	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 <u>step 5</u> 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	The <b>Participant</b> (short form of <b>'Participating Legal Entity'</b> ) 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 ( <u>PIC</u> ). Participant registration is made through the <u>Participant register</u> on the Funding & Tenders Portal and subject to a rigorous validation process that may last several weeks. Ideally, a <u>LEAR</u> 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	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 <b>Participant register</b> 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	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 <b>Proposal Coordinator Contact</b> and a <b>Proposal Coordinator Organisation</b> . See <u>Proposal Coordinator</u> 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 <u>Participant</u> <u>register</u> .
Funding & Tenders Portal F&T Portal Participant Portal PP	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.
<u>Back to text</u>	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 <u>Participant register</u> 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 <u>Online Manual</u> available from the Portal under the <b>Support</b> Section):
	<ul> <li>the checks carried out on the information you provide on registering</li> <li>appointing a representative (LEAR)</li> </ul>
	The checks that may be carried out on your organisation's financial viability
Proposal	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	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 <b>Proposal Coordinator</b> 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 <b>Proposal Coordinator Organisation</b> 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: <u>Beneficiary</u> , <u>Partner</u>
Proposal ID	An identifier assigned to a proposal after it was submitted. Once a proposal is funded, its Proposal ID becomes its Project ID.
Back to text	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			
	H2020-MSCA-NCP-2017         Image: Series of the series o			
	The Proposal ID can be provided to the helpdesk for troubleshooting purposes.			
REA	Research Executive Agency			
Submission	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 <b>Submission System</b> is the tool used for sending a <u>proposal</u> for an open call. It is accessible via de Funding & Tenders Portal, and it is often referred as <u>SEP IT System</u> .			
SEP IT System	The Funding & Tenders Portal Proposal Submission and Evaluation System.			
Types of Action	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 <u>Online Manual</u> for more information.			
Topic	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	The document adopted by the European Commission for the implementation of the specific programme in accordance with Regulation (EU) <u>No 1291/2013</u> of the European Parliament and of the Council of 11 December 2013 Check the <u>Online Manual</u> for more information.			