

10 minute guide

To the proposal submission – version 3.4

(Last Updated on 19/12/2013)

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Read this first

Contacting the Horizon 2020 Helpdesk

If you have questions about any aspect of European research in general and the EU Research Framework Programmes in particular, send them to [Horizon 2020 Helpdesk](#). You need to use a contact form on their page selecting the most relevant subject area of your question. It assures that the competent person receives directly your question in Horizon 2020 Helpdesk (previously called Research Enquiry Service) and can deal with it quickly.

The service is provided by the Europe Direct Contact Centre.

Important: Please make sure to submit any submission proposal enquiries at least 2 weeks before the deadlines so that the Horizon 2020 Helpdesk can have sufficient time to provide an answer in time.

Contacting the IT Helpdesk

Any IT-related problems that you have on the Participant Portal must be addressed to the [IT Helpdesk](#).

Getting Adobe Reader support

For issues related to Adobe Reader installation and setup, contact your local information system support.

To install the Adobe Reader, you may need administrator's rights on the machine you are using.

Check the mandatory system requirements

Before you start, check if your system complies with the **mandatory requirements** listed at the end of this document.

Account with the European Commission - ECAS

To access the electronic submission system, you must first obtain an account with the European Commission, as the system does not issue its own user accounts. Users are advised to identify themselves upon accessing the [Research and Innovation Participant Portal](#).

To create an account with the European Commission, go to the ECAS sign-up page:
<https://webgate.ec.europa.eu/cas/eim/external/register.cgi>

To change your ECAS password, go to: <https://webgate.ec.europa.eu/cas/change/changePassword.cgi>

To view your ECAS account details, go to: <https://webgate.ec.europa.eu/cas/userdata/ShowDetails.cgi>

Using a Participant Identification Code (PIC)

All participants are required to obtain a Participant Identification Code (PIC) upon organisation registration, and then use this code for interaction with the European Commission, including the electronic submission system. Using an organisation PIC helps to avoid the need to enter the same organisation details over and over again, as well as to speed up the processing of information by the relevant European Commission services.

System performance and availability

The electronic submission process can sometimes be slower than expected, depending on a series of conditions, such as the Internet access line speed, a heavier traffic and data loads on the system, and so on. Therefore, when you need to start some part of the process over, it is highly recommended to allow the system to complete the current operation first, otherwise the system could be slowed down ever more.

Please report any issues you may encounter using the system promptly, where possible.

Submission deadline

Submit your proposal early, do not wait until the last minute! **You can submit the proposal as many times as you need to before the deadline:** each time you submit, the new version of the proposal will replace the previous one. You will receive a confirmation mail for each submission.

Draft and submitted proposals

After you have submitted a proposal, you can still update it with new content using a 'draft' version of it. As a result, a proposal can be in both 'draft' and 'submitted' statuses at the same time, when the content between the two versions differs.

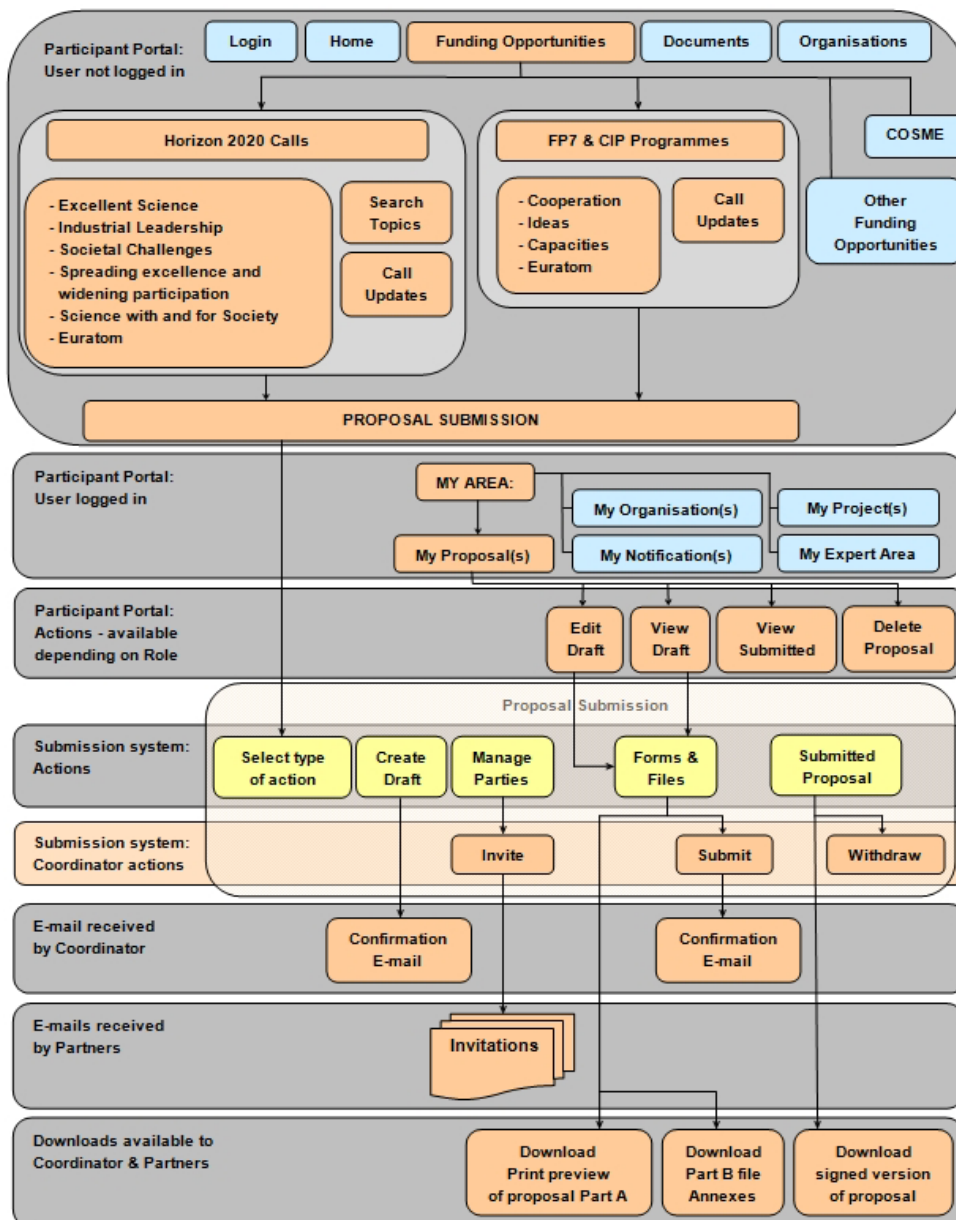
As soon as you submit the 'draft' version, it will replace (and become) the 'submitted' version.

Submitting a proposal in a few easy steps

Overview of the process

Funding decisions in the H2020 and FP7 research programmes are made on the basis of proposals. Proposals describe planned activities, information on who will carry them out, and how much they will cost. The European Commission evaluates all eligible proposals in order to identify for possible funding the ones that have a sufficiently high level of quality. This evaluation is performed through a peer-review carried out by independent experts.

The electronic submission system enables the submission of proposals using the Internet. It helps you to select the type of action (previously called "funding scheme" for FP7 participations), to manage the list of participants and their contact details, to communicate with partners in the proposal, to upload the required files, and to fill in the administrative forms. Once you complete the proposal, you can submit it (and re-submit it multiple times if revisions are needed) before the call deadline. All the uploaded data is securely stored on a server that can only be accessed by the proposal coordinator and partners until the call deadline. The system is integrated with the Participant Portal and the ECAS authentication system. The diagram below shows the key system interactions.



Starting the process: the Participant Portal

The submission of a proposal starts from the European Commission's Research and Innovation Participant Portal - a single entry point for all the usual participant's activities in the field of research and innovation. As a participant, you can use the Participant Portal to:

- find funding opportunities
- find partners for your proposals
- submit proposals
- define grant agreements with the European Commission services
- manage costs statements, reports, and payments

To access the Participant Portal, go to the Participant Portal home page:

<http://ec.europa.eu/research/participants/portal/desktop/en/home.html>

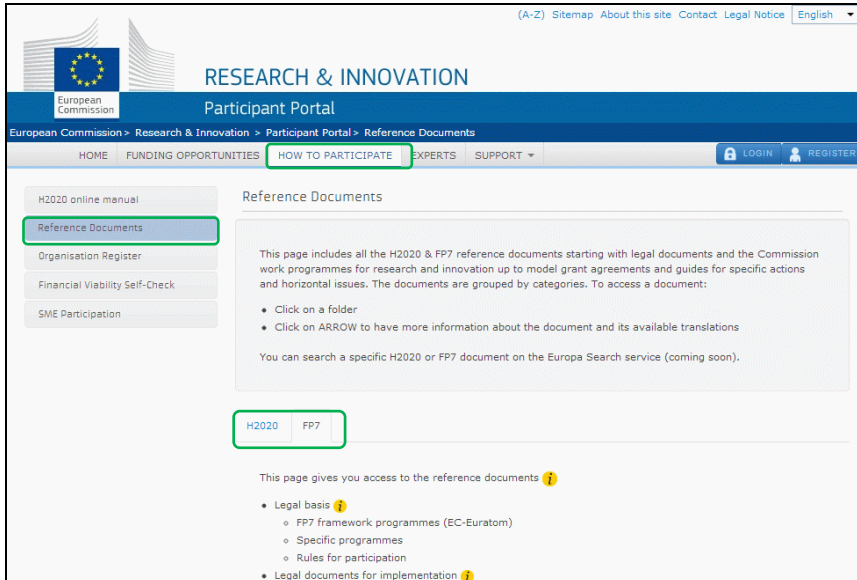
The screenshot shows the homepage of the European Commission's Research & Innovation Participant Portal. At the top, there is a navigation bar with links for (A-Z), Sitemap, About this site, Contact, Legal Notice, and a language dropdown set to English. The main header features the European Commission logo and the text "RESEARCH & INNOVATION Participant Portal". Below this is a breadcrumb trail: "European Commission > Research & Innovation > Participant Portal > Home". A secondary navigation bar includes "HOME", "FUNDING OPPORTUNITIES", "HOW TO PARTICIPATE", "EXPERTS", and "SUPPORT". A "LOGIN" button with a lock icon and a "REGISTER" button with a person icon are highlighted with a green circle. The main content area features a "Horizon 2020 Funding" banner with the text "Starting from 1/1/2014". Below the banner, it states: "On this site you can find and secure **funding** for research & innovation projects under the following EU programmes:" followed by a list: "• 2014-2020 Horizon 2020 - research and innovation framework programme" and "• 2007-2013 7th research framework programme (FP7) and Competitiveness & Innovation Programme (CIP)". There are two columns of user options: "Non-registered users" (search for funding, read the funding guide & download the legal documents, check if an organisation is already registered, contact our support services or check our FAQs) and "Registered users" (submit your proposal, sign the grant, manage your project throughout its lifecycle). At the bottom, there are six colorful icons representing different portal functions: "WHAT'S NEW?", "FUNDING OPPORTUNITIES", "HOW TO PARTICIPATE", "WORK AS AN EXPERT", "MY PERSONAL AREA", and "INFORMATION AND SUPPORT". The footer contains the text "RESEARCH ON EUROPA CORDIS OLAF" and "© European Communities".

Before you log in to the Portal, you will only be able to use the following options

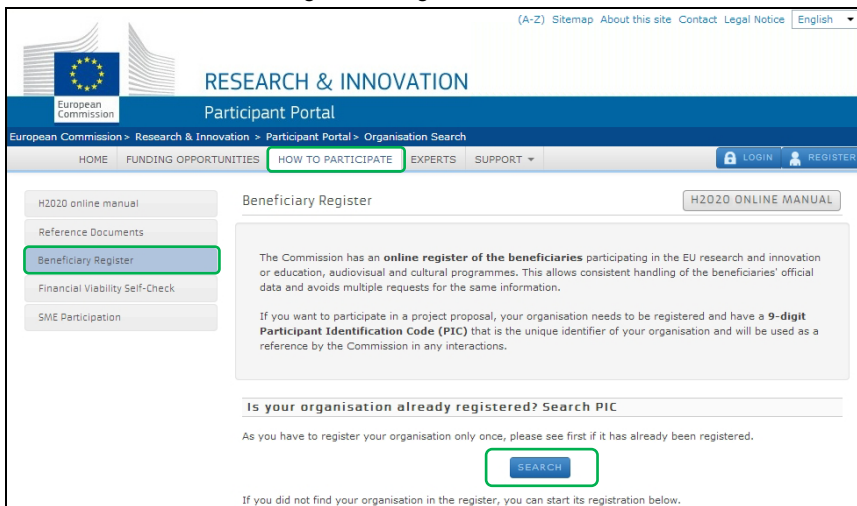
- Find a Call (for which you can submit a proposal later after login/registration):



- Access reference documentation about your participation in Research projects:



- Access information about registered organisations.



The access to the Participant Portal and its underlying services, including the submission system, requires a registered account in the **EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS)**. ECAS registration is described further in this document.

Once you log in, you gain access to the full range of services in the Portal, depending on your roles and credentials. The additional **My Area** menu provides you personalised access to your **Organisations, Proposals, Projects, Notifications, and Expert Area**. Each of these pages enables you to view, create, set up, and modify the respective resources as needed.

The visual examples below show an example of a personalised **My Organisation(s)** page, where you also can view your **Roles** for an organisation once it gets validated by the Validation Services:

The screenshot displays the 'My Organisations' page in the Research & Innovation Participant Portal. At the top, there is a navigation bar with links for (A-Z), Sitemap, About this site, Contact, Legal Notice, and English. The main header includes the European Commission logo and the text 'RESEARCH & INNOVATION Participant Portal'. Below this, a breadcrumb trail shows 'European Commission > Research & Innovation > Participant Portal > My Organisations'. A secondary navigation bar contains 'MY AREA', 'HOME', 'FUNDING OPPORTUNITIES', 'HOW TO PARTICIPATE', 'EXPERTS', and 'SUPPORT'. A user profile for 'IVAN TERZIEV' is visible on the right.

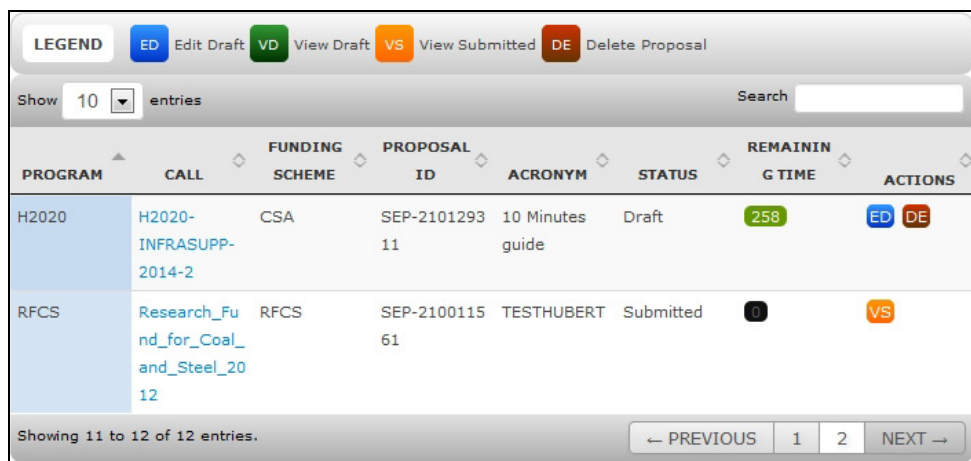
The 'My Organisations' section features a left-hand menu with options: 'My Organisation(s)', 'My Proposal(s)', 'My Project(s)', 'My Notification(s)', and 'My Expert Area'. The main content area has a title 'My Organisations' and a link to the 'H2020 ONLINE MANUAL'. A text box explains that users must have registered their data or been nominated as a LEAR or Account Administrator to access their organisation data. Below this is a section for 'My Registered Organisations' with a legend for actions: View Organisations (VO), Modify Organisations (MO), View Proposals (OP), View Roles (OR), and View Projects (VP). A search bar and a table of organisations are present. The table shows one entry for 'Scient Associates Ltd.' with PIC 949682381 and VAT BG0123456. A 'CONTINUE REGISTRATION' button is located below the table.

NAME	PIC	VAT	STATUS	ACTIONS
Scient Associates Ltd.	949682381	BG0123456	DECLARED	VO MO

The following visual example shows how you can access the **My Proposals** page from the personalised **My Area** menu after login:



In the **My Proposals** page, you can view your proposals and use the **ACTIONS** buttons to view/edit your draft, to view your submitted proposal or to delete a proposal:



The visual example below shows where you can start with the submission of your Proposal for a selected Call (after login):



Editing or withdrawing an already created proposal

From the Participant Portal you can edit an already created proposal by accessing the "My proposals" page. All proposals you are involved in, will be displayed - i.e. proposals you have initiated or proposals, for which your contribution (as a Partner or as a Referee) has been requested.

To access the "My proposals" page, perform the following steps:

1. Go to the Participant Portal: <http://ec.europa.eu/research/participants/portal/desktop/en/home.html>
2. Click on the **Login** button and provide your European Commission Authenticated Service (ECAS) username and password.
3. In MY AREA at the top left corner of the screen, click **My Proposals**.

In addition to the proposal information displayed, you can jump directly to the electronic submission service by clicking on one of the links located in the **Actions** column for the respective proposal, as indicated in the visual example below.

Depending on the proposal status, the link takes you either to Step 5 (**ED** Edit Draft) or Step 6 (**VS** View Submitted) of the submission system, where the last submission can be viewed; the same step offers the submission withdrawal (**DE** Delete Proposal). To view your draft, click **VD**.

PROGRAM	CALL	FUNDING SCHEME	PROPOSAL ID	ACRONYM	STATUS	REMAINING TIME	ACTIONS
H2020	H2020-INFRA-SUPP-2014-2	CSA	SEP-210129311	10 Minutes guide	Draft	258	ED DE
RFCS	Research_Fund_for_Coal_and_Steel_2012	RFCS	SEP-210011561	TESTHUBERT	Submitted	0	VS

Note: Depending on the proposal status, some of the action buttons may not be available. For example, if a proposal has not been submitted yet, the **VS** button for this proposal will not be shown.

Identifying yourself

To submit a proposal, you must have an European Commission Authentication Service (ECAS) account with the European Commission. This ECAS account is strictly personal and is not transferable.

If you already have an ECAS account - login

1. Open the ECAS login page.

Ensure you are logging in from the "**External**" domain – the domain is indicated in the grey field right above the username/password prompt:

- a. If so, skip the next step and go to step 3 to log in.
- b. If not, click the **Change it** link to go to the **Where are you from?** screen.

Contact | Privacy Statement | English (en)

EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS)
External

EUROPA > Authentication Service > Login

Login New password Sign Up Help

Login [Not registered yet](#)

Is the selected domain correct?
External [Change it](#)

Username or e-mail address *

Password *

More options...

Login! [Lost your password?](#)

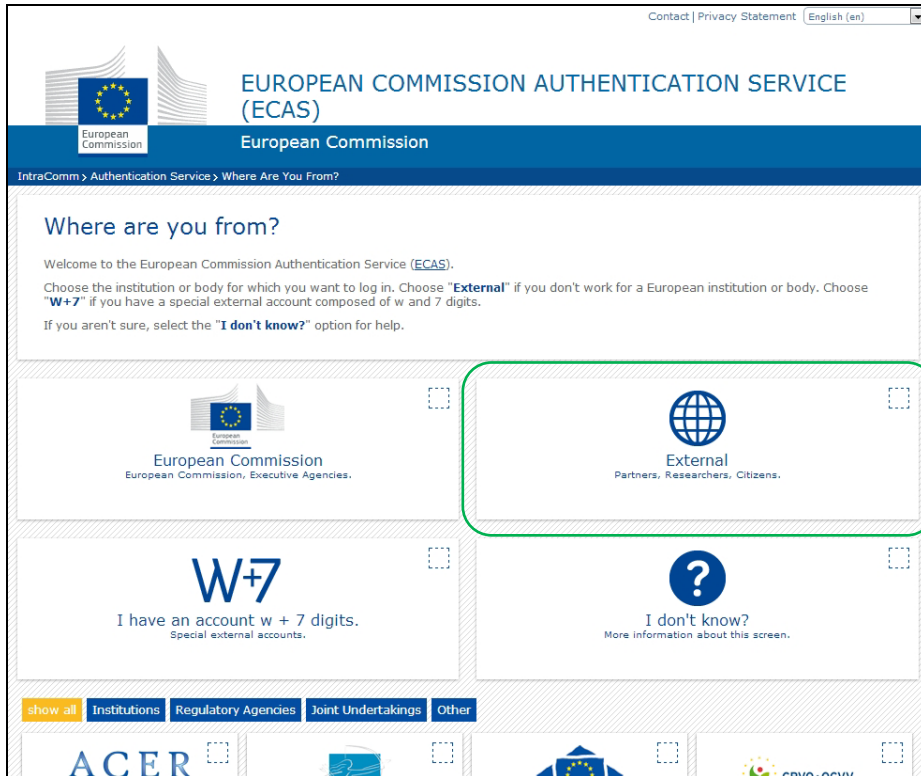
* Required fields

Or log in with your

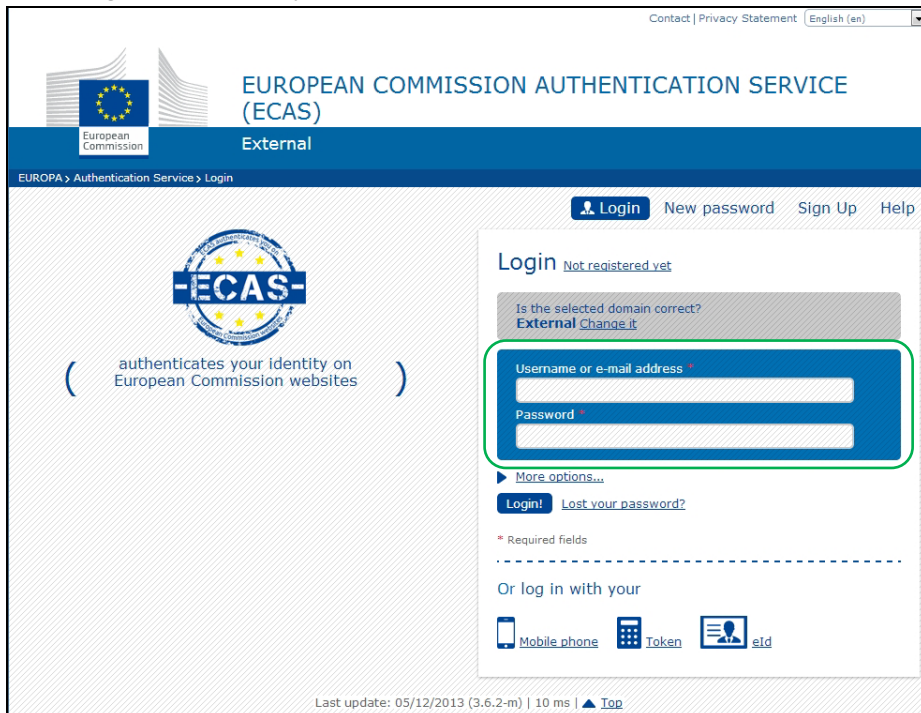
Mobile phone Token eID

Last update: 05/12/2013 (3.6.2-m) | 10 ms | [Top](#)

2. In the **Where are you from?** screen, click the **External** option. This will take you to the **Login** screen.




3. In the **Login** screen, enter your ECAS Username or e-mail address.






4. In the **Password** field, enter your ECAS password.
5. Click the **Login** button.

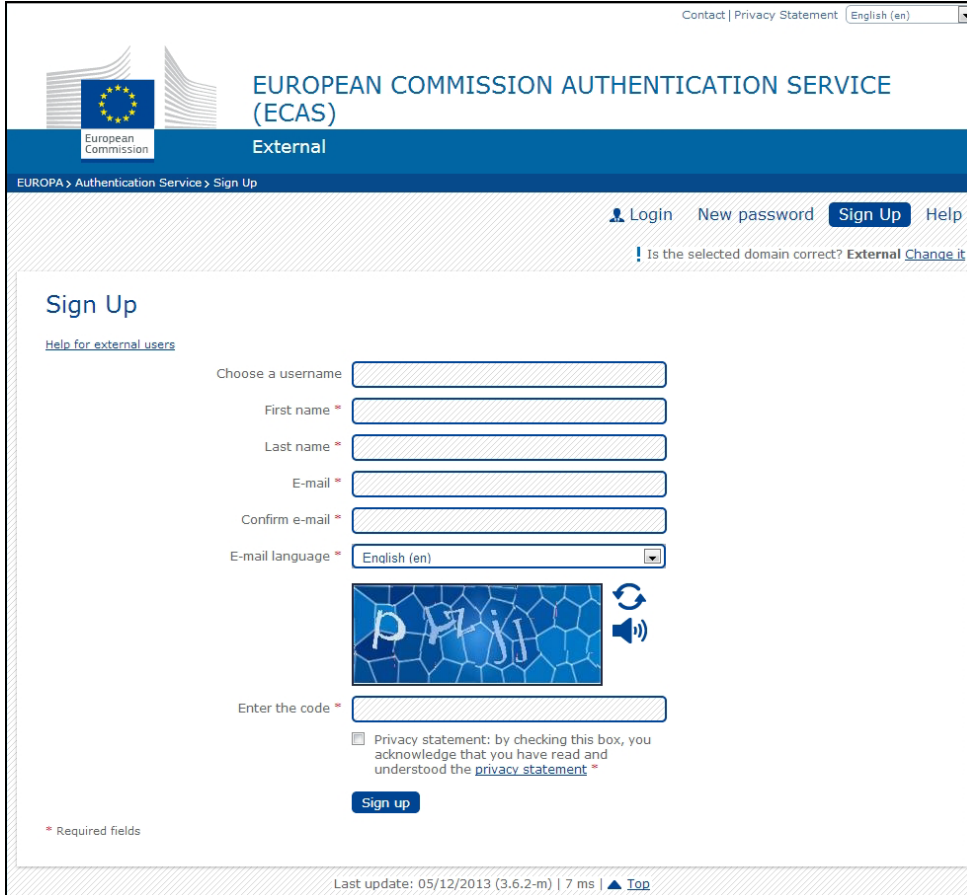
If you do not have an ECAS account - register

If you do not have an account with the European Commission, you can create one in a few minutes. Go to the home page of the Participant Portal and click  to open the **ECAS Sign Up** page, as shown in the visual example below. All fields in the registration form are mandatory. Perform the following steps:

1. Choose a username and enter it in the **Choose a username** field.
2. Enter your **First name** and your **Last name**.
3. Enter your **E-mail**. When registration is complete, a confirmation email will be sent to this email address.
4. 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 3.
5. Select the **E-mail language** that you want the European Commission to use for e-mail communication with you.
6. 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 enter them but you receive an error message, try the following:

- a. Click  to reload a different character combination and enter it in the **Enter the code** field.
 - b. Click  to hear an audio recording of the characters. You will need to use your computer speakers or headphones – make sure you have turned the volume on to a comfortable volume level.
7. Click the [privacy statement](#) link under the **Enter the code** field and read it in the new window that opens. If you agree with it, close the privacy statement window and check the respective check box under the **Enter the code** field.
 8. Click .



The screenshot shows the ECAS Sign Up page. At the top, there is a header with the European Commission logo and the text "EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS) External". Below the header, there is a navigation bar with "Login", "New password", "Sign Up", and "Help" buttons. A warning message says "Is the selected domain correct? External Change it". The main content area is titled "Sign Up" and includes a link for "Help for external users". The form contains the following fields: "Choose a username", "First name *", "Last name *", "E-mail *", "Confirm e-mail *", "E-mail language *" (set to "English (en)"), and "Enter the code *". Above the code field is a blue box with a distorted image of the letters "D P H J I" and a refresh icon. Below the code field is a checkbox for "Privacy statement: by checking this box, you acknowledge that you have read and understood the [privacy statement](#) *". At the bottom of the form is a "Sign up" button. A footer note says "* Required fields". The page footer includes "Last update: 05/12/2013 (3.6.2-m) | 7 ms | [Top](#)".

Roles: Proposal Coordinator, Partner, Referee, Contact Person

The roles that are available in the system are the Proposal Coordinator, Partners, Referees, 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 enabled to perform and the information 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 the respective 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.
- 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 data already supplied by the Commission systems in order to save time and to ensure better data quality.
- Referee.** For some calls (Marie Skłodowska-Curie Actions / Mobility Actions) you might be invited to participate to the proposal cycle as a Referee. The Referee is the person designated by the Proposal Coordinator (fellow) that assesses the participant quality to the Commission services by submitting a reference letter. The Referee does not need to read or contribute to the proposal and his/her assessment is not visible to the Proposal Coordinator.
- Contact Person.** As an option, you as a Proposal Coordinator or as a Partner may decide to delegate some of the work on filling in or reviewing your 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.

Role Rights

The following table highlights the differences between a Proposal Coordinator and Partner 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	No
Create Contacts for a Partner	Yes	No

The following table highlights the differences between a Proposal Coordinator (fellow) and Referee actions:

Action	Proposal Coordinator	Referee
Select the call	Yes	No
Invite referee	Yes	No
Write, read, submit proposal	Yes	No
Write, Read, submit assessment	No	Yes
Create Contacts for a Partner	Yes	No

Submission System Screen

The electronic submission system screen is organised as follows:

1. A progress bar banner showing the proposal completion progress (in the visual example below, the proposal is in preparation phase so the progress bar is not visible yet).
2. Buttons for the available Actions.
3. The ID card of your proposal – shown on the left-hand side of the screen. The information displayed there is completed as the user progresses. You can click on the Acronym, ID, PIC, and Contact tabs.
4. Configuration status check tool – it is displayed in the bottom left part of the screen. In the visual example below, the configuration complies with the minimum requirements.
5. Navigation buttons available in the bottom right corner of the screen.

Notes:

- If the compatibility check highlights issues (Configuration unconfirmed), click on the [help page](#) link located at the compatibility results box for more information. *Consult the frequently asked questions lists for assistance.*
- The time out for the system is of 13 hours. In other words, you will not be requested to identify yourself for this period of time.
- If you are not using your own computer or if security is a concern, close your browser completely and delete any PDF forms that you may have saved locally on the computer. It is also recommended to delete the recent browser history for the time you have been using the submission system.
- 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.
- 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.
- The Warning message shown in the visual example above is usually displayed while you progress with the editing of your proposal, until the submission of the proposal draft.



*TIP: Please read carefully the work programme and the reference documentation in the information package of the call, available from the Funding Opportunities page of the Participant Portal. Proposals are **only** eligible under certain conditions and the submission system checks some of these conditions, displaying error messages whenever these are not met. If one or more of the conditions are not met, you will not be able to submit the proposal.*

The second step: selecting the type of action

Depending on the call configuration, a list of types of actions (previously called "funding schemes" for FP7 participations) will be presented by the site. The proposal coordinator must choose the appropriate one.

Refer to the work programme and the documentation in the information package, available from the Participant Portal, for the various conditions applicable to each available option. After selecting the relevant option, click on **SELECT**.

When you select the type of action, click **next >>** to continue.

The screenshot displays the 'Step 2: Funding Scheme' interface. At the top, a progress bar shows stages: LOGIN, FUNDING SCHEME (current), CREATE DRAFT, PARTIES, EDIT PROPOSAL, and SUBMIT. The main content area is titled 'Funding scheme' and includes a description: 'Funding schemes are the types of research projects of the European Commission for the 7th Research Framework Programme. See more on funding schemes'. Below this is a 'Choose your funding scheme' section with three options, each with a 'SELECT' button: 'Coordination & support action' (CSA, closing on: 2014-03-20), 'Innovation action' (IA, closing on: 2014-03-20), and 'Research and Innovation action' (RIA, closing on: 2014-03-20). The CSA option is highlighted in blue. A green callout box points to the 'SELECT' button of the CSA option with the text 'Select the type of action'. Below the options, it states 'You have selected: Coordination & support action, closing on: 2014-03-20'. At the bottom right, a green callout box points to a 'next >>' button with the text 'Click \'next >>\' to continue'. On the left side, there is a 'Configuration OK' message with a green checkmark and a system message: 'You're using Chrome 27 on Windows. Adobe Reader (version 10, 1, 8, 0) is installed. For more information, please consult the User Guide.' The footer contains 'cancel' and 'Version: 20131204-1059 - Service Desk: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)'.

Prior to Step 3: Obtaining a mandatory participant code or PIC

The Participant Identification Code (PIC) is a unique 9 digit number that helps the European Commission to identify a participant. It is used in all grant-related interactions between the participants and the Commission.

If your organisation has already participated in a Research (7th Framework Programme) proposal, it is likely that the organisation has already received a PIC number. You can check it on the Participant Portal:

<https://ec.europa.eu/research/participants/portal/desktop/en/organisations/index.html>

All participants already possessing a PIC should use it to identify themselves in the proposal submission system. After entering the PIC, sections of the A forms will be filled in automatically.

If a PIC is not yet available for an organisation, it can be obtained by registering the organisation in the Unique Registration Facility from the link below. This takes only a few minutes.

<https://ec.europa.eu/research/participants/portal/desktop/en/organisations/index.html>

If the data retrieved upon PIC entry appears to be incorrect, you have the possibility to changes some details. These changes will be valid only for the proposal. The objective of the PIC is to identify the organisation and validation of the information will happen at a later stage, if the proposal is retained for funding.

Notes:

- If an organisation has a Participant Identification Code, it may be likely that it has a person in charge of the administrative matters between the organisation and the European Commission (the Legal Entity Appointed Representative – LEAR). Identifying this person inside your organisation may help you in the proposal submission process.
- Make sure that the organisation invited to participate is the correct one. Check its official address and key details. Even if you have the possibility to remove the organisation from the proposal, check with your contacts inside the invited organisation.

The third step: Proposal overview

Data entry

Once the type of action is selected, basic proposal information must be entered in order to create a placeholder for all elements (forms and proposal text).

Organisation PIC

If you already know the PIC number of the prime organisation (proposal coordinator), enter it at the PIC field. The details of the organisation will be displayed and the legal name of the organisation will be automatically filled in.

If you need to change the name of the organisation, use only Latin characters as the use of non-Latin or accented characters cause issues with the system down the line.

Notes regarding newly registered organisations:

- **When searching for your organisation using its PIC number, please note that** newly registered organisations only become available in the submission system 15 minutes after the registration is complete.
- **When searching for your organisation using a text entry (e.g. Legal name), please note that** newly registered organisations only become available in the submission system on the day following their registration after 5:00 AM CET/CEST time.
- As a result, when the organisation has been registered a day before the call deadline, it is highly recommended to use the PIC number in the submission system when using the search.

LOGIN FUNDING SCHEME CREATE DRAFT PARTIES EDIT PROPOSAL SUBMIT

Step 3

Create a Draft Proposal

Please enter the following information to create a draft proposal. Please note that fields marked with a star (*) are **mandatory**.

H2020-SPIRE-2014

Ivan Terziev

CSA

THU 20 March 2014 17:00:00
Brussels Local Time

100 days left until closure

Configuration OK

You're using Chrome 27 on Windows. **Adobe Reader** (version 10.1.8.0) is installed.

For more information, please consult the [User Guide](#).

Your Organisation

PIC* Short name*

949758914 Tohoku University 2-1-1 Katahira Sendai, JP VAT:

Organisations you have been previously associated with. Click to select.

PIC: 949758914
Tohoku University
2-1-1 Katahira
Sendai, JP

Search for your organisation PIC

Your Role

Please indicate your role in this proposal

Main contact

Contact person

Your Proposal

Please choose an acronym for your proposal. It will appear also in the "General Information" section of the submission form Part A and can also be updated there.

Acronym* Please restrict acronym to latin characters only

Short Summary (max. 2000 characters)*

Character count: 50

cancel Version: 20131204-1059 - Service Desk: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

Selecting Your Role

In the **Your Role** section, you are prompted to select the role on behalf of which you will be acting in the proposal.

Each Partner can have **only one Main contact** and **optionally one or more additional Contact persons** to assist in the proposal submission activities when this is required.

The Main contact usually has full access rights for the relevant actions and form parts in the proposal, whereas a Contact person can have full rights or read-only rights, depending on the scope of his/her planned activities.

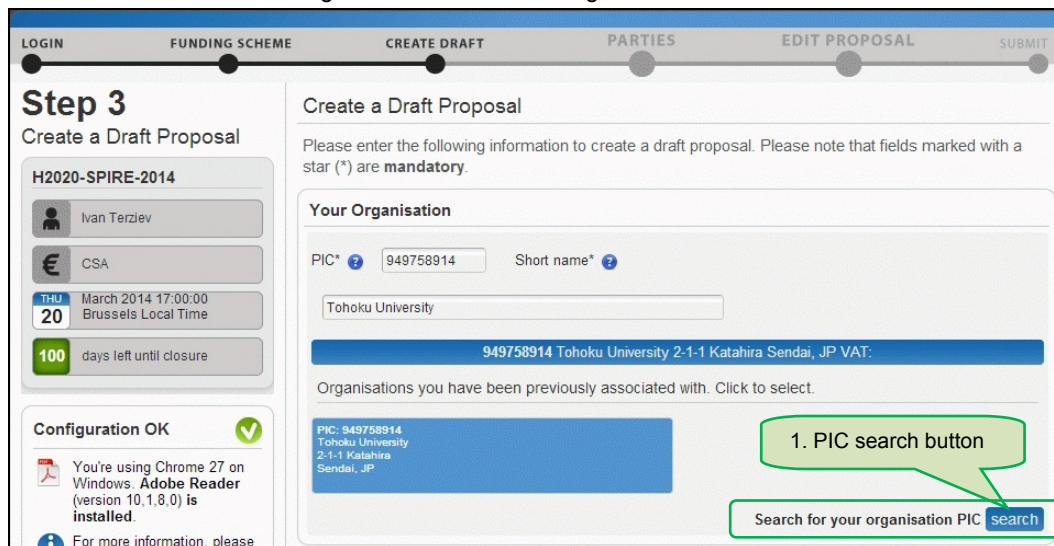
- Select **Main contact** if you are going to be the main person responsible for the proposal submission on behalf of this organisation.
- Select **Contact person** if you want to add another person as a Main contact later.

You can modify the contacts and reorder their priorities later in Step 4.

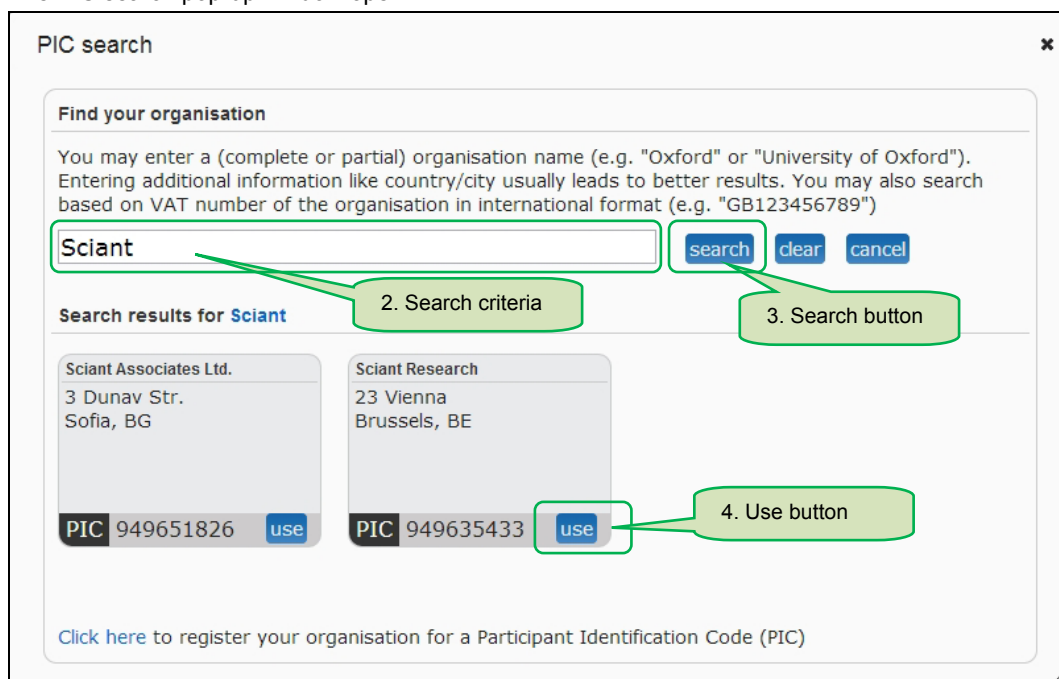
Your Organisation: the PIC search function

If you do not know the PIC number of your organisation, you can use the search function. To do so, follow the steps below:

1. Click **search** in the bottom right corner of the Your Organisation section:



2. The PIC search pop-up window open:



Enter one of the following search criteria:

- a. The usual short name of the organisation (e.g. "IBM" instead of "International Business Computers").
- b. The VAT number (if applicable).
- c. The legal name of the organisation. Important note: when you search for the PIC of an organisation, make sure you enter the original spelling of the organisation's legal name. Although there are cases where an English-language version is used as a substitute for an organisation's legal name (especially for languages in non-Latin alphabets, e.g. the University of Tokyo), it is recommended that you first check the original spelling and use it in the Search.

3. Click **search**. The system will show a list of the matching organisations in a Search results section below the Search field.
 - a. To clear the Search criteria field, click **clear**.
 - b. To cancel the search and close the PIC search window, click **cancel**.
4. To select an organisation from the results list, click the respective **use** button.

Note: The PIC search screen also enables you to register a new organisation – to do so, click the link at the bottom of the screen to go to the Unified Registration Facility (URF).

Acronym, abstract and evaluation related codes

Once the prime organisation (proposal coordinator) is known and identified, essential details on the proposals must be provided. These details will be used by the Commission service to plan the evaluation. In general, the following is requested:

1. The proposal acronym. This is the name of the proposal and it will be used throughout the lifetime of the project, if funded. No more than 20 characters are allowed (standard alphabet and numbers only; no symbols or special characters, except underscore, space, hyphen and dot).
2. The short summary, which describes briefly the purpose of the proposal with a maximum of 2.000 characters. Entering at least keywords will help the services in the planning of the evaluations. Coordinators may choose to enter 'N/A' (or something else) at this stage should they prefer not disclosing any data.
3. The evaluation related codes, the panel code or the technical group codes are presented as drop down list. Up to three codes may be shown, depending on the call.

Click **next >>** to continue to the next step. The set of administrative forms for the proposal will be created, once the proposal is created, there is no way to change the type of action. If a change is needed, you should create another proposal. The abstract and the acronym can be changed directly in the forms.

The system will send a confirmation e-mail to the coordinator of the proposal.

The fourth step: managing other participants to the proposal

In this step, the Proposal Coordinator will set up the consortium. The proposal coordinator can:

- **Add other participants** to the proposal. You can use the Search in Step 3 to find and copy the most up-to-date information so that you can insert it in the administrative forms that follow in Step 5. In addition to this information, you must add contact details – multiple contacts can be added. Other participants will be invited to access to the proposal (the contact person will receive an email with a link to access the system and update the participating organisation information).
- **Delete a participant.** This action is applicable to all participants except the first one. When a participant is deleted, the associated information (additional forms and budget figures) is automatically removed. This action is immediate and can not be undone.
- **Reorder the participants.** The order of the participants in the administrative forms will be adjusted. This action is possible only with forms with multiple partners. To reorder, drag the respective participant from its original position and drop it at the new desired position.
- **Add a Contact.** You can add one or more additional contacts for a participant (partner). Each Partner has a Main Contact (usually the main contact person registered for the respective organisation) and optionally can have one or more Contact Persons. Depending on the access rights they are granted, Contact Persons can edit or view the parts of the proposal that are in the domain of the Partner organisation they are assigned to.

The Proposal Coordinator is always the first participant. The proposal in preparation cannot be deleted from this point. Only submitted proposals can be withdrawn.

For Marie Skłodowska-Curie Actions calls – People specific programme

Participants to Marie Skłodowska-Curie Actions 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, nor is he requested to comment the proposal.

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, the Research directorates general, and will be used as part of the evaluation procedure.

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 Main Contact of the Partner). The additional contact points are offered as convenience in order to guarantee continuity of proposal building should the Main Contact person be absent. This workflow is necessitated by the fact that the submission system password functionality is linked to a person and no longer to a proposal.

The submission system will warn you about the consortium eligibility rules applied for each call. Most types of actions require proposals from a number of participants (usually at least three) who agree to work together in a consortium.

For two stage calls, first stage: simplified submission

In the case two stage calls, i.e., calls for which a simplified proposal is initially requested, followed by the submission of a full proposal for the retained participants, only the coordinating organisation details are needed at first stage. It is thus usual to prevent adding partners to the consortium, even if the consortium details must be disclosed in the proposal text. For details, refer to the information package available from the Participant Portal. The **ADD PARTNER** button will **not** be shown. Adding partners will be available to participants invited to the second stage of the two stage calls.

Add Partner - a participating organisation / a referee

To add a participating organisation / referee to your proposal, perform the following steps:

1. Click on the **ADD PARTNER** button.
2. The system will provide the same Search function as in the third step so that you can search for an organisation that you want to add as a Partner. To search for an organisation, follow the instructions described in the third step.

The screenshot displays the 'Parties' management interface. At the top, a progress bar indicates the current step is 'PARTIES'. The main content area is titled 'Step 4 Manage Your Related Parties' and includes a sidebar with user information (Ivan Terziev), currency (CSA), and date (March 2014). The 'Parties' section shows 'Number of participants: 1' and an 'Add Partner' button. A red banner indicates 'Consortium eligibility' with a note: 'Call requires between 1 and 2 SME organisations, currently 1'. Below this, a list of participants shows 'Tohoku University' as the coordinator. A modal window titled 'Add partner' is open, showing a search form with the input '999870763' and search results for 'SAINT PETERSBURG ELECTROTECHNICAL UNIVERSITY LETI'. A yellow callout box points to the 'Add Partner' button in the background, and another yellow callout box points to the 'Search criteria' input field in the modal.

3. Once you have selected your partner organisation, the 'Add contact' pop-up window is displayed. Here you can enter the contact information for the Main contact person. Fill in the requested information, following the next recommendations and click on the **OK** button
- Select 'Main contact' from the Project Role list.
 - Select the Access rights – a Main contact usually must have full access, so select the 'Participant contact (full access)' option.
 - Fill in the First Name and the Last Name of the Main contact.
 - Enter the Main contact's Email Address (must be in a valid email format).
 - Enter the Telephone number (must be in a valid international phone number format).

Add contact ✕

ETU

Please enter the contact name and details: ?

Project Role: Main contact

Access rights: Participant contact (full access)

First Name *: John

Last Name *: Smith

Email Address *: john.smith@abcdefg.mail.com

Telephone: + 32 485012345

* required field

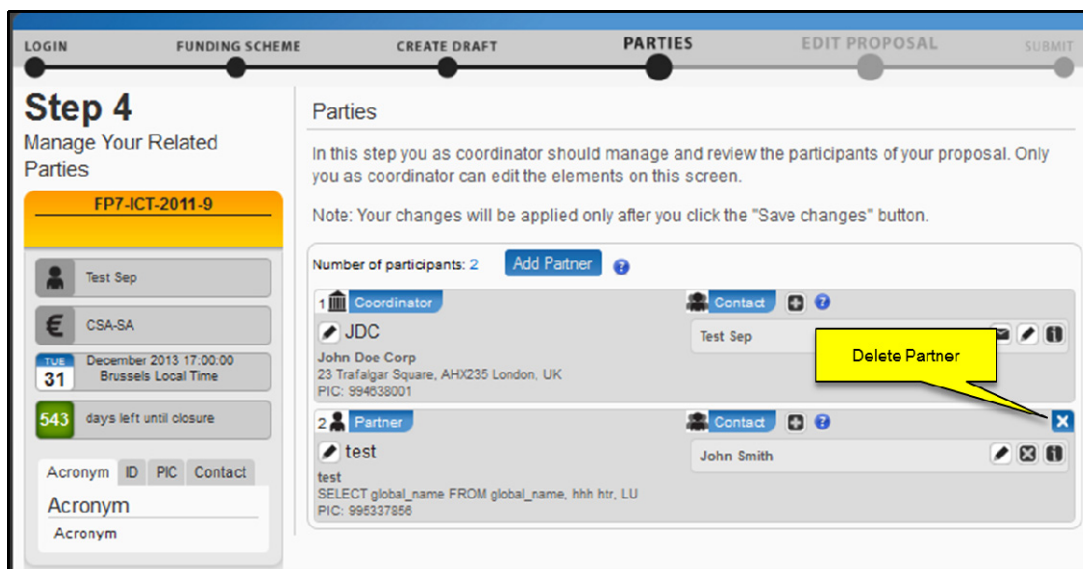
OK **Cancel**

Notes:

- In the forms this information is not editable, so you must return here if you wish to edit it (press "back" on Step 5).
- Please ask the contact if they have an existing ECAS account and use the corresponding email where possible. If they do not have an ECAS account, use the email they supply to you - an ECAS account will be created and an email sent to the contact with details on how to validate.

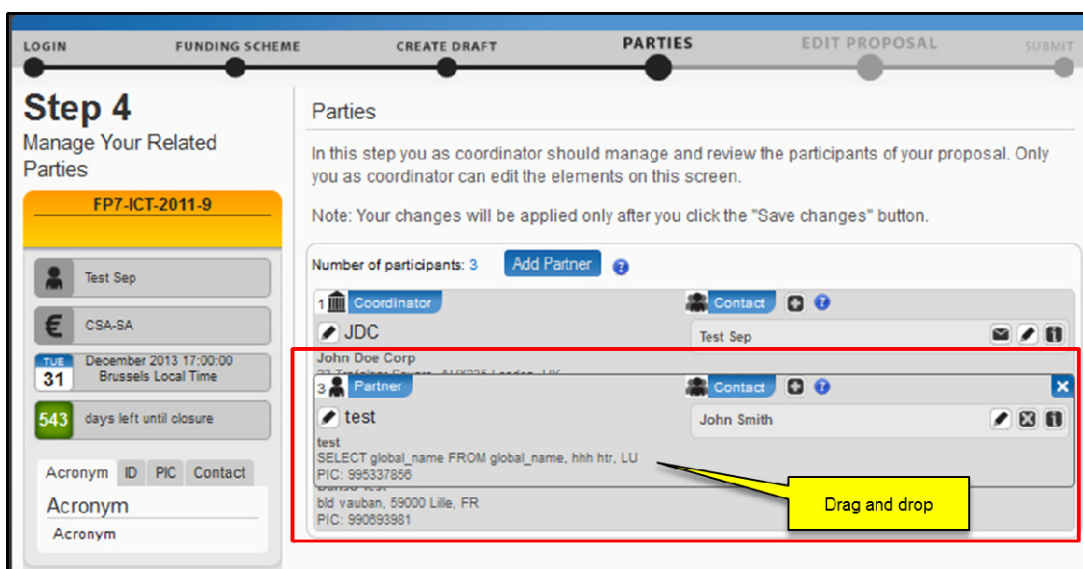
Delete a participating organisation

To delete the participant, click on the delete button (X), located at the top right corner of the participant information. **WARNING:** when deleting a participant, all the administrative forms for this participant are deleted. This action takes place right after you click on delete button



Reorder participating organisations

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.

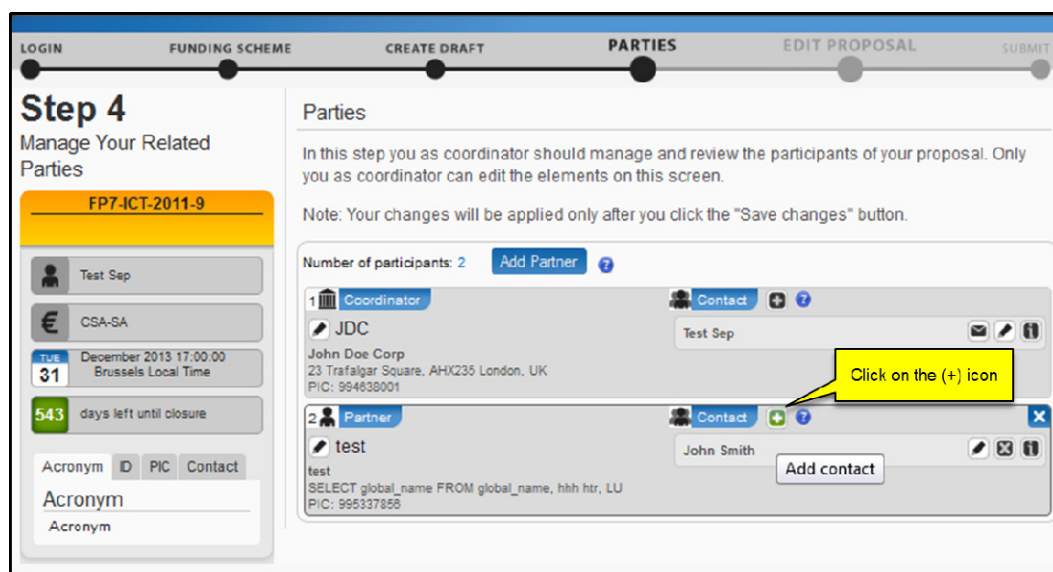


Add contact person for participating organisations (co-ordinators, partners or referees)

From the contact part of the screen it is possible to add persons that contribute to the proposal preparation (coordinator, partners or referees). Multiple contacts to participating organisations can be added. The information for the primary coordinator contact and the first participant contact is pushed into the administrative forms and will be used as contact information for the evaluation process. To change this, drag and drop another contact within the organisation to the top of the list.


To add a contact person to your proposal,

1. Click on the add button (+) , located next to the contact label
2. Follow the above instructions to fill the contact person pop-up window



3. Select the Project Role – this can be a 'Main contact' or a 'Contact person'.
4. Select the Access rights – either a 'Participant contact (full access)' or a 'Team member (read-only access)'.
5. Names (First Name & Last Name)
6. E-mail Address must be in e-mail format. The email address is mandatory - it is used to grant user access via the ECAS system and also to send an email invitation to the user. You cannot change the email address for a created contact unless you delete the contact and re-create it.
7. Telephone must be in international phone number format

Add contact ✕

 ETU

Please enter the contact name and details: ?

Project Role

Access rights

First Name *

Last Name *

Email Address *

Telephone +

* required field

Add contact

ETU

Please enter the contact name and details: ?

Project Role: Contact person

Access rights: Team member (read-only access)

First Name *: John

Last Name *: Smith

Email Address *: john.smith@abcdefg.mail.com

Telephone: + 32 485012345

* required field

OK Cancel

Once the contact person is added to your proposal, you need to inform the central system of the information just entered by clicking on the **SAVE CHANGES** button, located at the bottom of the screen.

Step 4
Manage Your Related Parties

FP7-ICT-2011-9

Test Sep

CSA-SA

31 December 2013 17:00:00 Brussels Local Time

543 days left until closure

Configuration OK

You're using Firefox 10 on Windows. Adobe Reader (version 9 or above) is installed..

For more information, go to the help page, or read the Starter Manual.

Parties

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.

Note: Your changes will be applied only after you click the "Save changes" button.

Number of participants: 2 Add Partner ?

1 Coordinator Contact

JDC
John Doe Corp
23 Trafalgar Square, AHX235 London, UK
PIC: 994838001

2 Partner Contact

test
test
11 SELECT global_name FROM global_name, hhh htr, LU
PIC: 995337856

Drag and drop participant contact

Icon buttons

next >>





done

Version: 20120704-1558 - Support: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

An invitation email will automatically be sent to the address entered and the following buttons (icons) are displayed at the contact screen; the following table describes the actions you can take by clicking on one of them.

If by mistake you click on the **NEXT** button, without saving your changes, the system will warn you by displaying the confirm navigation window.

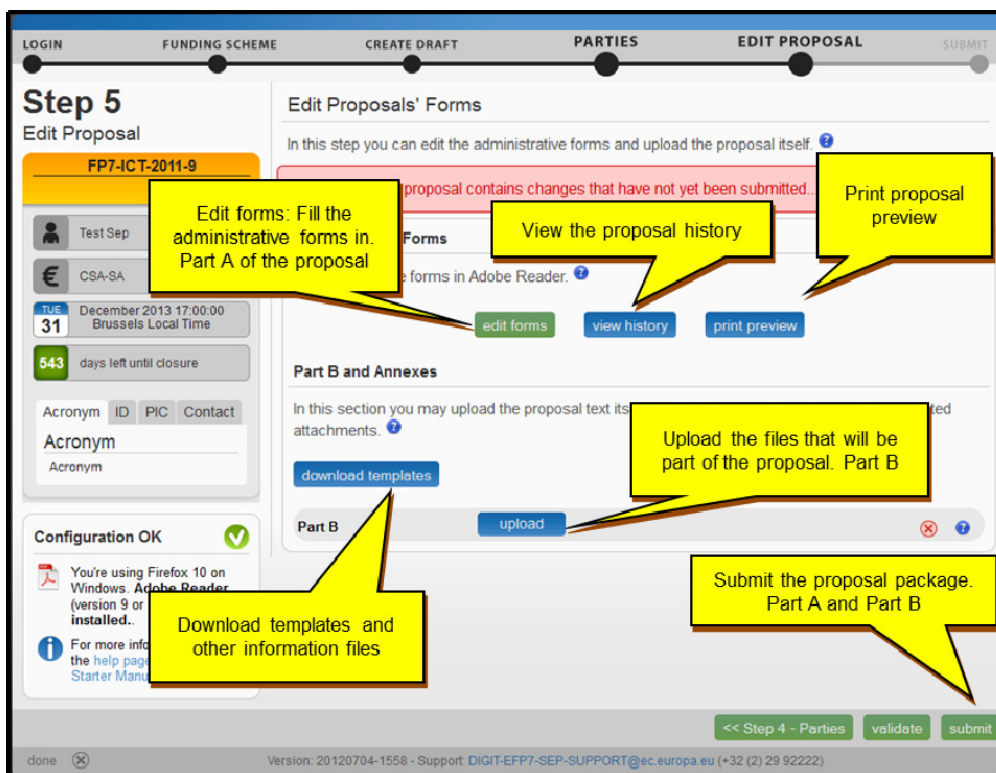
The following table describes icon buttons and the actions they perform.

Button (icon)	Action
	Re-invite a contact person to participate in the proposal. The system sends an e-mail with the proposal details and a link to access the proposal
	Edit contact person information
	Delete contact person information. This will immediately cancel the access of this person to the proposal
	Expand and minimise the information box of the contact person. By default, the information is reduced to the name of the contact person

The fifth step: forms, files and submit

This step is the core of the submission process, as, from this step, the proposal coordinator can edit forms, view the history, print the draft proposal, download templates, upload files and submit the proposal by clicking on the relevant buttons:

It can be accessed from the participant portal when clicking on the **EDIT DRAFT** button.



The screenshot shows the 'Step 5: Edit Proposal' interface. The navigation bar includes 'LOGIN', 'FUNDING SCHEME', 'CREATE DRAFT', 'PARTIES', 'EDIT PROPOSAL', and 'SUBMIT'. The main content area is titled 'Edit Proposals' Forms' and includes instructions: 'In this step you can edit the administrative forms and upload the proposal itself.' Below this, there are buttons for 'edit forms', 'view history', and 'print preview'. A section titled 'Part B and Annexes' contains instructions: 'In this section you may upload the proposal text its attachments.' and buttons for 'download templates' and 'upload'. At the bottom, there are buttons for '<< Step 4 - Parties', 'validate', and 'submit'. Callouts explain: 'Edit forms: Fill the administrative forms in Part A of the proposal' (pointing to 'edit forms'), 'View the proposal history' (pointing to 'view history'), 'Print proposal preview' (pointing to 'print preview'), 'Download templates and other information files' (pointing to 'download templates'), 'Upload the files that will be part of the proposal. Part B' (pointing to 'upload'), and 'Submit the proposal package. Part A and Part B' (pointing to 'submit').

Notes:

- Only the proposal coordinator can upload the part B of the proposal and submit the proposal.. Partners can preview the forms; download the template and the uploaded files.
- Only the proposal coordinator can go back to the previous step 4 and change or delete the participating organisation and the associated contact persons, Partners can view the organisation and contact details.

Edit forms - Online or inline / offline edition

The Proposal Coordinator is the only person that can complete all the forms, including the budget table and its own administrative details. Other participants are limited to edit their own organisation and contact detail information.

Click on the **EDIT FORM** button 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.

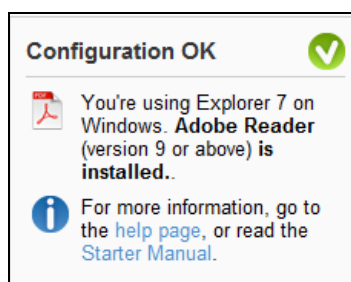
Please note that forms are completed using the Adobe PDF reader, either in “inline” mode or in “offline” mode.

Editing the PDF form in the inline mode means that your configuration system fulfils the submission system minimum requirements. Under this condition the PDF form will be opened up within the Internet browser and this will provide the best proposal submission experience.

The configuration check tool, located on the left-hand side of the submission system, automatically verifies if your configuration system fulfils the minimum system requirements. It will display information about any possible incompatibilities found.

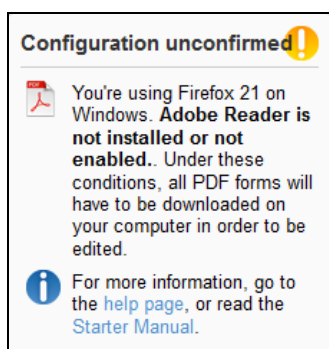
Configuration OK

In this case your configuration system fulfils the minimum requirements and this will provide the best proposal submission experience. Under this conditions all PDF forms will be opened up within the browser.



Configuration unconfirmed

In this case your configuration system does not fulfil the minimum requirements. Under this condition all PDF forms will be opened up outside your browser and you might experience errors while editing/saving the administrative forms.



What to do if your system configuration is not OK?

Please refer to the **Troubleshooting your system configuration** section at the end of this document.

Forms - general usage information

The PDF forms are programmed by the European Commission services and have some built-in logic. 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.

Read-only information

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, changes have to be requested via the Organisation Registry by the authorized persons. Read more about the [modification of the organisation data](#).

Who can fill in the forms?

'Coordinator contacts' and 'Participant contacts', who must be identified at Step 4 of the submission wizard. The 'coordinator contact(s)' can edit any parts of the administrative form, 'Participant contacts' can only edit the respective section of the organisation in section 2, including the contact persons' data.

Guidance in the form

If you click on the question marks in blue, you can read more information about the question or section. In order to print this guidance, the blue question marks must be open.

Each box of the form contains a short guidance on the format, the length and the expected level of information. Once you click on the text or start editing the information, it disappears automatically from the box.

Navigation in the form

To view the different sections in the form, you may either use the scroll bar or the blue "Show" buttons as seen in the Table of contents.

Validation

The system offers some automatic checks and gives warning messages in case mandatory fields are not completed. Please click on the "Validate" button to check your data. Errors and warnings will be listed at the end of the form. Errors mean that mandatory information is missing (such as the Proposal Title) and the proposal cannot be submitted until these are resolved. Warning messages do not block submission, but indicate missing information that may be important for the proposal and you should ideally also be cleared. By clicking on the "Show" button, you can easily get back to the field with an error, highlighted in yellow with the other fields with warnings highlighted in red.

Saving of the data

Before closing the form, click on the button "Save and Close". The save function works even if the form is not completely filled in. 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 prior to call closure. Any changes saved on the form need to be resubmitted in order to be received by the European Commission and considered for evaluation.

Technical requirements

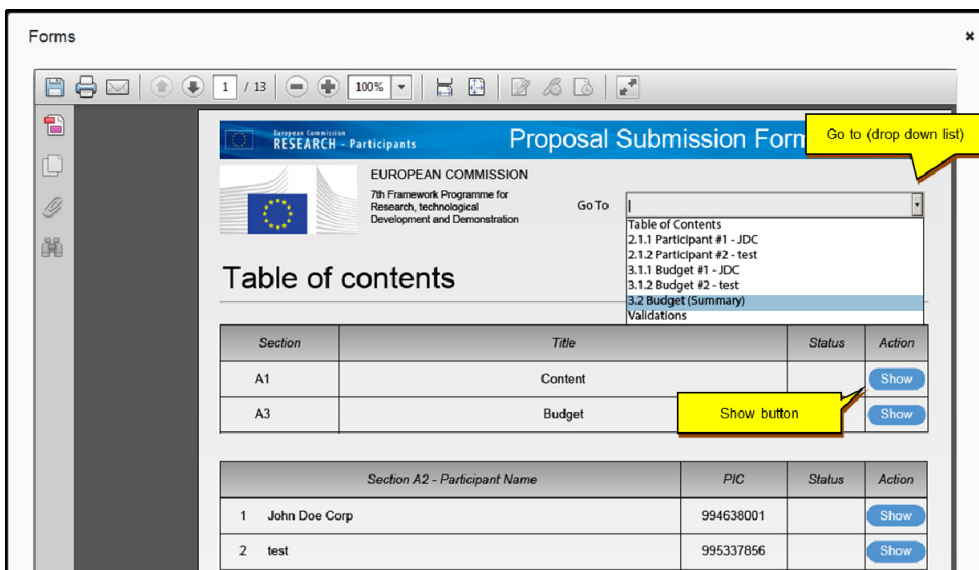
Please note that forms are completed using the Adobe PDF reader, either in 'online' mode or in "offline" mode. Editing the PDF form in the online mode means that your system's configuration fulfils the minimum requirements and this will provide the best user experience. The configuration check tool, located on the left-hand side of the submission system, automatically verifies if your system configuration complies with the [minimum requirements](#).

Action Buttons

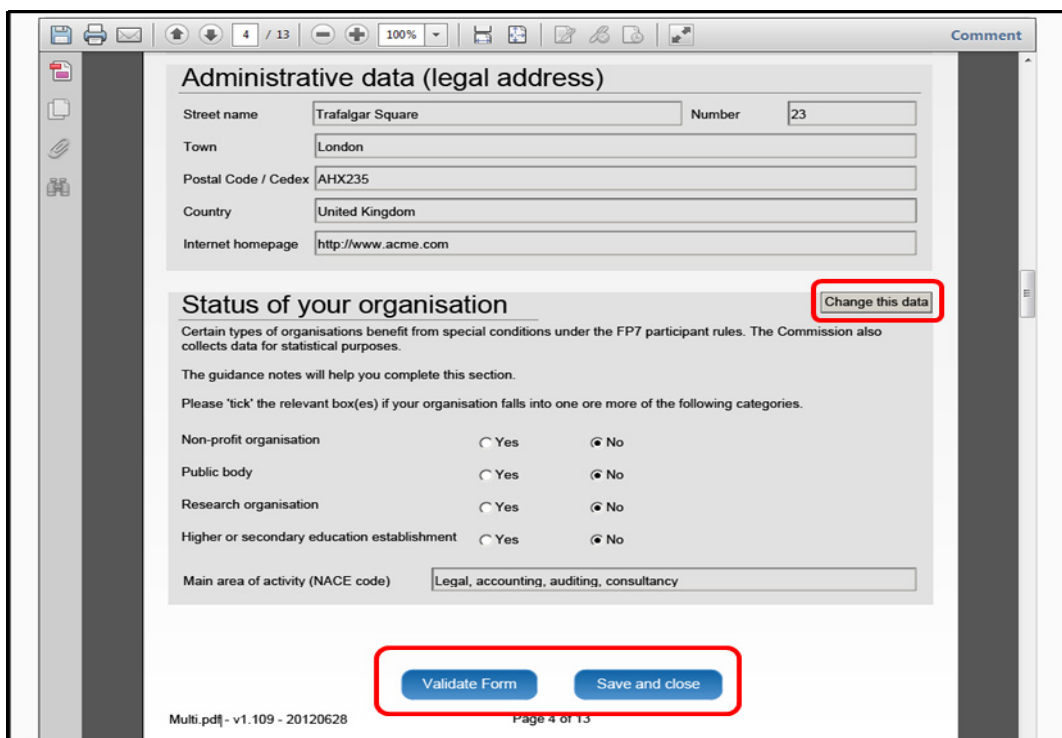
Some action buttons are available in the PDF form, to help you find and verify the information easily.

Go to (drop down list) enables you to go to the PDF form sections in one click instead of moving up and down the entire PDF form.

Show takes you to the selected section of the proposal.



By default, the administrative data is copied from the European Commission databases.



Change this data enables you to change the status of your organisation data if it is not correct. Please note that the changes you make will be used only at the proposal submission stage.

Validate Form – when you click this button, all data fields in the forms 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 PDF form. By default, all fields must be filled with a value with the exception of the budget form.

Save and close click to save 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 in - you can edit it at any moment prior the deadline.

View history

Click **VIEW HISTORY** to see in detail the list of all system and user actions. This function enables:

- the Proposal Coordinator to verify that partners have updated their forms, and
- Partners to verify that the coordinator has submitted the proposal in a timely fashion.

Print preview

The **PRINT PREVIEW** button enables you to download the proposal and save it locally on your computer. The difference between using this option from the form and from Adobe Reader is that here you download a local copy of the proposal. You can use this copy to send to participants or to keep for archiving purposes.

Download templates

Click **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.

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

- 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 and visible as nuances of grey.
- There is no need to select a high resolution used for illustrations or pictures – use a maximum resolution of 300 dpi (photocopy quality). This can dramatically reduce the PDF file size.
- The file size itself is limited. The limits are given in the documentation available in the call's information package on the Participant Portal.
- 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.
- Practise the conversion to the PDF format. Download the proposal submitted from the site to check whether the transfer is correct and if the produced file is complete.

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

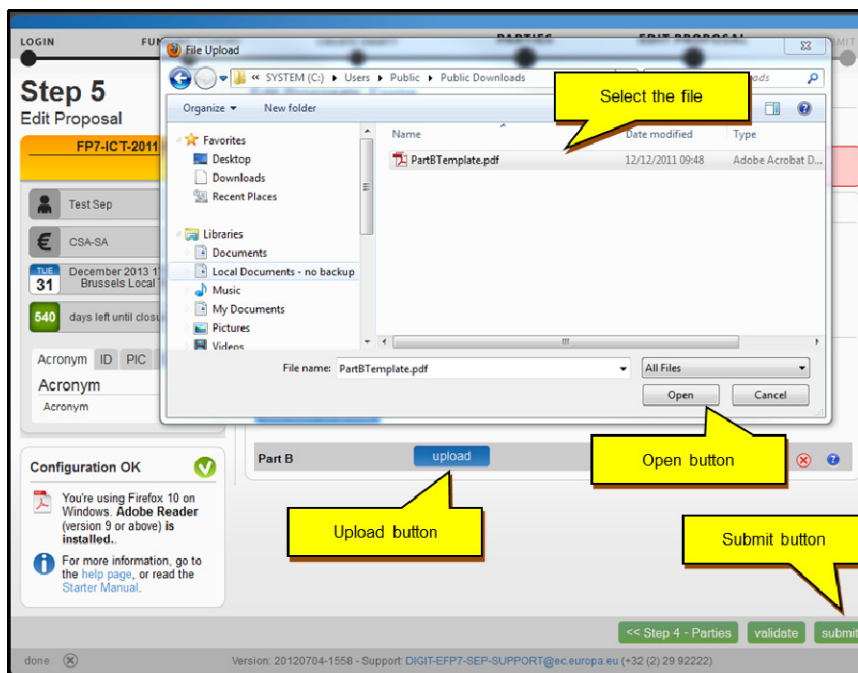
Upload files

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. The following requirements are mandatory:

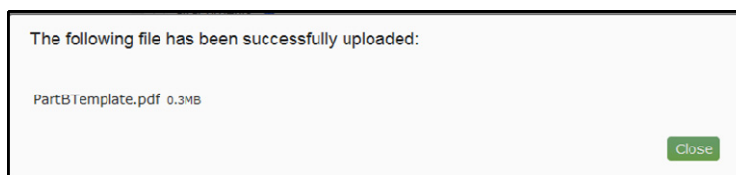
1. Proposal Part B must be in PDF format, compatible with Adobe version 3 or higher, with embedded fonts. No other file formats will be accepted by the electronic submission system. The overall file size limit of the proposal Part B file is 10 Mb, with no limitation on the number of pages it contains. It is recommended to limit the size of the proposal to 2 Mb.
2. Ensure that the Part B file name only contains alphanumeric characters (A-Z, 0-9) - special characters must be avoided.
3. Clean up your document before converting it to PDF (e.g. accept all tracked changes, delete internal review notes or comments, etc.).
4. 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 or graphics).
5. Check that your PDF conversion software has not cut down landscape pages to fit them into portrait format.
6. Check that captions and labels have not been lost from your diagrams Please note that the Commission prints out proposals in black and white on plain A4 paper.
7. Ensure that the printable zone on the print engine is bounded by a 1.5 cm margin from right, left, top and bottom sides, that no scaling is applied to make the page "fit" the window, and that printing is done at 300 dots per inch.

To upload the files that will be part of the proposal,

1. Click the **UPLOAD** button.
2. Select the file to upload from the File Upload window.
3. Click the **OPEN** button.



4. A confirmation message will appear - click the **CLOSE** button:



SUBMIT to continue

Completing the Part A forms in the submission system and uploading a Part B does not yet mean that the proposal is submitted - you must click the **SUBMIT** button once there is a completed version of the proposal.

The system performs a limited automatic validation of the proposal. If it encounters any problems (such as, missing data, wrong file format, excessive file size), it will display them on the screen and will block the submission until they are resolved. When all issues are fixed, the Proposal Coordinator must repeat the steps mentioned above in order to successfully submit the proposal. If the submission procedure described above is not followed, the Commission will consider that no proposal has been submitted.

When the proposal is successfully submitted, the system proceeds to Step 6 where it displays a message indicating that the proposal has been received. The system also sends a submission confirmation e-mail to the Proposal Coordinator, containing the details of the submitted proposal. Note that the e-mail could end up in the spam folder or get blocked by the anti-spam system of your organisations, so make sure that you check for it as needed.

It is considered that the point at which the submission takes effect is the moment when the Proposal Coordinator clicks **SUBMIT** without any errors found, and sees the message indicating that the proposal has been received. It is not the point at which the upload of the part B is started. Therefore, if you wait until too near to the close of the call to start uploading your proposal, there is a serious risk that you will not be able to submit it in time.

You can upload your Part B 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 final moment to perform these operations. Each time you upload a new Part B document, you must click **SUBMIT** to save your changes.

The sixth step: proposal submitted page

Reaching Step 6 means that your proposal has been successfully submitted and therefore sent to the European Commission services for evaluation. It does not however mean that the proposal is valid, complete, and eligible in all aspects or that it will be funded!

In Step 6 you can perform the following actions.

Revise the proposal

Re-edit the proposal – click this option to go back to Step 5 if you need to revise the proposal. The Proposal Coordinator may continue to modify the proposal and submit revised versions overwriting each preceding one right up until the deadline.

Download submitted proposal package

Download the proposal. After you submit the proposal, it is advised to download it in order to check that it has been correctly sent. The downloaded proposal will be digitally signed and time-stamped. Depending on the system load, this action may take some time before it is accessible.

LOGIN FUNDING SCHEME CREATE DRAFT PARTIES SUBMIT

Step 6

Submit

FP7-ICT-2011-9

Test Sep

€ CSA-SA

TUE 31 December 2013 17:00:00 Brussels Local Time

544 days left until closure

Acronym	ID	PIC	Contact
Draft ID	SEP-200017926		

Configuration OK

You're using Firefox 10 on Windows. Adobe Reader (version 9 or above) is installed.

For more information, go to the help page, or read the Starter Manual.

Your proposal has been successfully submitted

Your proposal was submitted on: **05 July 2012 at 12:21:23 (Brussels Local Time)** as part of the **FP7-ICT-2011-9** call, before the deadline of **31 December 2013 at 17:00:00 (Brussels Local Time)**. Your project ID is **601791**. This number is important and will be used as future reference during the evaluation process.

Revisit your Proposal

You may edit your proposal and re-submit at any time before the deadline of **31 December 2013 at 17:00:00 (Brussels Local Time)** by clicking the "re-edit proposal" button.

A digitally signed and time-stamped version of your submitted proposal can be viewed/down-loaded. Note: this can take from a few seconds to several hours depending on system load.

You may withdraw the proposal at any time prior to call closure. In doing so it will not be passed to the evaluation stage.

Successfully submitted message

Revise proposal

Download proposal

Withdraw proposal

re-edit proposal

download

withdraw proposal

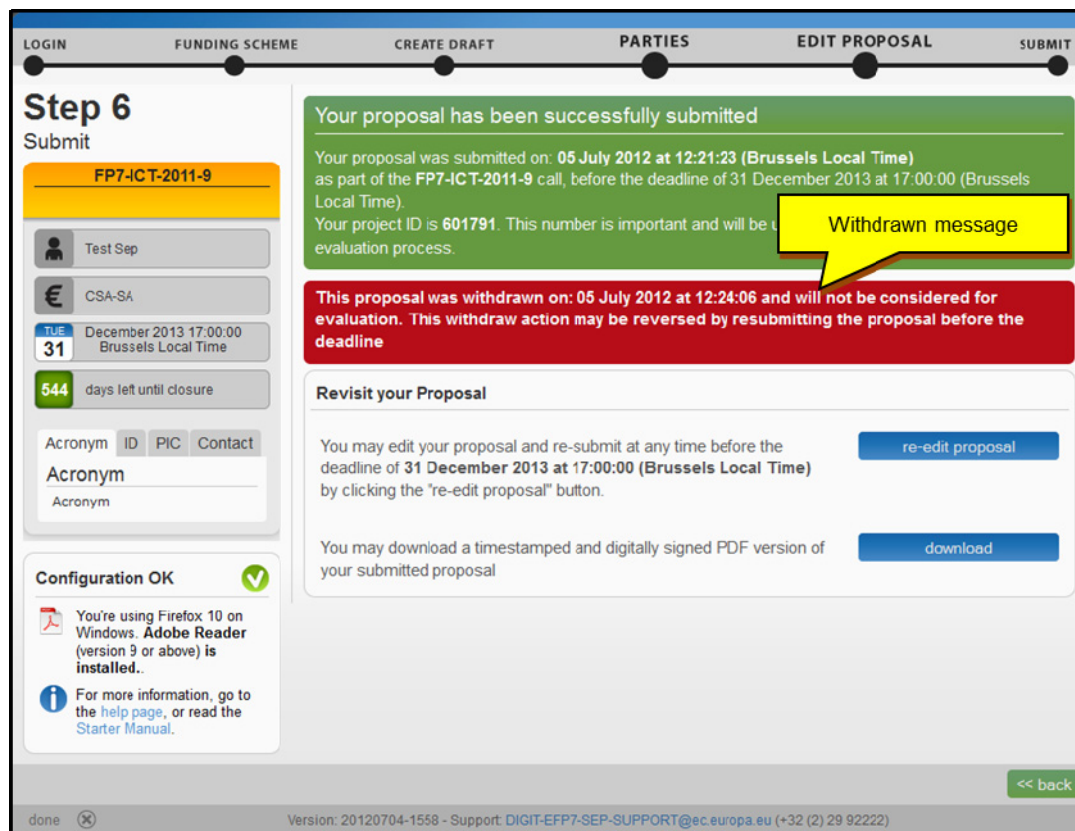
<< back

done Version: 20120704-1558 - Support: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

Withdraw submitted proposal

Withdraw the proposal If the 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 deadline. The system will request a reason for the withdrawal.

When a proposal is withdrawn, a message is displayed on the screen, as shown in the visual example below.



The screenshot shows a web interface for proposal submission. At the top, a progress bar includes steps: LOGIN, FUNDING SCHEME, CREATE DRAFT, PARTIES, EDIT PROPOSAL, and SUBMIT. The current step is 'Step 6 Submit'. On the left sidebar, there is information for 'FP7-ICT-2011-9', a user profile 'Test Sep', currency '€ CSA-SA', a deadline of 'December 2013 17:00:00 Brussels Local Time', and '544 days left until closure'. A 'Configuration OK' message indicates that Firefox 10 on Windows and Adobe Reader are installed. The main content area features a green success message: 'Your proposal has been successfully submitted' with submission details. A yellow callout bubble labeled 'Withdrawn message' points to a red warning box: 'This proposal was withdrawn on: 05 July 2012 at 12:24:06 and will not be considered for evaluation. This withdraw action may be reversed by resubmitting the proposal before the deadline'. Below this is a 'Revisit your Proposal' section with 're-edit proposal' and 'download' buttons. A '<< back' button is at the bottom right.

The Withdrawn status will be shown on the **My proposals** page of the Participant Portal.

Contributing to a proposal as a partner

When the Proposal Coordinator invites you to participate in a proposal as a Partner, you receive an electronic invitation (e-mail) with the proposal details and a **link** to access the Participant Portal.

Note: Keep in mind that in order to access the electronic submission system, you must have an account with the European Commission (ECAS). If you do not have an account, the system will guide you through the necessary steps.

Once you enter the electronic submission system, it will display Step 5 of the submission process where the **EDIT FORM** button enables you to access the electronic administrative forms and the rest of the proposal package as your participation requires.

To access the consortium contact details, click the **BACK** button – the system will show Step 4 of the submission process.

Completing the forms

When the PDF form is opened, you will have to verify or fill in your administrative forms.

Click **SHOW MYSECTIONS** to access your administrative forms and proceed to complete the requested information.

When you finish, make sure that no validation errors are left unaddressed. To check for validation errors, use the **VALIDATE FORMS** button located at the bottom of the page.

Contributing to a proposal as a referee

When the Proposal Coordinator invites you to participate in a proposal as a Referee, you receive an electronic invitation (e-mail) with the proposal details and a link to access the PDF assessment form to submit your opinion on the participant to the Commission services. The Referee does not need to access the proposal. This reference letter will be used as part of the evaluation and decision process.

To submit your assessment letter:

1. Click on the link received by e-mail.
2. A form will be downloaded to your computer.
3. Fill in the form as requested and save it to your computer.
4. Click on the **SUBMIT** button.

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 Participant Portal. Calls deadlines are fixed and are strictly enforced. Only the last submitted version will be evaluated, where each newly submitted version overwrites the preceding one. After the call deadline, the proposal can no longer be modified and no further participants can be invited. Practise the submission action well before the deadline to ensure a risk-free submission of your proposal.

The proposal, as of Step 6 "Signed proposal download" onwards, remains accessible in read-only mode to the coordinator and to the proposal participants invited before the deadline.

Checks before the final submission

- Do you have the agreement of all the members of the consortium to submit the proposal on their behalf?
- Is your Part B in portable document format (PDF), including no material in other formats?
- Is your Part B filename made up only of the letters A to Z and numbers 0 to 9 without special characters?
- Have you printed out your Part B, to check that it really is the file you intend to submit, and that it is complete, printable and readable? After the call deadline it will not be possible to replace your Part B file.
- Have you respected the minimum font size (11 point) and the page limitations for the different sections?
- Is your Part B file within the file size limit?
- Have you virus-checked your computer? The Submission system will automatically block the submission of any file containing a virus.

Submitting the proposal

- Have you made yourself familiar with Submission system in good time, i.e. have you submitted a draft version of your proposal well in advance of the deadline (at least several days prior to it). You can continue to improve it with regular re-submissions of updated versions.
- Have you clicked the submission action button, available in Step 5? Have you reached Step 6 without errors or warnings issued by the system?
- In Step 6 of the system, have you downloaded and checked the “signed proposal”? This is the version that will be retained for evaluation.

The deadline

- Have you completed the submission process for your final version? When the deadline is over or when the cut-off date is reached, no one is allowed to submit proposals. Calls usually close at 17:00:00 Brussels time.

Following the submission deadline

- Information submitted to the Submission system can still be reviewed (in read only mode) by the participants, provided that (1) the invitation to the participant was made before the deadline, and (2) the participant has an account created.
- It is recommended to review this information while there is still time to submit a corrected version if necessary.

Messages at submission action

The system will display warnings where possible in order to avoid eligibility issues further in the process. Most likely, the system will show you 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.
- Other messages may also be displayed.

Frequently asked questions

How do I obtain a username and a password for the electronic submission system?

To access the electronic submission system and other information systems dealing with proposals and research projects, you must create a user account with the Commission (ECAS). To do so, use the Register option available from the Participant Portal.

Is it required for an organisation to have a PIC code during the proposal submission stage?

Yes, your organisation must have a PIC number for a proposal to be submitted on its behalf as a participant. Getting a PIC is a simple process that takes ten minutes to complete using the Unified Registration Facility (URF) that is accessible from the Participant Portal. Please note that the requested PIC code does not need to be validated for proposal submission. If your proposal is selected, then additional information and validation will be needed at a later stage.

I received a security message while using Adobe Reader – it tries to connect to the Internet.

This is the intended behaviour of the Adobe Reader. It must be allowed to connect to the Internet in order to send form data to the submission system (in case of offline submission) or to check the signature of the European Commission when displaying the submitted proposal (signed PDF).

While working on Offline mode, the computer displays: "Security warning the document is trying to connect https://ec.europa.eu/research/"

This is standard behaviour. Adobe Reader will NEVER connect to an external site without your approval due to security reasons. This behaviour cannot be overridden. However, you can check the "remember my action" checkbox on to dismiss this message next time.

Note: The message is not shown when you display a PDF in the web browser using the inline mode edition.

To disable this message, please:

- Open Adobe Reader
- Click Edit > Preferences > Trust manager
- Click Change Settings
- Click "Allow all websites" (or white list ec.europa.eu)

Why am I able to open other PDF forms in Adobe Reader on iPad but I cannot open the Submission forms?

Adobe Reader 10.2 for iPad only supports AcroForms. Submission system uses a different type of form (XFA Forms), and they are not supported. Support for XFA forms on mobile devices is not on the roadmap. Adobe wants to move to HTML5-forms instead.

- An AcroForm is created with the Forms toolbar in Adobe Acrobat Professional, and is limited in functionality. These forms are supported on mobile devices.

- An XFA form is created/rendered with LiveCycle, has an XML structure, and has a very comprehensive feature set. These forms are NOT supported on mobile devices.

The European Commission digital signature (eReceipt) of the submitted proposal is not validated.

The following procedure is only applicable for Windows operating systems.

After you download the submitted proposal, perform the following actions:

- Click once on the signature located at the table of contents page.
- Click on 'Signature Properties...' in the Signature Validation Status window.

- In the Signature Properties window click on ' Show Certificate...!.
- Select 'Trust' tab and Click on 'Add to Trusted Identities' in the Certificate Viewer window.
- Click on 'OK' to confirm in the Acrobat Security pop-up window.
- The Import Contact Settings window should be displayed.
- Tick off the 'Use this certificate as a trusted root' and click OK (note: ticking off 'Certified documents' is not required).
- In the Signature Properties window click first on 'Validate Signature' and then on 'Close'.
- The Commission digital signature or eReceipt should be validated.

I have been invited to participate in a proposal, but when I click on the link, I receive the following error message: "Error 403 — Forbidden we can't seem to find what you are looking for"

In most of these cases, this error is displayed when the person who is trying to access the system is already logged in at the ECAS service with another username.

Please do the following:

- Close your Internet browser sessions.
- Click again on the link to access the proposal.
- When the ECAS page is displayed, verify the selected domain is "External".
- Provide your username and password and click on the Login button.

I cannot install version 9 or 10 of Adobe Reader

Contact your local service desk support. Perhaps you do not have administrator's rights to install programs on your computer. If you have an old version already installed on your computer, it is highly recommended to uninstall it before installing the new one.

Searching for organisations takes a long time

Revise your search criteria. Non-Latin characters in the search are not supported. Accents are not supported either. The search takes the usual business name of the organisation, the VAT number or the PIC as search criteria.

I have forgotten the account identifier associated to my electronic mail – the service desk request diagnostics of the account used for further analysis

Close all browser windows, start your Internet browser again, and click on the following link:

<https://webgate.ec.europa.eu/cas/userdata/ShowDetails.cgi>

Your account details will be displayed.

I am using MAC OSX and I cannot edit the Part A form - the form-page opens but I can only see the sign indicating that the system is busy trying to open the form.

There is a compatibility issue with Adobe Reader's plugin on MAC OSX. Disabling Adobe Reader plugins on your browser is the only way to work around this issue. If you need help with this, please contact the Submission Service Desk.

How to change the primary proposal coordinator

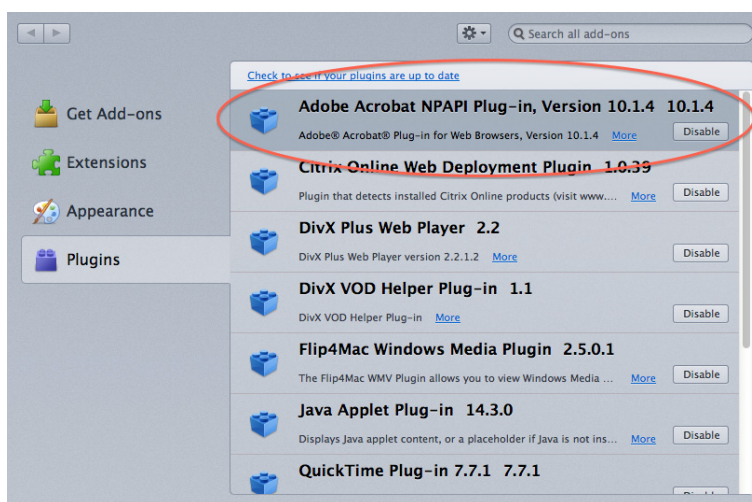
To change the primary proposal coordinator, please refer to the pages 23 to 25 of this manual.

I am trying to submit the Part A of my Proposal from a downloaded, filled in, and validated PDF file. But I receive the following error: "An error has occurred while processing your request, please try again"

My configuration is OK: "You're using Firefox 21 on Windows. Adobe Reader (version 9 or above) is installed.

This is a known issue caused by the new built-in PDF viewer on Firefox 19 or above. To work around this issue, disable the Adobe plugins and work in of-line mode. How to Disable Adobe reader plugins in Firefox:

Go to Tools > Add-ons > Plugins and click the Disable button for the respective plugin:



I guess the Adobe plugin you are using is blocked for the new versions of Firefox:

<https://addons.mozilla.org/en-US/firefox/blocked/p89>

This affects Firefox users on Mac OS X who have installed the Adobe Acrobat plugin. The electronic submission system does not support online renditions on Firefox on the Mac (it has been like this for a long time). Mac users are advised to use Safari. Nevertheless, if you would like to use Firefox, it is recommended to disable Adobe plugin. To do so, go to Firefox's Tools – Add-ons – Plugins and Disable Acrobat NPAPI Plug-in. The administrative form "Part A" is going to be opened outside your Internet browser.

Sometimes when I first open a form, a part of the area on the right-hand side is not displayed.

To resize the form page correctly, just minimise and then restore the browser window.

Mandatory requirements

The electronic submission system of the European Commission is a web application, so you will need a working Internet connection to use it. Although the system has been tested with a set of typical reference configurations, it is not guaranteed that the system 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	Mandatory requirements
Adobe Reader	Version 9 or above, all previous reader installations must be removed
Internet connection	ADSL Line, 512 Kbps or faster
Memory	RAM – 512 Kbytes or more
Screen resolution	Minimum 1024 x 768 or higher
JavaScript	JavaScript must be enabled
Cookies	Cookies must be enabled
Pop-up blocker	No effect
User ID	Valid user ID with the Commission (ECAS account)

The following table shows the operating systems and browsers actively supported by the system, as well as the Adobe Reader version recommended for each configuration.

Operating system	Internet browser	Adobe Reader
Windows XP	Internet Explorer 7 & 8 Firefox 3.6 or above Google Chrome 10 or above Opera 10.6 & 11 Safari 5	Version 9 or above
Windows Vista & 7	Internet Explorer 8 & 9 Firefox 3.6 or above Chrome 10 or above	Version 10
Mac OSX	Safari 5 or above	Version 10.1.3 - Newer Mac machines run on 64bit operating systems, where Adobe Reader versions 9 and 10 are incompatible
Note: The system is best viewed with Mozilla Firefox 3 and above		

The electronic proposal submission system is best viewed using Mozilla Firefox 3.6 (or above).

Adobe Reader

The electronic submission system of the European Commission relies on the proprietary Adobe form technology for key parts of the process (Adobe Reader version 9 or above must be installed on your machine).

To download Adobe Reader, follow this link: [Adobe Reader Download](#)

Troubleshooting your system configuration

What to do if your system configuration is not OK?

1. Make sure Adobe Reader 9.0 or above is installed on your machine and is set up as your default PDF handler.

To download Adobe Reader go to [Adobe Reader Download](#) and follow the instructions.

If you have Adobe Reader version below 9.0 already installed on your machine it is highly recommended to uninstall it before installing the new version.

2. Make sure Adobe Reader plug-in is enabled on your browser in order for the system to open up the PDF administrative forms within it.

The following instructions show how to enable Adobe Reader plug-in on the supported browsers and operating systems.

On Windows

Internet Explorer 7, 8 and 9

- Choose Tools menu > Manage Add-ons and click on Enable and Disable Add-ons...
- Enabled Adobe PDF Reader, if it is not, by clicking on it and then on the "Enable" button at the Settings box
- Click OK to confirm

Firefox 3.6 up to 18

- Choose Tool menu and click on Add-ons
- Enable Adobe Acrobat, if it is not, by clicking on Enable button

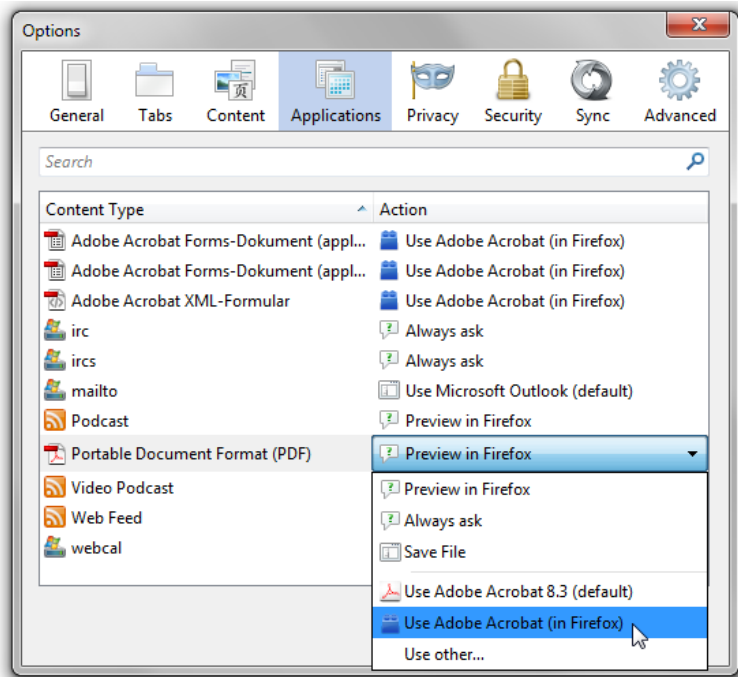
Firefox 19 and above

Please note that Firefox 19 and above has a built-in PDF viewer, which by default eliminates the need for third-party plugins like Adobe Reader plugin.

Besides enabling Adobe plugins, you will have also to change from using the Firefox built-in PDF viewer to Adobe PDF reader plugin.

To change Firefox built-in PDF viewer, please follows these steps:

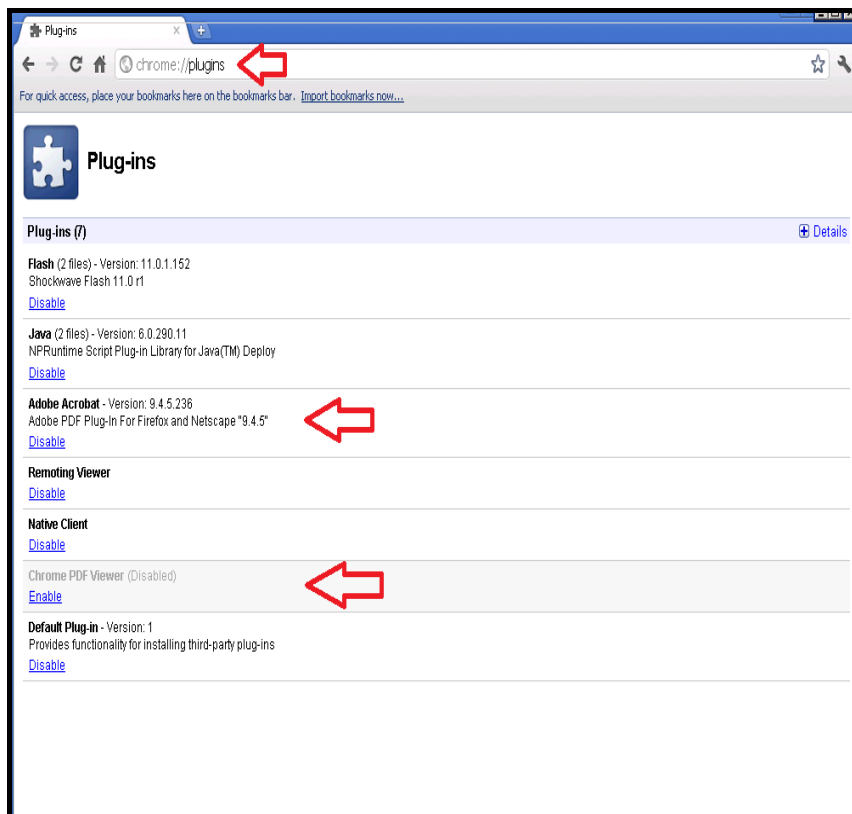
- At the top of the Firefox window, click on the Firefox button and then select Options.
At the top of the Firefox window, click on the Tools menu and then select Options.
On the menu bar, click on the Firefox menu and select Preferences.
At the top of the Firefox window, click on the Edit menu and select Preferences.
- Select the Applications panel.
- Find Portable Document Format (PDF) in the list and click on it to select it.
- Click on the drop-down arrow in the Action column for the above entry and select Use PDF Adobe reader name (in Firefox).



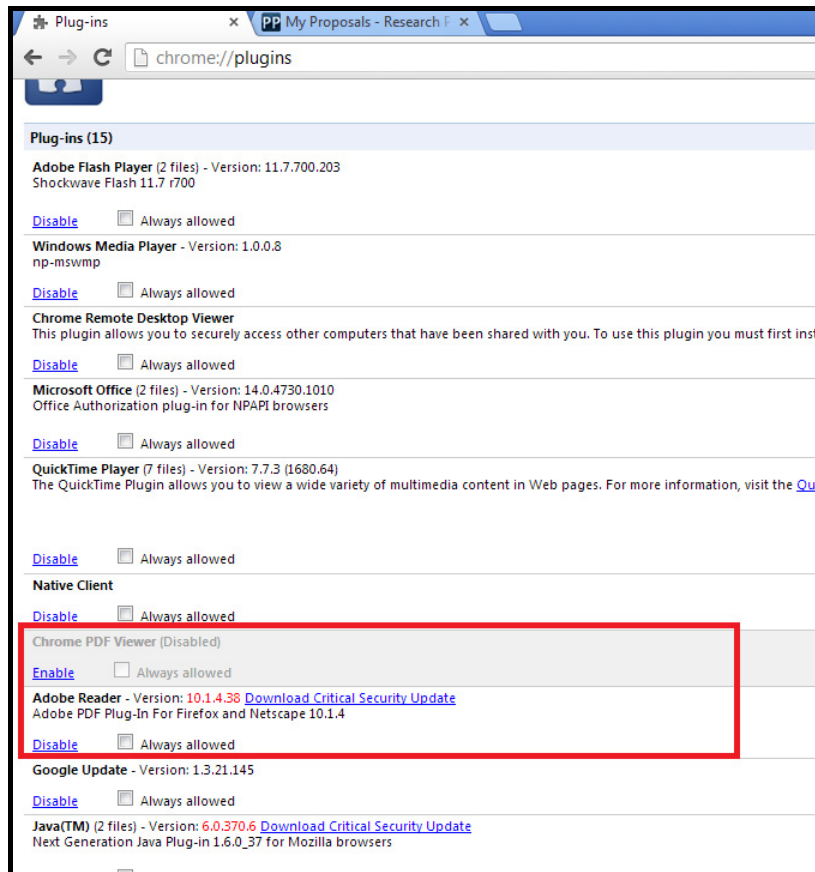
Google Chrome

Google Chrome uses the Chrome PDF Viewer as the default application for opening PDF files. In order for the system to open up the PDF eForms within the browser you must disable Chrome PDF viewer

- On your browser type **chrome://plugins/** the Plug-ins page will be displayed
- Disable Chrome PDF Viewer
- Enable Adobe Acrobat plug-in

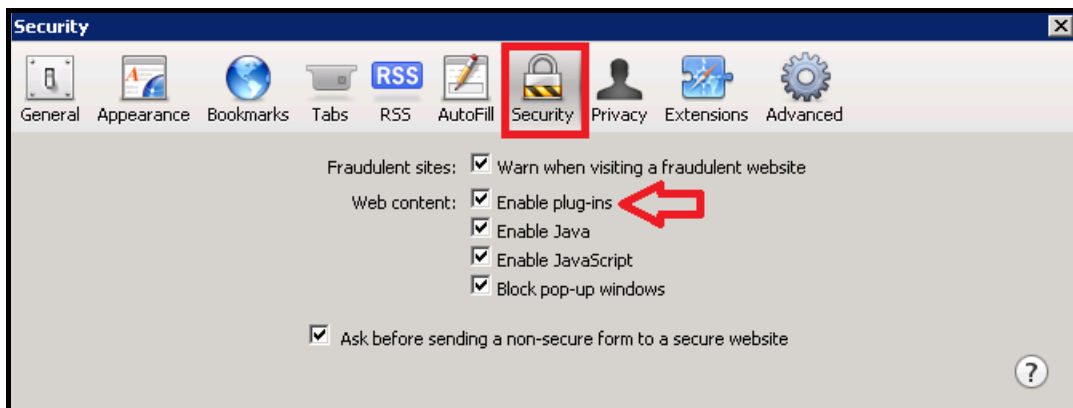


Google Chrome latest version plugins page



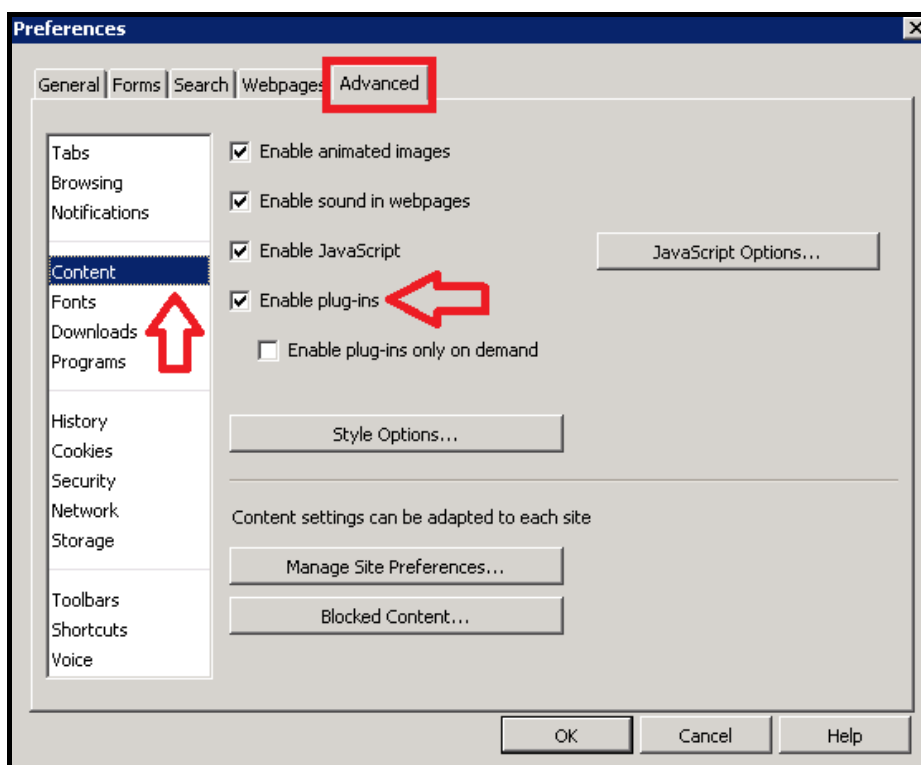
Safari 5

- Choose Action menu > Preferences and click Security. (The Action menu is near the upper-right corner of the Safari window, and looks like a gear.)
- Make sure that "Enable plug-ins" checkbox is selected



Opera 11

- At the top of the Opera window, click on the Opera button and then select "Settings"
- Choose "Preferences" and then click "Advanced" tab
- Select "Content" from the left column and make sure that "Enable plug-ins" checkbox is selected

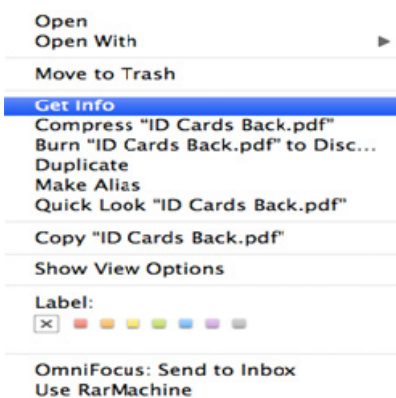


On Mac OSX

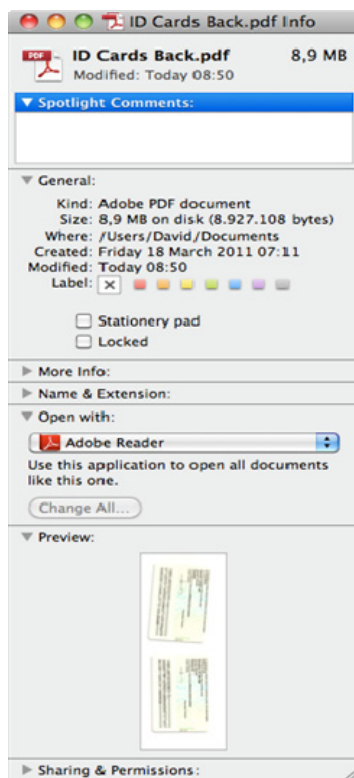
Adobe only provides a plug-in for Safari; all other browsers will switch to off-line mode, meaning all PDF forms will be opened up outside the browser (Configuration unconfirmed)

On top of this OS X uses the Preview application as the default for opening PDF files. In order for the system to open up the PDF eforms within the browser you must first set Adobe Reader as the default PDF application.

1. Single click a PDF file you wish to open or any PDF file in general while holding the *control* key. Then select 'Get Info' from the menu you've opened.



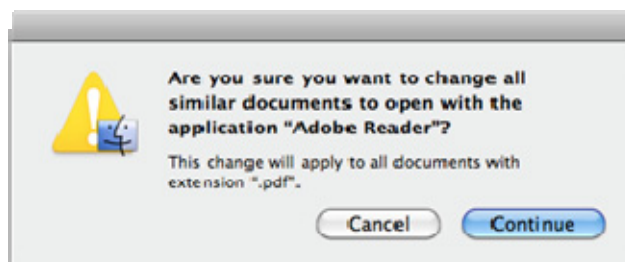
2. Under the heading 'Open with,' the current default application for opening PDF's is listed. Locate the icon for the Adobe Reader application and click on it.



3. Click the 'Change All' button so that all subsequent PDF files will be opened by the Adobe Acrobat reader.



4. Click the Continue button to confirm that you'd like to change your settings. Now all PDF files will be opened by the Adobe Acrobat Reader



Glossary

Deadline

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.

ECAS

The European Commission's Authentication Service - it is the system for logging in to a whole range of web sites and online services run by the European Commission. Once you use ECAS to log in to a Commission website, you will not need to identify yourself again for other Commission websites until you browser session expires.

Information package of the call

Key documents required for the preparation of your proposal. It is available for each call from the Funding Opportunities section of the Participant Portal.

LEAR (Legal Entity Appointed Representative)

The LEAR is a person nominated in each legal entity participating in Research (H2020, FP7) 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. The LEAR receives a Participant Identification Code (PIC) from the Commission (see below), and distributes this number within his/her organisation.

Part A

This is the part of a proposal deals with administrative data. It is completed using the web-based electronic Submission system.

Part B

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.

Part B template

A document in RTF format supplied by the Submission system, consisting of a template of all chapter headings, forms and tables required to prepare a proposal Part B.

Participants

The members of a consortium in a proposal or project, these are legal entities, and have rights and obligations with regard to the Community.

Participant Identification Code (PIC)

Organisations participating in Research (H2020, FP7) programmes are assigned Participant Identification Codes (PIC). The possession of a PIC enables organisations to take advantage of the Unique Registration Facility and to identify themselves in all transactions related to Research (H2020, FP7) proposals and grants.

Participant Portal

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.

Principal investigator

For the European Research Council proposals, the Proposal Coordinator is the principal investigator - PI. The principal investigator is the only person having the right to submit the proposal.

Proposal Coordinator

The Proposal Coordinator leads and represents the applicants. He/she acts as the point of contact with the Commission.

Unique Registration Facility (URF)

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 URF is accessible from the Beneficiary Register page of the Participant Portal:

<http://ec.europa.eu/research/participants/portal/desktop/en/organisations/register.html>

URF also provides an organisation search tool where you can check if your organisation has already been registered as a participant.

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