submission & evaluation of proposals

10 Minutes Guide
to the Electronic Submission

Service desk contact details:

- the service desk is available on weekdays between 9:00 and 18:00 CET (Friday 17:00)
- it can be contacted by phone at this number +32 2 29 92222
- or alternatively by electronic mail at this address DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu

Please mention the following information:

- your telephone number
- the call and funding scheme you have applied to
- the version of the Adobe Reader used
- Whether your computer is a PC or a Mac
- The memory available on your computer

Read this first

The electronic submission system of the European Commission is made of a web site (which need a web browser and an Internet connection) and a forms management software (with must be downloaded from the Internet if not already present on your computer).

Whilst the submission site can be accessed with virtually any recent Internet browser, some constraints do apply for the forms management software. The electronic submission relies on the Adobe technology, the Adobe Reader for key parts of the process. If it is not installed, please install it now.

The site is built as a succession of steps towards the submission of a complete proposal. When using the site, navigation buttons NEXT and BACK will be located at the bottom of the screen. The submission action is also considered as a navigation button. You may have to scroll down in order to locate the button if the screen is small.

The system has been tested with a set of reference configurations. However, this does not guarantee that the system will be fully functional on your computer. A diagnostic window is provided and may warn you of possible incompatibilities.

See: https://ec.europa.eu/research/participants/submission/manage/diagnostics

Note that the system can be slow depending on a series of conditions, like the Internet access line speed, user present on the system. Allow the system to complete the operation before starting over as this may cause the system to slow down ever further. Report promptly any issue encountered when using the system.

Contacting the right help desk

- For issues related to the content of the call itself, contact the central help desk of the European commission http://ec.europa.eu/research/enquiries.
- For issues related to the use of the submission system, contact the central help desk or contact the dedicated service desk at DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu
- For issues related to installation of the Adobe Reader, contact your information system assistance. Installing the Adobe Reader may require administrator rights on the machine you are using.

Preparing and submitting a proposal in a few easy steps

Overview

The electronic submission system allows participation in calls for proposals published by the European Commission. The system helps you in selecting the call, managing the list of participants and contact details, communicating with partners of the proposal, uploading the necessary files and filling the administrative forms. Once the proposal is completed, it can be submitted, multiple times if revisions are needed, before the call deadline.

The system is built around simple steps that will guide you through the proposal preparation and submission process, i.e., the transfer of your proposal to the services of the European Commission in a safe and secure manner.

LOGIN
PROJECT
CREATE DRAFT
PARTIES
EDIT PROPOSAL
SUBMIT
1
2
3
4
5
6
Selection of the call for proposals
From the participant portal, you will have the opportunity to select the calls and access the needed background information.
The key information is available in the call fiche.
1 Login
To access the system, you will need a personal account with the European Commission. This allows access to the proposal by multiple users in the proposal preparation phase.
4 Parties
Proposals are prepared by a consortium or by individuals. Depending on the call, additional parties do participate in the process; this is managed by this step.
2 Funding Scheme
Proposal submission administrative forms are adapted according to the funding schemes retained for the call.
5 Edit Proposal
This is the central point of the process: forms are completed and files are uploaded. The complete history of end users and system action are equally available from this step. to finish step 5 and move to step 6, you have to submit the proposal.
3 Create Draft
Once the funding scheme selected, basic proposal information must be entered in order to create a placeholder for all elements (forms and proposal text).
6 Submitted
This is the status screen. When editing the proposal again, the system will bring you back here. Press the back buttons to access step 5 or step 4.

TIP: Read carefully the call fiche. Proposals are eligible under certain conditions and some of these conditions are checked by the system and may prevent submission. Error messages will be displayed – some conditions may prevent submission.

Screen design

On the screen, you will find, from top to bottom:

- A banner giving you the action you can perform at each step in the proposal preparation and submission,
- The ID card of your proposal on the top left side of the screen,
- The results of the compatibility of your computer with the requirements of the site on bottom left side of the screen,
- The navigation buttons, PREVIOUS, NEXT and SUBMIT at the bottom of the screen,

What is needed

As this is a web application, an Internet connection is mandatory. The system has been tested with the following minimum configuration but is best viewed with Firefox 3 and above. Click on to check https://ec.europa.eu/research/participants/submission/manage/diagnostics.

Component	Minimum requirement
Adobe reader	Version 9 installed – all previous reader installations removed
Internet connection speed	ADSL line, 512 KBps
Memory	RAM – 512 Kbytes
Screen resolution	Minimum 1024 x 768
Browsers tested under Windows	• Firefox 3 and Firefox 4 • Internet explorer 7 and 8 • Chrome 8 • Opera 10 • Safari – work around needed
Browsers tested under MacOS	• Safari – work around needed
Javascript	Javascript must be enabled
Cookies	Cookies must be enabled
Pop-up blocker	No effect
User ID	Valid user ID with the Commission

Coordinators and partners

Two roles are available when preparing and submitting a proposal. You could be either a coordinator or a partner to the proposal. This has an effect on the actions you may do and the information you have to supply. The table below highlights the differences. Note that for some calls, only one participant is needed and the participant will be the coordinator of the proposal by default.

Action	Coordinator	Partner
Select the call	Yes	No
Invite participants	Yes	No
Submit the proposal	Yes	No
Define the budget tables	Yes	No
Enter all administrative form data	Yes	No
Enter own administrative forms	Yes	Yes
Download and read the proposal files	Yes	Yes
Download and read the proposal forms	Yes	Yes

If you are a partner to a proposal, you will be invited by the coordinator to fill the administrative forms that contain the contact and address details. Most of the fields will be pre-filled with data already supplied by the Commission system in order to gain time and ensure higher data quality.

Referees

You may also be invited to participate to the proposal cycle as a referee. A referee is a person designated by the proposal coordinator that will provide a reference letter to the Commission. The referee does not need to read or contribute to the proposal but issues a reference letter that is part of the information given to the European Commission. The assessment is not visible to the proposal coordinator (fellow).

Action	Coordinator	Referee
Select the call	Yes	No
Invite referee	Yes	No
Write the proposal	Yes	No
Read the proposal	Yes	No
Submit the proposal	Yes	No
Write assessment	No	Yes
Read assessment	No	Yes

Starting the process

The site is available on the web, at the following address:
http://ec.europa.eu/research/participants/portal/page/testcallpage

In order to safeguard your data, the site relies on encrypted communications to the European Commission machines. On some Internet browsers, informative messages may be shown on installing a certificate. Please do so if requested.

Preparing a proposal can be done on-line, with the key elements of the proposal being built on the proposal submission site. The process always starts from the European Commission Research participant portal, a single entry for all activities in the field of research: finding opportunities, finding partners for your proposal, submitting proposals, defining the grant agreement with the European Commission services and managing costs statements, reports and payments.

Focusing on the submission activity, for the current version, the system will present:

- All calls for proposals available,
- All proposals that you manage or that you contribute to as a partner or referee

Creating a proposal

You be offered the choice of calls available – select the call and click on the **NEXT** button at the bottom of the screen and follow the instructions. A choice of funding schemes will be proposed to you at a later stage.

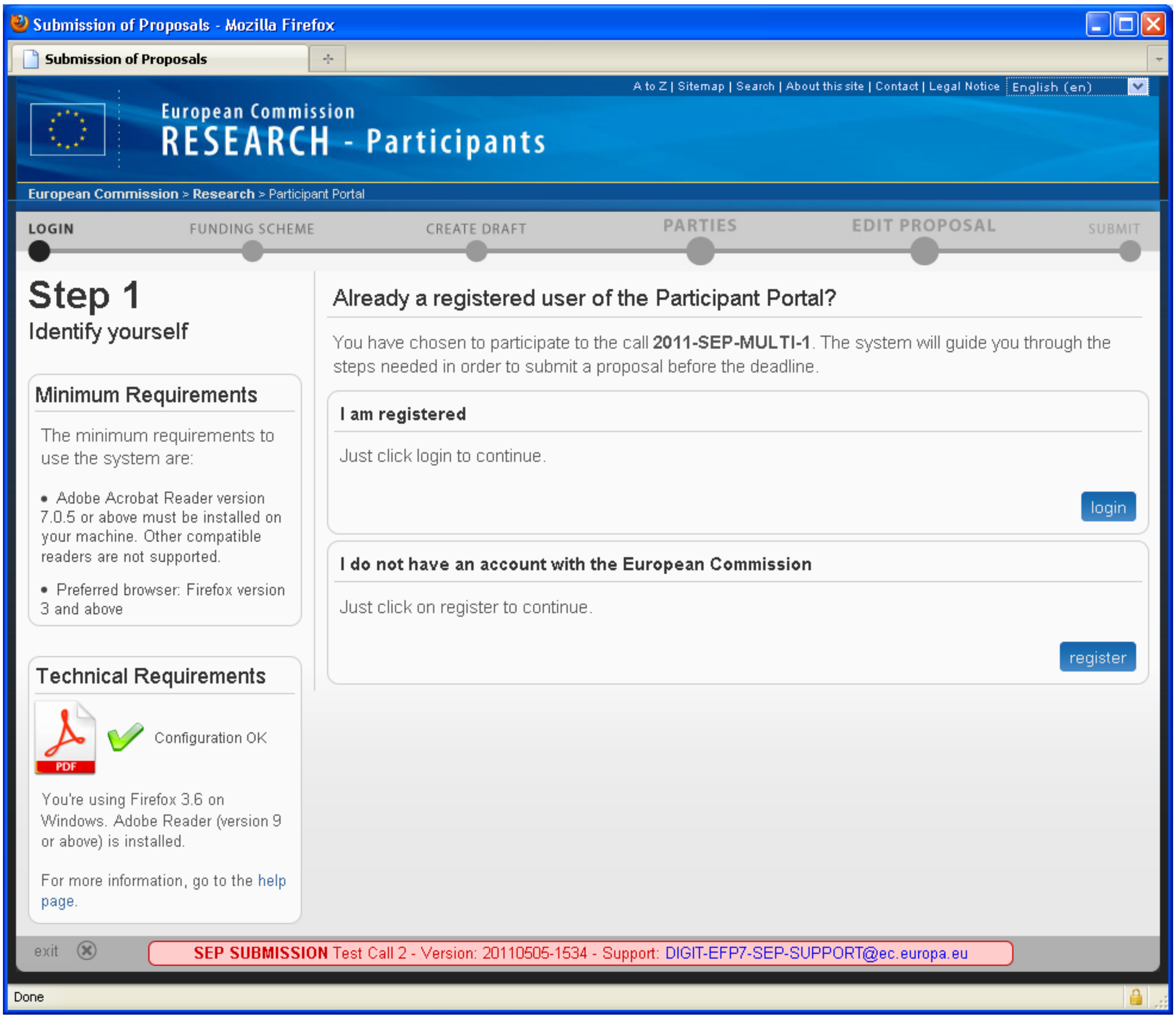
Editing an already created proposal

From the participant portal, select the proposal to complete. All proposals in which you are involved will be shown; i.e., proposals you have initiated or proposals for which your contribution is requested.

Click on the button at the right hand of the screen to edit the selected proposal. Once the call is closed, you will be allowed to download the proposal but not edit it.

First step: getting a user ID with the Commission

Getting a personal user ID with the Commission is mandatory in order to complete the information requested from partners or in order for the coordinator to submit the proposal. The system will request it anyway and the instructions to get one are easy. Next, the same user id will be used for all interactions with the European Commission in the field of Research.



TIP: The user ID is personal. Do not share it with other people as this may lead to giving access to proposals, contracts and deliverable of all proposals or projects you manage.
Make sure you have selected the external domain from the "change it" option below the main box. The other options are available for the personnel of the European Commission and other EU organisations.

If you already have an account with the Commission, please provide the user id and the password – you will have to click on the LOGIN button.

If you do not have an account with the Commission, you will have to click the button REGISTER. Provide you electronic mail address and enter the security code.

TIP: Request the account well in advance of the closure of the call as the process may take more than a few minutes to complete: you will have to check your electronic mail to activate the account. Check the spam folder.

The site will check if your computer is compatible with the submission process. If the compatibility check highlights issues, request assistance to upgrade the Adobe reader to the latest version and verify with your information system administrator that such an upgrade can be made. This information is shown on the left side of the screen.

Note:

- There is currently no way to log off the system. In order to do so, you will have to close the Internet browser windows opened. (All browser windows).
- The time out for the system is of 13 hours. In other words, you will not be requested to identify yourself for an extended period of time. If security is a concern or if you are not using your own computer, follow the instructions above.
- Passwords are personal. They are no longer linked to a specific proposal. Sharing your password means giving access to all your proposals, projects and costs statements.

Next to continue

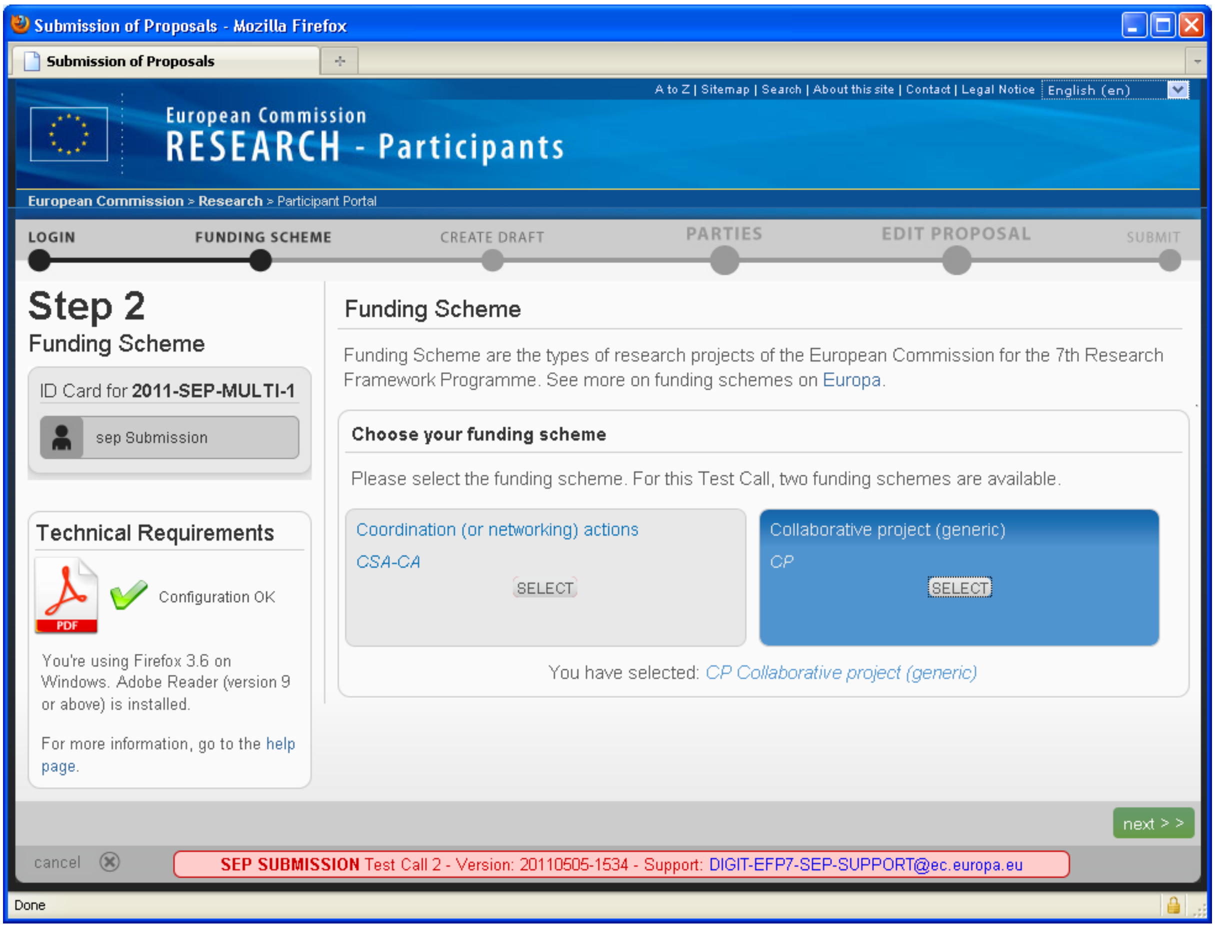
Note that once you have an account with the Commission, you will not longer go through this process.

The second step: selecting the funding scheme

For each call, a list of funding schemes will be presented by the site. Refer to the call fiche of the call for the various conditions that are applicable as the number of participants, the European Commission funding amounts, the countries of the participants may differ.

Two big families of funding schemes are available in the system; they correspond to the calls published by the European Commission:

- Funding schemes for which at least three independent organisations must participate
- Funding schemes for which a person, the researcher, is the prime beneficiary. This is the case of the Marie Curie action and actions of the European Research Council.



NEXT to continue

If the wrong funding scheme has been selected, there is a possibility to change it. If the proposal has been created with the wrong funding scheme, you will have to start the cycle again. A functionality to change from funding scheme will be provided at a late stage but with limitations as forms and conditions may differ so much that such a change may not be possible.

TIP: Read the call fiche and identify the funding scheme carefully well in advance. Please check the call and sub-scheme identification first. If you have selected the wrong call and the wrong sub-scheme, you may have to start again. In case of questions, contact the central help desk or you national contact point representative. Information is also available on the Internet.

Prior step 3: obtaining a mandatory participant code or PIC

In order to avoid repetitive typing of the details pertaining to organisation, the Commission relies on a directory of organisations. Information from this directory is copied to the proposal. The following elements are available in this directory:

- The legal name of the organisation, i.e., the head office or central site,
- The legal address of the organisation. Even if the work is carried out de-centrally, the head office must be mentioned as legal address
- The legal status, validated for the FP7 activities
- The maximum funding rates applicable for FP7, depending on the legal status
- The industry sector (known as NACE code)

The participant code is needed when:

- A proposal is initiated by the coordinator
- Participants are added to the proposal by the coordinator.

Searching a participant identification code or PIC is easy provided that you know one of the following elements:

- The usual short name of the organisation, used for naming the website
- The VAT number, whenever the VAT is applicable
- The legal name of the organisation – in English only
- If the organisation is a university, type in the word university.

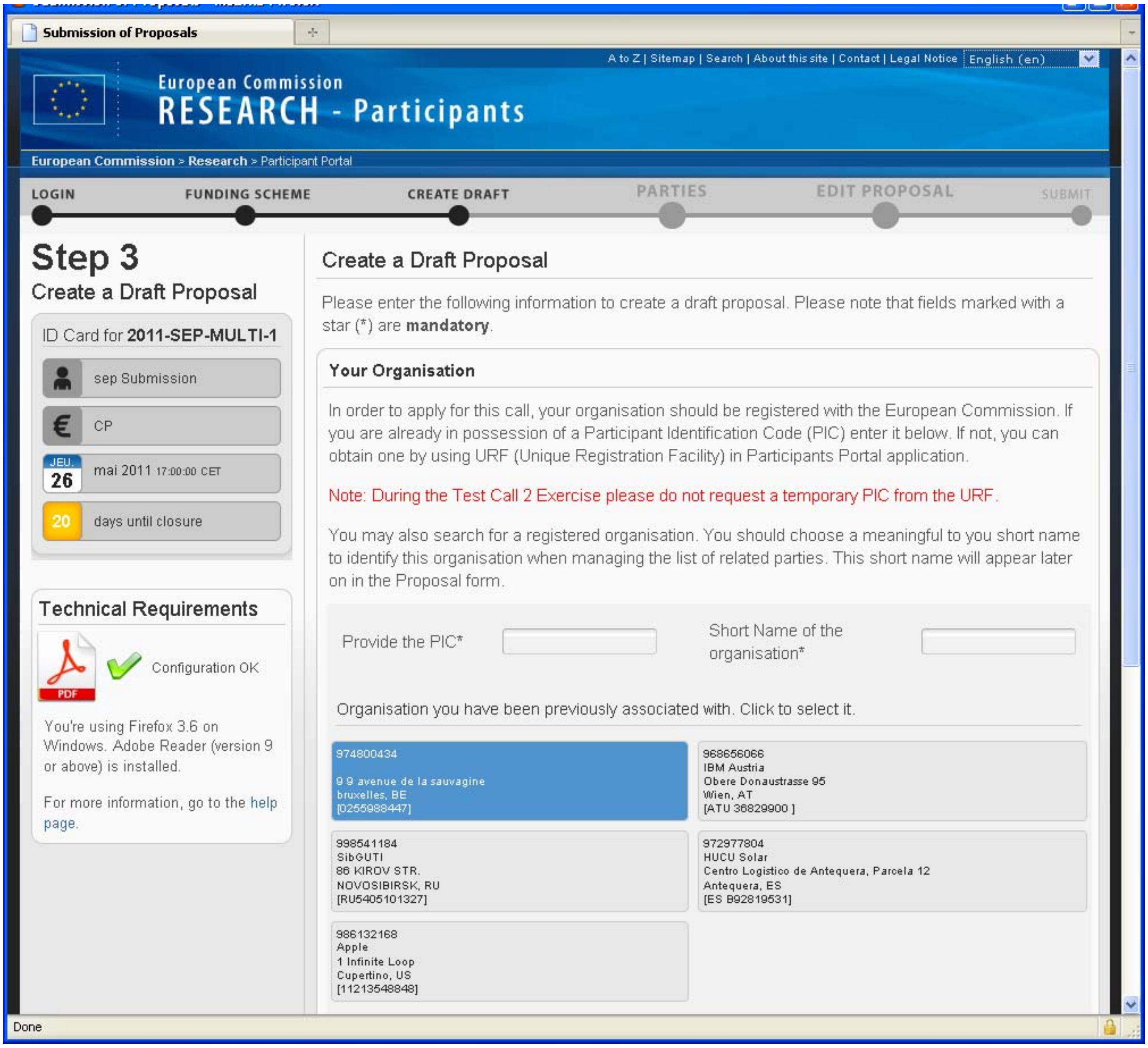
TIP: check that the organisation you select is the one intended. You will have the possibility to correct it at a later stage but better be safe that sorry: invitations to participate may just be sent to the correct person but associated to the wrong organisation. Ask your contact to confirm that the information you have obtained is for the correct organisation.

If the search does not return the expected result, several possibilities are offered:

- If the VAT number is known use it. To check whether the VAT number is valid, the VIES system can help you: http://ec.europa.eu/taxation_customs/vies/
- The system provides you with 200 results returned by the search. This extended display of the search can be perused to identify the participant.
- The organisation is not present in the database. This may happen for small and medium enterprises (SME). In this case, the advice is search with other parameters and confirm with the participant that the organisation is not in the database; registering the organisation is possible (STEP 2: Self-Register your organisation in PP): http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=myorganisations#

Once you have created a proposal, the PIC will be associated to your account. Creating a new proposal with the same organisation is easy: you will just have to click on it to select it.

TIP: The participant identification code or PIC is a nine digit numeric code identifying the organisation. The last two digits are check digits. Incorrect codes will be rejected by the system.


Submission of Proposals
A to Z | Sitemap | Search | About this site | Contact | Legal Notice
English (en)
European Commission
RESEARCH - Participants
European Commission > Research > Participant Portal
LOGIN
FUNDING SCHEME
CREATE DRAFT
PARTIES
EDIT PROPOSAL
SUBMIT
Step 3
Create a Draft Proposal
ID Card for 2011-SEP-MULTI-1
sep Submission
CP
JEU. 26
mai 2011 17:00:00 CET
20
days until closure
Technical Requirements
Configuration OK
You're using Firefox 3.6 on Windows. Adobe Reader (version 9 or above) is installed.
For more information, go to the help page.
Create a Draft Proposal
Please enter the following information to create a draft proposal. Please note that fields marked with a star (*) are mandatory.
Your Organisation
In order to apply for this call, your organisation should be registered with the European Commission. If you are already in possession of a Participant Identification Code (PIC) enter it below. If not, you can obtain one by using URF (Unique Registration Facility) in Participants Portal application.
Note: During the Test Call 2 Exercise please do not request a temporary PIC from the URF.
You may also search for a registered organisation. You should choose a meaningful to you short name to identify this organisation when managing the list of related parties. This short name will appear later on in the Proposal form.
Provide the PIC*
Short Name of the organisation*
Organisation you have been previously associated with. Click to select it.
974800434
9 9 avenue de la sauvagine
bruxelles, BE
[0255988447]
968656066
IBM Austria
Obere Donaustrasse 95
Wien, AT
[ATU 36829900]
998541184
SibGUTI
86 KIROV STR.
NOVOSIBIRSK, RU
[RU5405101327]
972977804
HUCU Solar
Centro Logistico de Antequera, Parcela 12
Antequera, ES
[ES B92819531]
986132168
Apple
1 Infinite Loop
Cupertino, US
[11213548848]
Done

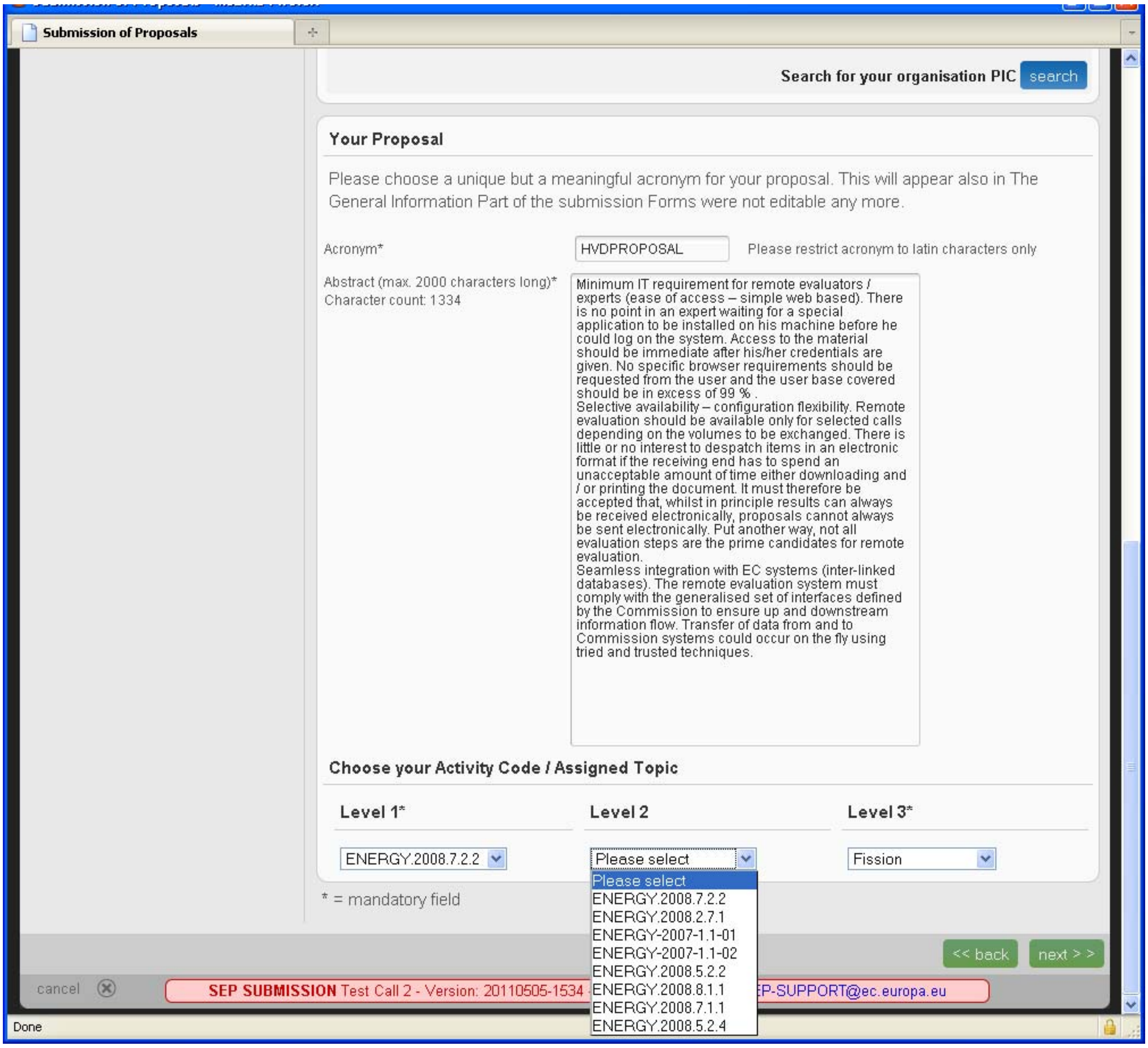
The third step: giving an overview of the proposal

Data entry

Once the prime organisation is known and identified, the system will request the essential details of the proposal. These details will be used by the Commission service in order to plan the evaluation. In general, the following is requested:

- The short name of the organisation. This short name is used in forms where the complete legal name can not fit the administrative forms. Non Latin or accented characters should be avoided if possible as this causes issues with systems down the line.
- The proposal acronym. This is the name of the proposal and it will be used throughout the lifetime of the project, if funded. Given the number of systems and information sites that will process this information, only the letters A-Z, a-z, the numbers 0-9, the hyphen ('-'), the blank (' ') and the underscore are allowed ('_') in the acronym.
- The proposal abstract. The abstract is 2000 characters long and describes briefly the purpose of the proposal. To help you, a counter is available.
- Depending on the call, activity codes, scientific panels or other information meant to allocate the proposal to a budget line or to an evaluation panel will be shown. Select the most suitable codes.

TIP: The abstract given here is preliminary information. The latest version of it will be found in the proposal submission forms, usually in form A1. Differences between the initial abstract and the final one are expected by the European Commission services.



NEXT to continue

Clicking next will create the set of administrative forms for the proposal. Once the proposal is created, there is no possibility to change the proposal acronym, funding scheme or proposal coordinator.

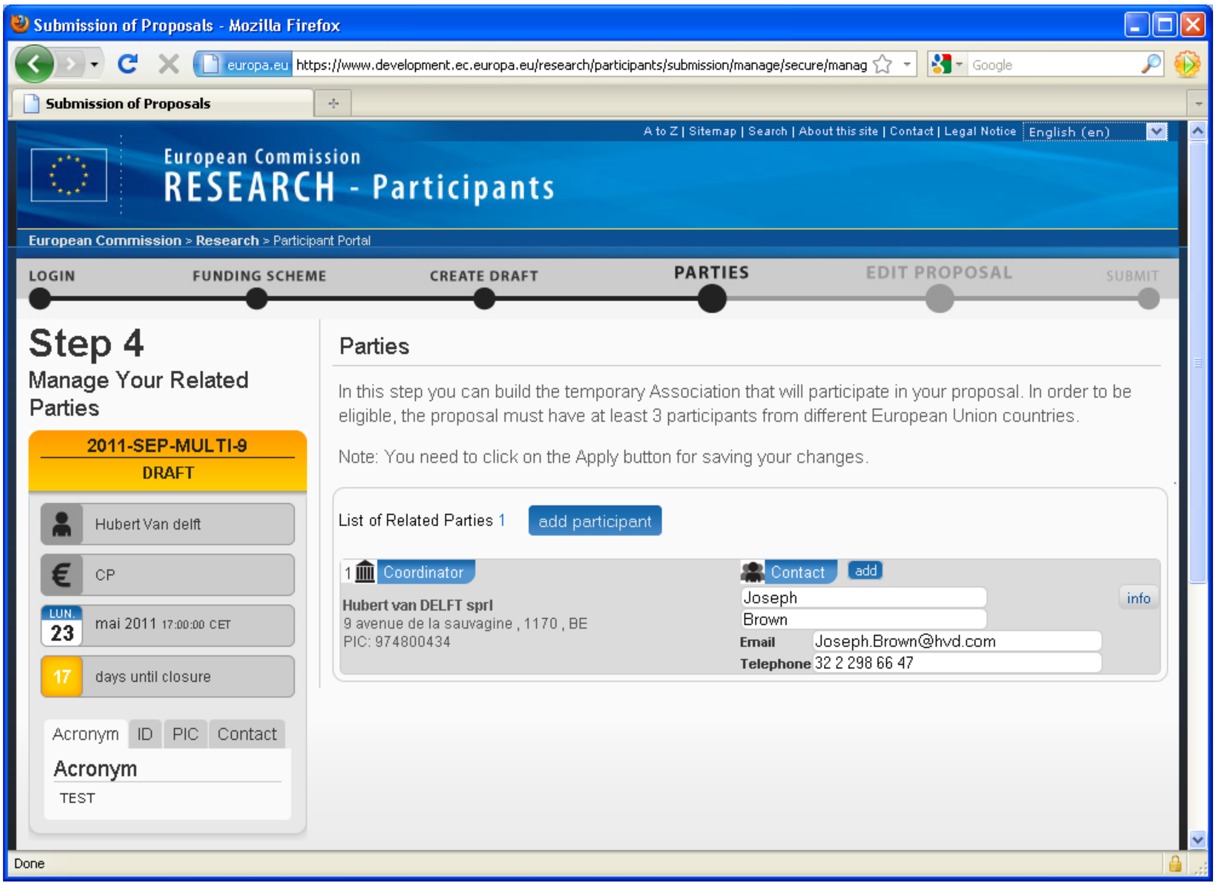
If a change is needed, there is no other solution than creating the proposal again with the right acronym, funding scheme or coordinator.

The fourth step: managing other participants to the proposal

Depending on the call selected, the system will propose you to:

- Add organisation to the proposal. A search function is offered to you, in order to insert the participant code in the administrative forms and copy the most up to date information for you. This information will be completed with contact details – multiple contact can be added at this point.
- Add other participants to the proposal – notably, the referee for the Marie Curie actions.

The following screen will be shown on step 4.



For Marie Curie calls

Participants to Marie Curie calls may invite up to three referees. The referee is a physical person that will inform the European Commission on the good standing of the participant. However, the referee is not requested to contribute to the proposal itself.

Whenever the referee has submitted an opinion on the participant, the system will inform the participant of the action. The content of the assessment remain private to the Commission services.

For other calls

For other calls, organisations can be added, deleted and their order in the proposal changed. Each organisation can have one or more contact persons that can be declared as part of the proposal building. Note that the European Commission requests only one contact point per organisation. The additional contact points are offered as convenience in order to guarantee continuity of proposal building should a person be absent. Such a facility is needed as the password system is linked to a person and no longer to a proposal.

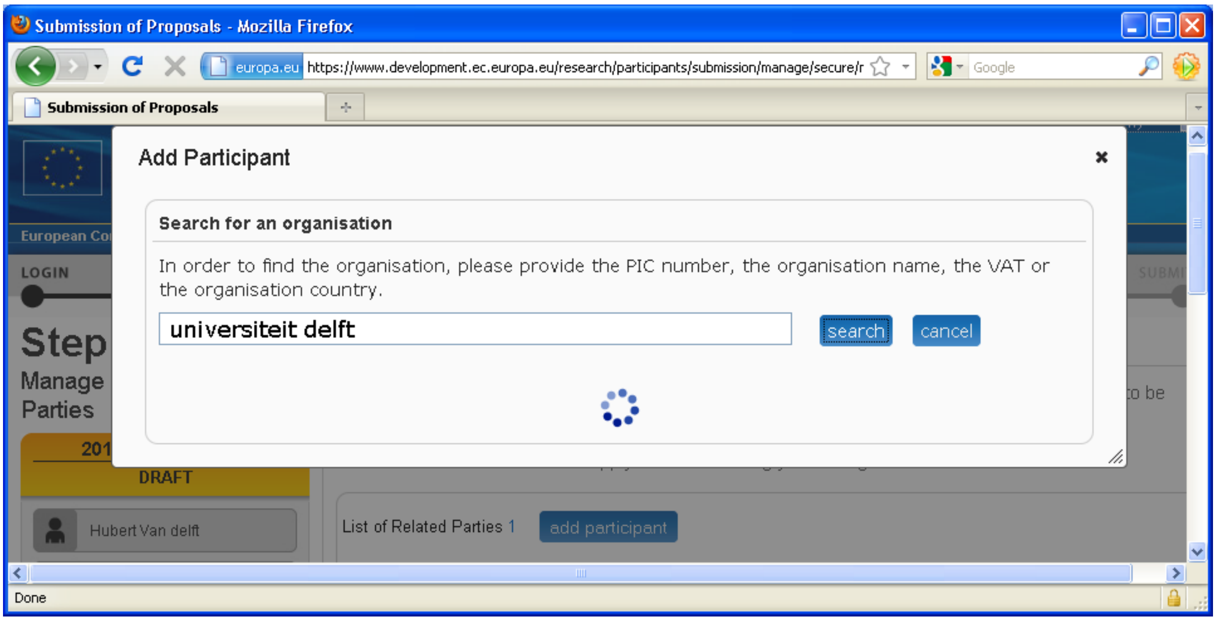
Add participant

From the participant part of the screen, it is possible to:

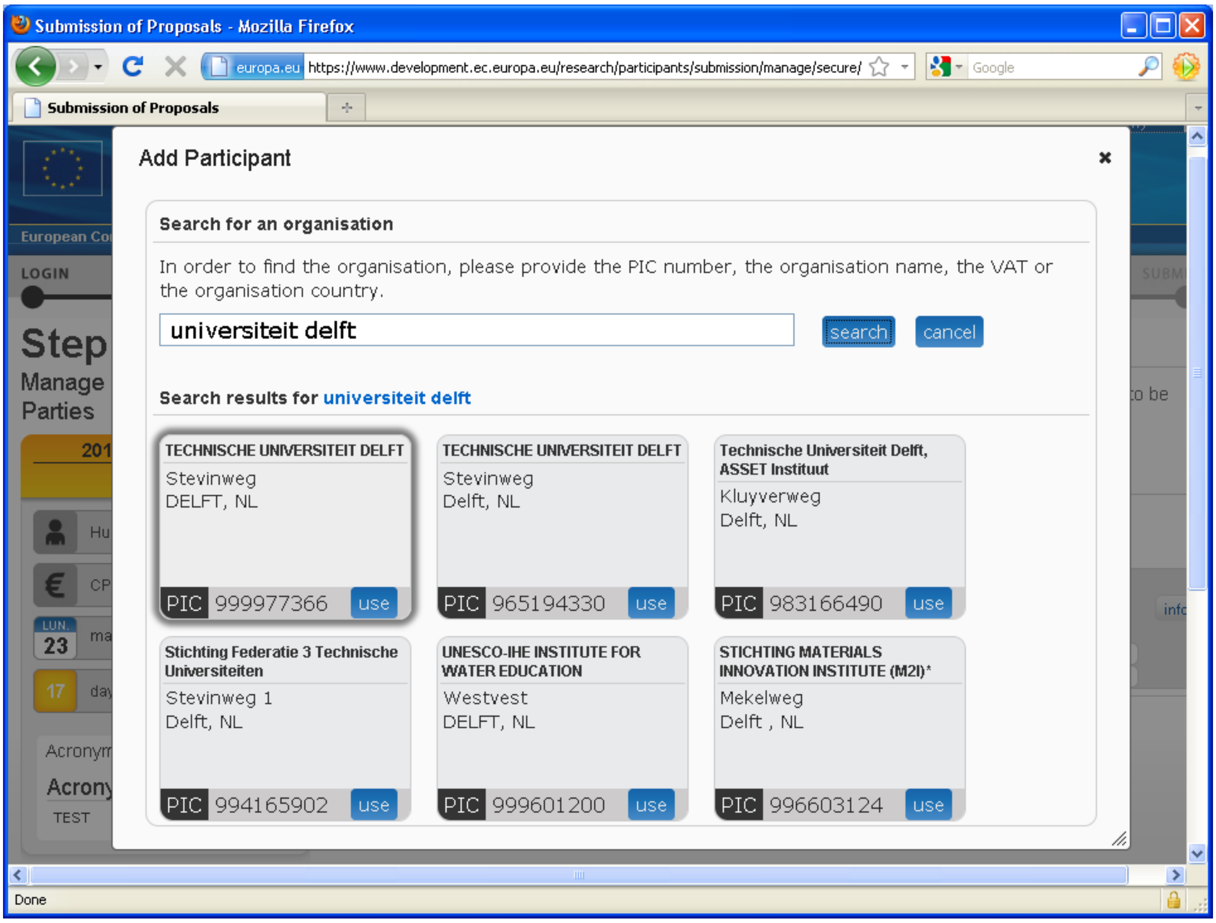
- **Add** a participant. You will have to enter the PIC or enough information to search from the organisation.
- **Delete** the participant. Click on the button next to the participant's name.
- **Reorder** the participants. To reorder the participants, select one participant line, click on the mouse and drag it to the correct position. Release the mouse button. The order of the participants in the administrative forms will be adjusted.

TIP: The participant that coordinates the proposal cannot be deleted. Should another organisation coordinate the proposal; it is advisable to start from the beginning.

Here, a participating organisation will be added, TU Delft:



The search results in a series of organisations containing matching the search criteria. Click on the **USE** button to select the organisation.



WARNING: when deleting a participant, all the administrative forms for this participant are deleted. The deletion of the organisation is immediate.

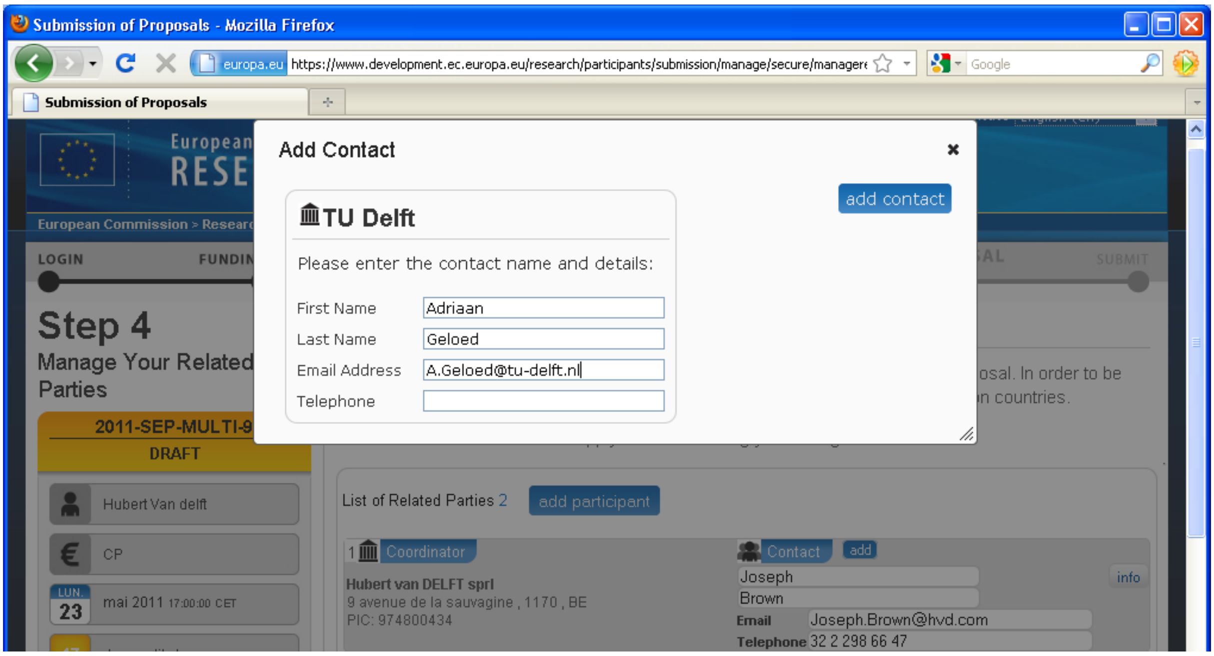
WARNING: new organisations can not be created from within the submission system and this should be used as a last resort solution. Use the following address to access the registration pages:
http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=myorganisations#

Add contact for participating organisations / add referee

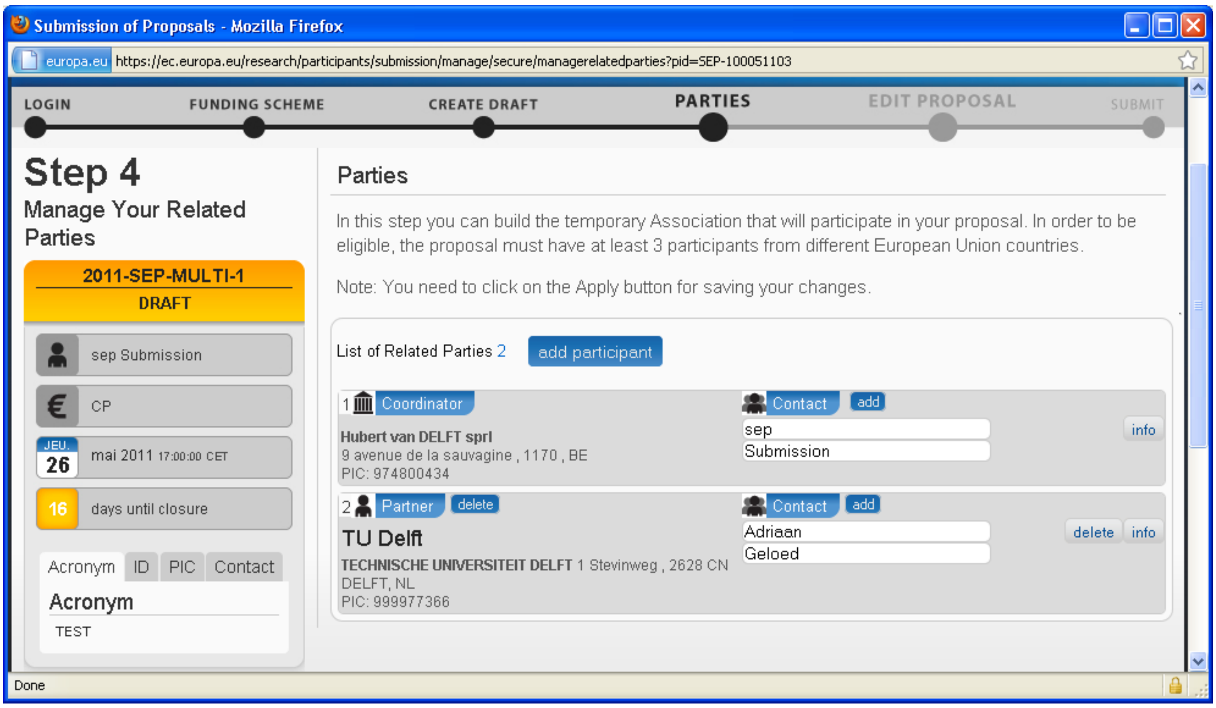
From the contact part of the screen it is possible to:

- **Add** persons that contribute to the proposal preparation, partners or referees. Contact points can be added individually (where you **Save** the information for each contact) or in bulk (where you **Save** after having completed the screen).
- **Invite** the contact person to participate in the proposal. The system sends a mail and a link to he person designated with instruction on how to complete the forms.
- **Re-invite** the contact person. This may be needed to remind to sign in and contribute to the proposal. Check that the electronic mail address is correct.
- **Delete** the contact person
- Expand the information box of the contact person. Clicking on **Info** expands the details box. Clicking on info again minimises the box.

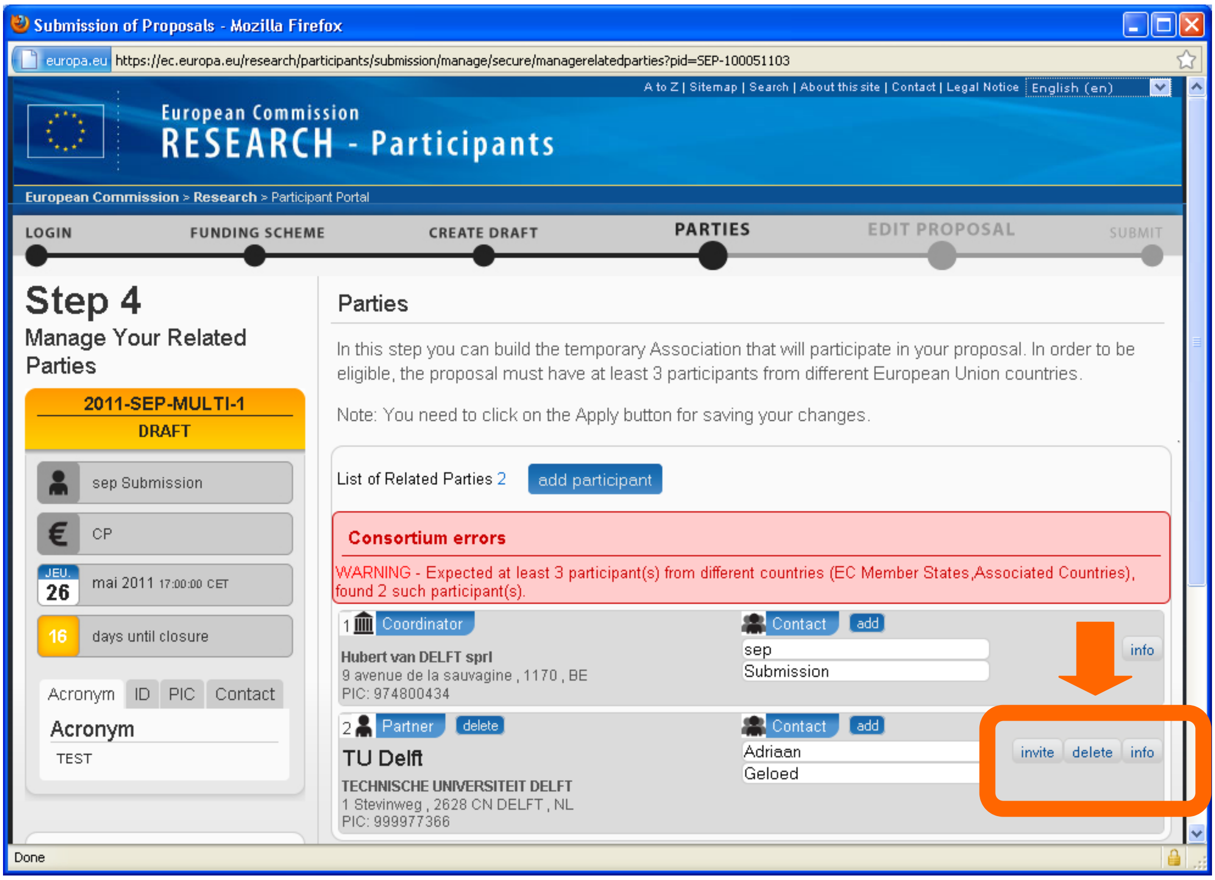
In the following example, contact information is added; to close the box and return to the main screen, **ADD CONTACT** needs to be clicked.



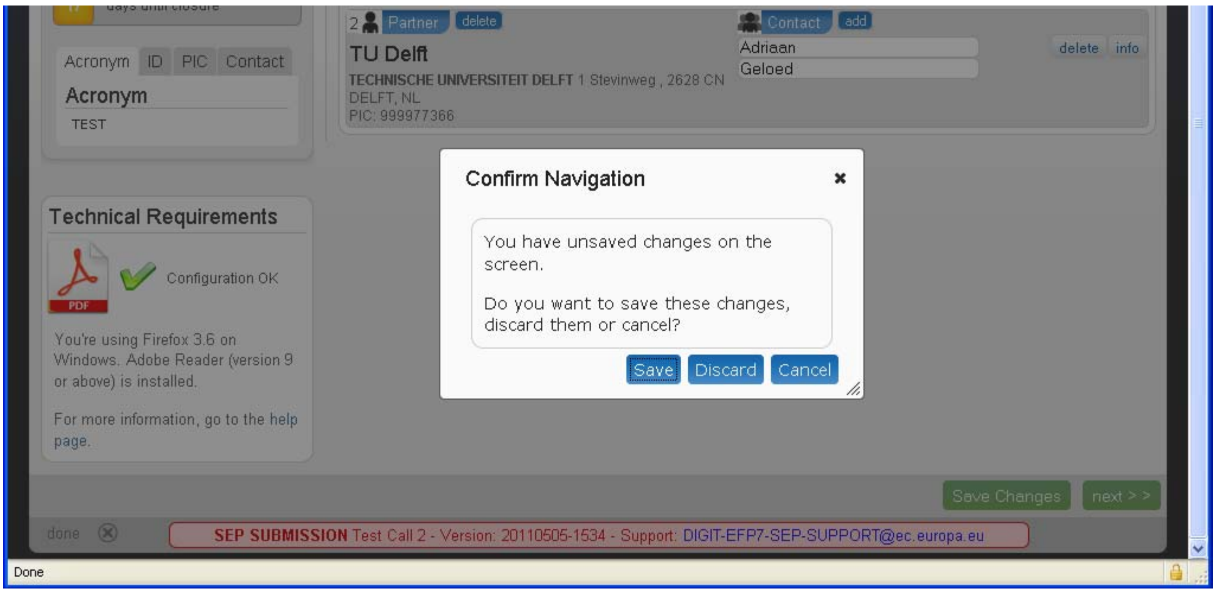
You need to inform the central system of the information just entered by clicking on SAVE – the button is located at the bottom of the screen. At this point, you have just added the contact.



From this screen, you can **invite**, **delete** of get extended **info** of the contact person. The invitation / deletion of a contact are immediate. The invitation is sent by email and this process can take an extended period of time.



The system will remind you of any unsaved changes. The Confirmation box is then shown.



TIP: Check that the electronic mail addresses are correct and complete. Click on the info button to do so. The e-mail addresses introduced in this section are used by the site to send automatic electronic mail invitations. Please check that they are complete and accurate.

WARNING: when deleting a contact, the deletion is immediate.

TIP: To avoid performance issue with the system, it is better to make small changes and then to hit the SAVE button. Applying changes early and often will also give you an overall better response time.

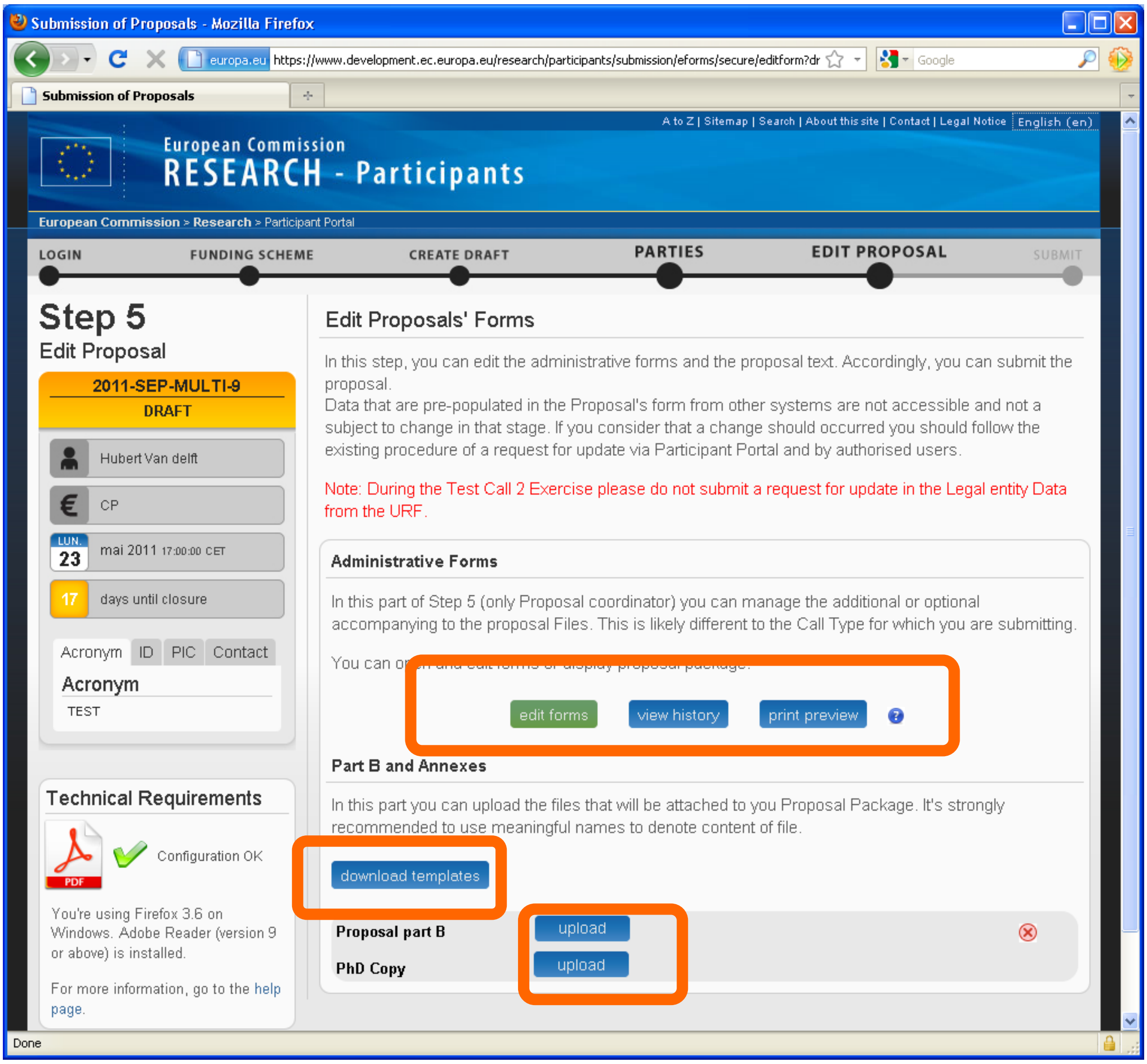
Next to continue

To end the step, click on the NEXT button located at the bottom of the screen.

The fifth step: forms, files and submit

This step is the core of the site; form here you can:

- Download the templates and other information files
- Fill the administrative forms
- Upload files that will be part of your proposal
- Submit the proposal package for evaluation
- View the proposal history



Edit forms - Online or inline edition

For a technical overview on the forms software, see the section Forms in this guide.

Most proposals forms (part A) have the same structure where:

- The project outline is described
- The organisation responsible for the proposal is identified
- Additional partners are listed
- Budget information is given in monetary units or in man-days.

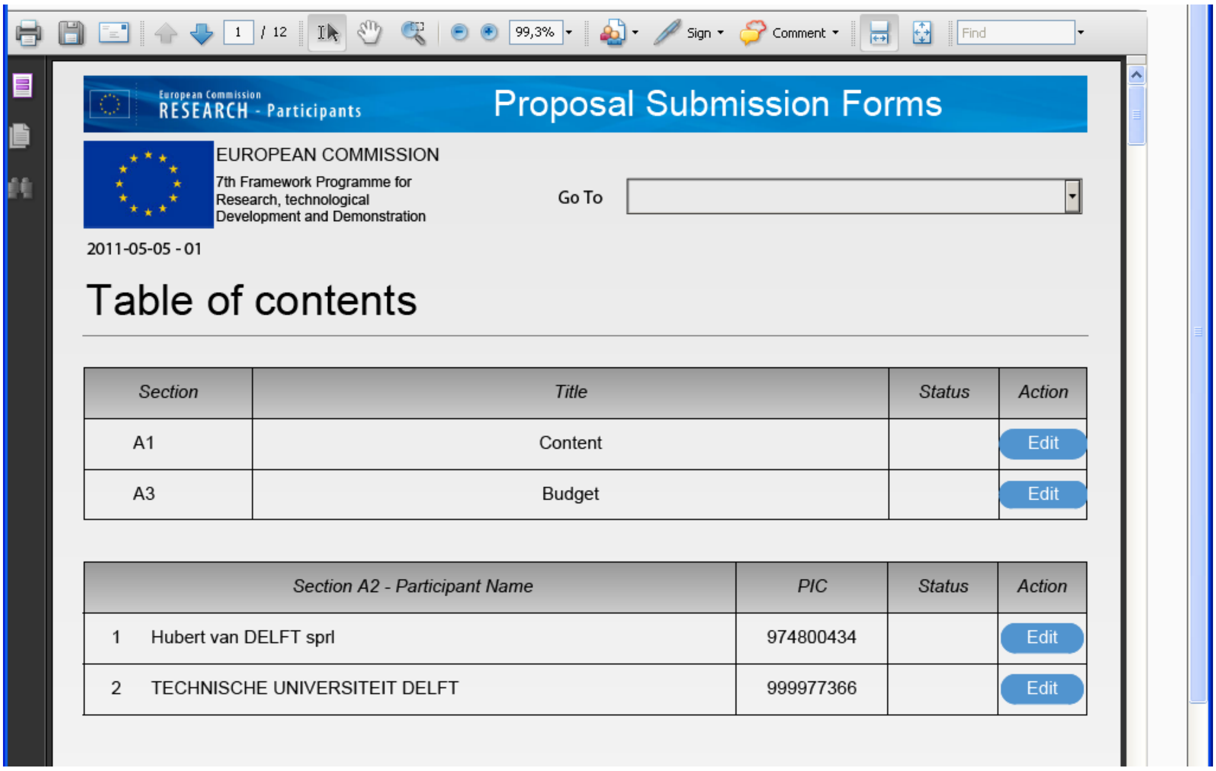
Depending on the type of call (strictly call- and sub-scheme-specific), Part A shows the overview of forms A1, A2, A3.1 and the summary A3.2 (certain sub schemes also have an A4 form or don't have the A3.1/A3.2 forms).

Click on the EDIT FORM button on the screen to access the forms. Wait until the reader has loaded to start filling the forms; this may take a few seconds depending on the speed of your computer. A new set of action are offered to you; these depend on the version of the reader installed on your machine.

Reader actions

The following actions are available by default on the reader window. These actions depend on the version of the reader installed on your computer.

- Save the form on your computer
- Print the form
- Close the reader window



European Commission RESEARCH - Participants

Proposal Submission Forms

EUROPEAN COMMISSION
7th Framework Programme for Research, technological Development and Demonstration

Go To

2011-05-05 - 01

Table of contents

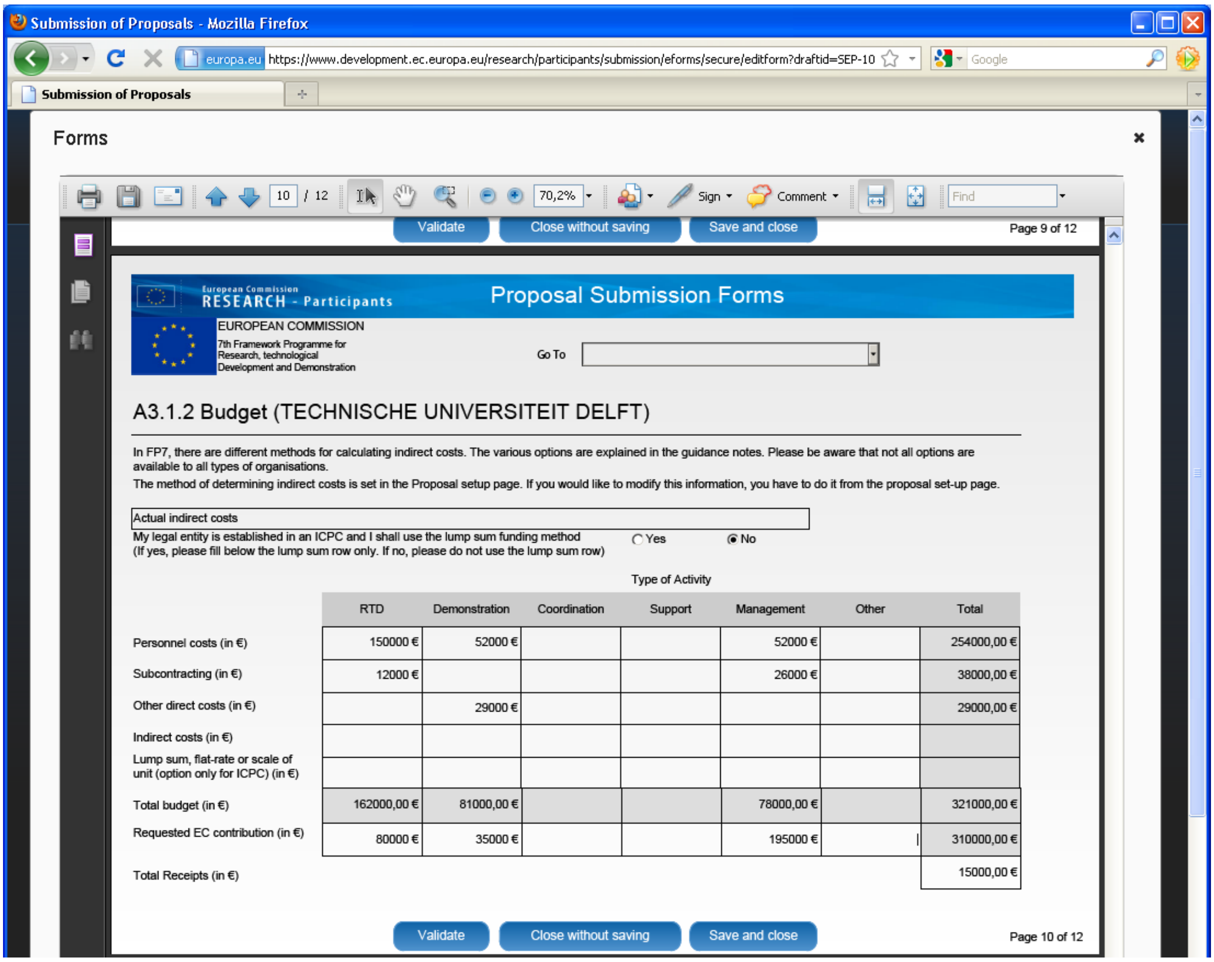
Section	Title	Status	Action
A1	Content		Edit
A3	Budget		Edit

Section A2 - Participant Name		PIC	Status	Action
1	Hubert van DELFT sprl	974800434		Edit
2	TECHNISCHE UNIVERSITEIT DELFT	999977366		Edit

Forms actions

The proposal submission forms are designed by the Commission services and have built-in validation routines. They also have action button located at the top and bottom of the forms.

- Top of form
  - Selecting the party (drop down list). The topmost menu allows the selection of the participant form in one click. This avoids moving up and down in the form until the selected party is found.
- Bottom
  - Validate. As the forms are programmed, fields can be validated against predefined parameters. Clicking the validate button also forces a re-computation of the budget
  - Close without saving changes. If the last set of changes is incorrect, you have the possibility to close the form without saving the changes. This is equivalent to the close reader option described above.
  - Save and exit.



Edit forms - Offline edition

(For a technical overview on the forms software, see the section Forms in this guide.)

When the Internet browser is not compatible with the reader technology, the site will advise you to save the forms on your computer. This is possible by clicking on the disk icon present on the menu bar of the reader. A box will be shown on where to store the file on your computer.

You will have the possibility to complete the forms during a few minutes and submit these to the central site. Your computer may alarm you that a program tries to connect to the Internet – you will have to authorise the action.

WARNING: when transferred to another computer by email or file transfer, it is possible that the forms can no longer be submitted to the central system.

View history

Clicking on the view history allows the proposal coordinator and partners to examine in details the list of all system and user actions. This enables the coordinator to verify that partners have updated their forms and enables partners to verify that the coordinator has submitted the proposal in a timely fashion.

Print preview

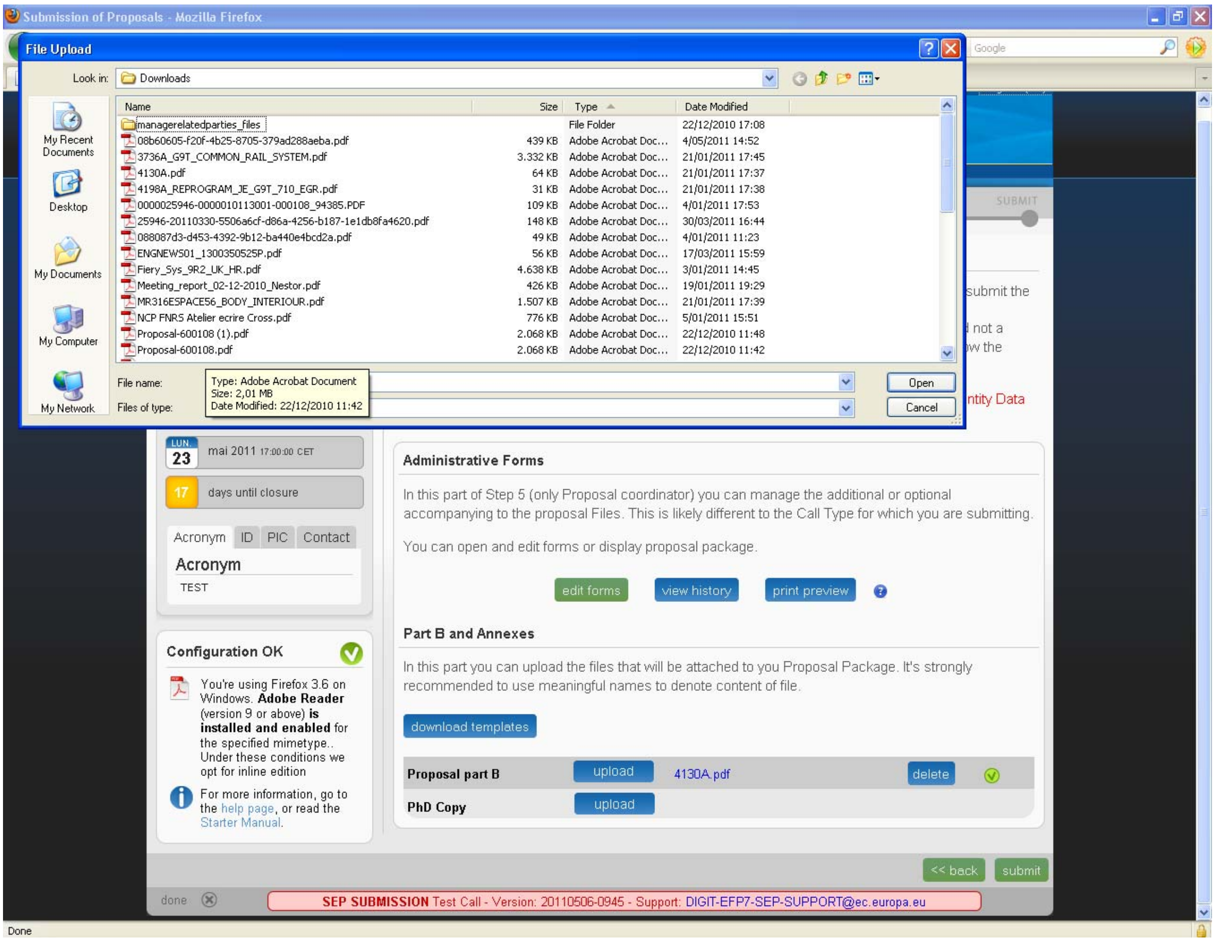
Administrative forms can be downloaded to your computer; this is the object of the print preview button. Once present on your computer, you can click on the forms to view these. The only difference with the option available from the reader resides in the fact that you have downloaded a copy. This copy can be sent to participants or retained for archiving purposes.

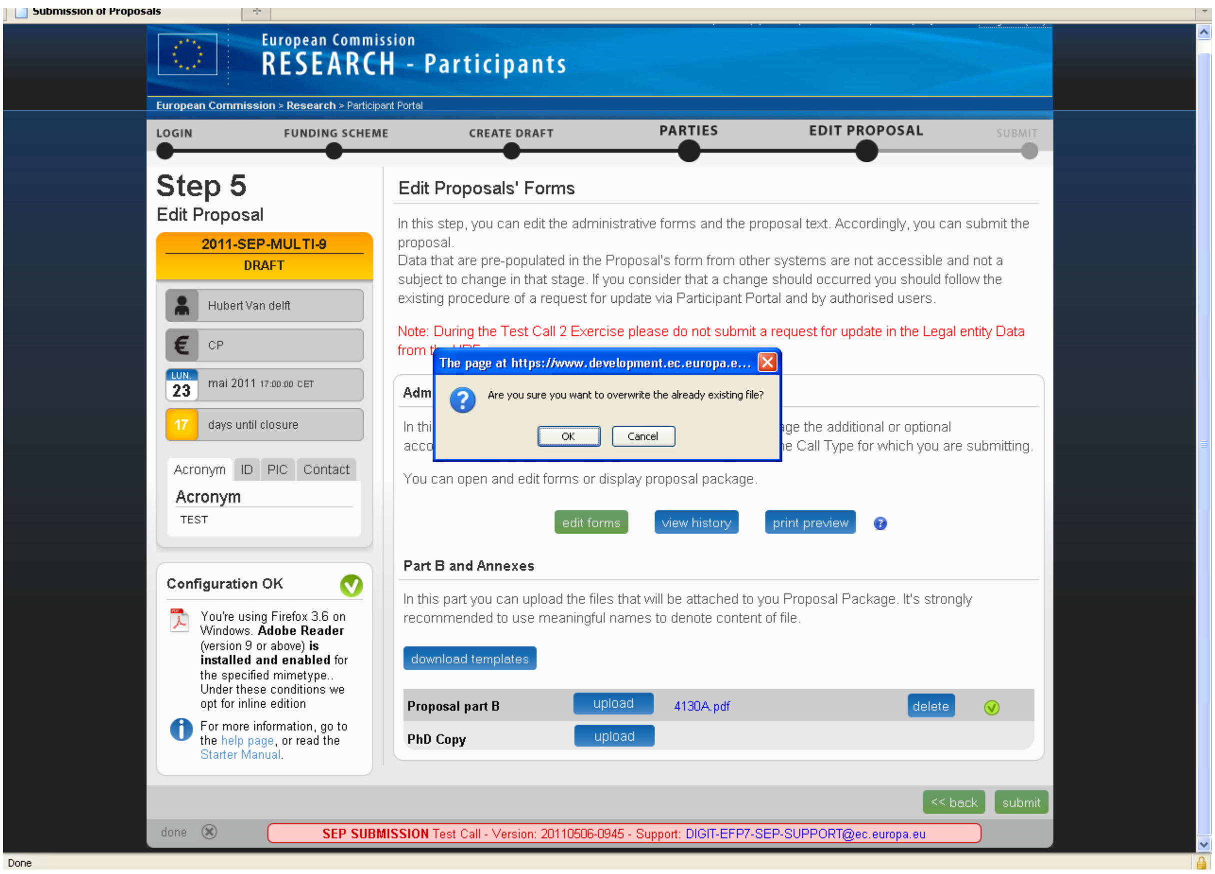
Download templates

Click on the download templates to retrieve the latest information package available for the call. By default, the proposal template is included in a readily editable format (RTF). It is your responsibility to convert the proposal into the PDF format.

Upload files

Uploading files that are part of the proposal needs clicking the upload button and the selecting of the file to upload. Depending on the speed of the Internet connection this may take a few seconds or a few minutes. At the end of the upload, a confirmation message is shown and an entry is created in the history log.


Submission of Proposals - Mozilla Firefox
File Upload
Look in: Downloads
Name
Size
Type
Date Modified
managerelatedparties_files
File Folder
22/12/2010 17:08
File name:
Files of type:
Type: Adobe Acrobat Document
Size: 2,01 MB
Date Modified: 22/12/2010 11:42
Open
Cancel
Administrative Forms
In this part of Step 5 (only Proposal coordinator) you can manage the additional or optional accompanying to the proposal Files. This is likely different to the Call Type for which you are submitting.
You can open and edit forms or display proposal package.
edit forms
view history
print preview
Part B and Annexes
In this part you can upload the files that will be attached to you Proposal Package. It's strongly recommended to use meaningful names to denote content of file.
download templates
Proposal part B
upload
4130A.pdf
delete
PhD Copy
upload
Configuration OK
<< back
submit
SEP SUBMISSION Test Call - Version: 20110506-0945 - Support: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu


European Commission
RESEARCH - Participants
LOGIN
FUNDING SCHEME
CREATE DRAFT
PARTIES
EDIT PROPOSAL
SUBMIT
Step 5
Edit Proposal
2011-SEP-MULTI-9
DRAFT
Edit Proposals' Forms
In this step, you can edit the administrative forms and the proposal text. Accordingly, you can submit the proposal.
The page at https://www.development.ec.europa.e...
Are you sure you want to overwrite the already existing file?
OK
Cancel
You can open and edit forms or display proposal package.
edit forms
view history
print preview
Part B and Annexes
In this part you can upload the files that will be attached to you Proposal Package. It's strongly recommended to use meaningful names to denote content of file.
download templates
Proposal part B
upload
4130A.pdf
delete
PhD Copy
upload
<< back
submit
SEP SUBMISSION Test Call - Version: 20110506-0945 - Support: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu

Download files

In order to download the file from the system to check if the upload completed correctly, click on the file name – it will be underlined. A window will open to request where to save the file.

TIP: make sure that no identical files names are used for the proposal file and for the annexes. This will make your proposal ineligible.

TIP: Upload your proposal files (part B and annexed files) early in the process and press the "submit" button and all buttons that follow in the subsequent pages. Doing this ensures that an interim version of the proposal is already present on the system. Remember that the system allows multiple uploads of the proposal files and this facility should be used to avoid the call closure rush.

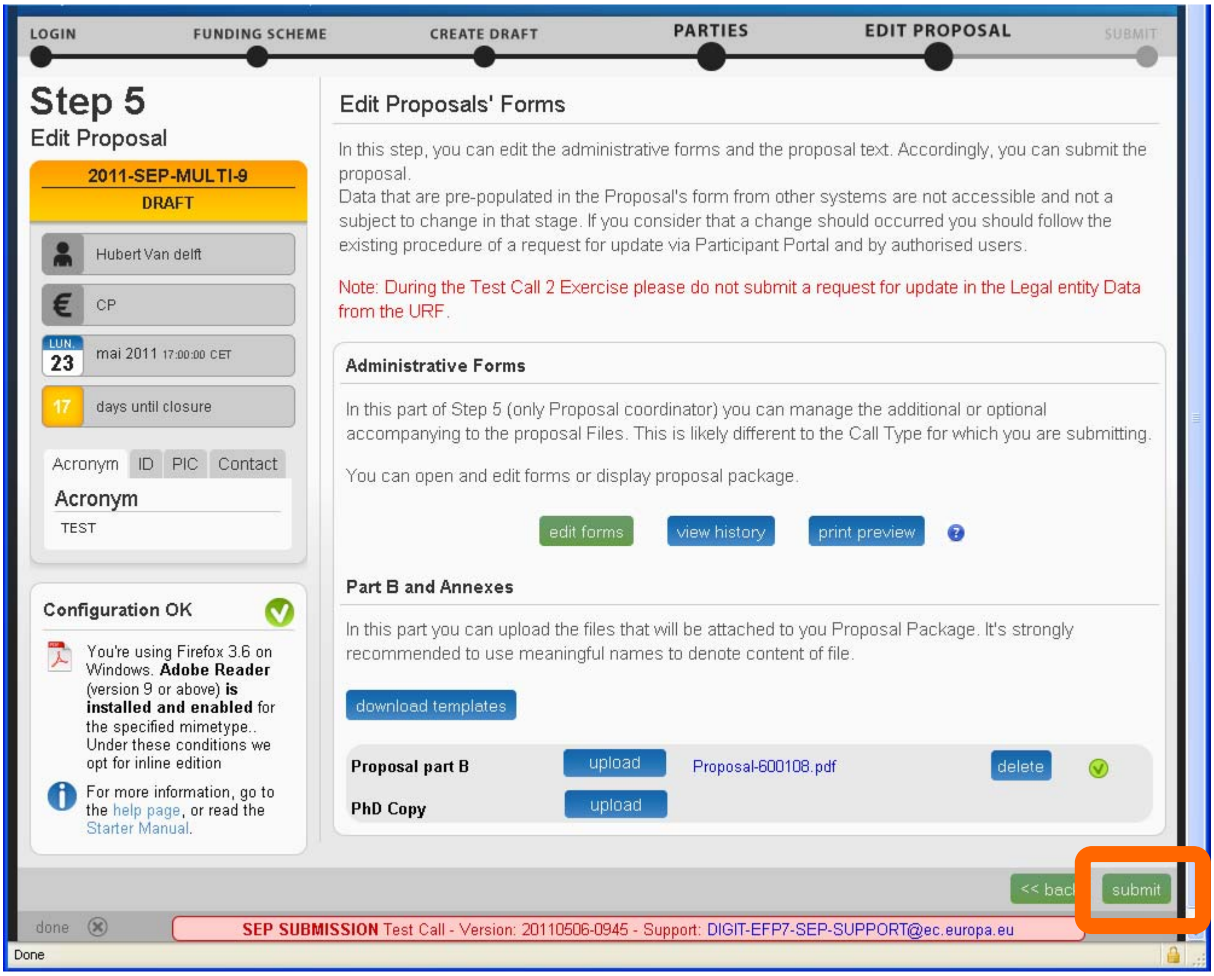
TIP: In some rare instances, the proposal may be altered while in transit on the Internet. To check that the uploaded file has been received unaltered, perform a download of the part B.

TIP: Practice the conversion of the file to the PDF format. The conversion may take an extended period of time if the page layout is complex or contains graphics. There is no point is creating a PDF document with a resolution higher than 300 DPI and in black and white. Nuances of grey may be reproduced but should be avoided for legibility purposes.

Uploading a file is not equivalent to submitting a proposal. In order to have the latest version of the files retained for evaluation, you have to press SUBMIT.

SUBMIT to continue

In order to reach the last step of the process, you will have to click on the SUBMIT button. The system will then package the proposal for later evaluation by the Commission services. At this point in time, the proposal is just received and held in a queue for later processing.



The sixth step: proposal status page

Reaching the sixth page means that the proposal is submitted (i.e., send to the European Commission services). It does not mean that the proposal is valid, complete in all aspects or that it will be funded.

Re-edit the proposal

This allows you to change the components of the proposal, administrative forms, proposal files and optional annexes. Clicking on this button will bring you back to the previous screen.

Download

From this screen, you will download the proposal package, the administrative forms and the proposal text in one package, digitally signed by the European Commission. This acts as your receipt.

The facility to download the proposal package is available after the submission deadline.

Withdraw proposal

Proposals may sometimes be withdrawn for the queue for various reasons. Please use this options with care are as withdrawing the proposal means erasing it completely without any opportunity for recovery.

TIP: This functionality may be activated on demand. If not active, withdrawing a proposal entails uploading a proposal files – part B - with a single document containing the word “Withdrawn” and with the following words entered in the abstract field of form A1
"*The applicants wish to withdraw this proposal. It should not be evaluated by the European Commission services*".

Past deadline

Past deadline, the system will still provide some facilities to you – for a limited time. The basic rule is that past deadline, the proposal can not be changed at all.

You have the possibility however to:

- Withdraw the proposal. This is possible for a few days only as once the proposal is reviewed by the eligibility committee, it is considered as received. However, it will not be evaluated. This is not currently active
- Download the full proposal. From STEP 6, the download of the proposal package will still be possible. Depending on the configuration, this facility may be open up until one month past the deadline date.
- Download the administrative forms
- Download the proposal files, part B and other annexed files
- Download the templates
- View the proposal history

TIP: Past the deadline, the proposal is in “read-only” mode. It can no longer be modified; however, the proposal remains accessible by the coordinator and by the partners to the proposal.

Contributing to a proposal as a partner in 3 easy steps

Once you have received the invitation

When requested to contribute to a proposal, attention should be paid to timely information to be given to the coordinator. In order to ease the work, the following must be collected well in advance:

- The participant identification (PIC) code of your organisation,
- Your professional electronic mail address. Even if generic mail accounts are enough, it is preferable to use the professional electronic mail account.
- Your telephone and physical address, in order to communicate effectively with the proposal coordinator.

Accessing the proposal

The proposal can be directly accessed with the link provided in the invitation mail. In order to access the proposal, you must have an account with the European Commission. If you do not have an account, the system will guide you through the necessary steps.

Once the account obtained or the user identification and password entered, the step 5 of the submission process will be presented to you. From this screen, you will be able to access the electronic forms and the rest of the proposal package. Your task is to verify or fill the administrative forms. Click on EDIT FORMS to do so.

Completing forms

Only complete your forms. Make sure that no validation errors are left in the forms and that the data is completed. Some fields cannot be modified as they are copied from the central database.

All the other forms can not be changed: the proposal abstract forms, the budget forms. Details are available in the FORMS section of this document.

Use the buttons at the bottom of the forms to:

- validate the form
- save and close the form
- close the form without saving it

Use the topmost button [X] to close the Adobe Reader window.

Viewing the proposal

All components of the proposal package are available for download from the site. The complete history log is also shown in order to give complete feedback of user / system actions.

Contributing to a proposal as a referee

Referees will be invited by electronic mail to contribute by submitting a reference letter to the Commission services. This reference letter will be used as part of the evaluation and decision process.

The process has been designed with ease of use and speed of interaction in mind. The process will take only a few minutes online. Here is how:

- Click on the link received by electronic mail.
- A form will be downloaded to your computer.
- Fill the form as requested or save it to your computer.
- You can complete it online, whilst being connected to the Internet and submit it
- If you wish, the form can be completed whilst not being connected to the Internet. Once you are satisfied with the text, click on the SUBMIT button at the bottom of the form

Clicking on the submit button will force the form to connect to the Internet. This may result in some messages being shown and warning you about the security issues. This is the intended behaviour of the system; you should not be alarmed by this.

Forms

As mentioned in this guide, the Adobe Reader is a pre-requisite to use the site efficiently. The key piece of advice is to install the latest release of the reader well in advance of the closure of a call and to test the configuration immediately. The site provides a diagnostic toolbox but may give you a false positive answer. This section helps you in the troubleshooting and understanding the technical details.

TIP: The system retains only one version of the forms. Saving a new version overwrites the previous one.

Installing the Reader

The minimum requirements are available on http://www.adobe.com/products/reader/tech-specs.html. The download process may request that you disable the antivirus of your computer and that you install a plug-in for your internet browser.

If a previous version of the Adobe Reader is installed on your computer, it may be wise to uninstall it first. Then, install the new version of the reader.

Plug-in missing – Reader can not be used to view PDF forms

A technical component ("plug-in") allowing the opening of the Adobe forms in the Internet browser may be missing; this happens when:

- An old version of the Adobe Reader is used
- Adobe Acrobat and Adobe Reader are both installed on the same machine
- Adobe does not support the specific browser
- The plug-in of the latest version of the reader is down in the list of plug-in or is in inactive status

This will be the case whenever you will be messages like:

- “The Adobe Acrobat/Reader that is running can not be used to view PDF files in a web browser”.
- “Missing plug-in”. A technical component is not found or not installed on your machine. Installing or re-installing the reader may solve the issue. Searching for the plug-in on the Internet may also solve the issue.

Please refer to http://kb2.adobe.com/cps/405/kb405461.html for trouble shooting by your local system administrator. Installing the latest version of the Adobe Reader may solve some of the issues encountered.

Fields are highlighted in pink in the forms

All fields in the forms should be filled with information. The fields where information is missing are highlighted in pink. The colour will disappear when the data entry is complete or when a validation action is made.

TIP: When the field is mandatory but when no value is applicable, enter zero for numeric values and the minus sign (‘-‘) for “not applicable”
TIP: Validating forms will highlight fields in error. All validation messages are found at the end of the form. You can access your form by clicking on the list of partners provided at the top right of the page.

Form menus

The forms are programmed by the European Commission services and have some built-in logic. The following menu options are available, depending on the form configuration.

Validate

When clicking this button, all data fields in the forms will be validated against a set of rules. Presence of valid data is assessed, formats are checked, computations are done and interlinked data is checked for consistency. Any issue present in the form is reported at the end of the form. By default, all fields must be filled with a value with the exception of the budget forms.

Save and exit

This button saves the complete administrative form (as there is only one proposal submission form dealing with administrative details). The save function works even if the form is not completely filled. You have the possibility to edit it at any moment prior the deadline.

Close without saving changes

Using this option means that all changes made from opening the form are lost. Use it with care, after having reviewed the changes to be discarded.

Files

Proposal file – part B

Files that can be uploaded to become part of the proposal can be of different types and sizes.

However, the main proposal file, the part B, must be a PDF file. Depending on the call a proposal template may be available for download and completion.

If the Commission encounters a problem at opening or printing the file, the complete proposal will be ineligible.

When converting the proposal to a PDF file, pay attention to the following:

- The proposals are printed in black and white. Evaluators may not have access to the colour version of the proposal. Make sure that colours are correctly interpreted as nuances of gray.
- There is no need to select high resolution of illustration or pictures when creating the PDF documents. The maximum resolution to use is 300 dpi (photocopy quality). This can reduce the file sizes dramatically.
- The file size itself is limited. The limits are given in the call fiche.
- Do not put a password on the attached file. It will not be printed and the Commission will not request any additional information from you.
- If special characters are needed, embed the font in the PDF file (math symbols, non Latin alphabet text, etc.).
- When a limit in pages is expressed, the underlying measurement is A4 pages, with 2 centimetres border and minimum 11 points type. Any divergence from these standards may render your proposal ineligible.
- Practice the conversion to the PDF format. Download the proposal submitted from the site to check whether the transfer is correct and whether the file is complete.

TIP: restrict yourself to the letter A-Z, a-z, to the number 0-9 and to the following special characters in the filename: the hyphen, the underscore and the point. Never use spaces in the filename. Use version numbers or other schemes to denote the version of the file.

TIP: whenever you upload a new proposal file, think of submitting the proposal again. This will ensure that the latest version of the proposal will be evaluated. The system only retains the last version of the files; the previous version is overwritten.

To illustrate the tip given above, some examples are given below.

Good:

- Impact-2012.Version02.pdf
- GoForIT.V-002.pdf

Bad:

• Science&Technology.pdf	**Do not** use the ampersand ('&')
• <CryptoCross>.pdf	**Do not** use the less than or greater than signs
• Bad example.pdf	**Do not** use a blank in the file name
• Proposal/2014/2056.pdf	**Do not** use division bars
• TheSame\2014\2056.pdf	**Do not** use backslash
• IamOK.pdf.V001	**Does not** end with PDF

The special characters above are known to give issues when they are sent over the Internet or processed by the Commission systems.

Annexes

Depending on the call, additional files can be uploaded. This information will be available on the site. If templates are used, select the download option. Extract the relevant annexed file and complete it.

Again, pay attention to the file names as mentioned in the previous section: special characters will prevent automatic processing or even file retrieval. This may result in an incomplete proposal.

Searching for organisations

Information on organisations is available from the system. Over 20.000 organisations details are already available, with details verified by the European Commission services. The information is copied in the administrative forms to avoid typing mistakes. The key information to watch for is the **PIC** or Participant Identification code. Prior to creating a new entry in the database for your organisation, you are advised to search inside the database.

Key information

Tips for a successful search:

- The database does contain the organisation legal name in the national language and in a translated to English version.
- the database relies also on the website of the organisation, if the website is entered as data in the database.
- VAT numbers are also a search field.
- PIC numbers are also a search field.

Please note:

- A search like TÜM – Technische Universität München fails both on the short name TUM and on the full name. If the search is on technische univeristaet muenchen, the search will bring the correct results. Characters like Ä will be expanded to AE, Ü to UE, β to SS, etc.

Creating a new entry

This is a last resort action. **Please, for this test DO NOT CREATE ANY ORGANISATION**

http://ec.europa.eu/research/participants/portal/page/myorganisations#

Submission

When is a proposal complete, allowing submission?

In order to be valid, a proposal must be made of various components and all these components must be present. The system checks for completeness at this stage. The components are:

- The administrative forms outlining the project, the participants and a budget outline. The information provided in the form may be very limited and depend on the call for proposal.
- The proposal document, describing the project in details. For most calls, a proposal template is available for download from the site. See the DOWNLOAD button.
- Optional annexes. These files contain additional information used at the eligibility control review or additional budgetary details.

Requesting an account is not enough to become eligible for funding by the European Commission.

The system tries to avoid the most obvious mistakes. However, the submission of an ineligible proposal will not be prevented: the validation has limitations and some eligibility criteria can not be expressed in a binary fashion. This is explained below.

TIP: Look at the proposal status. If the status "SUBMITTED" is shown, then you are safe. At least a version of the proposal will be evaluated. Check the history to identify which version of the proposal is submitted.

When is submission blocked?

The submission is blocked when key information is missing. Are blocking and need your immediate attention:

- Missing proposal file. The proposal file must be present. You must press SUBMIT in order to push your proposal in the box.
- Proposal file extension is not PDF. Only PDF files are allowed.
- Proposal file size is too big. File sizes are controlled. Reduce the file size.
- The forms are not completed – mandatory fields are not present or the proposal form has not even been opened yet.

The submission is blocked past the deadline of the call:

- When the deadline is over or when the cut-off date is reached. At this point, no one is allowed to submit proposals; usually, calls do close at 17:00:00, Brussels time.

Uploading a file is not equivalent to submitting a proposal. In order to have the latest version of the files retained for evaluation, you have to press SUBMIT.

TIP: Make sure that the proposal is submitted before the deadline. Your local time is not the reference, Brussels time is the reference. Submit early and often in order to familiarise with the process. Only the last submitted proposal will be evaluated. There is no way to obtain the last uploaded file from the system.

What are warnings?

The system will give you warnings where possible in order to avoid eligibility issues further in the process. Most likely, the system will issue a warning when:

- The number of partners is insufficient. This will not block submission but you will be requested to provide information on why you think the proposal is eligible.
- Too low budget. For some calls, the contribution of the European Commission must be higher than an amount mentioned in the call fiche. This control may be absent for some configurations.
- Too high budget. For some calls, the contribution of the European Commission must be lower than an amount mentioned in the call fiche. This control may be absent for some configurations.

Nearing the deadline

There is no guarantee that the system will be available to you the two days if the load is excessive. In order to avoid the queues and the wait, you can anticipate your submission by two days as 80% of the traffic occurs the last two days of the deadline.

TIP: Avoid the rush hour. Make sure that the proposal is submitted before the deadline. Check the history list to verify that the correct proposal version is uploaded. You can also make use of the download of the full proposal package.

Check list for the proposal coordinator

- Are you a coordinator of a proposal or a partner? This has implications on your workload and actions to perform.
- Have you identified the relevant call and the funding scheme?
- Have you read the call fiche, notably the section on eligibility conditions?
- Have you tested your computer against the minimal requirements needed to operate the submission system?
- Do you have you ECAS account details on hand?
- Are all the PICs of the organisations participating in the proposal collected and checked?
- Is the budget finalised and checked against the call fiche?
- Is the proposal file in a PDF file of size that is below the limit defined for the call?
- Have you tested printing your proposal from the PDF file? Is the layout correct, with tables, index and references correctly rendered?
- Have you submitted your proposal already?

What is

A PIC	PIC stands for the participant identification code. All organisations are expected to obtain a PIC in order to facilitate data entry and reduce typing errors.
A referee	A referee is a person writing a reference letter in favour of a Marie Curie fellow.
Adobe Reader	The reader is the computer programme that processes the administrative forms. Without this programme, the submission system cannot operate.
General system error	The system has encountered an error. You are advised to try again. If the error persists, call the service desk.

What can go wrong

I have a screen that does not look the screens provided in this document
- The screens have been copied using Firefox.

The system is slow and unresponsive.
- Clear cache and clear cookies

I can not install the version 9 or 10 of the reader
- Contact your site administrator; deactivate the firewall for the download

I have installed the version 9 or 10 of the reader but no luck. Does not work
- Uninstall previous versions of the reader
- Change the order of the Internet browsers reader plug-ins

I have the following message: Endless loop detected on ECAS
- Close all browser windows; close the browser. Start again

Searching takes a long time
- Revise you search

I can not find the organisation and it is not a SME
- revise search terms, avoid accents
- use "university"/ "city"

I can not find the organisation and it is a SME
- search by VAT number if possible; ask the SME to register

The system is slow
- check your internet connexion;
- Speed depends on your computer speed as well

I have a Mac
- The system has been tested under Safari

I have a personal computer running Windows
- The site is best viewed with Firefox

I did not find my organisation

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