



**I N T E L L I G E N T
E N E R G Y**

E U R O P E

FOR A SUSTAINABLE FUTURE



Electronic Proposal Submission Service

**EPSS preparation and submission guide
Vs5**

Release Date: December 2011

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EPSS help desk

Phone: +32 2 23 33 760

Email: support@epss-fp7.org

Important note for EPSS users – Time out after 30 minutes

For security reasons, the EPSS system automatically disconnects users that have been inactive for more than 30 minutes.

Being active means clicking on buttons, i.e. 'validate', 'save' or 'submit', 'adding or deleting' participants.

'Entering/filling' data into the A forms does not count as being active. You are advised to save the form early and often.

1. EPSS Preparation –User’s Guide

The EPSS (Electronic Proposal Submission Service) allows proposers to create their proposal completely on-line without downloading or saving anything on their local personal computer. The EPSS service is available via the internet as a web based application.

The System requirements are:

- a connection to the Internet
- a screen with a 1024x768 resolution and small fonts.
- On-screen text size: Users should not use the font scaling option that is available with some browsers to enlarge the font size when viewing 'A forms', as this may lead to corrupted view of the forms.
- Internet Explorer 7.0 and above or
- Netscape Navigator 7.0 and above or
- Mozilla Firefox 3.0 and above or
- Opera 10.63 and above or
- Mac OS X Mozilla Firefox browser for Apple Macintosh users (Mac OS 9 is not supported and Safari - Google Chrome neither, see Note on last page)
- JavaScript or ActiveX controls enabled (depending on browser)
- Cookies enabled browser

Note: The EPSS web application is best viewed with using:

- Internet Explorer 7.0 (and above)
- or Mozilla Firefox 3.0 (and above).
- Safari and Google Chrome are NOT supported (whatever the OS)

1.1. The first step: Register and get a user ID and password

Registration should be done only by proposal co-ordinators. Partners receive registration information from their co-ordinator.

Access to the EPSS is call- and sub-scheme-specific, i.e. you have to first choose for which call for proposals and for which sub-scheme within the call you want to prepare a proposal. IEE currently knows three sub-schemes (CIP-IEE-Promo-P, CIP-IEE-Promo-A, CIP-IEE-PROMO-BWI).

Note that not every sub-scheme might be open in each call for proposals.

Access is provided at the website of the IEE programme at the respective call page http://ec.europa.eu/energy/intelligent/call_for_proposals/call_library_en.htm.

After selecting the sub-scheme, you will arrive at the EPSS start page. Click on "Register", fill in the registration form and submit it.

The screenshot shows a web form titled "Registration - Personal Details". At the top, it indicates "Call Selected: WP4-PIC" and "Sub-Scheme Selected: CP-FP-INFISO". A note says "Please fill in your details below. Note that you must provide entries marked with an asterisk." Below this is a section for "PIC info?" with a text input field containing "956171778", a "Clear PIC-data" button, and a "Change PIC" button. A link "View PIC data" is also present. The form then asks for "Title" (a dropdown menu with "Mr." selected), "First name" (a red input field), "Surname" (a red input field), "Organisation Short Name" (a red input field), "Telephone" (a red input field), and "E-mail" (a red input field). Below these is a large text input field for "Organisation Legal Name" containing "EPSS". At the bottom, there are "City" (a dropdown menu with "Bruxelles" selected) and "Country" (a dropdown menu with "Belgium" selected). A "Warning" message at the bottom states: "Warning: Only proposal Coordinators should register. Partners should obtain the registration information from the proposal Coordinator." At the very bottom right, there are "reset" and "next" buttons.

The registration form first asks for some contact data. **Optionally**, if you have a PIC (Participant Identification Code) you can already enter it here. You will be still able to stop working with a PIC if you decide so once you have obtained the EPSS account. If you enter your PIC, and wish to see what the associated PIC data is you may click on the 'View PIC data' button. If at that stage you object the correctness of your PIC-data or simply you decide not to use it, you can clear it by clicking on the "Clear PIC-data" button. After clearing your PIC-data (or simply if you don't have a PIC) you should proceed with entering valid data to all mandatory fields by manual typing.

1.1.1 How to search for a specific PIC in EPSS :

Once you have click the "search PIC" button a window will open giving you the possibility to search a PIC.

The screenshot shows a window titled "PIC Search". At the top, there are instructions: "At least a Legal Name must be provided.", "If NO Legal Name is provided, a valid 9 digits PIC number is required. Otherwise no search will be performed.", "If PIC AND Legal Name are provided, the PIC takes the precedence.", and "The Country cannot be used alone." Below these are input fields for "PIC:", "Legal Name:" (with a "Search tip" link), and "Country:" (a dropdown menu showing "SELECT ONE"). To the right is a captcha image with the text "eeyxtn" and a "SEARCH" button. Below the search fields, there is a "Show 20 entries" dropdown and a table with columns "PIC", "Organisation Legal Name", "Address", "City", and "Country". The table currently displays "No Data Found".

This screenshot is similar to the first one but with specific input values and red arrows. The "Legal Name" field contains "%EPSS%", the "Country" dropdown is set to "Belgium", and the captcha image shows "m6bw6". Red arrows point from the text below to the "Legal Name" field, the "Country" dropdown, the captcha image, and the "SEARCH" button.

Please follow these steps in order to search a PIC :

- 1) Complete a legal name (use the search tip if needed)
- 2) Choose a country (this is optional but will help to focus the search)
- 3) Write the captcha code
- 4) Click on search button

Tip: Click on "search tip" to get detailed information on how to search for a PIC. You can for example use the character % to get more results.

Note: If you cannot read the captcha you can click on its picture to change it.


PIC Search

- At least a Legal Name must be provided.
- If NO Legal Name is provided, a valid 9 digits PIC number is required. Otherwise no search will be performed.
- If PIC AND Legal Name are provided, the PIC takes the precedence.
- The Country cannot be used alone.

PIC:

Legal Name: [Search tip](#)

Country:



Cannot read the image? Click it to get a new one.

Please enter the verification code as shown above

Show entries

PIC	Organisation Legal Name	Address	City	Country
956171778	EPSS	Av. Einstein, 1	Bruxelles	Belgium

You will then see a list corresponding to your search criteria.

You should then select the PIC corresponding to your needs.

If you know the PIC, you can also enter it directly.

Registration - Personal Details

Call Selected: **WP4-PIC**
 Sub-Scheme Selected: **CP-FP-INFISO**

Please fill in your details below. Note that you must provide entries marked with an asterisk.

PIC info?

PIC
[View PIC data](#)

Title *

First name *

Surname *

Organisation Short Name *

Telephone *

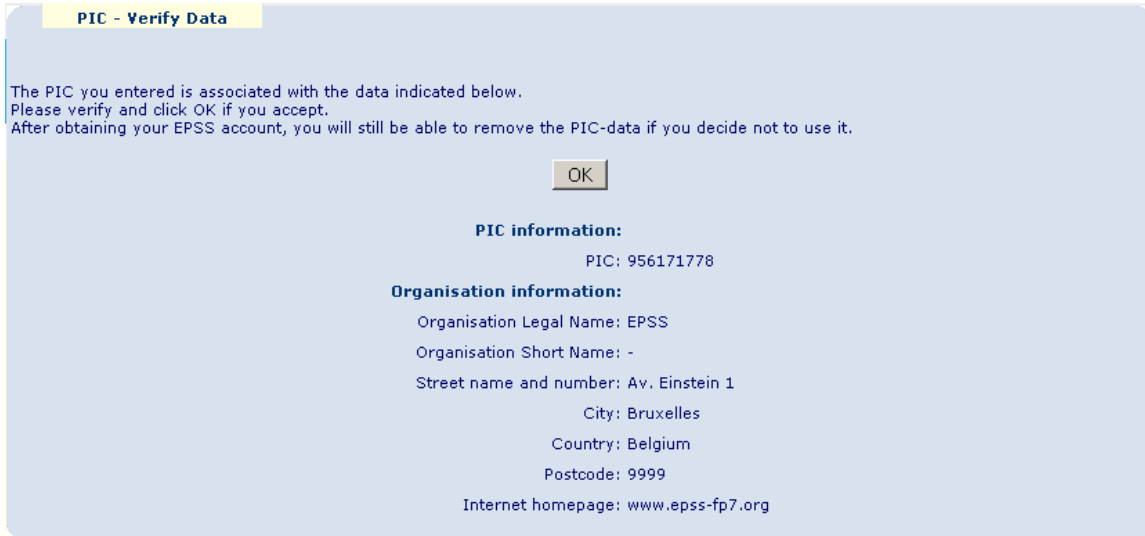
E-mail *

Organisation Legal Name

City * Country *

Warning: Only proposal Coordinators should register. Partners should obtain the registration information from the proposal Coordinator.

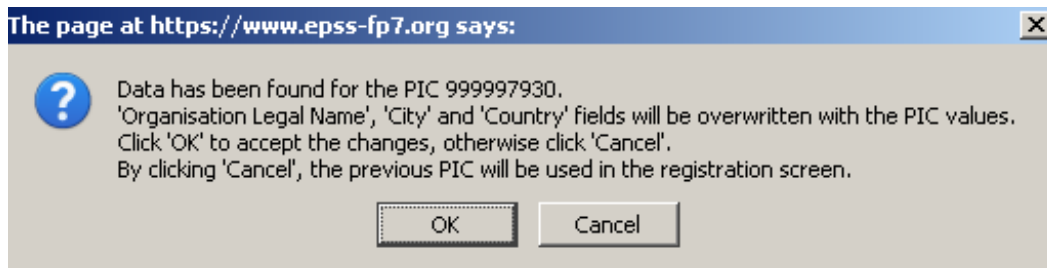
At this stage you can click on "view PIC data" to be sure the PIC is correct.



If this is not correct, you can try to use another PIC by clicking on "change PIC".



If you select another PIC this screen will appear :



If you click on cancel, the previous pic inserted will remain. After adding your PIC-data you should proceed with entering valid data to all the remaining mandatory fields by manual typing.

Registration - Personal Details

Call Selected: **WP4-PIC**
 Sub-Scheme Selected: **CP-FP-INFISO**

Please fill in your details below. Note that you must provide entries marked with an asterisk.

PIC info?

PIC:
[View PIC data](#)

Title *

First name *

Surname *

Organisation Short Name *

Telephone *

E-mail *

Organisation Legal Name

City * Country *

Warning: Only proposal Coordinators should register. Partners should obtain the registration information from the proposal Coordinator.

If at that stage you object the correctness of your PIC-data or simply you decide not to use it, you can clear it by clicking the .

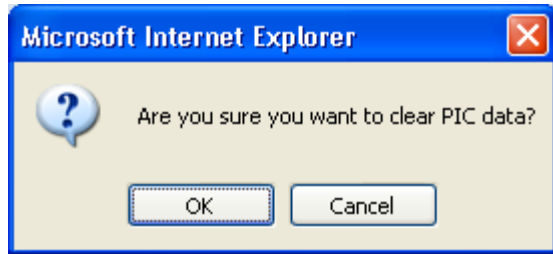
Registration - Personal Details

Call Selected: **WP4-PIC**
 Sub-Scheme Selected: **CP-FP-INFISO**

Please fill in your details below. Note that you must provide entries marked with an asterisk.

PIC info?

PIC:
[View PIC data](#)



After clearing your PIC-data (or simply if you don't have a PIC) you should proceed with entering valid data to all mandatory fields by manual typing.

For further information about using PIC for IEE see page 16.

Next you are asked to indicate IEE Key Actions, title, acronym and abstract of the proposal as well as the number of participants.

All information marked with an * is mandatory for the registration but can be changed later in the process of proposal preparation.

The EPSS will send you coordinator and partners' usernames and passwords **by e-mail**.

Important notice:

- The EPSS registration email, which contains the access codes to prepare and submit the proposal, will be sent to the email address you define during the registration. This email will be sent from noreply@epss-fp7.org. Prior to the registration you should check that this domain (epss-fp7.org) is accepted by the email server of your organization. If you do not receive this email, please check your SPAM in case it ends up there. In any case you can always contact the EPSS Helpdesk to assist you if you have not received the EPSS codes.
- The login and password is linked to only one proposal (for the call and for the sub-scheme you have chosen). For each other proposal you want to prepare you have to register again, following the procedure described above.

1.2. Login

As a co-ordinator you must use the login and password that has been sent to you by e-mail to access the EPSS.

1.2.1 Initial Login

- Go to <https://www.epss-fp7.org/eaci-iee/>
- Introduce the Coordinator User ID
- Enter the Coordinator Password
- Change the Coordinator Password
- Enter the Other participant Password
- Change the Other participant Password

Distribute the Other participant username and the modified Other participant password to your other participants –if any (Note that the minimum number of participants required differs between sub-schemes).

1.2.2 Subsequent Logins

- Go to <https://www.epss-fp7.org/eaci-iee/>
- Introduce the –Coordinator or Other participant- User ID
- Enter the –modified Coordinator or Other participant- Password

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IEE Call for proposals



Prepare Proposal	Change Password	Check Validation	Submit Proposal	Logout
General	Proposal Setup	Part A	Part B, C and Annexes	History

Ne
inf

General Information

Call Selected: CIP-IEE-2011

Sub-Scheme Selected: CIP-IEE-Promo-P

Proposal ID: Not available

Proposal status: Proposal NOT submitted

The information below has been supplied during the registration phase; the information supplied during the registration is not inherited in the EPSS account since it is considered indicative only; it cannot be modified but is NOT used for the evaluation of the proposal. Make sure that the correct information is present in the A forms and Part B.

De

Title: test proposal

Coordinator: Albert Einstein

In "**General**" no data can be entered. Information is only displayed.

Tip: Please check the call and sub-scheme identification first. If you have selected the wrong call and the wrong sub-scheme, you will have to register again. The EPSS operator cannot change the registration information and transfer data from one registration to another.

Note:

- If the co-ordinator details change, you do not need to register again; co-ordinator information is taken from the A2 forms.
- If you wish to modify the Title of the proposal you will have to do it in the forms of Part A. The title appearing in this page is taken from the registration data and cannot be changed. However, this does not affect the submitted proposal, because what is evaluated is the content of the Part A and the Part B.

Go to "**Proposal setup**".

1.4. Proposal Setup

In the proposal setup section you define the number of other participants that participate in your project.

Note: The first participant is always the co-ordinator.

The screenshot displays the 'Proposal Setup' section of the EPSS interface. At the top, there are navigation tabs: 'Prepare Proposal', 'Change Password', 'Check Validation', 'Submit Proposal', and 'Logout'. Below these are sub-tabs: 'General', 'Proposal Setup' (selected), 'Part A', 'Part B & Annexes', and 'History'.

The main content area is titled 'Proposal Participants' and contains a table with the following data:

Participant ID	Organisation short name	A2-Link	A3-Link	E-mail(s)	
1	gh			davidee.maes@epss-fp7.org	Edit details

Below the table is the 'Add Participant' section, which includes a 'Participant Identification Code' field, a 'PIC info?' link, a 'PIC' input field, a 'Clear PIC-data' button, a 'Search PIC' button, and an 'add participant' button.

Tip: The e-mail addresses introduced in this section are used by EPSS to send automatic e-mail confirmation once the proposal is submitted/transferred for evaluation. Please check that they are complete and accurate.

Make sure that the co-ordinator e-mail address is correct. You can include multiple e-mail addresses, you must separate them with a semi-colon “;”.

1.4.1 Adding participants

To **add a participant** to the proposal the co-ordinator must provide the partner's short name and e-mail address. Optionally, if this partner has provided a PIC, the co-ordinator may insert the relevant participant's PIC number.

Click the "Add participant" button.

Once a participant is added, the system automatically creates an A2 form and an extra row in the A3 form. Those forms are accessible via the A2-Link, A3-Link buttons, but they can also be found after clicking in the "Part A" Tab.

Participant ID	Organisation short name	A2-Link	A3-Link	E-mail(s)	
1	gh			davidee.maes@epss-fp7.org	Edit details

Add Participant

Participant Identification Code:

PIC info? [PIC info?](#)

PIC: [Clear PIC-data](#) [Search PIC](#)

[add participant](#)

If a PIC was entered, clicking on "add participant" opens a window "PIC – Verify Data". It informs about the data associated with the PIC and asks to either "Accept" or "Reject". If you disagree or decide not to use it, click "Reject"; otherwise "Accept" to complete the addition of this participant.

If a PIC is provided, some of the A2 data fields (such as the legal name of the organisation city and country) will be filled automatically once the corresponding A2 form is opened. Most fields will be in 'read-only-mode' and allow no change in the respective fields. However PIC data can always be cleared at a later stage, see 1.4.2 Modifying participant information.

Important:

The co-ordinator must make sure that all participants open the corresponding A2 form in order to finish validation:

- (a) All participants must **complete their A2 form** with data which need to be added manually, even if a PIC is used. Most of these data are mandatory, and therefore must be completed.
- (b) The associated **PIC-data set is only inherited once the A2 form opened**. The same validation step is mandatory if the PIC number is deleted or modified. These validation steps are necessary to avoid unintended changes in the administrative data. If for some reason you decide to change or re-introduce a PIC, please always make sure that you not only click on the 'Update Participant information' and then click on 'Accept' but afterwards you make sure that the corresponding A2 form is opened to finish verification and have the PIC data inherited.

Using PIC in EPSS within IEE

Important: This is not a compulsory step - you can prepare and submit a proposal without holding and/or using a PIC.

Intelligent Energy - Europe uses the services offered by the Unique Registration Facility (URF) of the European Commission's Research DGs. The PIC or Participant Identification Code is a unique code for identifying the participant in any stage alongside the R&D funding management process of the programmes managed by the Commission's Research DGs. Participants will not have to submit their legal and financial information (and supporting documents) each time they submit a proposal or negotiate a grant agreement, but they should just introduce their PIC. All organizations which already signed an FP7 contract with the Commission should have received a PIC, which has been communicated to all contact points for FP7 grant agreements known to the Commission. Find out within your organization who are contact points for FP7 grant agreements; they will be able to tell you what your PIC is. If you cannot find any contact point within your organization, ask the **Digit-EFP7 help desk** to put you in contact with them. DIGIT-EFP7-SUPPORT@ec.europa.eu

If your organization does not have a PIC yet, then we suggest that get one by registering your organization by following the steps described on the following page of the Participants Portal.

http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=myorganisations#

If you encounter some problems during the registration, please contact the service desk:

http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=contactus

For more information about Unique Registration Facility including support please visit the corresponding section of CORDIS: http://cordis.europa.eu/fp7/pp_en.html

After registration, the new PIC will only be active in EPSS after 48h, therefore we suggest you to make sure that you start your self registration well before the deadline of the chosen call.

Once ready, you should type your PIC when asked in EPSS. Part of the legal data associated to that PIC will then be shown in order for you to verify that the PIC you are using is indeed the right one. Should you think there are errors in the data shown that might affect the eligibility of your proposal you can always remove the PIC and fill in all requested data manually as usual.

For technical reasons, there is no dynamic synchronization between the EPSS and the URF registry of legal entities. The data related to a PIC are transferred to the EPSS only at the moment when the PIC is inserted in EPSS. If between the introduction of a PIC in the EPSS and the submission of the proposal the data of the legal entity are changed in URF, a synchronization with the data displayed in EPSS can only be forced by a removal of the respective PIC of the partner (with loss of PIC data for this partner in the partner-specific proposal forms) and a new introduction of this partner PIC in the proposal setup. This procedure should only be applied for changes having an effect on the eligibility of the proposal (e.g. SME status in calls requiring a minimum number of SMEs or country of establishment in calls requiring a minimum number of participants from specific country groups). Minor data inconsistencies can be ignored.

Important: Applicants are able to prepare and submit their proposal (use EPSS) without the possession or without the introduction of PIC.

The default format of PIC is a 9 digits numeric code without separator or special characters. In EPSS the proposal co-ordinator (who is responsible for the overall coordination between partners) can introduce a PIC or clear a PIC for a participant. Providing the PIC implies that the proposal co-ordinator has access to this information from its own organisation or through the proposal partners' organisations.

1.4.2 Modifying participant information

The co-ordinator can use the "Edit Details" button in the section "Proposal Participants" to modify PIC, organisation short name and the email(s) related to a participant. The following screen appears:

The screenshot shows a web interface for managing proposal participants. At the top, there are navigation tabs: 'Prepare Proposal', 'Change Password', 'Check Validation', 'Submit Proposal', and 'Logout'. Below these are sub-tabs: 'General', 'Proposal Setup', 'Part A', 'Part B & Annexes', and 'History'. The main content area is titled 'Proposal Participants' and contains a table with the following data:

Participant ID	Organisation short name	A2-Link	A3-Link	E-mail(s)	
1	gh			davidee.maes@epss-fp7.org	<input type="button" value="Edit details"/>
2	test			support@epss-fp7.org	<input type="button" value="Hide Details"/> <input type="button" value="Delete"/>

Below the table is a 'Modify participant information' form for the selected participant (ID 2). The form includes:

- A 'Participant Identification Code' field with a 'PIC.info?' link.
- A 'PIC' input field, a 'Clear PIC-data' button, and a 'Search PIC' button.
- An 'Organisation Short Name' input field containing 'test'.
- A 'Participant E-mail(s)' input field containing 'support@epss-fp7.org'.
- An 'Update Participant Information' button at the bottom right.

If a co-ordinator objects the accuracy of the retrieved PIC information, he/she can remove it by clicking on the "Clear PIC-data" button. If the PIC-data is cleared, than all associated information will be erased from the A2 form and have to be re-entered manually.

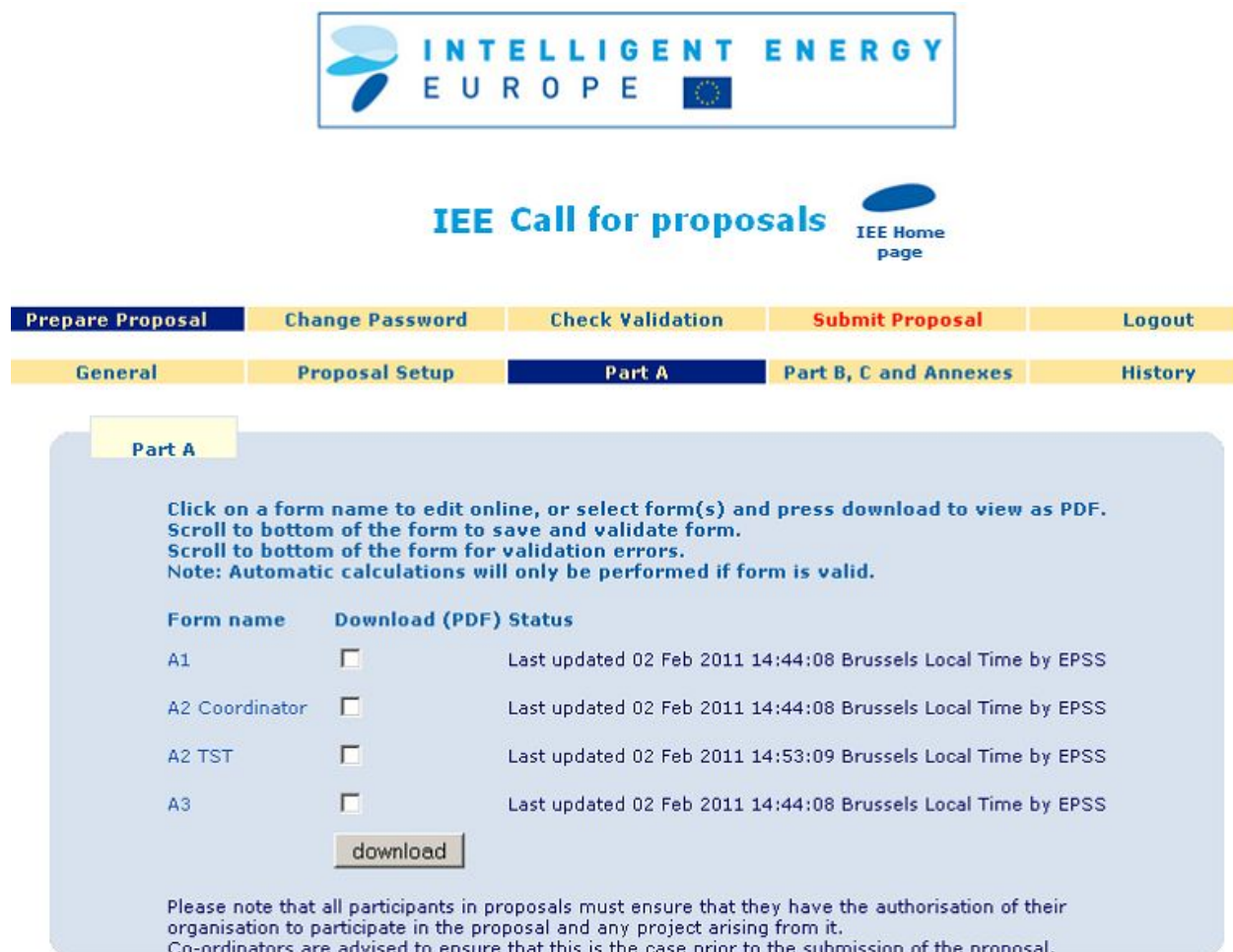
Important: In order to enforce changes you must click on "Update Participant Information" to update a Participant's details.

Participants can be removed from the proposal by clicking the "Delete" button.

1.5. Part A

This section deals with the administrative forms of the proposal and is called "Part A".

Part A shows the forms A1, A2 and A3. Click on the links that are listed below "Form name" to access the forms.



The screenshot shows the IEE Call for proposals web interface. At the top, there is a logo for 'INTELLIGENT ENERGY EUROPE' with the European Union flag. Below the logo is the text 'IEE Call for proposals' and a link to the 'IEE Home page'. A navigation bar contains several tabs: 'Prepare Proposal', 'Change Password', 'Check Validation', 'Submit Proposal', and 'Logout'. Below this is another set of tabs: 'General', 'Proposal Setup', 'Part A', 'Part B, C and Annexes', and 'History'. The 'Part A' tab is selected and highlighted. The main content area for 'Part A' contains instructions: 'Click on a form name to edit online, or select form(s) and press download to view as PDF. Scroll to bottom of the form to save and validate form. Scroll to bottom of the form for validation errors. Note: Automatic calculations will only be performed if form is valid.' Below the instructions is a table with the following data:

Form name	Download (PDF)	Status
A1	<input type="checkbox"/>	Last updated 02 Feb 2011 14:44:08 Brussels Local Time by EPSS
A2 Coordinator	<input type="checkbox"/>	Last updated 02 Feb 2011 14:44:08 Brussels Local Time by EPSS
A2 TST	<input type="checkbox"/>	Last updated 02 Feb 2011 14:53:09 Brussels Local Time by EPSS
A3	<input type="checkbox"/>	Last updated 02 Feb 2011 14:44:08 Brussels Local Time by EPSS

Below the table is a 'download' button. At the bottom of the 'Part A' section, there is a note: 'Please note that all participants in proposals must ensure that they have the authorisation of their organisation to participate in the proposal and any project arising from it. Co-ordinators are advised to ensure that this is the case prior to the submission of the proposal.'

The proposers need to fill the A forms appropriately and save them on the EPSS server. Also, each form can be downloaded as a PDF file to your hard disk. Check the relevant fields and click on "**download**" to receive PDF copies of the Part A forms.

Note:

For a participant for whom a PIC has been provided, the first time that the A2 or A3 form is opened the below screen shows up.

In case some information is not correct, the participant can click the "Open the form" button and edit the information in the form, if the field is editable. If it cannot be edited, the participant should contact the co-ordinator and ask for clearance of the PIC.

PIC - Verify Data

The coordinator has provided a PIC number.
The following information is retrieved from your PIC data and will be pre-filled in your forms.

In case some information is not correct you can edit the information in the form if the field is editable.
If the field is not editable then you should contact the coordinator and ask him/her to clear the PIC.
Please be aware that in such a case you will have to fill ALL PIC related information manually.

PIC information:
PIC: 123456789

Organisation information:
Organisation Legal Name: Test Organization
Organisation Short Name: TEST
Street name and number: Street 1
City: Brussels
Country: Belgium
Postcode: 12345
Internet homepage: -

Status of Organisation:
Non Profit Organisation: no
Public body: no
Research organisation: no
Higher, secondary organisation establishment: no
NACE - Nomenclature of economic activities in the European Community: not applicable
Number of employees smaller than 250: yes
Actual turnover smaller than € 50 million: yes
Actual balance sheet smaller than € 43 million: yes
Autonomous legal entity: yes
SME organisation: yes

Organisation Cost Model:
Method of determining Indirect Costs: Transitional Flat Rate (p.t. 60%)

Form completion and validation of Part A forms:

When filling the form please pay particular attention to the verification:

- Fill ALL fields with data. **All fields on the forms are mandatory.** ("-" or "0" are the values that designate the "none" or "Non applicable" value)
- The acronym will be used to identify your proposal efficiently in the call. It should be of no more than 20 characters (use standard **Latin alphabet and numbers only**; no spaces, symbols or special characters please). The same acronym should appear on each page of part B of your proposal.
- Press the "**Validate**" button at the bottom of the form: The validation is looking for formal errors in the forms. If it finds errors, it indicates which fields are wrongly filled (it will also be displayed in red color).

Have you or your partners, previously or currently, submitted this proposal to any Community programme?

IF YES - please specify Programme name

Distribution of requested budget between programme areas (total of 100%)

Energy Efficiency (SAVE)	Renewable Energy Sources (ALTENER)	Energy Aspects of Transport (STEER)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Validation Errors

- No value specified for mandatory field "Proposal Acronym"
- No value specified for mandatory field "Proposal Title"
- No value specified for mandatory field "Duration in months"
- No value specified for mandatory field "Key Action 1"
- No value specified for mandatory field "Free Keywords"
- No value specified for mandatory field "Abstract (max. 2000 char.)"
- No value specified for mandatory field "Major outputs & expected results (max. 2000 char.)"
- No value specified for mandatory field "Have you or your partners, previously or currently, submitted this"
- No value specified for mandatory field "Energy Efficiency (SAVE)"
- No value specified for mandatory field "Renewable Energy"
- No value specified for mandatory field "Energy Aspects of"

- If all the necessary fields are filled you will find "no validation errors" at the bottom of the form.

https://www.epss-fp7.org - A1 T.E.S.T. - Mozilla Firefox

Major outputs & expected results (max. 2000 char.)

!!!!

Have you or your partners, previously or currently, submitted this proposal to any Community programme? no

IF YES - please specify Programme name

Distribution of requested budget between programme areas (total of 100%)

Energy Efficiency (SAVE)	Renewable Energy Sources (ALTENER)	Energy Aspects of Transport (STEER)
100	100	100

Validation Errors

No Validation Errors

Save Form Validate

Done www.epss-fp7.org

Do not forget to save the form by pressing the **“Save Form”** button, or your changes will be discarded!

Note: The **“Save Form”** button performs form validation as well.

Please make sure, you fill out all forms for which you are responsible.

For forms with spreadsheets, the total amounts are automatically calculated by the system when the **“Validate”** button is pressed. Obviously the appropriate fields need to be completed first.

Tip Save early and often. Saving will also validate the form. Pay attention to the time-out of the system (after 30 minutes): editing a form is not considered as an action of the user, saving or validating the form will reset the time-out.

1.6. Part B, Part C and Annexes

Part B and Part C as well as all required annexes can only be uploaded by the co-ordinator. However, all participants can download them once it is uploaded.

The screenshot displays the 'IEE Call for proposals' web interface. At the top, there is a navigation menu with options: 'Prepare Proposal', 'Change Password', 'Check Validation', 'Submit Proposal', and 'Logout'. Below this is a secondary menu with 'General', 'Proposal Setup', 'Part A', 'Part B, C and Annexes', and 'History'. The 'Part B, C and Annexes' section is active, showing three main upload areas: 'PART B Upload', 'PART C Upload', and 'Annexes Upload'. Each area includes a 'File' input field with a 'Browse...' button and an 'Upload' button. Below each upload area is an 'Overview' section showing 'No Part B File Uploaded', 'No Part C Uploaded', and 'No Annexes uploaded' respectively. A red link for 'Download Part B/Annexes Templates (zip file)' is visible under the Part B section, and another for 'Download Part C Template (zip file)' is under the Part C section. A 'Why only PDF? Help with PDF' link is also present in the top right of the Part B section.

1.6.1 Part B

For proposal content (Part B) you are requested to use exclusively PDF ("portable document format", compatible with Adobe Acrobat version 5 or higher, with embedded fonts). Other file formats will not be accepted by the system. Both commercial and free tools to convert files to PDF format are widely available on the WEB. Also zipped (or otherwise compressed) archives will not be accepted (PDF is self-compressing, there is no gain in zipping). Technical problems resulting from the use of other formats may lead to your proposal being excluded.

Unless otherwise specified in the call for proposals, only **one** PDF file comprising the complete technical annex (Part B) can be uploaded. Further files with annexes or additional information (company brochures, supporting documentation, reports, audio, video, multimedia etc.) will be rejected during the evaluation of the proposal.

Using only PDF format for submission of Part B

Why?

This format for text documents is supported by the vast majority of computer platforms. The advantage of saving as a PDF file is that the contents are "locked" and the original formatting (margins, page breaks, etc.) will always be maintained when the file is printed. In addition, unlike many common document formats, there are almost no viruses associated with PDF files. Allowing proposers to submit in any possible format would require the Commission to maintain an arsenal of software in different versions - and even then readability could not be guaranteed in 100% of the cases.

How?

The possibility of converting a text file into PDF is integrated into some word processors. In case this is not implemented in the word processor you are using, you can download special conversion software (commercial software or downloadable freeware) from the web. Conversion into PDF is the last step in preparing a document for submission; since PDF documents are "locked", they cannot be edited like normal text files.

The format and structure of Part B of a proposal (the description of the content of the proposal) for the specific call is specified in the so called "Part B Template" file. By clicking on the link "**Download Part B/Annexes Templates**" the proposer downloads the template file (RTF format) and uses it as a guide to structure the proposal Part B appropriately. Open the template Part B RTF file and edit it. Save the file, and once finished convert it to PDF and then add it to the proposal.

The Part B filename should contain the year of the call and the proposal acronym. It should be structured as follows: IEE-YY-ACRONYM, i.a. in 2012: IEE-12-ACRONYM. The acronym can only contain Latin letters (a-z), digits (0-9), the underscore (_), the dash (-) and the dot (.) character. It cannot contain any special characters or spaces.

IMPORTANT for PDF CONVERSION:

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.

- **Do not use a resolution of larger than 300 DPI.**
- **Stay in black and white.** Colours cannot be reproduced and nuances of grey may be reproduced but should be avoided for legibility purposes.
- **Check your PDF in printed form for legibility.**

Part B checklist:

- Part B is in PDF format (compatible with Adobe Acrobat version 5 or higher, with embedded fonts)
- Filename ends in .pdf
- Filename does **not contain any special characters or spaces**
- The PDF Part B must **not be encrypted** and the parameter that prevents printing **must not be selected**
- The proposal contains no unnecessary coloured or high resolution pictures. It will be printed in Black and White at 300dpi for evaluation.

Once the Part B file is created, use the "**Browse**" button to locate the part B file.

Click on "**Upload Proposal File**" to upload the Part B file to the proposal.

Tip Do not use special characters in the file name. The system will prevent you from uploading such files.

1.6.2 Part C - Detailed Budget

The Part C file provides detailed information about the estimated budget and costs of the proposal, broken down to the level of participants and work packages. Each participant has to provide information to the co-ordinator, who fills the data into the Part C template.

For Part C you must use EXCEL or EXCEL compatible format. By clicking on the link "**Download Part C Template**" the co-ordinator downloads the template file (XLS format) and uses it as a guide to fill in the detailed financial information appropriately. Please make sure that Part C remains in EXCEL 97-2003 and is not converted into a more recent version to avoid problems in the later handling.

Do not upload a PDF.

The Part C filename should contain the Call year and the proposal acronym and should be structured as follows: IEE-YY-ACRONYM-PartC, i.a. in 2012: IEE-12-ACRONYM-PartC. The file name can only contain Latin letters (a-z), digits (0-9), the underscore (_), the dash (-) and the dot (.) character. It cannot contain any special characters or spaces.

Once Part C is completed, use the "**Browse**" button to locate the Part C file.

Click on "**Upload Part C File**" to upload Part C to the proposal.

1.6.3 Annexes

Further to Part A, Part B and Part C, most times additional annexes are required. These annexes are related to each participant, documenting its legal and financial situation.

You can use the Annexes Upload section to locate and upload them. You should not annex any other files unless this is specifically requested in the Call for proposals.

By clicking on the link "**Download Part B/Annexes Templates**" the proposer downloads not only the template for Part B but also the list of required annexes as well as the template file for the simplified financial statement (xls format) and the declaration by the applicant (rtf format).

For the Annex content the only supported formats are PDF and XLS. The Annex filename should not contain any special characters or spaces. It can only contain Latin letters (a-z), digits (0-9), the underscore (_), the dash (-) and the dot (.) character. The Annex filename must be different from the Part B filename. As most annexes are per participant, the file naming should, where indicated in the below table, include the short name of the participant:

Type of Annex	For whom?	Annex format	File name
1. Declaration by the applicant (DEC)	Every participant	PDF	Acronym_DEC (all declarations in one single pdf)
2. Legal documents (LD)*	Every participant*	PDF	Participant short name_LD
3. Legal entity form (LE)*	Every participant*	PDF	Participant short name_LE
4. Balance sheets (BS) and Profit and Loss account	<u>Private</u> participants	PDF	Participant short name_BS
5. Simplified financial statement (SFS)	<u>Private</u> participants	XLS	Participant short name_SFS
6. Audit report (AR)	<u>Private</u> participants who ask for more than 500.000 EUR funding	PDF	Participant short name_AC
7. Financial identification form (FI)	Co-ordinator	PDF	Participant short name_FI
8. Letter(s) of support (LOS)	Optional	PDF	Acronym_LOS

***Note: Participants who have a validated PIC do not have to submit 1. Legal documents nor 2. Legal entity form.**

Use the "**Browse**" button to locate the Annexes files.

Click on "**Upload Annex File**" to upload the annexes to the proposal.

Note: In case of uploading annexes to the EPSS, please make sure that the name of the annex file is NOT identical with the name of your part B file.

Note: Before being saved to the EPSS database, the Part B, the Part C and the Annex files are checked for viruses. If files are found to be infected they are rejected by the system and the user is warned.

Tip Upload your proposal 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 text (the Part B) is already present on the system. Remember that the system allows multiple uploads of the proposal text 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 files have been received unaltered, perform a download of the Part B and the other annexes.

Upon successful upload of a file the following screen appears:

The screenshot displays the IEE Call for proposals interface. At the top, there is a logo for "INTELLIGENT ENERGY EUROPE" with the European Union flag. Below this, the text "IEE Call for proposals" is shown next to a small "IEE Home page" icon. A navigation bar contains several tabs: "Prepare Proposal", "Change Password", "Check Validation", "Submit Proposal", and "Logout". Below this, another set of tabs includes "General", "Proposal Setup", "Part A", "Part B", and "History". The "Part B" tab is currently selected and highlighted in dark blue. The main content area shows a confirmation message: "Part B Upload", "Please wait... processing upload", "File upload complete, please wait...", and "File FundingSchemes.pdf was uploaded successfully". Below this, a "checkSum" is provided: "f0e804206b48b562c0b6943191e925f1". A final message states: "Your Part B has been uploaded on the EPSS System. If your forms are ready, please press the submit button to have your proposal evaluated for the next deadline." At the bottom of the message area, there are two buttons: "Submit NOW" and "Submit LATER".

If the proposal is ready you should click on "**Submit NOW**" in order to submit it. If not, then click on "**Submit LATER**" or any other of the tabs in order to continue with its preparation.

1.7 Validation

Select "**Check Validation**" and click on "**next**" in order to validate the entire proposal. Possible errors are indicated and can easily be found and resolved.



IEE Call for proposals



Prepare Proposal

Change Password

Check Validation

Submit Proposal

Logout

Validation Check

These checks are merely to ensure that all forms are complete and the basic requirements are met. It is the responsibility of the co-ordinator to ensure that the proposal meets all the eligibility requirements specified in the call for proposals.

Rules

- All Part A forms for all participants exist.
- All compulsory fields in all forms have valid values.
- Partnership requirements, as defined for the call, are satisfied.
- Part B file exists. If annexes are defined, annex files exist.

The validation check proceeds by checking the rules in the order specified above. If any of the rules fail, the check shall stop immediately and the system shall present an appropriate information message.

Please press **Next** to proceed with the validation check.

next

Please note that during the validation process **Failures** or **Warnings** may be reported. It is still possible to submit a proposal, which has **Warnings**; it is **NOT** possible to submit a proposal that has **Failures**.

If you cannot locate validation errors please contact the EPSS help desk immediately on +32 2 23 33 760 or support@epss-fp7.org.

After a successful validation check the following screen appears:



IEE Call for proposals



[Prepare Proposal](#) [Change Password](#) **[Check Validation](#)** [Submit Proposal](#) [Logout](#)

Validation Check

Validation check: **SUCCESSFUL**

Preliminary automatic checking has not detected any errors.
However these checks are not exhaustive and do not guarantee that your proposal is valid for this call

**If you wish, you may submit the Proposal now.
If you make further modifications you may submit again before the call deadline.**

[Submit NOW](#)

[Submit LATER](#)

This check is merely to ensure that all forms are complete and the basic requirements are met. It is the responsibility of the co-ordinator to ensure that the proposal meets all the eligibility requirements specified in the call for proposals

1.8 Submit Proposal

In order to complete the proposal submission the co-ordinator **must** select the “**Submit Proposal**” section (in fact it is to this section that a user is also directed when clicking on the “**Submit NOW**” button). Without submission, all the uploaded data (Forms, Part B, Annexes) are simply saved in the EPSS database **without** forming a proposal package **and without being recognised as a submitted proposal**.

By clicking on the “**Submit Proposal**” button the screen that follows appears:



The screenshot shows the IEE Call for proposals submission interface. At the top, there is a logo for 'INTELLIGENT ENERGY EUROPE' with the European Union flag. Below the logo, the text 'IEE Call for proposals' is displayed, along with a link to the 'IEE Home page'. A navigation bar contains five buttons: 'Prepare Proposal', 'Change Password', 'Check Validation', 'Submit Proposal' (highlighted in dark blue), and 'Logout'. The main content area is titled 'Proposal submission' and contains the following text:

Modifications to proposals are possible at any time before the deadline, also after an initial submission. The latest version available at the deadline is considered as the one submitted. For continuously open calls, this procedure applies to the intermediate closure dates. This means that, at each intermediate closure date all proposals with the status "Submitted" will be locked and evaluated and there will be no more possibility to modify them. When resubmitting you automatically accept to withdraw the previously submitted proposal by replacing it with the new version.

By submitting this proposal the co-ordinator confirms that all necessary internal authorisations have been obtained by all participants in order to permit your organisation to submit it and that the submission complies with any internal requirements of the participants' organisations relating to the submission of such proposals. In doing so the co-ordinator accepts that the Executive Agency for Competitiveness and Innovation (EACI) takes no responsibility for the evaluation or selection of any proposal which subsequently proves not to have been authorised by the competent officials of the participants' organisation(s).

Please press the button below to have your proposal submitted.

Press this button to submit the proposal

Press on “**Press this button to submit the proposal**”.

An automatic validation check will verify the proposal. If there are no validation errors, the following will appear:



IEE Call for proposals

[Prepare Proposal](#)[Change Password](#)[Check Validation](#)[Submit Proposal](#)[Logout](#)

Validation Check

Proposal submission

The proposal with ID 290744 has been successfully submitted at 02 Feb 2011 15:13:18 Brussels Local Time

Call ID: CIP-IEE-2011

Instrument: CIP-IEE-Promo-P

Title: test proposal

Part A forms:

A1 EACI
A2 Coordinator
A2 TST
A2 test a1
A3 EACI

Part B file:

1. FundingSchemes.pdf

Checksum: f0e804206b48b562c0b6943191e925f1

Part C file:

2. ENV.xls

Checksum: 0339c22fe428d8528e0df8fa66a39f8b

Annexes:

Comments: No comments provided

[return](#)

If you receive this screen, the proposal is successfully submitted. The proposal can be modified and submitted until the closure of the call. Each subsequent submission overwrites the previously submitted version (earlier versions are not archived).

If there are blocking validation errors ("Failure"), you'll not be able to submit the proposal and get a screen like the following:



IEE Call for proposals



[Prepare Proposal](#) | [Change Password](#) | **Check Validation** | [Submit Proposal](#) | [Logout](#)

Validation Check

Validation check: FAILED

Failure: Forms A1 EACI, A2 Coordinator, A2 TST, A3 EACI have validation errors or have not been saved. Please fix before submission.

Warning: Minimum number of participants for this call is : 3

Warning: Insufficient partners from Member States or Associated States

Failure: No Part C file present

Preliminary automatic checking has detected errors.

Your Proposal cannot be submitted

[return](#)

This check is merely to ensure that all forms are complete and the basic requirements are met. It is the responsibility of the co-ordinator to ensure that the proposal meets all the eligibility requirements specified in the call for proposals

If there are "Warning" type of validation errors, then you can still proceed with the submission by supplying some relevant comments and click on the "**Submit NOW**" button:



IEE Call for proposals



[Prepare Proposal](#) | [Change Password](#) | **Check Validation** | [Submit Proposal](#) | [Logout](#)

Validation Check

Validation check: FAILED

Automatic checking reveals potential errors in the following areas:

Warning: Minimum number of participants for this call is : 3

Warning: Insufficient partners from Member States or Associated States

If you wish, you may submit the Proposal now.

If you make further modifications you may submit again before the call deadline.

[Submit NOW](#)

[Submit LATER](#)

This check is merely to ensure that all forms are complete and the basic requirements are met. It is the responsibility of the co-ordinator to ensure that the proposal meets all the eligibility requirements specified in the call for proposals

Tip

Simply uploading a new Part B file or modifying the A forms is **not sufficient**; the "submit" button (as well as the buttons on the pages that follow) needs to be pressed in order for the changes to be registered in the proposal package. Pressing the "submit" button is similar to putting the envelope in the mailbox. Proposals or modifications that have not been submitted before the deadline are not transferred for evaluation.

Important! Nearing the deadline

As 80% of the traffic occurs the last two days of the deadline, we strongly recommend that you anticipate your submission by two days in order to avoid any last minute problems.

TIP: Avoid the rush hour. Make sure that the proposal is submitted well in advance before the deadline. Check the history to verify that the correct proposal version is submitted. You can also make sure that your part B submitted is correct by downloading it back from your EPSS account.

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. Only the last submitted version will be evaluated.

Important: Once your project is submitted in its final version, please download a copy of the A forms and part B. You have a delay of 30 days after the call closure to do it. After this delay, all data will be automatically deleted of your EPSS account and you won't be able to access it anymore !

1.9 The History

By clicking on the "History" Tab, the record of all the actions performed while using the EPSS system appears. Thus it is possible for the co-ordinator to check when for example Partner 2 updated his A2 form.

An example of the history record before proposal submission:



IEE Call for proposals 

Prepare Proposal	Change Password	Check Validation	Submit Proposal	Logout
General	Proposal Setup	Part A	Part B, C and Annexes	History

Modification history

Date and time	Action / Form modified	Modified by:
02 Feb 2011 15:08:24 Brussels Local Time	Document ENV.xls (Part B2) created	Coordinator
02 Feb 2011 15:08:11 Brussels Local Time	Document ENV.xls deleted	Coordinator
02 Feb 2011 15:07:53 Brussels Local Time	Document ENV.xls created	Coordinator
02 Feb 2011 15:07:36 Brussels Local Time	Form A3 EACI modified	Coordinator
02 Feb 2011 15:07:23 Brussels Local Time	Form A3 EACI modified	Coordinator
02 Feb 2011 15:07:14 Brussels Local Time	Form A3 EACI modified	Coordinator
02 Feb 2011 15:07:04 Brussels Local Time	Form A2 TST modified	Coordinator
02 Feb 2011 15:06:59 Brussels Local Time	Form A2 TST modified	Coordinator
02 Feb 2011 15:06:14 Brussels Local Time	Form A2 EACI modified	Coordinator
02 Feb 2011 15:05:22 Brussels Local Time	Form A1 EACI modified	Coordinator

[View all history Events](#)

And after the submission:



IEE Call for proposals



Prepare Proposal	Change Password	Check Validation	Submit Proposal	Logout
General	Proposal Setup	Part A	Part B, C and Annexes	History

Modification history

Date and time	Action / Form modified	Modified by:
02 Feb 2011 15:13:18 Brussels Local Time	Proposal submitted	Coordinator
02 Feb 2011 15:12:08 Brussels Local Time	Form A3 EACI modified	Coordinator
02 Feb 2011 15:11:46 Brussels Local Time	Form A2 test a1 modified	Coordinator
02 Feb 2011 15:11:04 Brussels Local Time	Form A2 test a1 created	EPSS
02 Feb 2011 15:11:04 Brussels Local Time	Partner test a1 created	Coordinator
02 Feb 2011 15:08:24 Brussels Local Time	Document ENV.xls (Part B2) created	Coordinator
02 Feb 2011 15:08:11 Brussels Local Time	Document ENV.xls deleted	Coordinator
02 Feb 2011 15:07:53 Brussels Local Time	Document ENV.xls created	Coordinator
02 Feb 2011 15:07:36 Brussels Local Time	Form A3 EACI modified	Coordinator
02 Feb 2011 15:07:23 Brussels Local Time	Form A3 EACI modified	Coordinator

[View all history Events](#)

2 EPSS Checklist

1. Choose the Call and Sub-scheme for which you want to apply (http://ec.europa.eu/energy/intelligent/call_for_proposals/call_library_en.htm)
2. Via the IEE call page, register with EPSS in order to obtain a login and password well in advance of the call
3. Use the provided username and password to prepare and submit the proposal (<https://www.epss-fp7.org/eaci-ieee>)
4. Proposal Setup – Enter Participants
5. Fill in the Part A Forms and save the forms
6. Upload the Part B file, the Part C file and the required annexes
7. Validate the proposal.
8. **"SUBMIT" THE PROPOSAL!**

3 Note for Macintosh users

Better results can be obtained using the Mozilla Firefox Browser (you can download it from <http://www.mozilla.org/download.html>). It handles the files without their pathname.

The Mac OS 9 is not supported.