

10 minute guide

to the proposal submission – version 3.2.2

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Read this first

CONTACTING THE SERVICE DESK

The service desk is best connected by electronic mail or by telephone. Do not wait until the last moment before the deadline of your call.

Please mention the following information on every support request:

- Your telephone number and prime electronic mail
- The call and funding scheme you have applied to
- The version of the Adobe Reader
- The internet browser and version
- The operating system and version

Service desk contact details:

- The service desk is available on weekdays between 9:00 and 18:00 Brussels Time
- It can be contacted by phone at this number +32 2 29 92222
- Or alternatively by electronic mail at this address DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu

GETTING THE RIGHT SUPPORT

- For issues related to the use of the submission system, contact the dedicated service desk by: Electronic mail address: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu
Telephone: +32 (2) 29 92222
- For questions related to the content of the call itself, contact the Research Enquiry Service of the European Commission: <http://ec.europa.eu/research/enquiries>
- For issues related to installation of the Adobe Reader, contact your local information system assistance. Installing the Adobe Reader may require administrator rights on the machine you are using.
- For key information related to the call for proposals, a valuable source of information is the call fiche available from the participant portal.

Mandatory requirements

The electronic submission system of the European Commission is a web application; an Internet connection is thus mandatory. The system has been tested with a set of reference configurations. However, this does not guarantee that the system will be fully functional on your computer. A diagnostic window is provided and may warn you of possible incompatibilities.

The follow table shows the mandatory system requirements

Component	Mandatory requirements
Adobe Reader	Version 9 or above. All previous reader installations removed
Internet connexion	ADSL Line, 512 Kbps
Memory	RAM – 512 Kbytes
Screen resolution	Minimum 1024 x 768
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's run on 64bit which is incompatible with Adobe Reader 9 and 10
Note: The system is best viewed with Mozilla Firefox 3 and above		

Adobe reader

The electronic submission system of the European Commission relies on 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](#)

Account with the European Commission - ECAS

To access the system, users must obtain an account with the European Commission, as the system does not issue passwords. Users are advised to identify themselves upon accessing the participants' portal.

To create an account with the European Commission follow this link [create ECAS account](#)

Using participant identification code

All participants are required to obtain and use a participant identification code. This avoids repeating the same organisation details over and over again. It also speeds up the processing of information by the European commission services.

Notes

System performance and availability

The submission can be slow depending on a series of conditions, like the Internet access line speed, current loads on the system. Therefore, it is highly recommended to allow the system to complete the operation before starting over as this may cause the system to slow down ever further. Please if possible, report promptly any issue encountered when using the system.

Submission deadline

Do not wait until the last two days before the deadline to submit your proposal. You can submit the proposal many times before the deadline: the previous version of the proposal will be overwritten with the new one. The system issues a confirmation mail for each submission.

Draft and submitted proposals

A proposal can be at the same time in draft and in submitted status, with different contents. Upon the submit action, the draft version becomes the submitted version. You can still update the draft version with new content with one proposal already submitted.

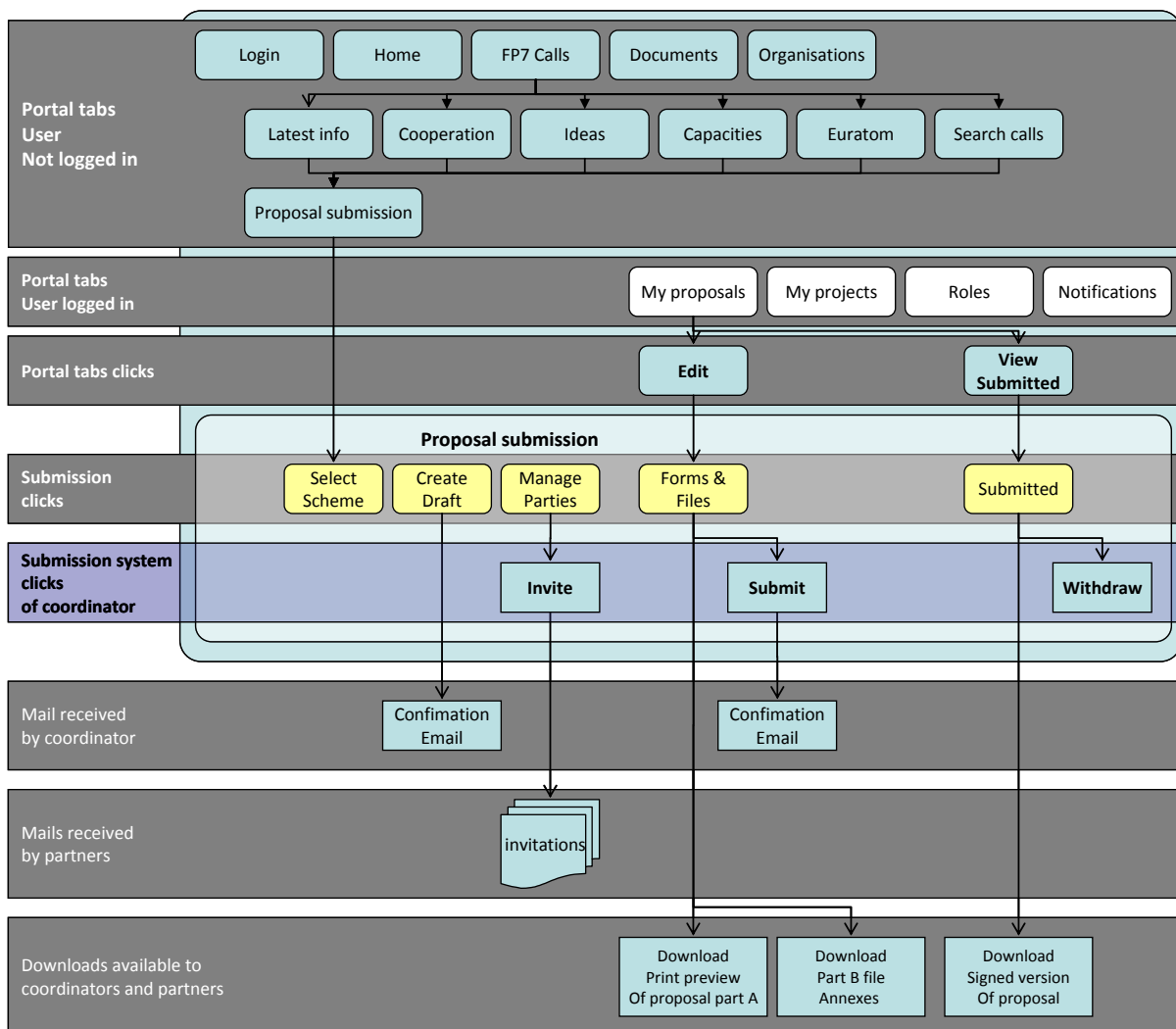
Submitting a proposal in a few easy steps

Overview of the process

Funding decisions in the Seventh Framework Programme (FP7) 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 Commission evaluates all eligible proposals in order to identify those whose quality is sufficiently high for possible funding. This evaluation is a peer-review carried out by independent experts.

The Submission system allows electronic submission of proposals, via the web. The system helps you in selecting the Funding scheme, managing the list of participants and contact details, communicating with partners of the proposal, uploading the necessary files and filling the administrative forms. Once the proposal is completed, it can be submitted, multiple times if revisions are needed, before the call deadline.

All the data uploaded is securely stored on a server to which only the proposal coordinator and the other participants in the proposal have access until the deadline. The system is built around the portal, the ECAS authentication module and the submission itself. Key interactions are depicted below.

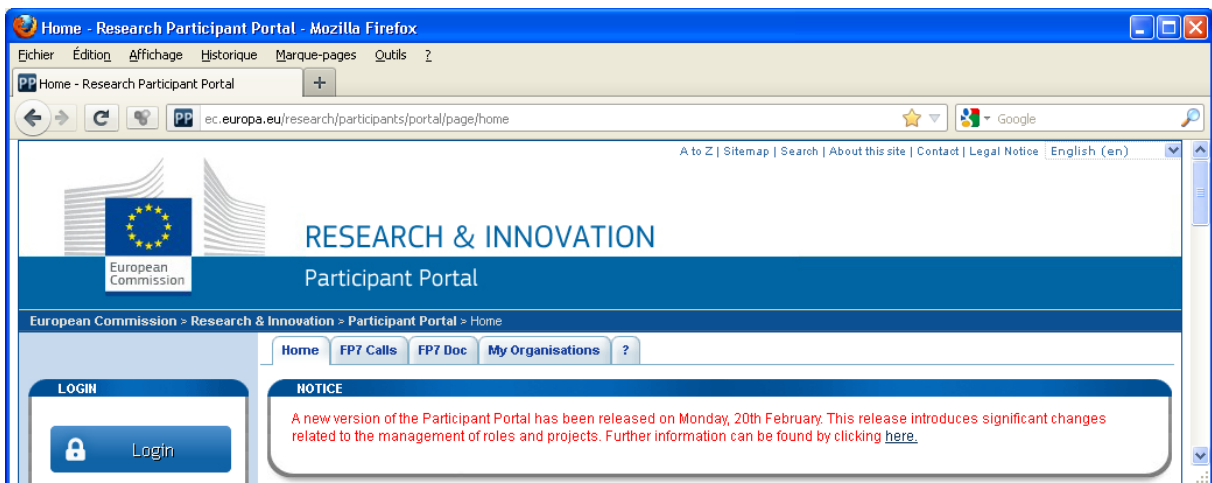


Starting the process: the portal

Submitting a proposal starts from the European Commission Research Participant Portal, a single entry for all activities in the field of research: finding opportunities, finding partners for your proposal, submitting proposals, defining the grant agreement with the European Commission services and managing costs statements, reports and payments.

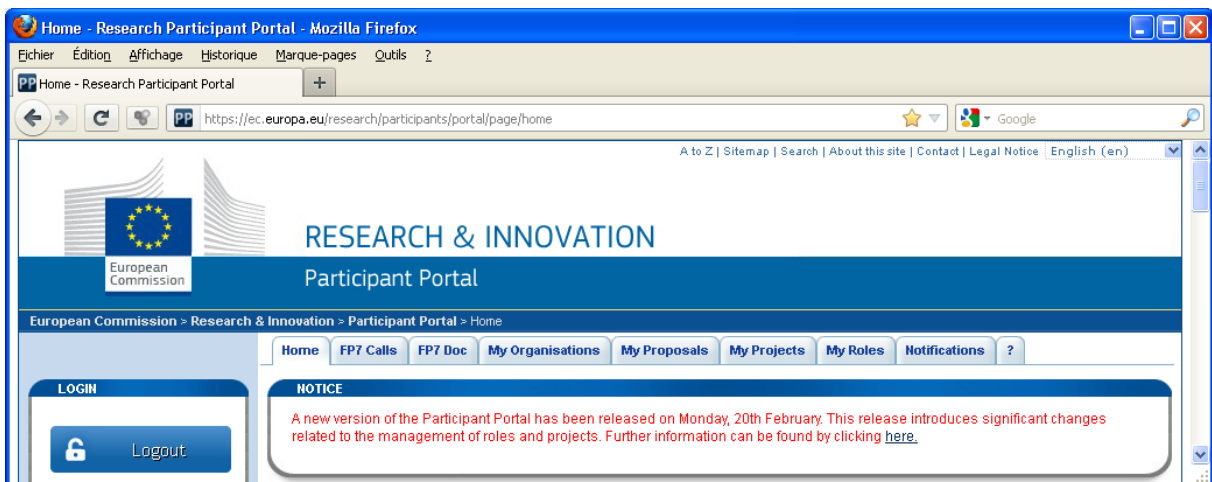
See: <http://ec.europa.eu/research/participants/portal/page/home>

Without being logged in, the functionality of the portal is reduced to a few options: finding a call, accessing basic documentation and information on organisations.



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

Being logged in, you have access to additional functionalities **My proposals** (proposals in which you are already involved), **My projects** (current projects of your organisation), **My roles** and **Notifications**. As depicted below.



Editing or withdrawing an already created proposal

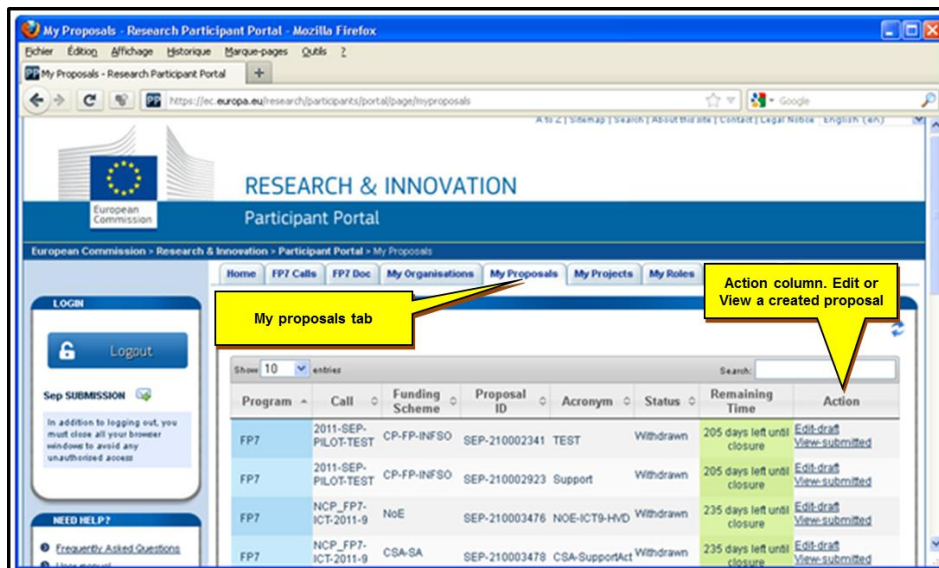
From the participant portal you can edit an already created proposal by accessing "My proposals" tab. All proposals in which you are involved will be shown; i.e., proposals you have initiated or proposals for which your contribution, as a partner or as a referee, has been requested.

Follow these steps to access "My proposals" tab,

1. Go to the Participant Portal: <http://ec.europa.eu/research/participants/portal/page/home>
2. Click on the Login button and provide your European Commission Authenticated Service (ECAS) username and password.
3. Click on the **My Proposals** tab

Besides the proposal information displayed, you can jump directly into the submission service by clicking on links located at the Action column.

Depending on the proposal status, the link takes you either to Step 5 (Edit Draft) or Step 6 (View submitted) of the submission system, where the last submission can be viewed; the same step offers the submission withdrawal.



Identifying yourself

You need to have an account with the European Commission or ECAS account to submit a proposal. The account is strictly personal and is not transferable. If you are not the proposal coordinator, this can block you at later stages.

If you already have an account - login

1. At the Where are you from? screen - Select the **Neither an institution nor a European body** option and click on the **Select** button



2. Provide your **user name and password**
3. Click on the **Login** button



If you do not have an account with the European Commission

If you do not have an account with the Commission, you can create one in a few minutes. From the Participant Portal, click on the **Register** your account to start the process.

1. Fill the required fields in
2. Click on the **Sign up** button located at the bottom of the page
3. An email will be send to the email address you have registered to confirm your registration

Coordinator, partner and referee

The roles that are available in the system are Coordinator of the proposal, Partners and Referees. Depending on the proposal you participate in, you might play some of these roles and this has an effect on the actions you may do and the information you have to supply.

For a given proposal, the coordinator acts as the single point of contact between the participants and the Commission. The coordinator is generally responsible for the overall planning of the proposal; for building up the consortium that will do the work and is always the first participant.

Note that for some calls, only one participant is needed and the participant will be the coordinator of the proposal by default.

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

The following table highlights the differences between a coordinator and partner action

Action	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

For some calls (Marie 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 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 assessment is not visible to the coordinator

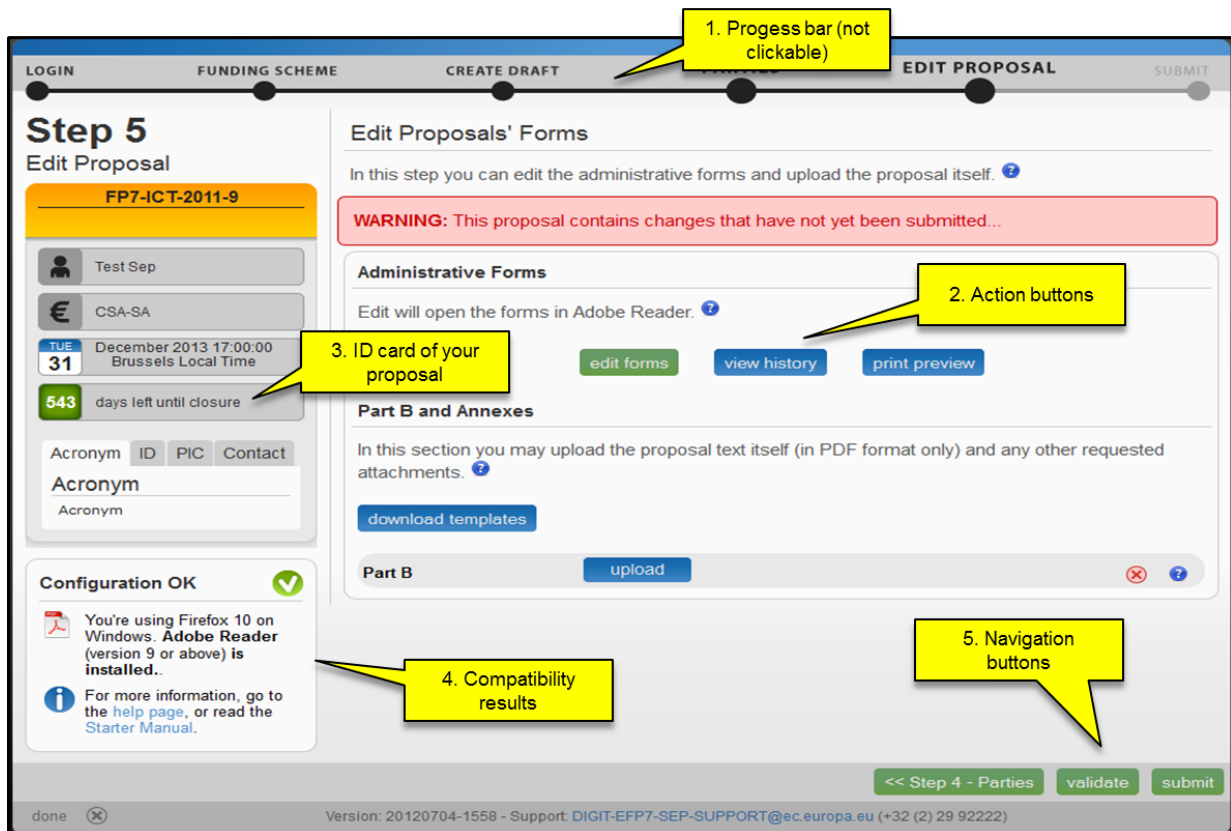
The following table highlights the differences between a coordinator (fellow) and referee actions

Action	Coordinator	Referee
Select the call	Yes	No
Invite referee	Yes	No
Write, read, submit proposal	Yes	No
Write, Read, submit assessment	No	Yes

Submission system screen

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

1. A banner giving you the completion degree of the proposal – here the proposal is in preparation.
2. Actions available on the screen.
3. On the top left side of the screen, the ID card of your proposal. The information is completed as the user progresses. Acronym, ID, PIC and contact can be clicked upon.
4. On the bottom left side of the screen, the configuration check is displayed – here, the configuration complies with the minimum requirements.
5. On the bottom right side of the screen, the navigation button



Note:

- 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, do not leave any submission session open and do not leave any PDF form saved locally in the computer.

- 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.



TIP: Please read carefully the work programme and the call fiche (both documents are posted on the Participant Portal website). Proposals are eligible under certain conditions and some of these conditions are checked by the system and may prevent submission. Error messages will be displayed.

The second step: selecting the funding scheme

Depending on the call configuration, a list of funding schemes will be presented by the site. The proposal coordinator must choose the appropriate one.

Refer to the call fiche and work programme for the various conditions applicable to each available option. After selecting the relevant option, click on **SELECT**.

Once the funding scheme, is selected; click the **NEXT** button to continue.

Prior 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 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 7th Framework Programme proposal, it is likely that the organisation has already received a PIC number. You can check it on the Participant Portal:

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

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. This takes only a few minutes.

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

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.

Note:

- If an organisation has a participant identification code, it may be likely that it has a person in charge of the administrative questions with 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's overview

Data entry

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

PIC and short name

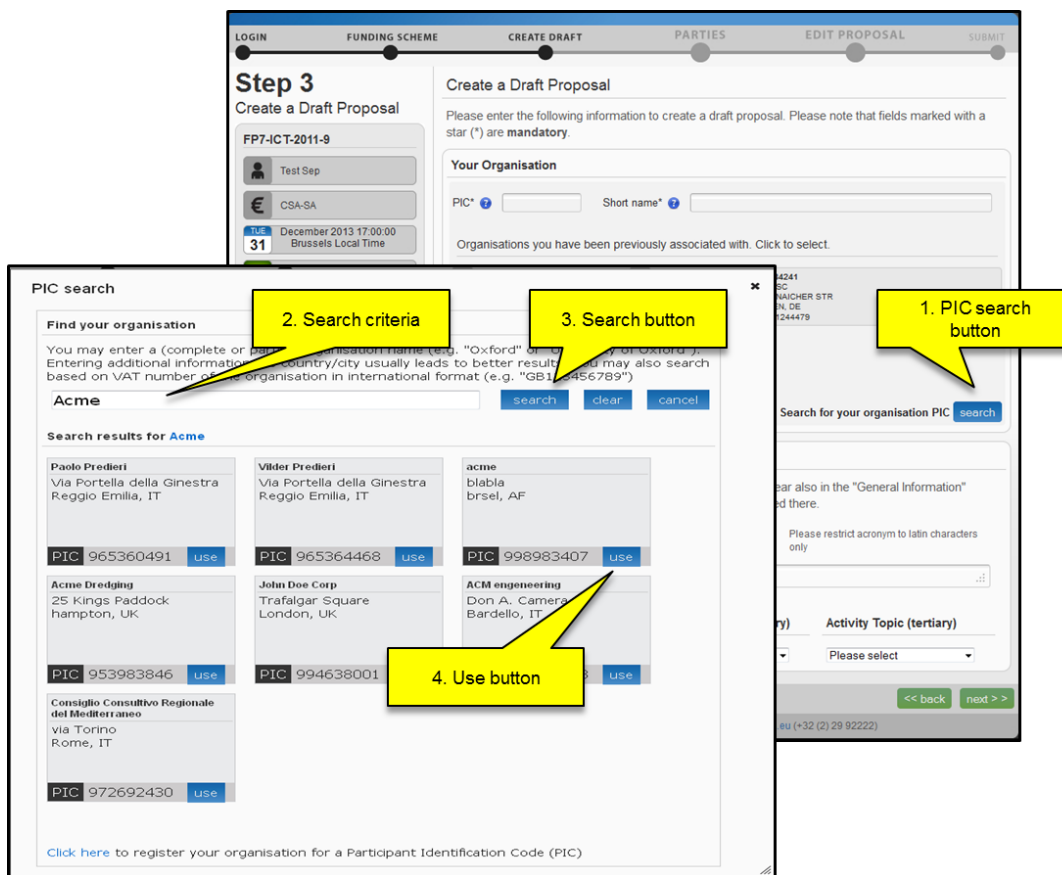
If you already know the PIC number of the prime organisation (proposal coordinator), enter it at the PIC field. The details of the organisation will be displayed and the short name of the organisation will be automatically filled in. If you need to change the short name of the organisation, use only Latin characters as the use of non-Latin or accented characters cause issues with the system down the line.

The screenshot shows the 'Create a Draft Proposal' form. The main form area is titled 'Your Organisation' and contains fields for 'PIC*' and 'Short name*'. Below these fields, a search function is shown with a list of organisations. The selected organisation is '994638001 JDC Trafalgar Square London, UK VAT: [486465445897]'. Other organisations listed include '953978414 Vides investīciju fonds' and '973484241 IBM DEUTSC'. The form also includes a 'Short Summary' field and 'Activity Topic' dropdowns. A 'SEARCH' button is visible at the bottom right of the search results area.

PIC search function

If you don't know the PIC number, a search function is offered. To search for an organisation PIC number, follow these steps:

1. Click on the PIC **SEARCH** button
2. At the PIC search pop-up window enter one of the following information:
 - a. The usual short name of the organisation, used for naming the website
 - b. The VAT number, whenever the VAT is applicable
 - c. The legal name of the organisation
3. Click on the **SEARCH** button. The system display the best entries
4. Click on the **USE** button to select the organisation



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 'xxx' at this stage should they prefer not disclosing any data.
3. The evaluation related codes, the activity code, 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.

Your Proposal

Please choose a short summary 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: 126

The purpose of the short summary is to provide your readers with an easy-to-understand summary of the entire proposal's focus.

Activity Topic (primary)*	Activity Topic (secondary)	Activity Topic (tertiary)
<input type="text" value="Digital Preservation [ICT-2(]"/>	<input type="text" value="Digital Preservation [ICT-2(]"/>	<input type="text" value="ICT [ICT]"/>

<< back
next >>

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NEXT to continue

Click on the **NEXT** button to continue. The set of administrative forms for the proposal will be created, once the proposal is created, there is no way to change the funding scheme or activity code. 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 issue a creation confirmation mail to the coordinator of the proposal.

The fourth step: managing other participants to the proposal

At this step the proposal coordinator will set up the consortium. The proposal coordinator can:

- **Add other participants** to the proposal. A search function is offered as in step 3, in order to insert the participant code in the administrative forms and copy the most up to date information for you. This information will be completed with contact details – multiple 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. Drag the participant from its original position and drop it at the new position with the mouse.

The proposal coordinator however cannot be deleted, and is always the first participant.. The proposal in preparation cannot be deleted from this point. Only submitted proposals can be withdrawn.

For Marie Curie calls – People specific programme

Participants to Marie Curie calls may invite up to three referees. The referee is a physical person that will inform the European Commission on the good standing of the participant. However, the referee is not requested to contribute to the proposal itself, 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 additional contact points are offered as convenience in order to guarantee continuity of proposal building should a person be absent. Such a facility is needed as the password system is linked to a person and no longer to a proposal.

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

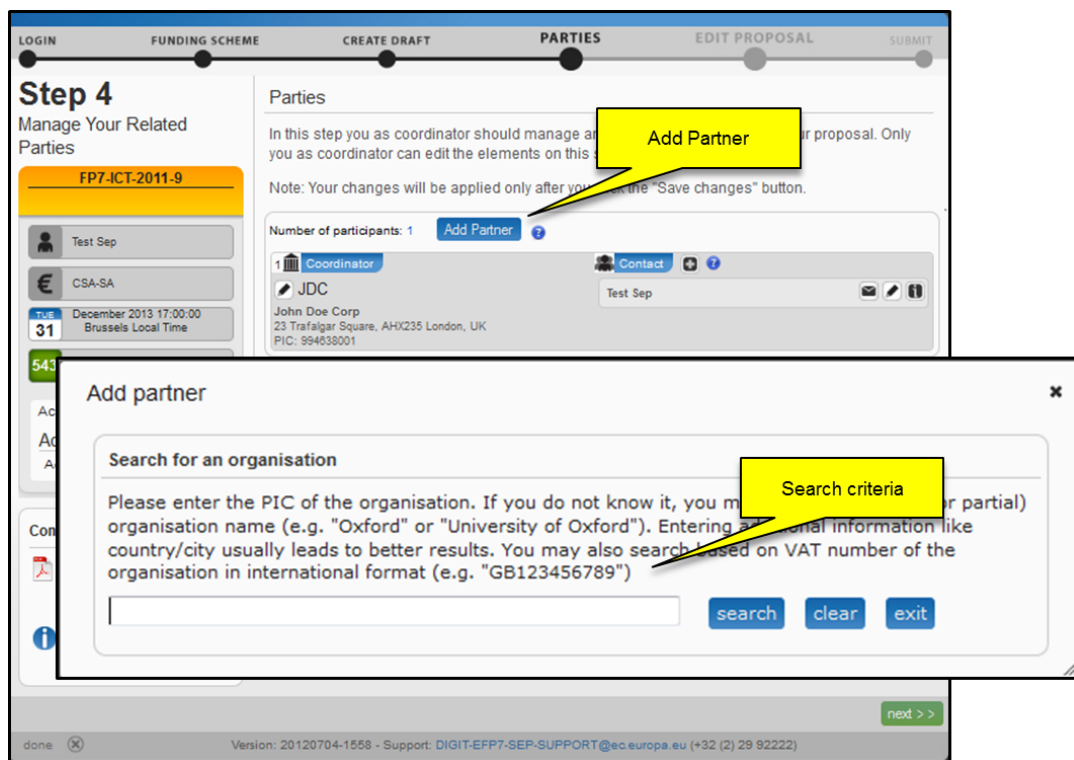
For two stage calls, first stage: simplified submission

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. Refer to the call fiche for details. 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.

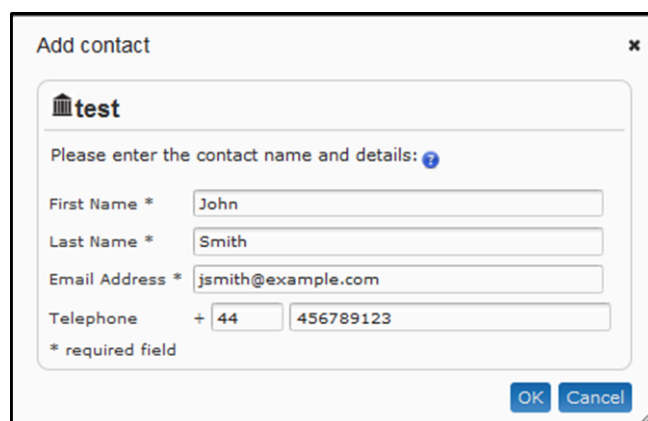
Add participating organisation / referee

To add a participating organisation to your proposal,

1. Click on the **ADD PARTNER** button, same search function as in the third step is offered.
2. Follow the same instructions given on the third step to search and select an organisation.



3. Once you have selected your partner organisation a contact person pop-up window is displayed. Here you can enter the contact person information. Fill in the requested information, following the next recommendations and click on the **OK** button
 - a) Names (First Name & Last Name)
 - b) Email Address must be in email format
 - c) Telephone must be in international phone number format



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

The screenshot shows the 'Parties' management interface. On the left, there is a sidebar with 'Step 4 Manage Your Related Parties' and a funding scheme 'FP7-ICT-2011-9'. The main area displays a list of participants. The first participant is 'JDC' (Coordinator), and the second is 'test' (Partner). A yellow callout box points to the 'X' delete button on the 'test' participant line. The interface includes a navigation bar at the top with 'LOGIN', 'FUNDING SCHEME', 'CREATE DRAFT', 'PARTIES', 'EDIT PROPOSAL', and 'SUBMIT'. Below the participant list, there is a 'Number of participants: 2' and an 'Add Partner' button. The 'test' participant details include a contact name 'John Smith' and a SQL query: 'SELECT global_name FROM global_name, hhh htr, LU PIC: 995337856'.

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.

The screenshot shows the 'Parties' management interface with three participants. The first is 'JDC' (Coordinator), the second is 'John Doe Corp' (Partner), and the third is 'test' (Partner). A red box highlights the 'test' participant line, and a yellow callout box points to it with the text 'Drag and drop'. The interface includes a navigation bar at the top with 'LOGIN', 'FUNDING SCHEME', 'CREATE DRAFT', 'PARTIES', 'EDIT PROPOSAL', and 'SUBMIT'. Below the participant list, there is a 'Number of participants: 3' and an 'Add Partner' button. The 'test' participant details include a contact name 'John Smith' and a SQL query: 'SELECT global_name FROM global_name, hhh htr, LU PIC: 995337856'.

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 first participant contact is pushed into the administrative form 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



Add contact

test

Please enter the contact name and details: ?

First Name *

Last Name *

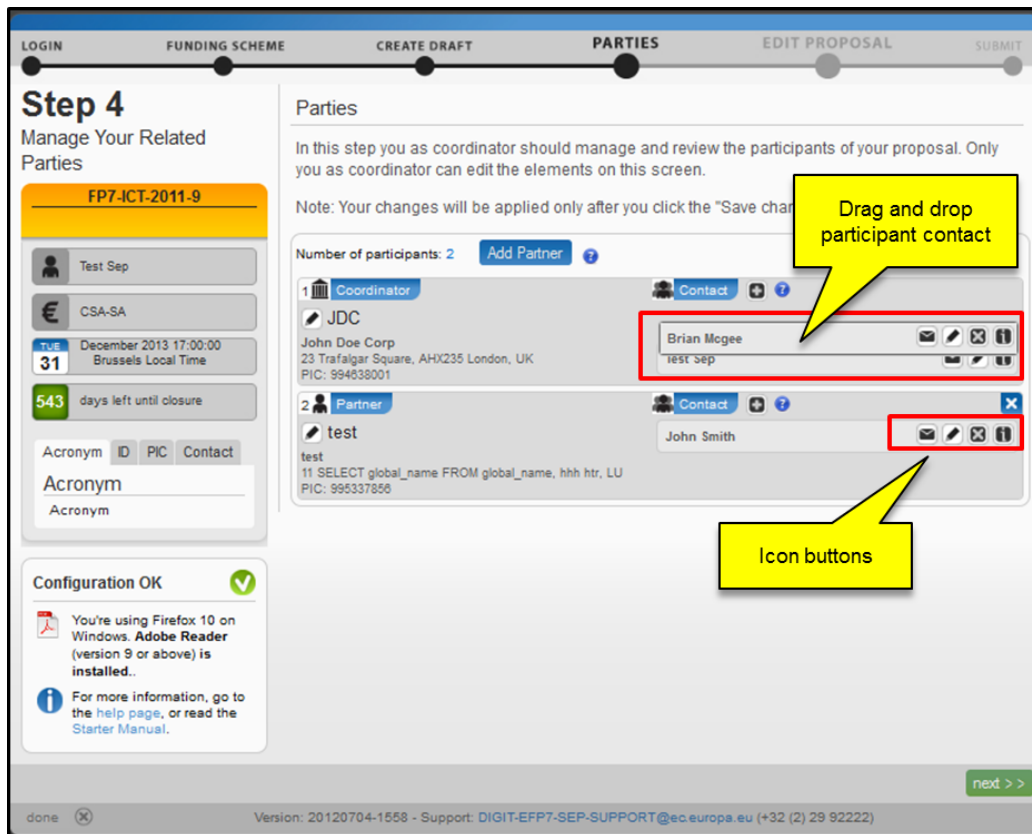
Email Address *

Telephone +

* 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.



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.

Button (icon)	Action
Error! Objects cannot be created from editing field codes.	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
Error! Objects cannot be created from editing field codes.	Edit contact person information
Error! Objects cannot be created from editing field codes.	Delete contact person information. This will immediately cancel the access of this person to the proposal
Error! Objects cannot be created from editing field codes.	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. At the top, a progress bar includes 'LOGIN', 'FUNDING SCHEME', 'CREATE DRAFT', 'PARTIES', 'EDIT PROPOSAL', and 'SUBMIT'. The main heading is 'Step 5 Edit Proposal' for 'FP7-ICT-2011-9'. A sidebar on the left shows 'Test Sep', 'CSA-SA', a date of 'TUE 31 December 2013 17:00:00 Brussels Local Time', and '543 days left until closure'. The main content area is titled 'Edit Proposals' Forms' and includes a red warning: 'proposal contains changes that have not yet been submitted...'. Below this are buttons for 'edit forms', 'view history', and 'print preview'. A section titled 'Part B and Annexes' contains instructions to upload proposal text and attachments, with a 'download templates' button. A 'Part B' upload area has an 'upload' button. At the bottom, there are '<< Step 4 - Parties', 'validate', and 'submit' buttons. A footer shows 'Version: 20120704-1558 - Support: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)'. Yellow callouts point to: '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').

Note

- 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

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.

On the other hand, editing the PDF form in offline mode means that your configuration system does not fulfil the submission system minimum requirements. Under this condition the PDF form will be opened up outside the browser. The Reader will submit the form directly to the server. You will have to close the Reader window to continue working with the system.

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.

Forms

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.

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

Go to (drop down list), this allows you to go to the PDF form sections in one click. In order to avoid moving up and down the PDF form.

Show button takes you to the selected section of the proposal

The screenshot shows a PDF form titled "Proposal Submission Form" for the European Commission. The form includes a "Table of contents" section with a table listing sections A1 (Content) and A3 (Budget), and a "Section A2 - Participant Name" table with two rows. A "Go to (drop down list)" button is highlighted in yellow, and a "Show button" is also highlighted in yellow.

Section	Title	Status	Action
A1	Content		Show
A3	Budget		Show

Section A2 - Participant Name		PIC	Status	Action
1	John Doe Corp	994638001		Show
2	test	995337856		Show

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

The screenshot shows a web form with two main sections. The first section, 'Administrative data (legal address)', contains several input fields: 'Street name' (Trafalgar Square), 'Number' (23), 'Town' (London), 'Postal Code / Cedex' (AHX235), 'Country' (United Kingdom), and 'Internet homepage' (http://www.acme.com). The second section, 'Status of your organisation', includes a 'Change this data' button (highlighted with a red box), a paragraph of text, and four rows of radio button options for 'Yes' and 'No' under the categories: 'Non-profit organisation', 'Public body', 'Research organisation', and 'Higher or secondary education establishment'. At the bottom of this section is a text field for 'Main area of activity (NACE code)' containing 'Legal, accounting, auditing, consultancy'. At the very bottom of the form are two buttons: 'Validate Form' and 'Save and close', both highlighted with red boxes. The footer of the page reads 'Multi.pdf - v1.109 - 20120628' and 'Page 4 of 13'.

Change this data: This button allows you to change the status of your organisation data, if it is not correct. Note that the changes will be used only at the proposal submission stage.

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

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

View history

Click on the **VIEW HISTORY** to see in details the list of all system and user actions. This allows the coordinator to verify that partners have updated their forms and allows partners to verify that the coordinator has submitted the proposal in a timely fashion.

Print preview

The **PRINT PREVIEW** button allows you to download the proposal and save it locally on your computer. The only difference with the option available from the reader resides in the fact that you have downloaded a copy. This copy can be sent to participants or retained for archiving purposes.

Download templates

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

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

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

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

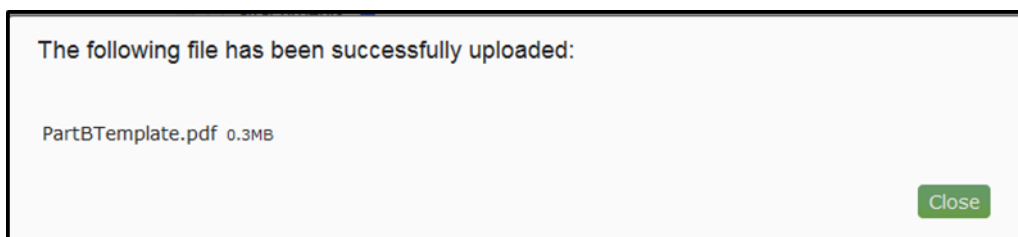
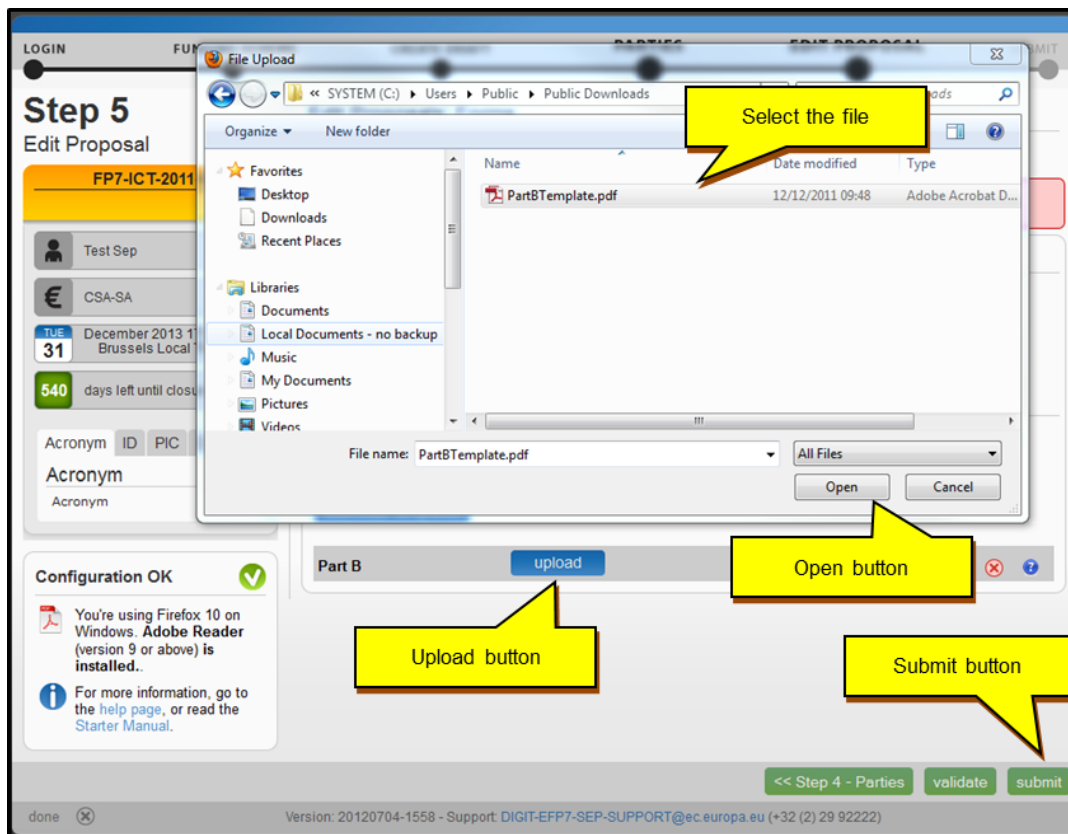
Upload files

Uploading the complete files might take a few second or minutes, depending on the speed of your Internet connection. At the end of the upload, a confirmation message is shown and an entry is created in the history log. The mandatory requirements are:

1. For the proposal Part B must be in PDF format, compatible with Adobe version 3 or higher, with embedded fonts. Other file formats will not be accepted by the submission system. Irrespective of any page limits, there is an overall limit of 10 Mbytes to the size of proposal file Part B. It is advised to limit the size of the proposal to 2 Mbytes.
2. The file name of the Part B file must be limited to alphanumeric characters (A-Z, 0-); special characters must be avoided.
3. Clean your document before converting it to PDF (e.g. accept all tracked changes, delete internal review notes).
4. Check that your conversion software has successfully converted all the pages of your original document (e.g. there is no problem with page limits, with tables or graphics).
5. Check that your 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. The printable zone on the print engine is bounded by 1.5 cm right, left, top bottom. No scaling is applied to make the page "fit" the window. Printing is done at 300 dots per inch.

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

1. Click on the **UPLOAD** button
2. Select the file from the file upload system window
3. Click on the **OPEN** button.
4. At the confirmation message click on 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.

Once there is a consolidated version of the proposal, the **SUBMIT** button must be pressed. The system performs a limited automatic validation of the proposal. A list of any problems such as missing data, wrong file format or excessive file size will then appear on the screen. Submission is blocked until these problems are corrected. When corrected, the coordinator must then repeat the above steps to achieve submission. If the submission sequence described above is not followed, the Commission considers that no proposal has been submitted.

When the proposal is successfully submitted, the system will proceed to Step 6 where message that indicates that the proposal has been received is displayed. The system also sends a submission confirmation e-mail to the

proposal coordinator, with the details of the submitted proposal. The mail can end up in the spam folder or be blocked by the anti-spam system of your organisations

Submission is deemed to occur at the moment when the proposal coordinator completes the submission sequence described above. It is not the point at which the upload of the part B is started. 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 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 advised not to wait until the final moment to perform these operations. Every time you upload a new Part B document you must click on the submit button in order to save your changes.

The sixth step: proposal submitted page

Reaching this step means that the proposal is submitted (i.e., send to the European Commission services for evaluation). It does not mean that the proposal is valid, complete, and eligible in all aspects or that it will be funded. In Step 6 you can:

Revise proposal

Re-edit the proposal, going back to step 5. The coordinator may continue to modify the proposal and submit revised versions overwriting the previous one right up until the deadline.

Download submitted proposal package

Download the proposal. It is advised to download the proposal once submitted to check that it has been correctly sent. The downloaded proposal will be digitally signed and time stamped. Depending on the system load, this facility may take some time before being available.

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.

Successfully submitted message

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/downloaded. 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.

Revisit your Proposal

Revise proposal

Download proposal

Withdraw proposal

re-edit proposal

download

withdraw proposal

<< back

done Version: 20120704-1558 - Support: DIGIT-FP7-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 proposal draft will be kept by the system and the withdraw action may be reversed by resubmitting the proposal before the deadline. A reason for the withdrawal will be requested by the system. When a proposal is withdrawn a message is displayed on the Step 6 screen

The status will be shown on the **My proposals** tab of the participant portal.

The screenshot shows the 'Step 6 Submit' page of a proposal submission system. The navigation bar at the top includes 'LOGIN', 'FUNDING SCHEME', 'CREATE DRAFT', 'PARTIES', 'EDIT PROPOSAL', and 'SUBMIT'. The main content area is divided into several sections:

- Submission Confirmation:** A green box states 'Your proposal has been successfully submitted' with details: '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 throughout the evaluation process.'
- Withdrawal Notice:** A red box states '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'. A yellow callout bubble labeled 'Withdrawn message' points to this box.
- Revisit your Proposal:** A section with two buttons: 're-edit proposal' and 'download'. Text explains that the proposal can be re-submitted before the deadline of 31 December 2013 at 17:00:00 (Brussels Local Time) and that a PDF version can be downloaded.
- Configuration and System Info:** A 'Configuration OK' status with a green checkmark, a note about Firefox 10 and Adobe Reader, and a link to the help page or starter manual.
- Left Sidebar:** Contains 'FP7-ICT-2011-9', user 'Test Sep', currency '€ CSA-SA', deadline '31 December 2013 17:00:00 Brussels Local Time', and '544 days left until closure'. Below this are fields for 'Acronym', 'ID', 'PIC', and 'Contact'.

The footer of the page includes 'done', a version number '20120704-1558', and support contact information: 'Support: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)'. A '<< back' button is located in the bottom right corner.

Contributing to a proposal as a partner

When the proposal coordinator invites you to participate to a proposal, you receive an electronic invitation (e-mail) with the proposal details and a **link** to access the participant portal.

Remember that in order to access the 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 submission system, the step 5 of the submission process is displayed and you are able to access the electronic administrative forms by clicking on the **EDIT FORM** button, and the rest of the proposal package. To access the consortium contact details, click on the **BACK** button. This will bring you at step 4 of the system.

Completing forms

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

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

When you finish, make sure that no validation errors are left. To do this 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 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.

In order to submit your assessment letter,

1. Click on the link received by electronic mail.
2. A form will be downloaded to your computer.
3. Fill the form as requested or 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 call fiche. Calls deadlines are absolutely firm and are strictly enforced. Only the last submitted version will be evaluated, overwriting the previous one. After the call deadline, the proposal can no longer be modified nor can participants be invited. Practice the submission action well before the deadline.

The proposal remains accessible in read only fashion, from step 6 – “Signed proposal download” - for the coordinator and for the proposal's participants that were invited before the deadline.

Final checks before 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 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 before). You can continue to improve it with regular resubmissions of improved version.

- The submission button is available on step 5. Have pressed on submit? Have you reached step 6 without errors or warnings issued by the system?
- From 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; usually, calls do close at 17:00:00, Brussels time.

Following submission deadline

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

Messages at submission action

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

- The number of partners is insufficient. This will not block submission but you will be requested to provide information on why you think the proposal is eligible.
- Other messages may also be displayed.

Frequently asked questions

What are the differences with the EPSS (the previous submission system)?

The participant portal submission system (PPSS) differs from the EPSS for service and support request. Contact details have changed. Next, the system relies on the Adobe Reader.

Which system will be used for the research proposals calls?

The Participant portal submission system will be the mainstream submission system starting July 2012. The EPSS will be gradually phased out.

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

You need to create an account with the Commission, from the participant portal in order to access the submission system and other information systems dealing with proposals and research projects. There is no mailing of passwords.

It was recommended, but not required for an organization to be in the possession of a PIC code in proposal submission stage. This has changed?

It is required to have a PIC in order to submit a proposal. Getting a PIC is a simple process that takes five minutes to complete. Note that the PIC code which is requested 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. The Reader 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 the standard behaviour. Adobe Reader will NEVER connect to an external site without approval of the user because of security reasons. This behaviour cannot be overridden. Obviously, you can check the "remember my action" checkbox to dismiss the message the next time.

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

To disable this message, please:

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

Why PDF form can be opened in Adobe Reader on iPad, and not 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 downloading the submitted proposal:

- *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"

Most of the times, 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 the version 9 or 10 of the reader

Contact your local service desk support; probably you don't have administration 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 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 a diagnostic on 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 is opening, but I only can 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 contact the Submission Service Desk.

How to change the primary proposal coordinator

To change the primary proposal coordinator please refer to the pages 22 and 23 of this manual

Glossary

Call fiche

The part of the work programme giving the basic data for a call for proposals (e.g. topics covered, budget, deadline etc.). It is posted as a separate document on the Participant Portal web pages devoted to a particular call.

Coordinator

The coordinator leads and represents the applicants. He or she acts as the point of contact with the Commission.

Deadline

For a particular call, the moment after which proposals cannot be submitted to the Commission, and when the Submission system closes for that call. Deadlines are strictly enforced.

ECAS

The Commission's Authentication Service, it is the system for logging on to a whole range of web sites and online services run by the Commission. Once you've used ECAS to log on to a website or service, you won't have to identify yourself again as long as you leave your browser open.

LEAR (Legal Entity Appointed Representative)

The LEAR is a person nominated in each legal entity participating in FP7. 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

The Part of a proposal dealing with administrative data, this part is completed using the web-based Submission system

Part B

The part of a proposal explaining the work to be carried out and the roles and aptitudes of the participants in the consortium, this part is uploaded to the 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 FP7 will progressively be assigned Participant Identification Codes (PIC). Possession of a PIC will enable organisations to take advantage of the Unique Registration Facility and to identify themselves in all transactions related to 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.

SEP

This stands for submission and evaluation of proposals – SEP. The actual submission system name is PPSS – participant portal submission system.

Unique Registration Facility (URF)

A system that will allow organisations who intend to submit on several occasions to register their details once and for all, obviating the need to provide the same information with each submission. The Web interface of the URF is found at <http://ec.europa.eu/research/participants/urf>. On this website you will also find a search tool to check if your organisation is already registered or not.

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