Proposal

Submission Service

User Manual

EU Funding Programmes 2021-2027

23/04/2024

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Chapter 1: Introduction

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

Document scope

The purpose of the Proposal Submission User Manual is to describe how Participants can prepare and submit a Proposal using the Submission system.

Document structure

The following sections of information are available:

- *Chapter 1: Introduction* provides information and links to the relevant resources, a high level description of what you will need to prepare prior to your submission, a list of user actions, and contact and support information.

- *Chapter 2: Submitting your proposal through the online submission system* provides step-by-step guidance on how to submit your information using the Commission's online system.

- *Chapter 3: Reference guide to screens, roles & access to user actions* describes the screens and the basic tasks you can perform using the system, as well as a description of the user roles in the system.

- *Appendix A: Compatibility & system configuration* provides general information on recommended system configuration to be used for the submission of your proposal.

- *Appendix B: Registration* provides instructions on how to register a new account with the European Commission Authentication Service (EU Login).

  The *Glossary* section contains descriptions of the most common specialised terms that you might come upon in this document.

The proposal submission process

Learning about the EC Grants proposal process

It is very important that you familiarize yourself with the overall research and innovation grant process by first consulting the How to participate page on the Funding & Tenders Portal. There you will find a wealth of information including the Online Manual and numerous Reference Documents, the Participant register, and a comprehensive set of support documentation. Please read through all these resources prior to starting your Submission process.

Proposal submission preparatory checklist

In preparation for your online application submission process, you must go through the following steps:

1. Decide on the funding opportunity that you want to apply for Funding Opportunities are categorised as Calls, Topics and Types of Actions.
2. Select your Participants. Most calls require a consortium. Relevant information can be found on the Funding & Tenders Portal.
3. Register as a user in the European Commission Authentication Service (EU Login). For instructions also see Appendix B at the end of this document.
4. All organisations participating in a proposal must register in the Participant register through the Funding & Tenders Portal and receive a Participant Identification Code (PIC). Additional information is available in the IT How To.

Quick steps to the online submission process

The following basic tasks summarize in the online submission process. Refer to Chapter 2 for the detailed step-by-step procedures:

1. Log into the Funding & Tenders Portal and select your topic.
2. Create a draft for your proposal.
3. Manage Participants (i.e. proposal consortium). The participants will be invited to the process by the system.
4. Edit the proposal draft form, download templates and complete all required information. Engage the other participants to maintain their organisation contacts and the details in the corresponding sections of the proposal form Part A.
5. Upload Part B and the rest of annex files and submit your proposal.
6. Following submission, you can update, download or withdraw your proposal until closure date is reached.

Accessing your draft and submitted proposals

You can access your saved proposal drafts as well as your submitted proposals at any time, from the My Proposal(s) page in the Funding & Tenders Portal (you must be logged in).

Contact and support

For any IT-related problems that you might experience with the submission system, please contact the IT Helpdesk using the form below, and selecting the domain **Submission of proposals**:

IT Helpdesk contact form in the Funding & Tenders Portal

Once you have started the submission process, additional contact information is available at the different screens of the wizard.

Chapter 2: Submitting your proposal through the online submission service wizard

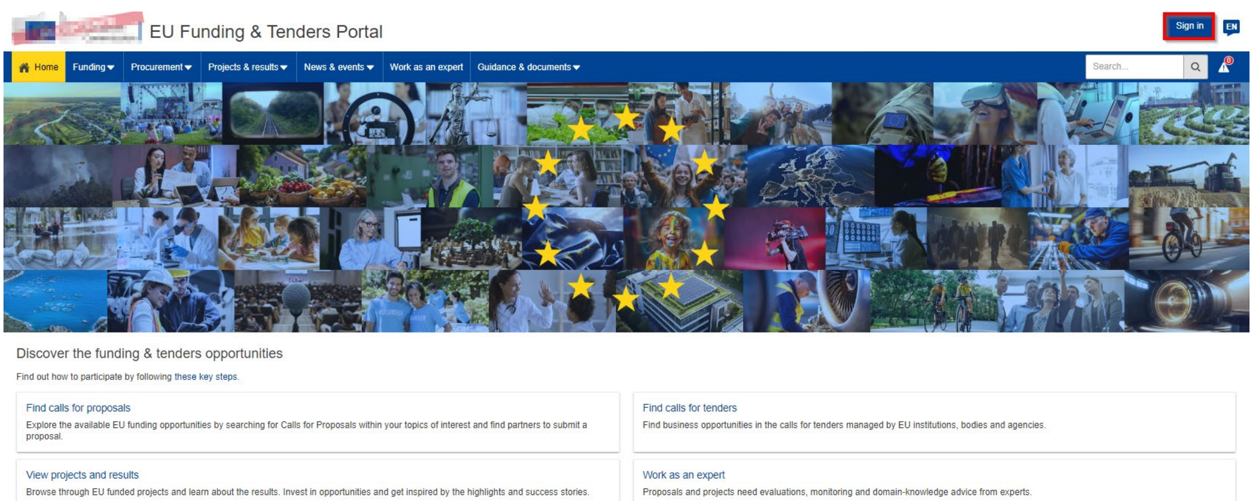
Once you have your EU Login username and password, your PIC and the other participants PICs, you can start the submission process by logging into the Funding & Tenders Portal and using the European Commission online submission service wizard.

The submission process consists of 5 differentiated steps. Please, see below the different actions to be taken for each one of these steps.

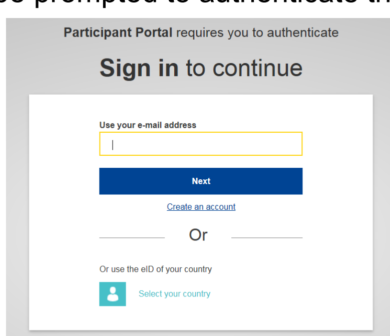
Log in

To log in, perform the following steps:

1. Go to the Funding & Tenders Portal (F&T Portal): https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home



2. Click the **Login** button. You will be prompted to authenticate throgh the **Sign in** screen:



Selec your topic

1. Once logged into the Portal, you will need to select the call topic for which you will submit your proposal.

Note: A Programme comprises many Calls and each Call can have one or more Topics. A submitted proposal is always for one Topic and one Type of Action.

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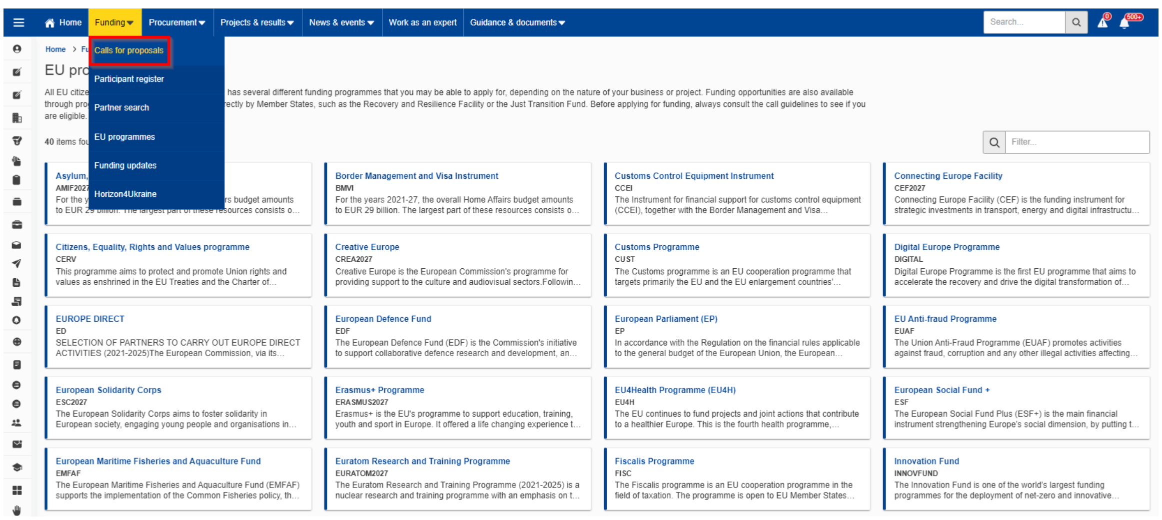
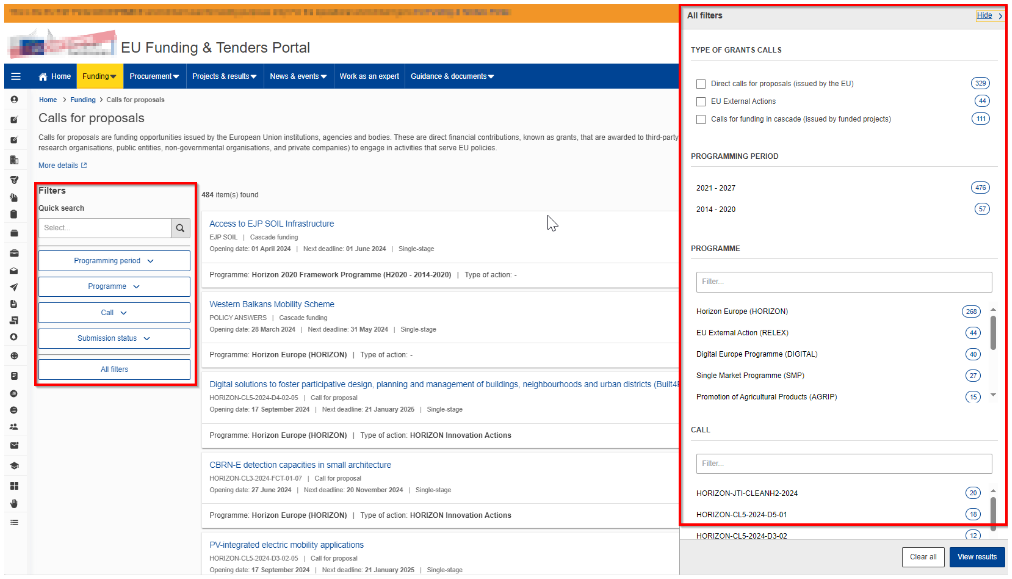
2. Click on **Funding, then Calls for proposals**:

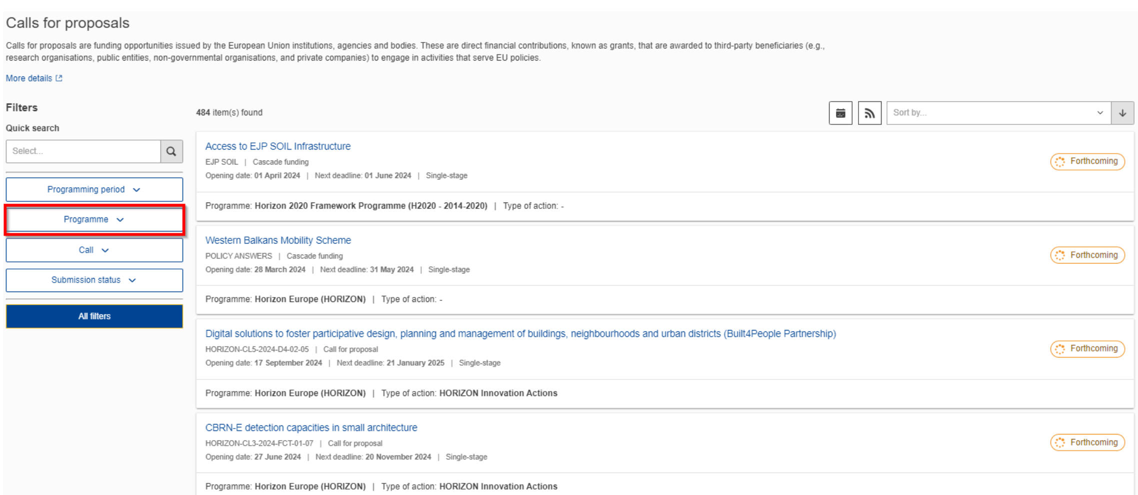


3. Filters are displayed on the left side, . Click All Filters and advanced search criteria are displayed on the right side.:



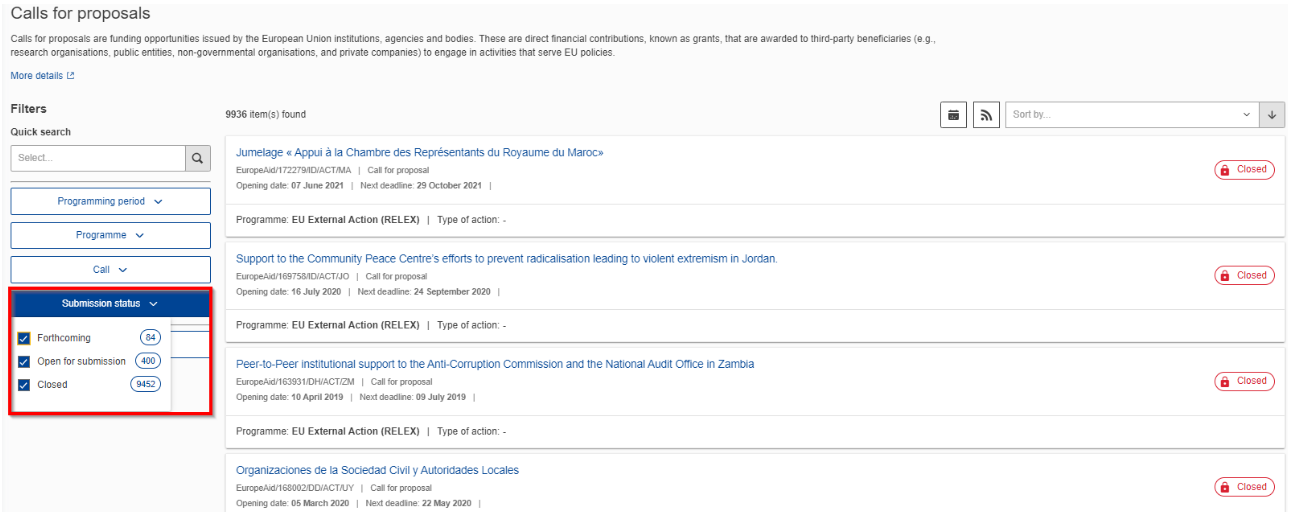
4. Then use the different filters. You can use one filter or combine several ones. This is a description of the different available filters:

   Programme filter: select a specific programme from the list (only one programme can be selected for each search).

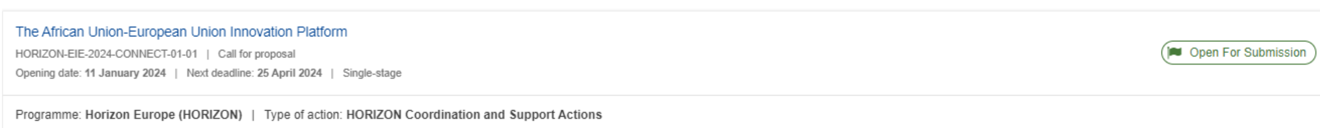


   Some programmes may contain further filtering options, whereas other programmes do not contain any further filtering options.

   Status: to filter the results by status, tick the corresponding status under **Submission status**. By default, **Forthcoming** and **Open for submission** are already selected. A tick means that the status is included in the search. Click on it to select or unselect it:



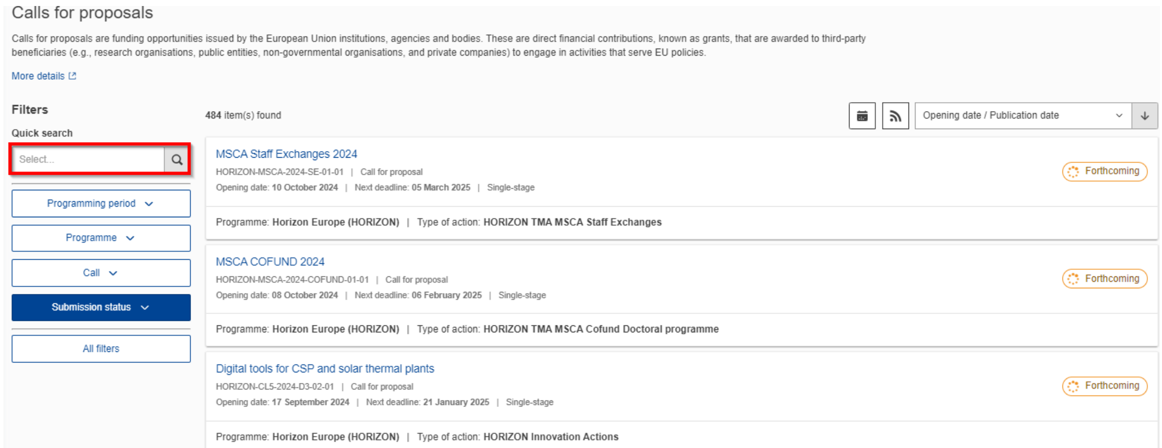
Text search: to search by a keyword, type a relevant word in the box on the top of the **Filter menu** and click on the magnifier icon, or hit **Enter** in your keyboard, to perform the search. The results are shown as topic cards on the right of the screen, which are overviews of each topic. Check this example where the different elements of topic cards are outlined:



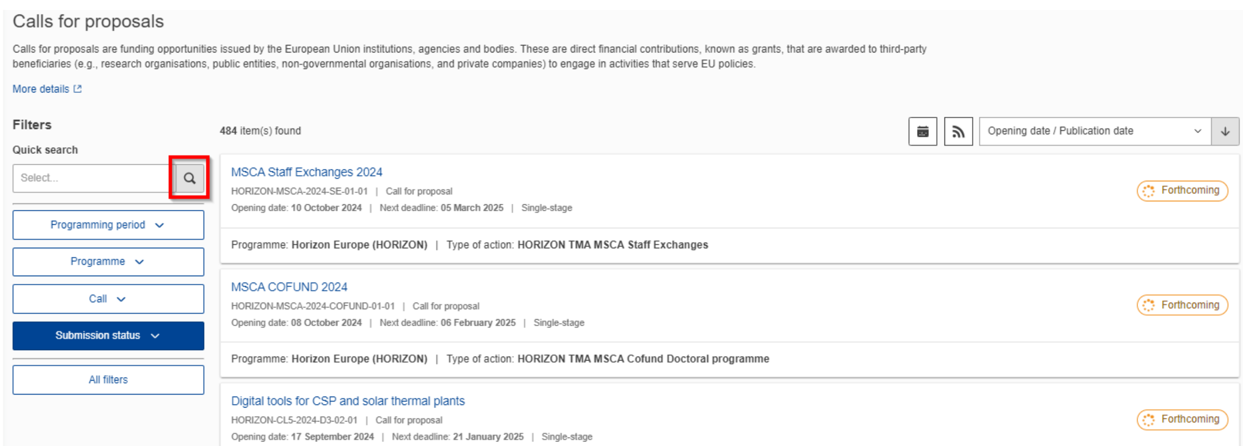
The input provided in the search box looks for 2 different types of matches:

- Matches for any text appearing in the topic card.
- Matches for keywords.

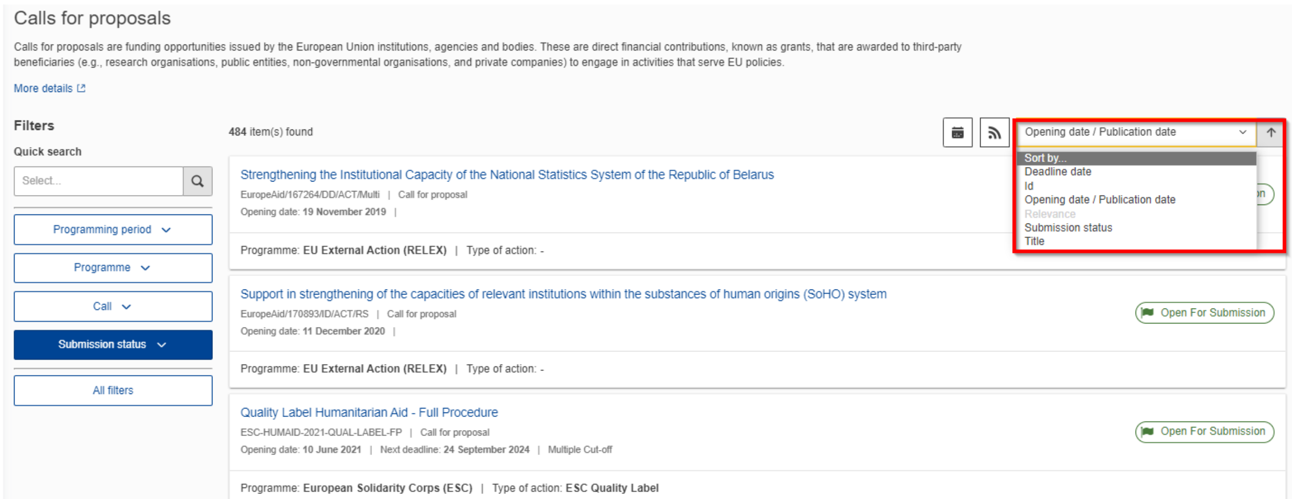
⚠ CPV code refers to keywords in the context of tenders. In the domain of funding opportunities, we use keywords.



After typing the keyword, press on the Search icon to see the list of matching calls.



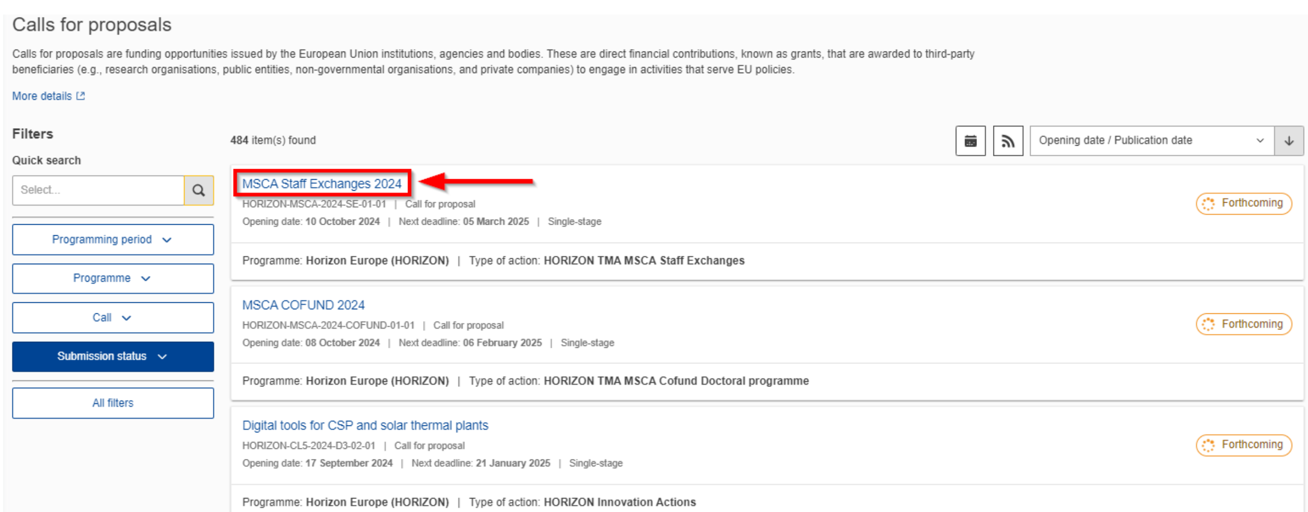
When you have obtained a list of results, you can use the **Sort by** options on the top to display them by opening date, title, ID or deadline. By default, results are displayed by Submission status:



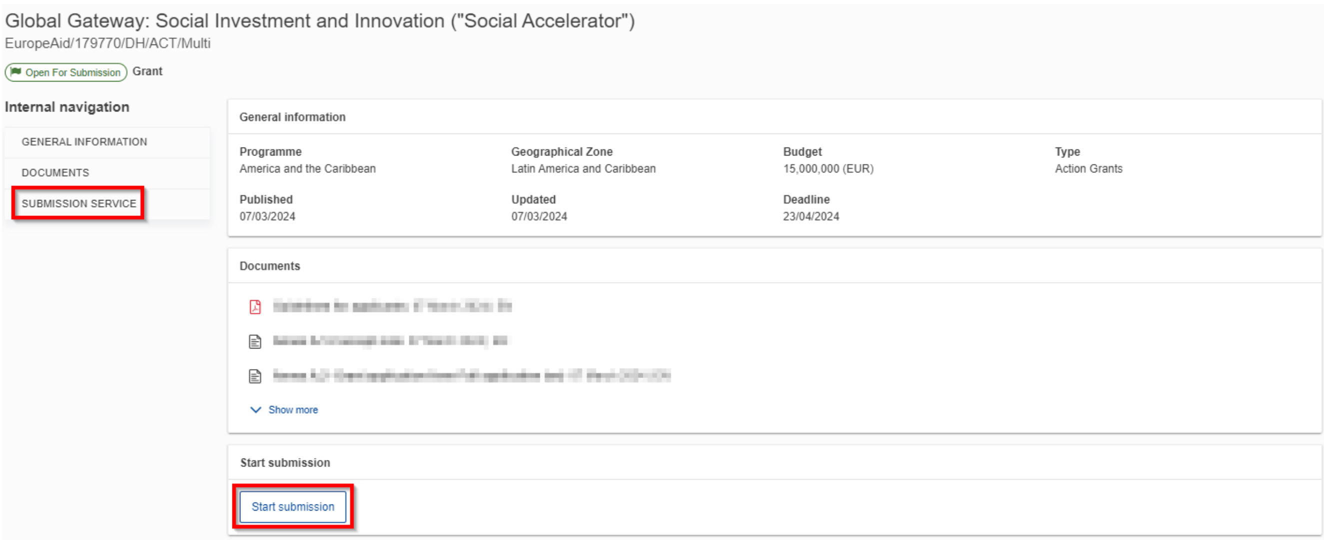
Also, please note that this field can be used to search not only on keywords, but on the text of the call page. Therefore, if you know the topic ID or the topic name, you can type it directly in the box without the need to select a programme first.

Access the topic page

Click on the topic title to access the call page:



5. Either scroll down in the call page to the **Start submission** section, or select **Submission Service** in the table of contents on the left. Then click on **Start Submission** button, see Submit a proposal for more information:

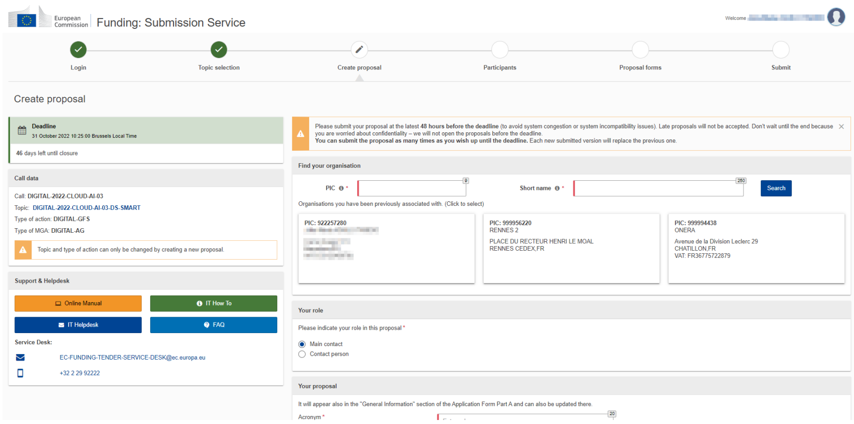


Create proposal

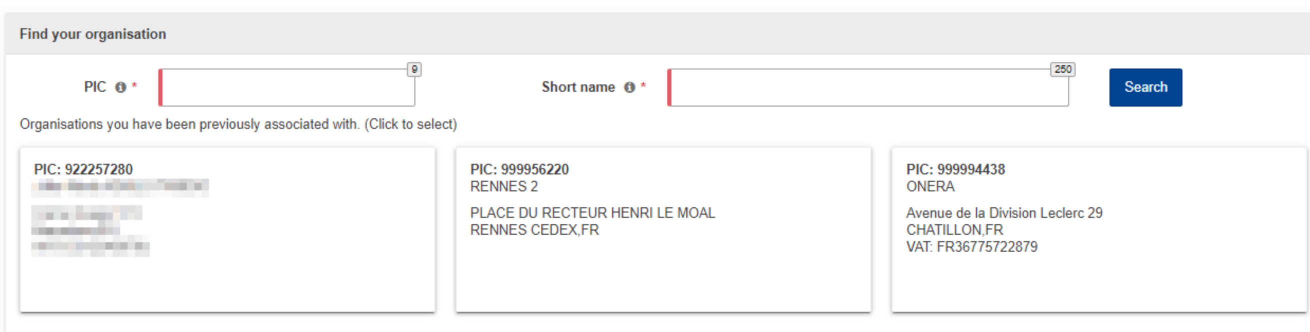
You are now in the Submission system. Carry out the following steps to create your call proposal. Please note, proposals coordinators are advised to submit their proposals at least 48 hours before call closure.

You can resubmit your proposal if needed until the closure of the call. Once the call is closed, the last submitted version will be the one being evaluated.

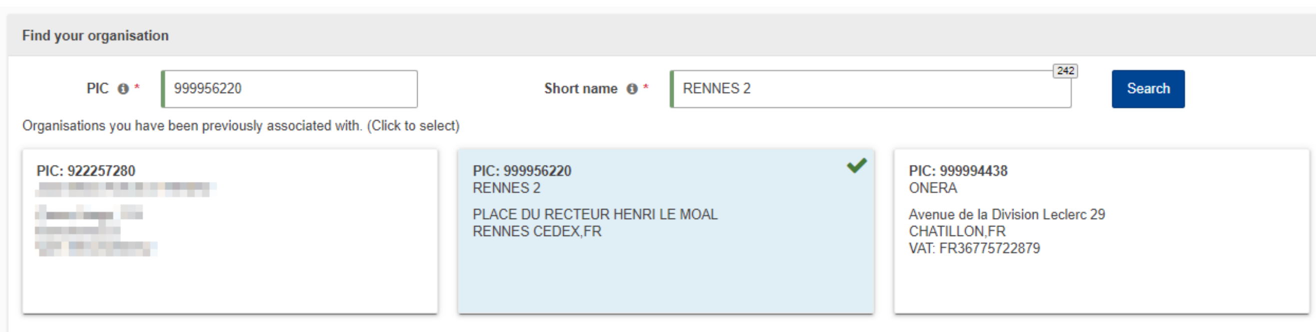
In the case of Continuous Calls, your proposal can be saved and edited throughout a specified period. Once submitted, your proposal will be evaluated immediately and re-editing will not be possible at any time.



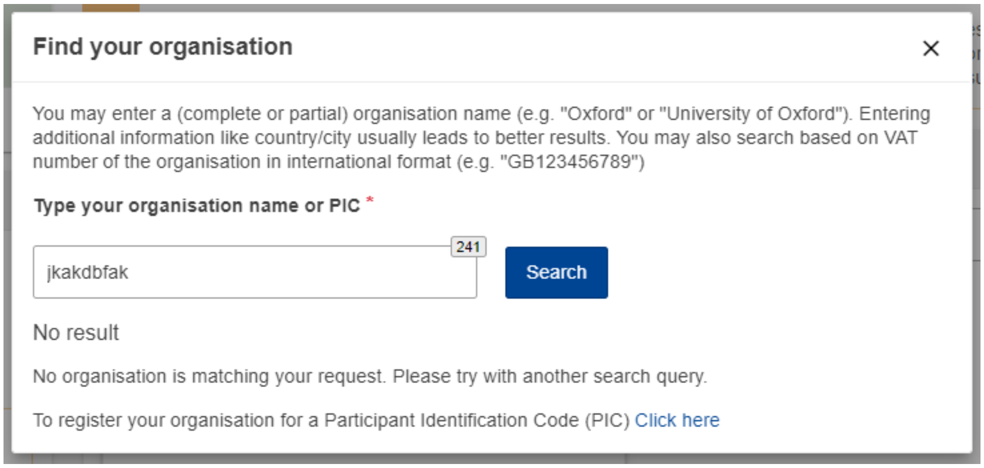
1. These are the steps you need to undertake to complete the draft proposal: Enter your organisation PIC. If you do not have the full PIC number, you can search by name or select from a previously associated organisation:



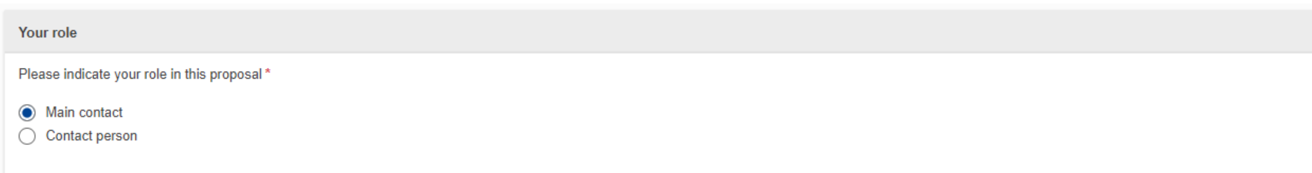
Entering the **PIC** will automatically populate the **Short name** field and highlight the address, as shown in the picture below:



Note: If the entered PIC is incorrect and you click on **Search**, the following message appears:



2. Select your role (**Main Contact** or **Contact person**):



You would typically select the top-level role (**Main Contact** for most calls) for the Proposal Coordinator organisation during the initial proposal draft creation. If you select the **Contact person** role (or another role if the call uses specific roles) for yourself, you will need to specify a top-level role (**Main Contact**) for your organisation in the next step . The person holding the Main Contact role will become the Coodinator of the proposal.

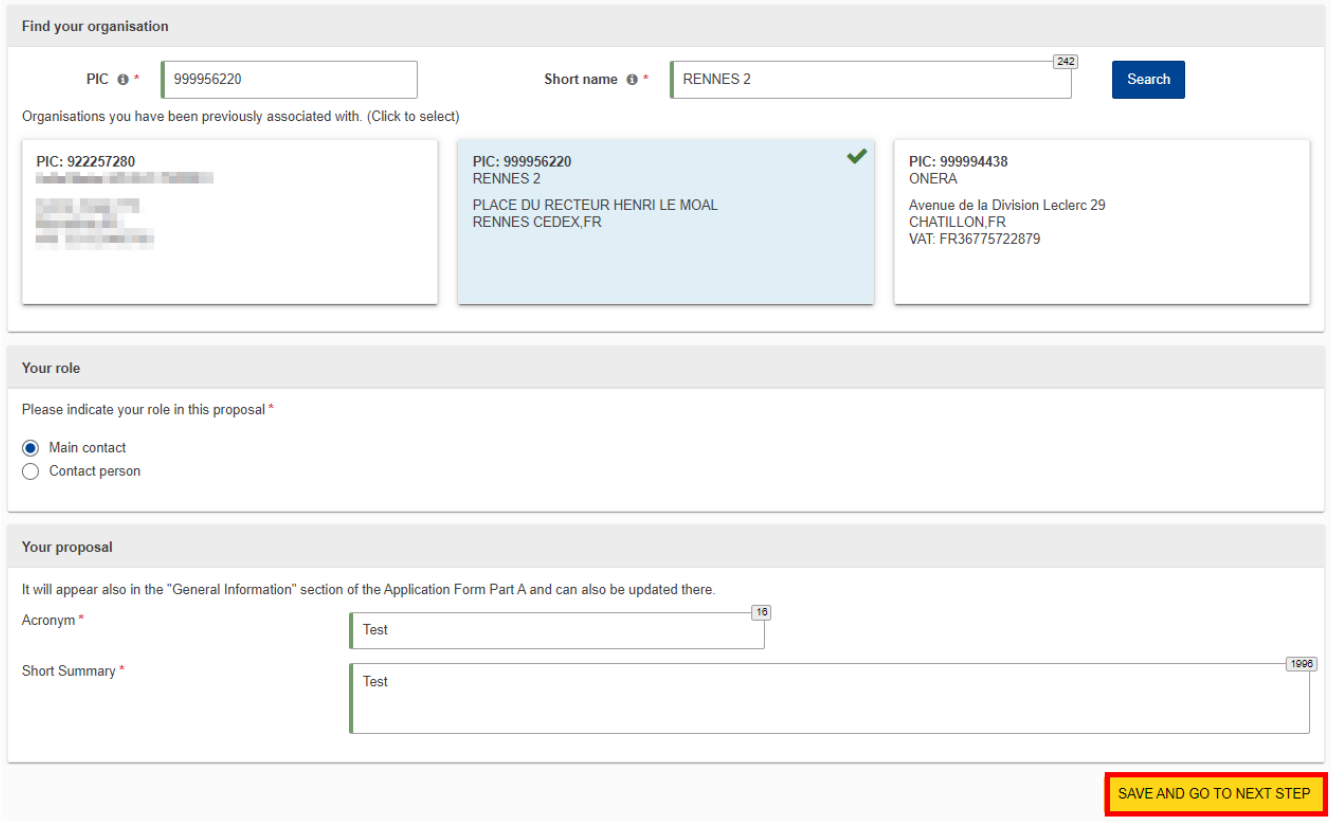
Note: For more information about roles in the system, see section Roles, Proposal Coordinator, Partner and Contact Person at the beginning of Chapter 3.

IMPORTANT: Most calls use the standard **Main Contact** and **Contact person** roles for the Proposal Coordinator organisation. However, some calls may require more specific roles, such as **Principal Investigator**, **Main Host Institution Contact**, **Researcher**, **Supervisor**, Applicant, etc. Calls of this type are pre-configured accordingly and their proposal submission forms contain special sections to address the specific roles and the respective data as needed. Likewise, the Proposal Submission Wizard for these calls will display the respective role options, as configured for each call.

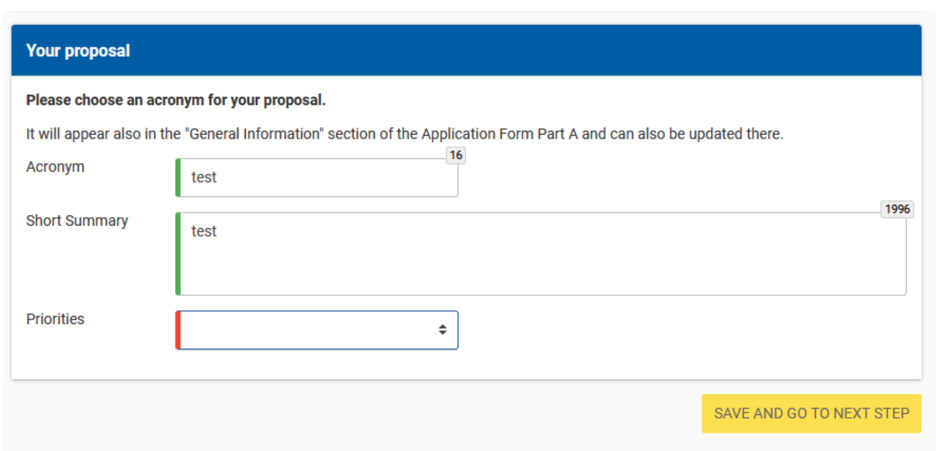
3. Fill in the **Acronym** field. Acronyms can be changed later on by the proposal coordinator, by editing the Administrative form in Part A (see Proposal forms below), in the section **A1 Content** within the form.

4. Fill in the **Summary** field.

5. Click on **Save and go to next step**:



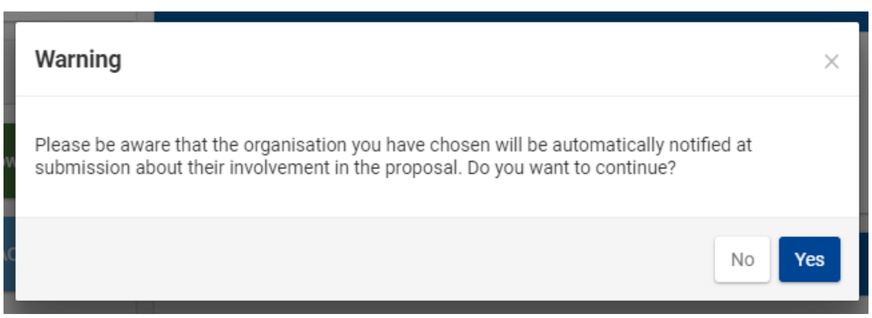
For some calls, there can be additional fields. For example, for the configuration shown here below, you need to pick up a priority from a drop-down in addition to provide the acronym and the summary:



Please note that for some calls we will add a structured proposal reference consisting of a prefix specific to the call, and your acronym. This reference cannot be changed, but you can always change your acronym when editing the application form. When a structured proposal reference identification is in use for the call you are submitting your proposal, it will be shown under the **My Proposal(s)** section on the Portal instead of just your acronym:

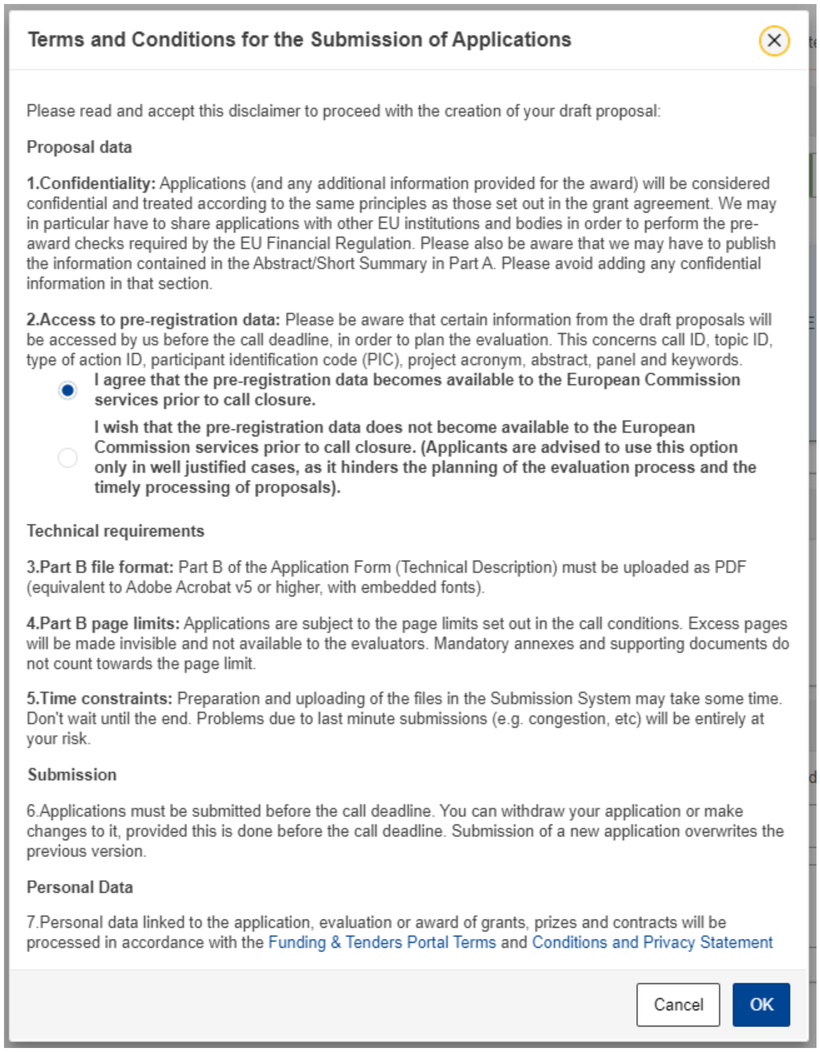
GRAMME	CALL	FUNDING SCHEME	PROPOSAL ID	ACRONYM	STATUS	REMAINING TIME	CLOSURE D
2027	CEF-DIG-2021-5GCORRIDORS	CEF-INFRA	101079832	21-BE-DIG-test_5gcorr_w...	Submitted	57	22/03/2022
2027	CEF-DIG-2021-CLOUD	CEF-INFRA	SEP-210827766	21-BE-DIG-test_dns_works	Draft	57	22/03/2022
2027	CEF-DIG-2021-CLOUD	CEF-INFRA	101079856	21-BE-DIG-test_fed_works	Submitted	57	22/03/2022
2027	CEF-DIG-2021-5GCORRIDORS	CEF-PJG	SEP-210828945	test_5gcorr_st...	Draft	57	22/03/2022
2027	CEF-DIG-2021-GATEWAYS	CEF-PJG	SEP-210828949	test_gateway_...	Draft	57	22/03/2022
2027	CEF-DIG-2021-CLOUD	CEF-PJG	SEP-210828950	test_cloud_st...	Draft	57	22/03/2022
2027	CEF-DIG-2021-TA	CEF-PJG	SEP-210828953	test_ta_agenda	Draft	57	22/03/2022
2027	CEF-DIG-2021-5GSMARTCOM	CEF-INFRA	SEP-210829033	21-BE-DIG-test_smartcom	Draft	57	22/03/2022
2027	CEF-DIG-2021-GATEWAYS	CEF-INFRA	SEP-210829035	test_gateways...	Draft	57	22/03/2022
2027	CEF-DIG-2021-TA	CEF-PJG	SEP-210829038	test_ta_platfor...	Draft	57	22/03/2022

Note: Organisations in the consortium would usually get a notification of their involvement when the proposal is submitted, as well as being notified if the proposal where they were participating is withdrawn, as suggested by the warning below:

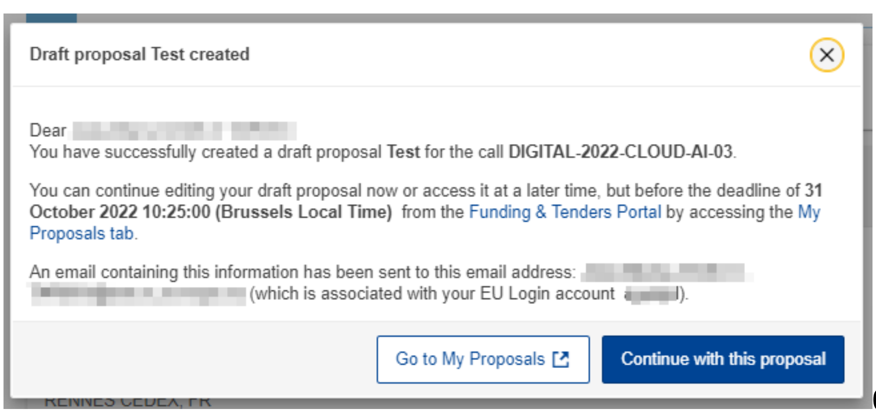


6. After clicking on **Yes**, you will be presented with the following disclaimer. To accept it, click on **OK** and proceed.

   Click on **Cancel** to decline and to cancel the proposal submission:



7. The following message confirms that your draft proposal has been created, and your draft will be given a temporary [Proposal ID](). You will also receive a confirmation email.



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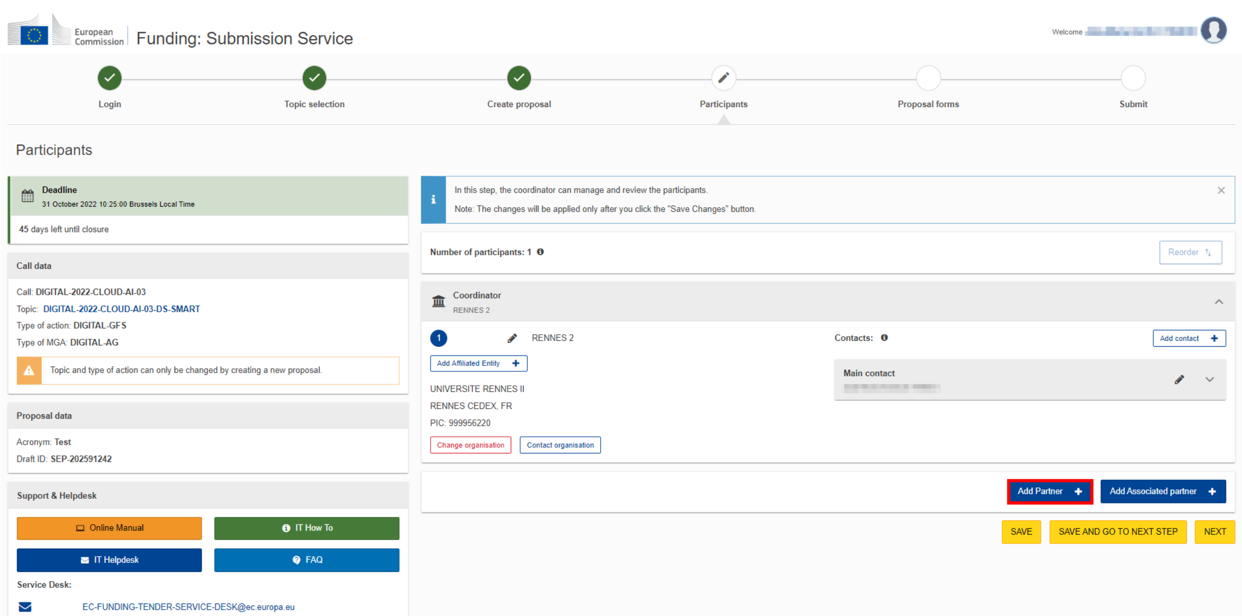
8. Click on **Continue with this proposal** to proceed to the next step.

   To postpone this action for a later time and return to your list of proposals in the Funding & Tenders Portal, click on **Go to My Proposals**.

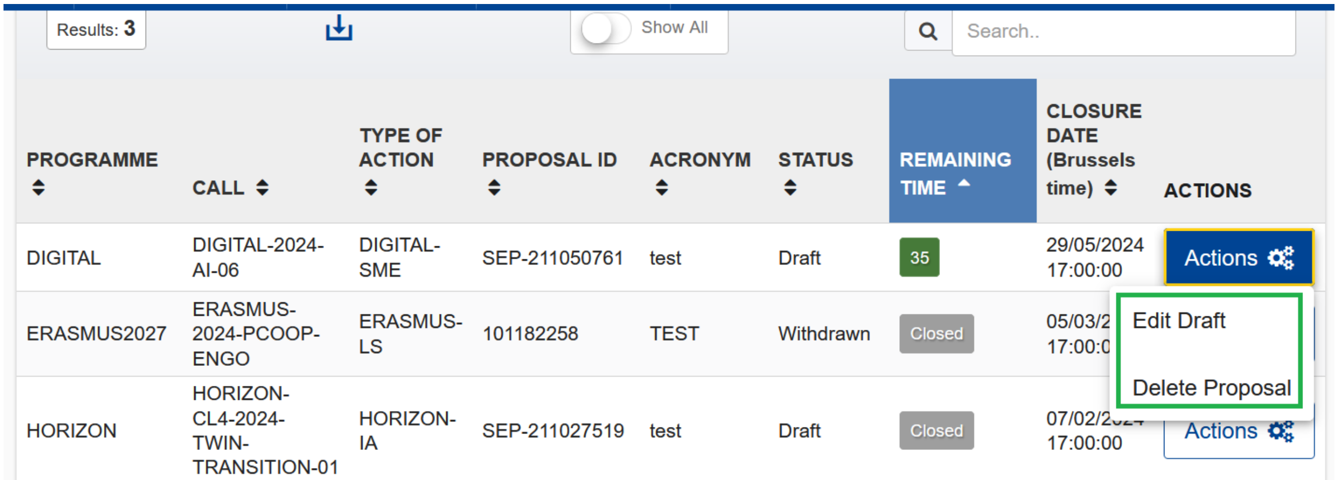
Participants

In this step you can add, remove, and manage additional partner organisations and their contact persons (roles). You can also edit the contact person's details of the main organisation. In the following steps, we cover the creation of the consortium.

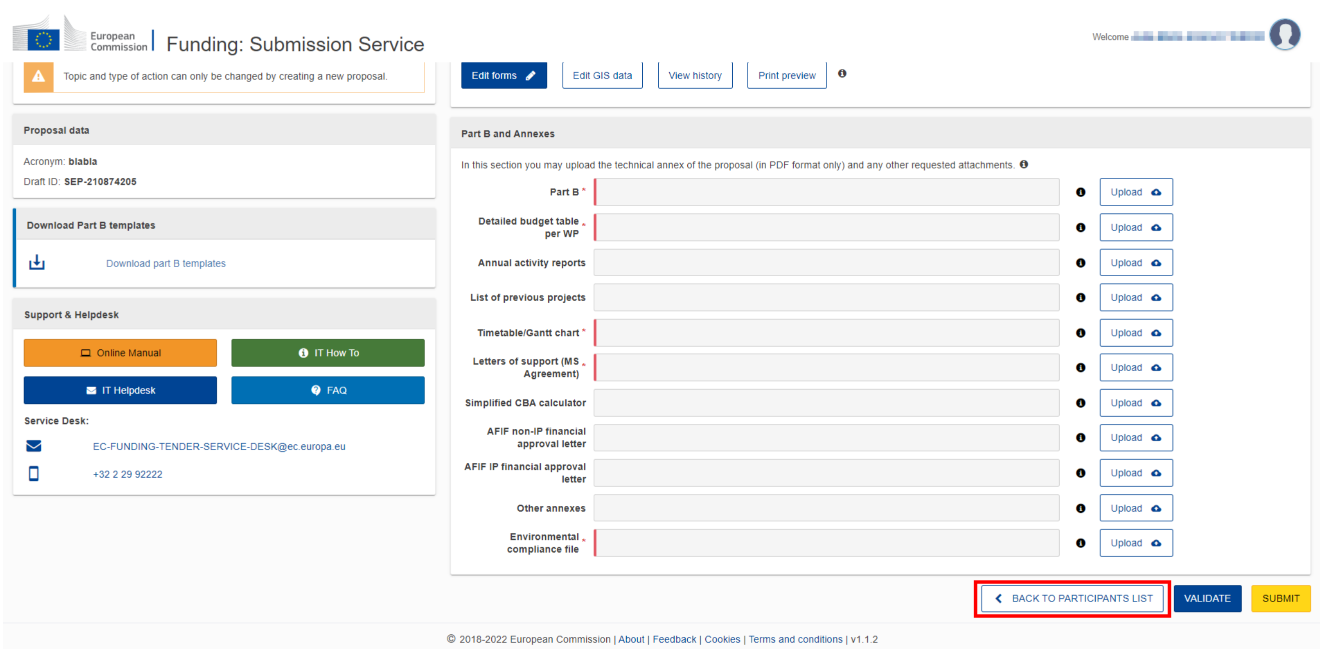
1. In order to manage the Participants, click on **Continue with the proposal** after the **Create proposal** screen. You will see the **Participants** screen, similar to the following one. Click on the **Add Partner +** button to add or change the partners for the proposal:



   Alternatively, you can also access this step from the list of your proposals from the Funding & Tenders Portal, click on the **Actions** button next to the proposal and select **Edit Draft**:

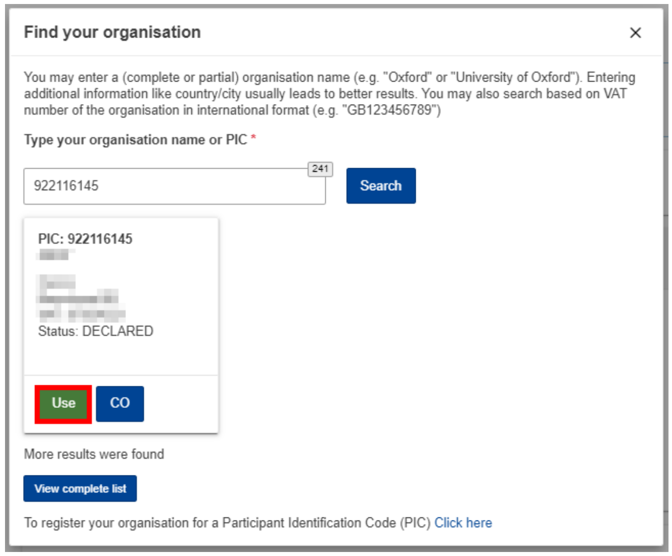


Once you are in the proposal, you will see the **Back to Participants list** button; click it in order to display the **Participants** screen and the **Add Partner +** button:



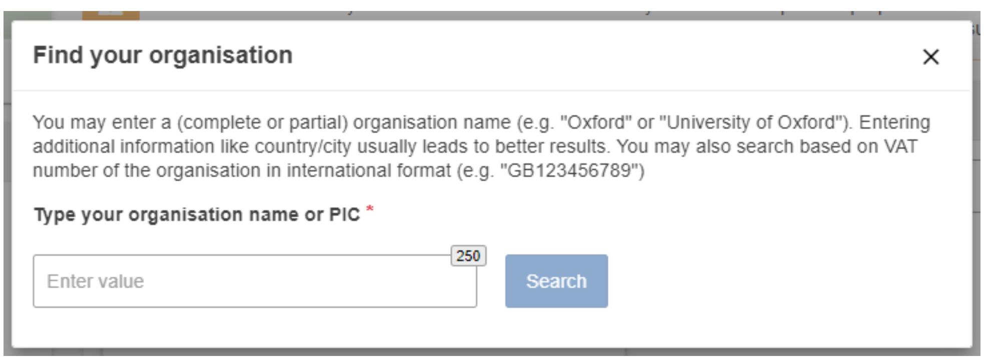
Note: Before you can invite a Partner, your partner must have a PIC (see the Submission Preparatory Checklist section above).

The requirements for a minimum number of participants are specific for each call. A message specifying the Consortium Eligibility requirements will be displayed under the **Add Partner** button, if applicable.



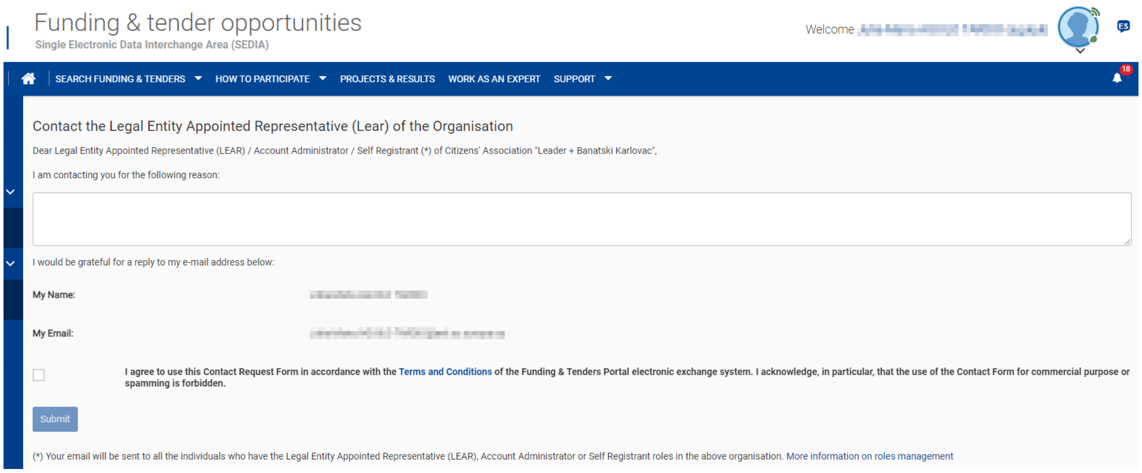
Note about eligibility: Eligibility problems indicated by the submission application are merely illustrative, and it is likely that not all applicable ones are indicated by the Portal submission system. Please check the topic page to get to know the exact eligibility conditions applicable to your proposal. See the specific requirements for your proposal by checking the **Topic conditions and documents** section in the topic page of the Portal.

2. Click on **Add Partner**. The **Add Partner** screen will be displayed:

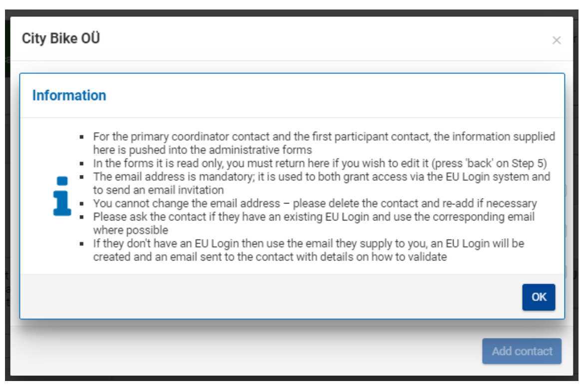


3. Enter your Partner organisation's name or PIC and click on **Search**. This will give you a list of organisations matching the term in the search field:

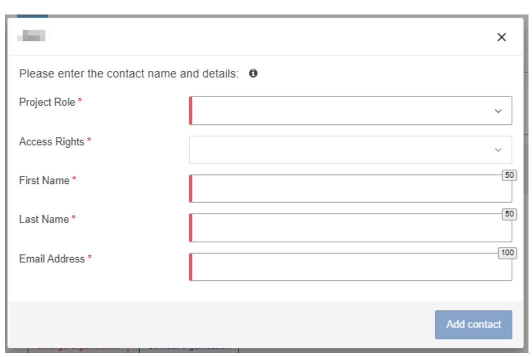
4. Find your Partner organisation. Click on the **CO** button if you wish to contact it, this will redirect you to a dedicated page in the Funding & Tenders Portal:



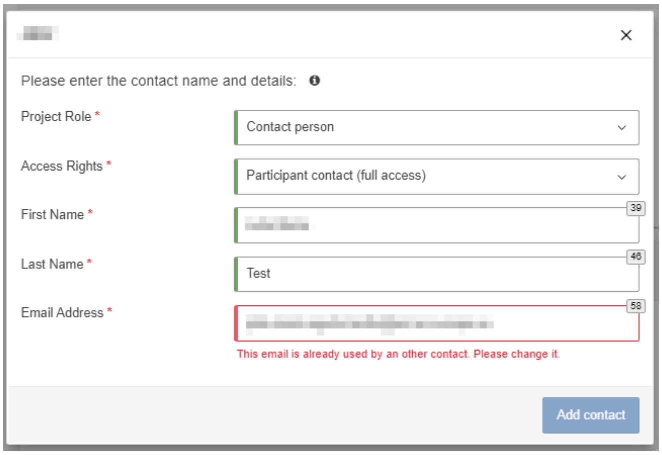
Otherwise, click the **Use** button to select your Partner organisation. The **Add contact** window will be displayed now. Click on the information tooltip to read the applicable rules for adding a contact:



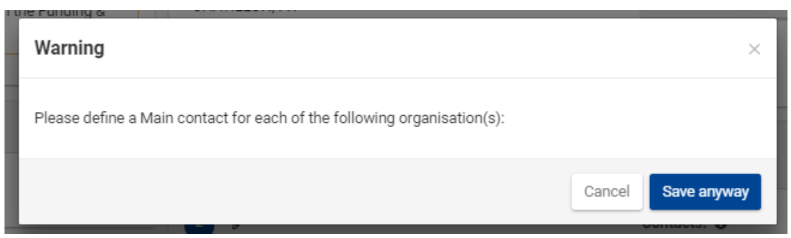
5. Select the appropriate project role of the Partner Contact:



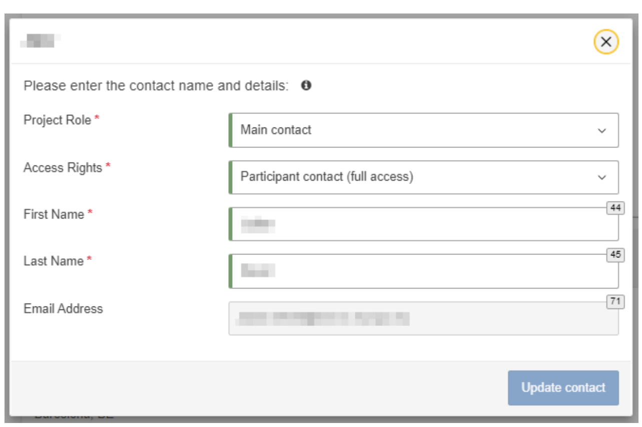
Note that a <u>same</u> email address cannot be used twice or more; a warning message will inform you of so:



6. Please note that at least one **Main Contact** must be provided for each partner or following message will be displayed when trying to move to the following step. Not specifying a main contact for each Partner (i.e. clicking on **Save anyway** in the pop-up message) will block the submission at the final step and require that you go back to the consortium structure in the wizard later on and validate the Part A again.

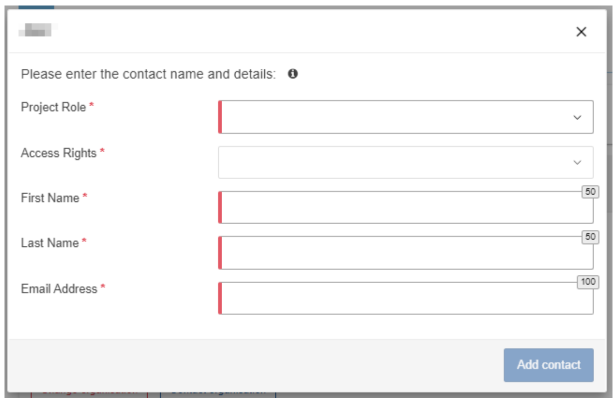


7. Select the access rights that you want to grant to your Partner contact. Only the person assigned the Main Contact role and having full access rights can submit an application:



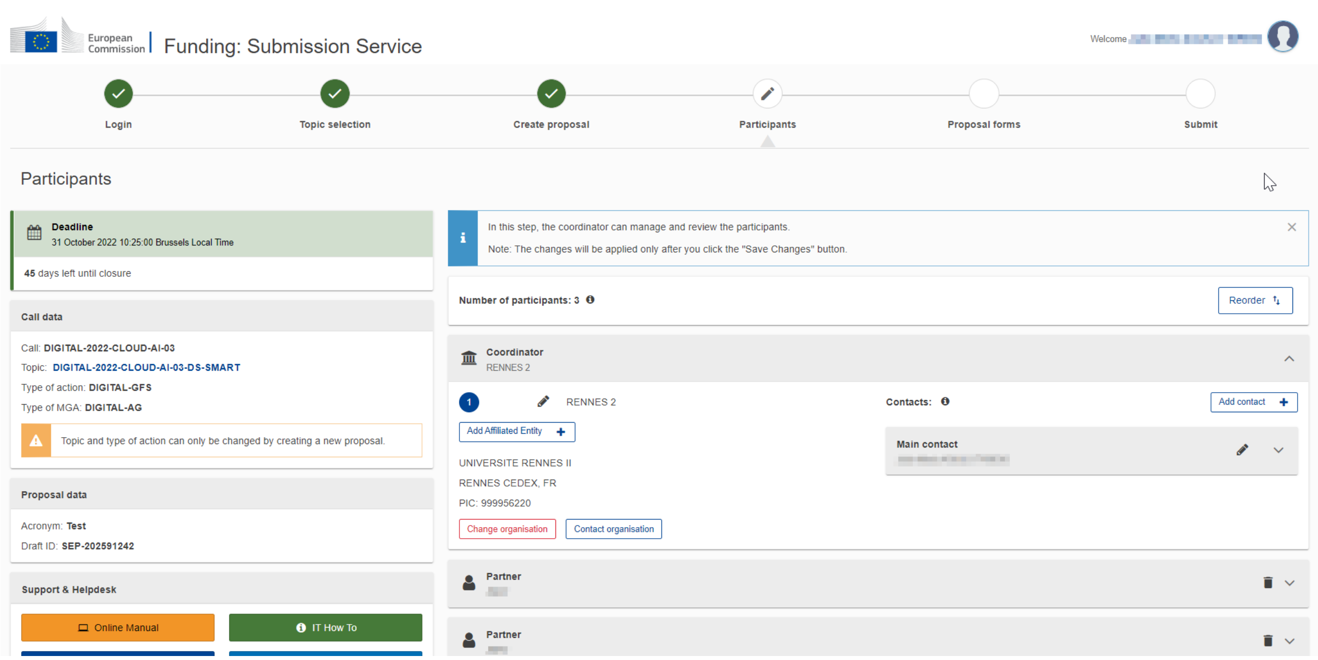
Note: Once you grant full access rights to a Contact person, they will not be allowed to alter their own access level to 'read-only'. This can only be done by you in your role of the Proposal Coordinator (or by another user with full access rights).

8. Fill in the fields and click **Add contact**:



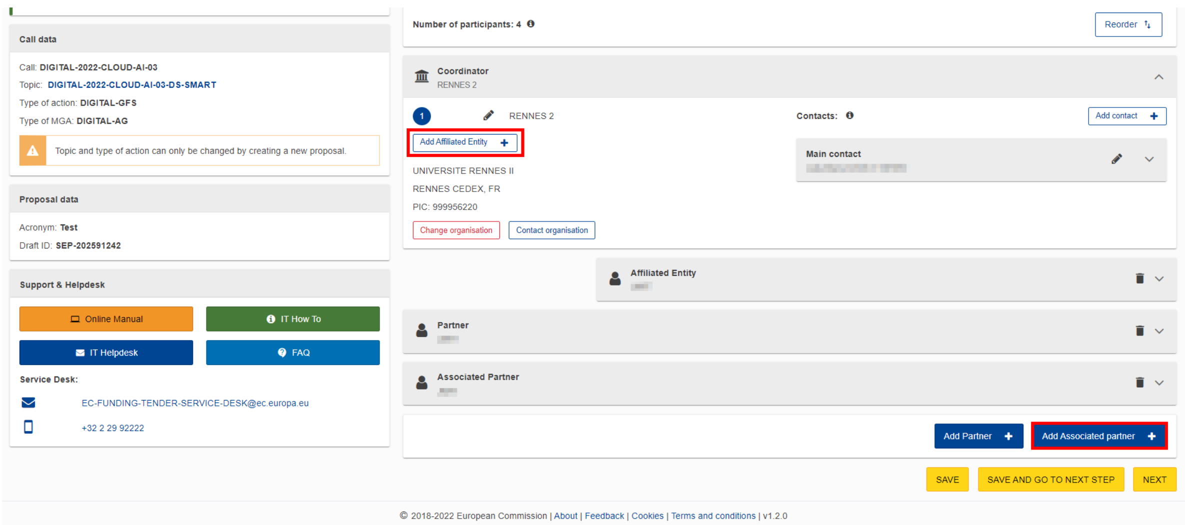
Note: If the Contact persons do not have an EU Login account yet, the system will use the provided email address to send them an invitation and grant access to the application.

9. Repeat the same steps for the remaining Partner organisations. You will see the additional contacts appear in the Partner information section:

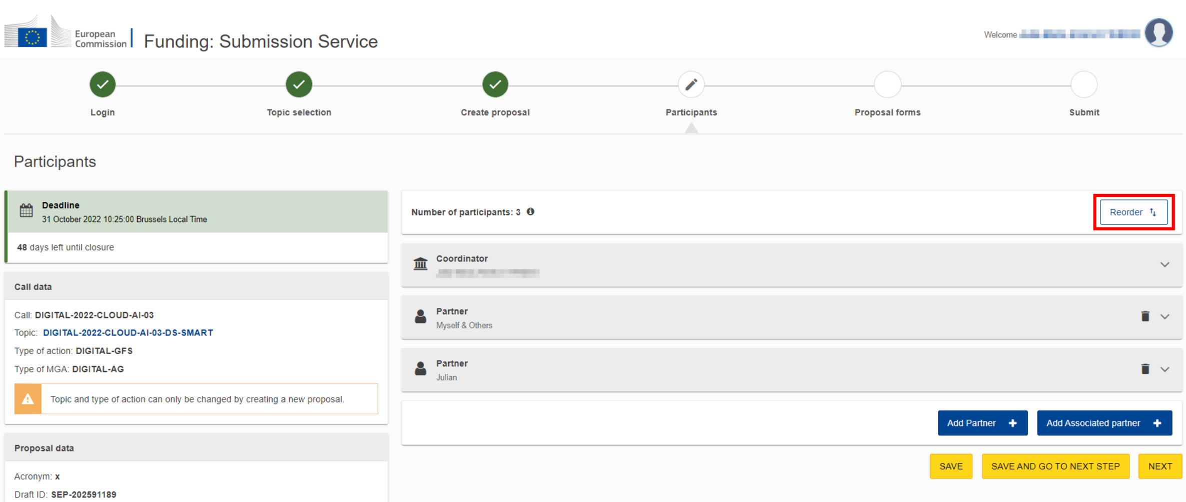


10. For certain calls, you will also have the possibility to add Associated Partners and Affiliated Entities linked to the Coordinator or to the Partners, by clicking on the **Add Affiliated Entity** and the **Add Associated Partner** buttons.
The coordinator contacts with full access rights can add/remove affiliated entities to any of the organisations in the consortium and associated partners to the proposal.
The contacts with full access rights of the rest of partners can add/remove affiliated entities only to their own organisation.

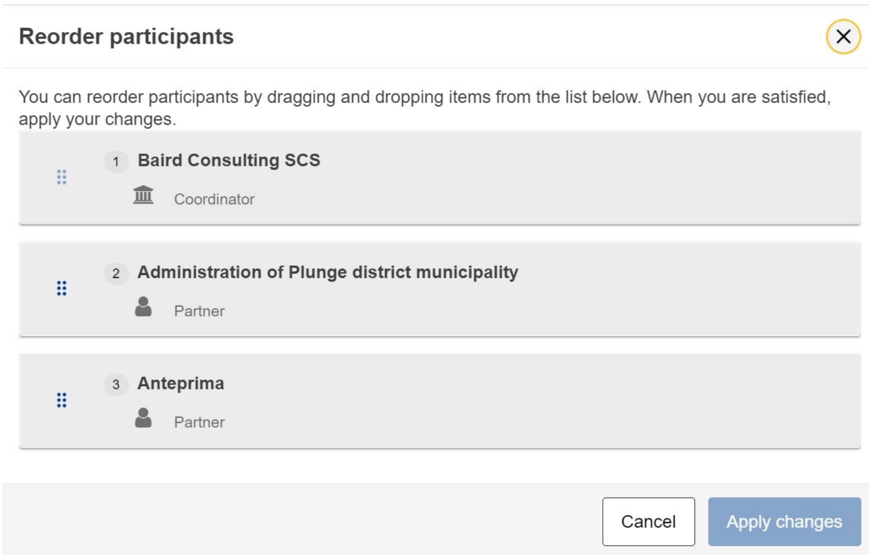
Please note that for the Affiliated Entities and the Associated Partners it is not possible to define Contacts:



If the number of participants is at least 3, you have the possibility to reorder them. To do so, click on **Reorder**:



Then, a pop-up window appears, where you can change the order of the participants by simply dragging and dropping them using the dots icon:



Finish by clicking on **Apply changes**.

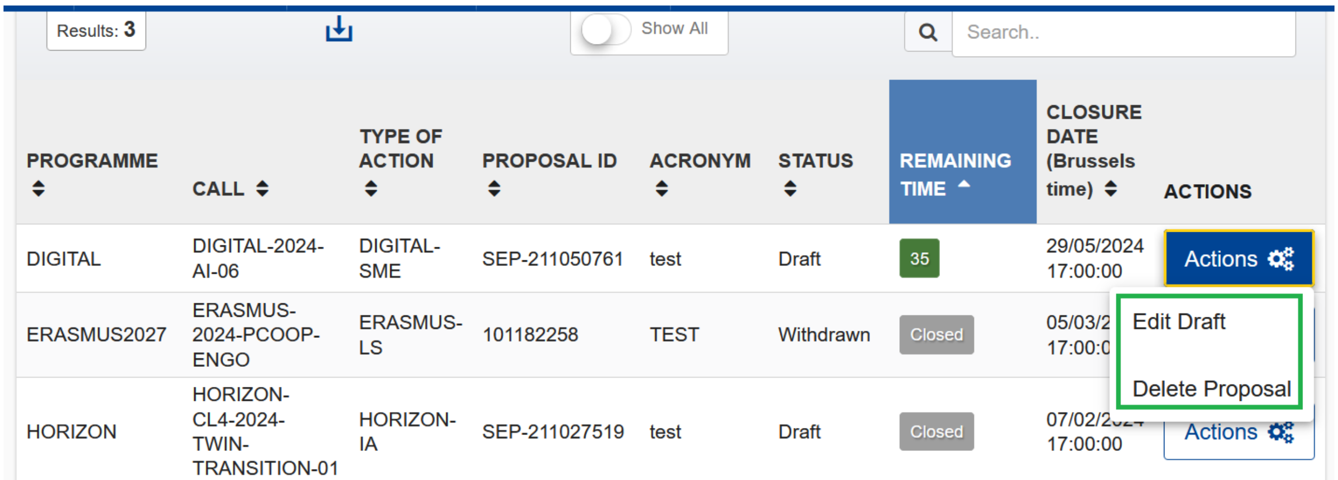
Once you have completed this task, click on **Save and go to next step**. At this point, the system will automatically send emails to all the provided participant contacts. The emails include the details of the proposal and links to access it, and if they need to create an EU Login, the link will take them to the EU Login creation screen (see Appendix B: EU Login registration).

> **Note:** There is a limitation of the amount of new invitations sent per minute (i.e., contacts which will be invited to register an EU Login). To avoid any errors, if you are entering many contacts at the same time, you are advised to save from time to time, instead of saving all changes at once. For instance, click on the **Save** button after entering about 10 contacts, then proceed entering another 10 contacts and save again, and so on.
>
> Please note that all the provided contacts are processed by the system when you click the **Save and go to next step** button at the bottom of the screen.

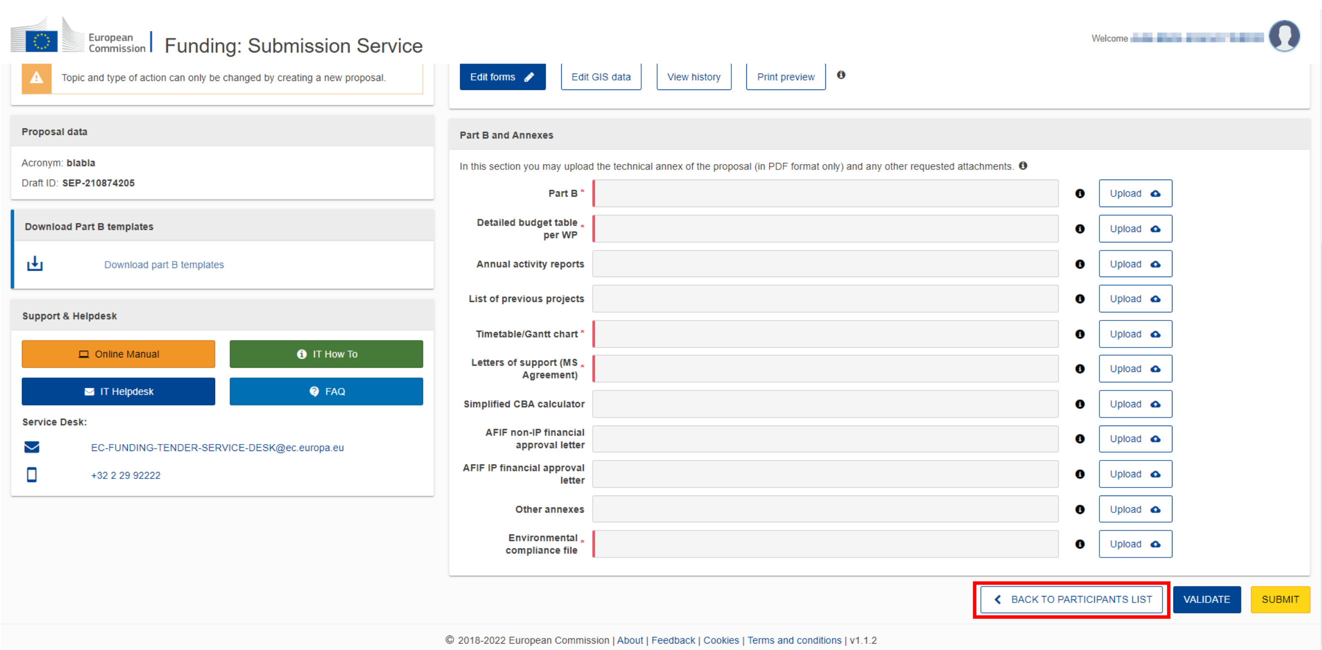
Once you performed the actions described above, you can always click on the **Back to Participants list** button and change the consortium structure or the partner data. Please note that every change in the consortium requires that you go to the new/modified partner organisation section in the form Part A (see Editing and Completing the Form) if the form has been already filled in before the change. You will see a warning message after having changed the consortium structure and clicking **Save and go to next step** button.

Modifying consortium and actions needed in the form Part A (Proposal forms screen)

The consortium data may be changed at any time before the submission. To do so, access your proposal from the Funding & Tenders Portal, click on the **Actions** button next to the proposal and select **Edit Draft**:



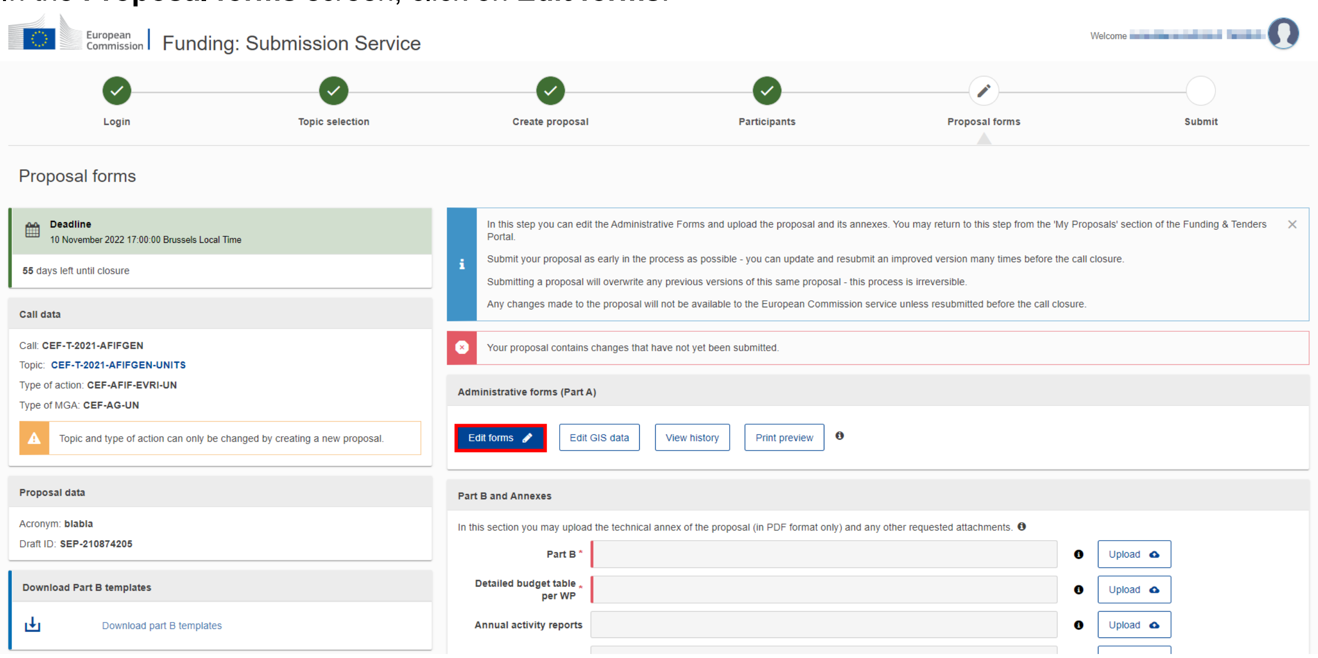
Once you are in the proposal, you will see the **Back to Participants list** button; click it in order to display the **Participants** screen and the **Add Partner** button:



Any modifications in the consortium require that you (the coordinator, who can do it for all partners, or the main contact of a participating organisation, who can do it only for their own organisation) go to the corresponding participant sections in the form Part A, provide the data for the participant, as well as filing in other corresponding sections such as the budget table line for a newly added participant organisation, and save the form after each change to the consortium structure. Please follow these steps:

1. Add the new partner and the partner contacts.
   Click on **Save and go to next step** at the bottom of the page.

2. In the **Proposal forms** screen, click on **Edit forms**:

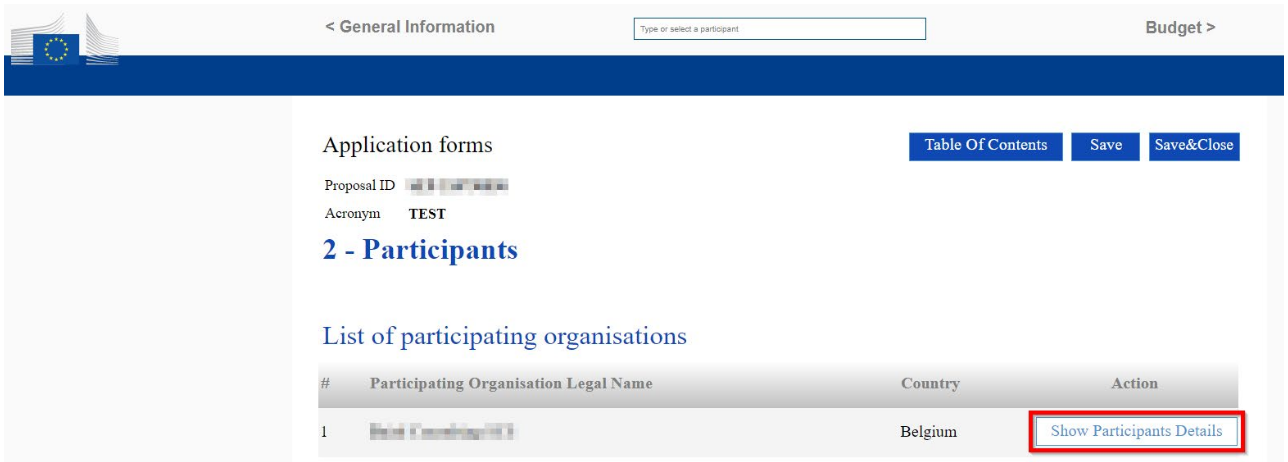


3. In the form, navigate to the **Participants** section (when opening the form, scroll down to the table of contents and click on **Show**):

Table of contents

Section	Title	Action
1	General information	Show
2	Participants	Show
3	Budget	Show
4	Other questions	Show

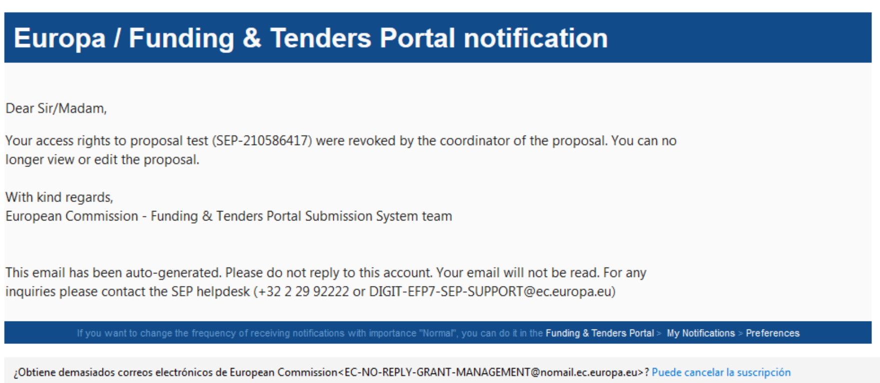
4. Then, click on **Show Participants details** for the added/modified partner and fill in the details as usual. You need to do this for each partner added/modified in the proposal consortium. Afterwards, save the form, this will prevent errors in the validation of the proposal before submitting:



5. Also, navigate to the **Budget** section and fill in the data for the corresponding partner. Save the form afterwards.

Notification system for deleted contacts

When a contact is deleted from the list of contacts for an organisation, their access rights to a proposal will be revoked. As a result, this person will no longer be able to view or edit the proposal. If you can no longer view or edit proposals that you were previously able to work on then it is very likely that your profile was deleted from the list of contacts resulting in a revocation of access rights. If this happens, you will be informed by email that your access rights to a particular proposal have been revoked.



<u>**Other eligibility issues when selecting a PIC (SME status, *for profit* status, etc.)**</u>

In addition to the consortium eligibility requirements, if applicable; there may be also a set of criteria which must be met by the participating organisations depending on each call. For instance, sometimes the participants need to have specific values for their legal status, such as being *for profit* or being registered as an SME or specific policy values need to be set for their organisation in the Participant Register, such as a gender equality plan, etc.

In order to participate with the selected PIC in these cases, the LEAR or the Self-registrant of the participant will need to update the participant's information and , if applicable, submit the supporting documentation to justify the change. For instance, for calls that have as eligibility requirement that applicants are categorised as SME, the LEAR/Account Administrator will have to complete the SME Self-Assessment in the Participant. Otherwise, the applicant will need to select a correct organisation in order to participate in those specific calls.

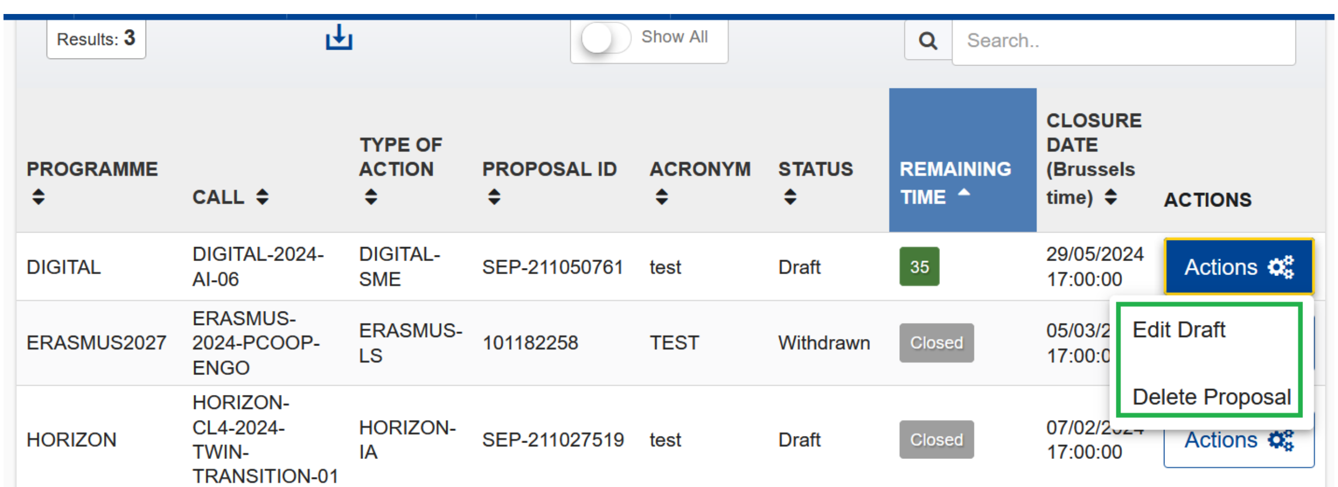
Please refer to the Participant register online documentation in order to learn how to maintain your organization data. Applicants are requested to carefully study the eligibility criteria of each call before actually trying to apply for a topic for which they are not eligible.

⚠ **Note about eligibility:** Eligibility problems indicated by the submission application are merely illustrative, and it is likely that not all applicable ones are indicated by the tool. Please check the topic page to get to know the exact eligibility conditions applicable to your proposal.

Proposal forms

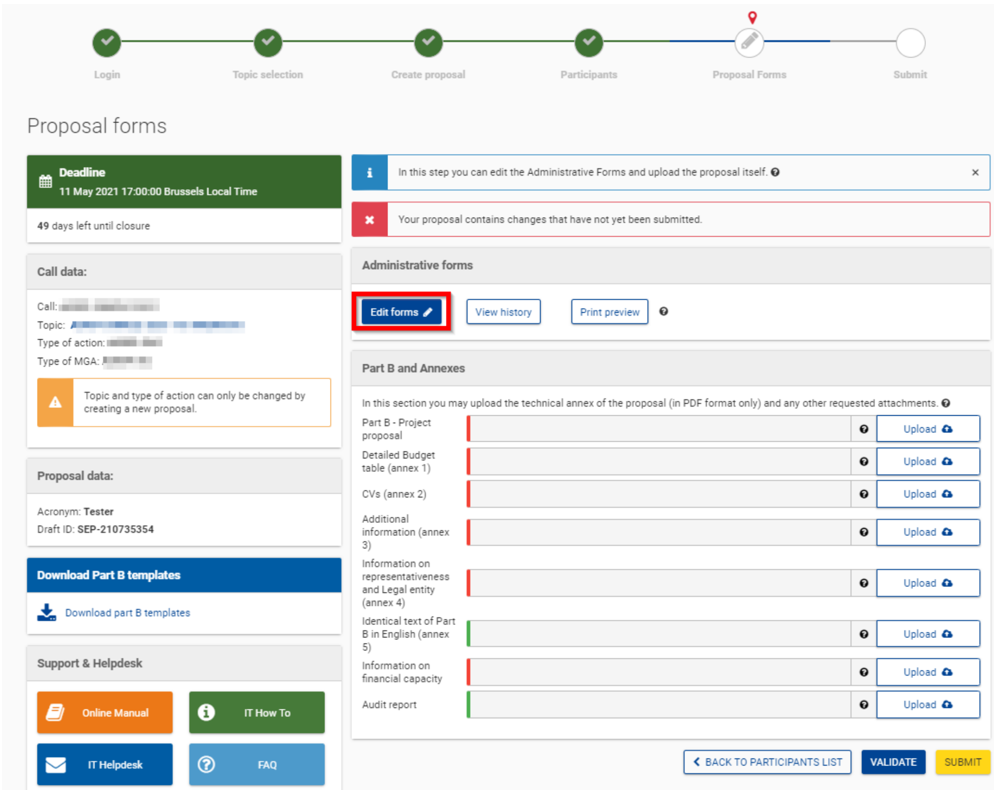
This step is the core of the submission process. Click on the submission wizard if you just created the draft proposal, or, to access a previously saved draft proposal form, take following steps:

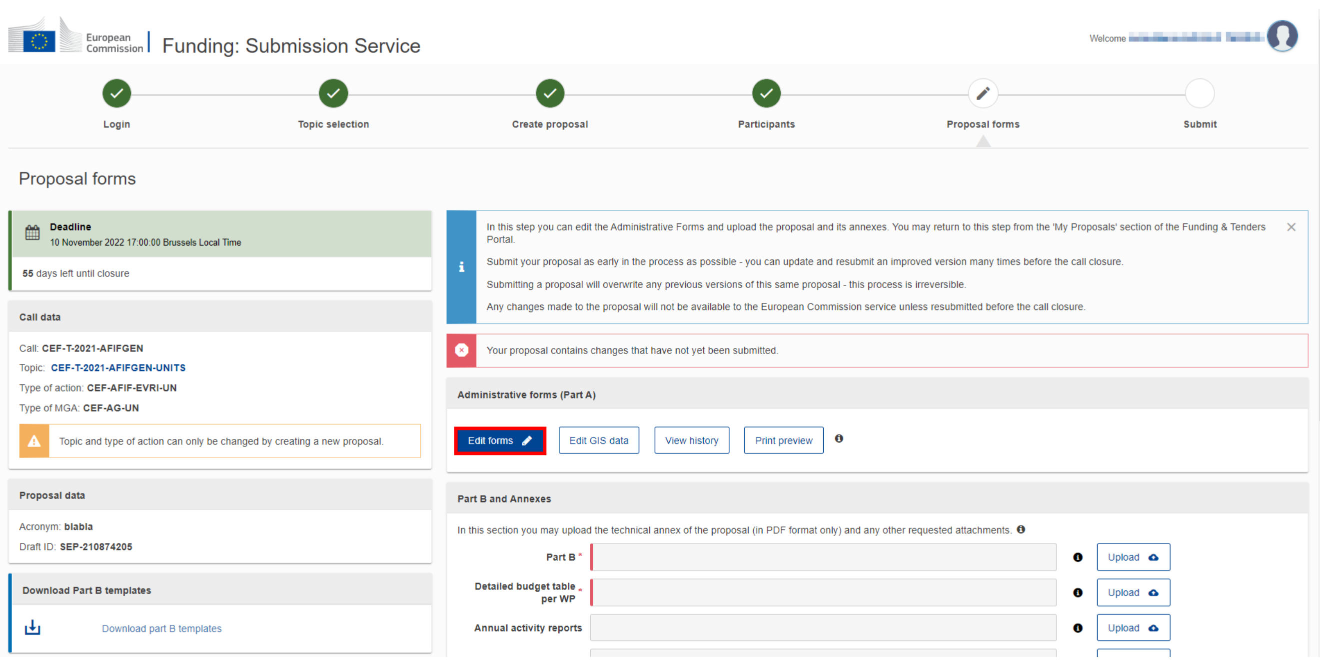
In the Funding & Tenders Portal, click on the **Actions** button next to the proposal and select **Edit Draft**:



PROGRAMME	CALL	TYPE OF ACTION	PROPOSAL ID	ACRONYM	STATUS	REMAINING TIME	CLOSURE DATE (Brussels time)	ACTIONS
DIGITAL	DIGITAL-2024-AI-06	DIGITAL-SME	SEP-211050761	test	Draft	35	29/05/2024 17:00:00	Actions
ERASMUS2027	ERASMUS-2024-PCOOP-ENGO	ERASMUS-LS	101182258	TEST	Withdrawn	Closed	05/03/2… 17:00:0…	
HORIZON	HORIZON-CL4-2024-TWIN-TRANSITION-01	HORIZON-IA	SEP-211027519	test	Draft	Closed	07/02/2… 17:00:00	Actions

Your proposal will open showing the **Proposal forms** screen.When clicking the **Edit forms** button, the administrative form (Part A) opens.





Note: The number of annexes shown in the image above is specific to the example used to capture images, the actual list of necessary annexes requested in the submission system is different from topic to topic.

Only one contact per organisation should make changes to the proposal at a time.

Editing the form in 2 or more tabs/browsers in parallel will lead to data loss.

The action buttons of the wizard

The action buttons shown in the **Proposal forms** screen of the submission wizard are:

Button	Description
Edit forms	Click to open the form Part A that you need to complete.
View history	Click to view in detail the list of all system and user actions on the form. This function enables: • the Proposal Coordinator to verify that partners have updated their forms • Partners to verify that the coordinator has submitted the proposal in a timely fashion.
Print preview	Click to **download** and save the Part A locally on your computer in PDF format. This PDF cannot be edited nor submitted, but it gives you an idea of what has been filled in so far and what the EC would see if you submit your proposal right now.
Download part B templates	Click this button to download all Part B templates at once before the draft proposal is created. The latest proposal requirements package will get downloaded, in a readily editable (RTF) template. Once completed, you must convert the proposal templates into PDF files.
Upload	Click to upload the respective file. The upload process for the complete set of files can take between a few seconds and a few minutes, depending on the speed of your Internet connection. When the upload is complete, the system displays a confirmation message and creates the respective entry in the history log. Please check the requirements for uploading your files Part B.

Familiarising yourself with the wizard and the form

Click the first button at the top of the screen to read the general help instructions for editing proposal forms, as shown in the picture below.

Click Edit forms to start editing the forms. You can check Appendix A at the end of this manual for further information about the compatibility recommendations to work with the form.

What you need to know about completing the form

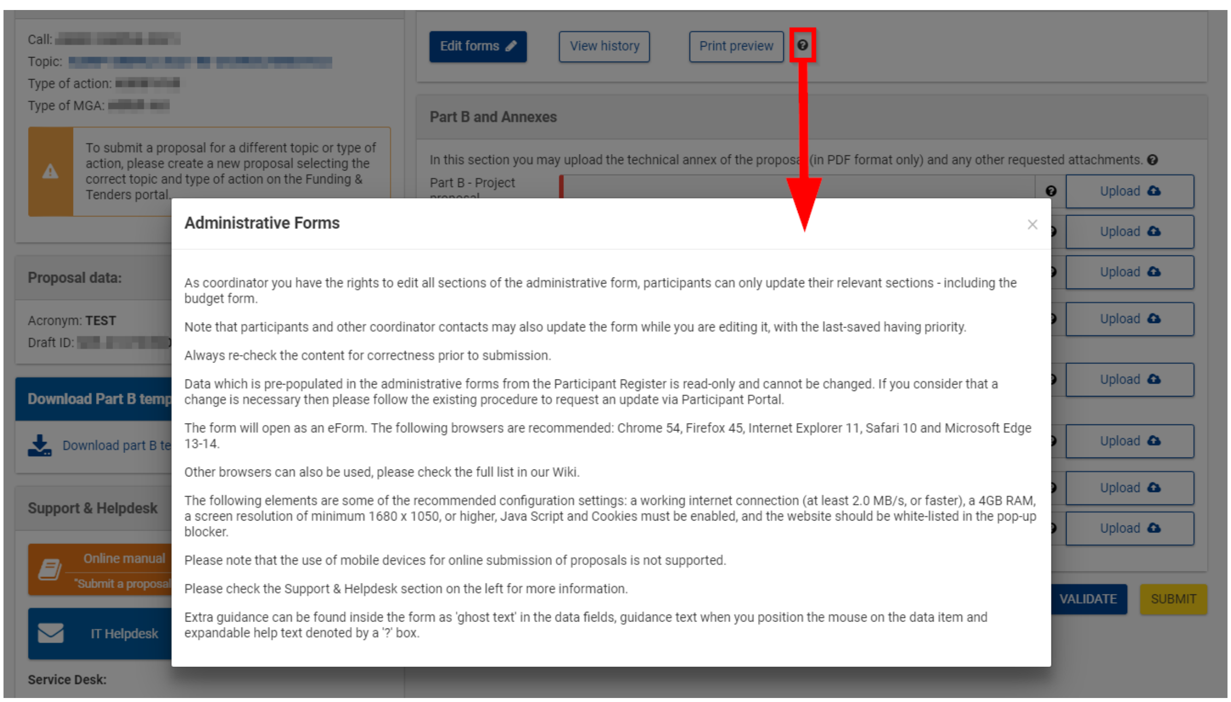
Who can fill in the form?

Any contact with full access from the coordinator organisation can submit the proposal, and can also modify the whole form Part A on behalf of the rest of participants. The rest of participants can preview the form and the main contact/contacts with full access can edit the contact details information of their organisation and the line in the budget table corresponding to their own organisation.

Click the Edit forms button to access the forms.

Read-only fields

The list of participants and contact persons, the Participant Identification Code (PIC) and the respective summary data of the participants (shown in blue in the form) are read-only fields. To modify the list of participants or contact persons, please go back to the **Participants** step. To modify the legal data of the organisation, please read more about it in this Data Updates section.



Guidance in the form

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

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

Navigation in the form

To view the different sections, you may either use the navigation in the header of the form or click on the **Show** buttons in the table of contents (cover page).

Validation

The form has built in checks and gives error or warning messages in case fields are not completed.

Please click the VALIDATE button to check your data. Errors and warnings will be listed at the end of the form. Error fields will be highlighted in red, whereas warnings will be highlighted in yellow.

Errors mean that mandatory information is missing (such as the **Proposal Title**). The proposal cannot be submitted until these errors are corrected.

Warning messages do not block submission, but they indicate missing information that may be important for the proposal. Ideally, these warning messages should be addressed by correcting the information provided.

By clicking on the **Show** button, you can easily get back to the respective fields to correct them. See Validating, saving and closing the form for more details.

Saving the data

Clicking the Save button saves your input at any moment. Please note that no data is actually saved until you perform the saving action. You can continue editing after clicking on **Save**.

Before closing the form, click the Save&Close button. It just saves the data and closes the form for further editing later on, but it does not mean that the proposal is submitted yet. This will take you back to **Proposal forms**, where you can upload the technical annex and any additional documents. You may return to edit the form as many times as you wish before the closing date of the call. However, remember that any changes saved in the form need to be resubmitted, if you already submitted the form once.

Please note, the eForm allows you to go back to **Proposal forms** in the submission wizard by either clicking the Proposal forms button in the cover page of the proposal (backwards button) or the Proposal forms button of the validation results page (forward button). In any of the two cases, leaving the form using these buttons does not save your changes, so please make sure to save the form first:

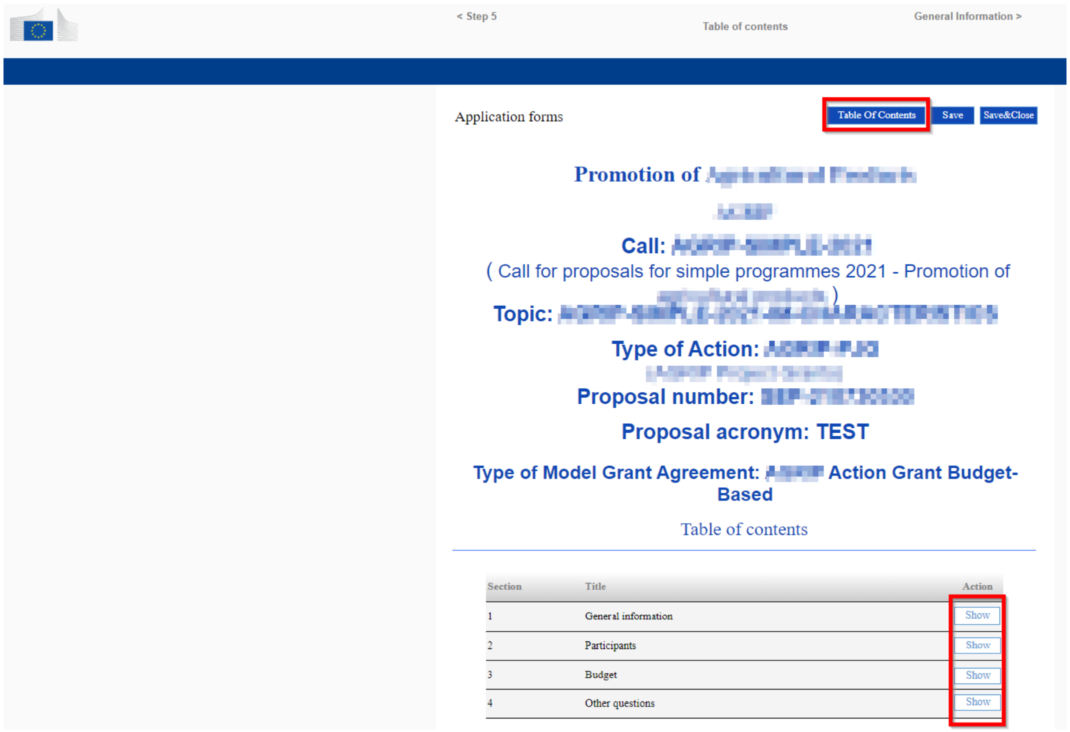
Action buttons within the form

The action buttons in the form help you find and verify the information easily. Two of them correspond to saving actions, as explained above, the other one checks for errors in the form:

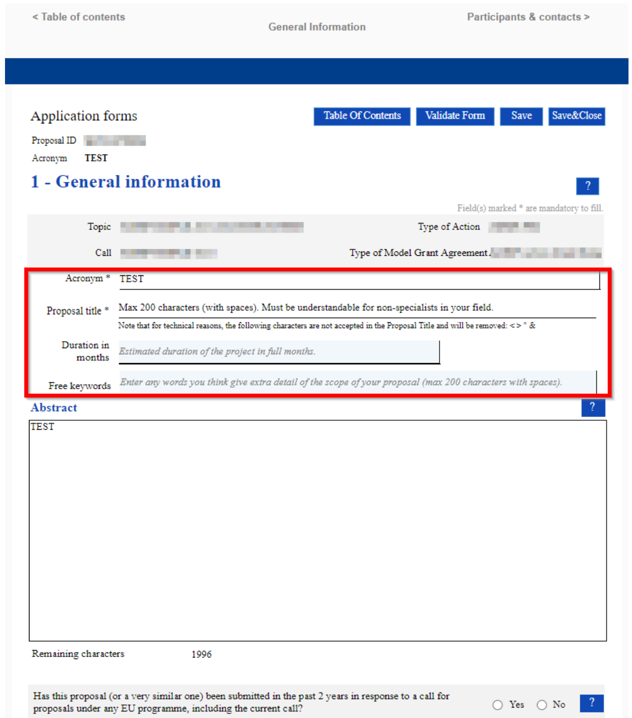
Button	Description
Validate Form	When you click this button, all data fields in the form will be validated against a set of rules. The system assesses if the available data is valid, checks the data formats, performs computations, and checks interlinked data for consistency. Any issues found in the form are reported at the end of the form.
Save&Close	Click to save your input in the administrative form and close it for later editing. You can save your form data even if the form is not completely filled in - you can edit it at any moment prior to the deadline. **Save&Close** does not validate the data nor submit your proposal.
Save	Click to save your input until that moment, and continue entering new input afterwards. No data gets saved until the **Save** or the **Save&Close** buttons are clicked.

Editing and completing the form

When clicking the Edit forms button in the submission wizard, **Proposal forms** screen; the form opens in the first page within your browser. This first page includes the **table of contents** and the **Call information**. You can return to this screen by clicking the Table Of Contents button at any moment, to be able to navigate to any of the sections in the form by clicking the **Show** button in the **Table of contents**:

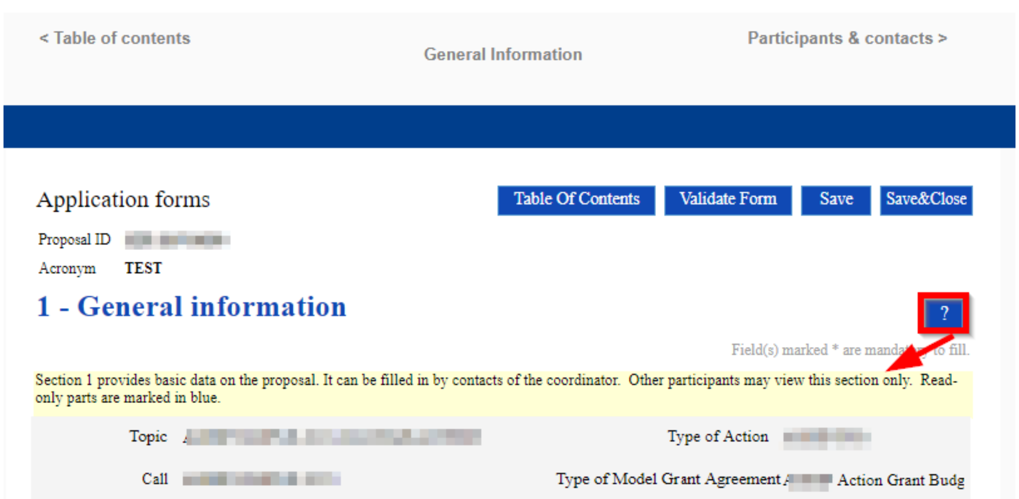


To start completing the form, use the navigation buttons on the banner in order to advance through the different sections:

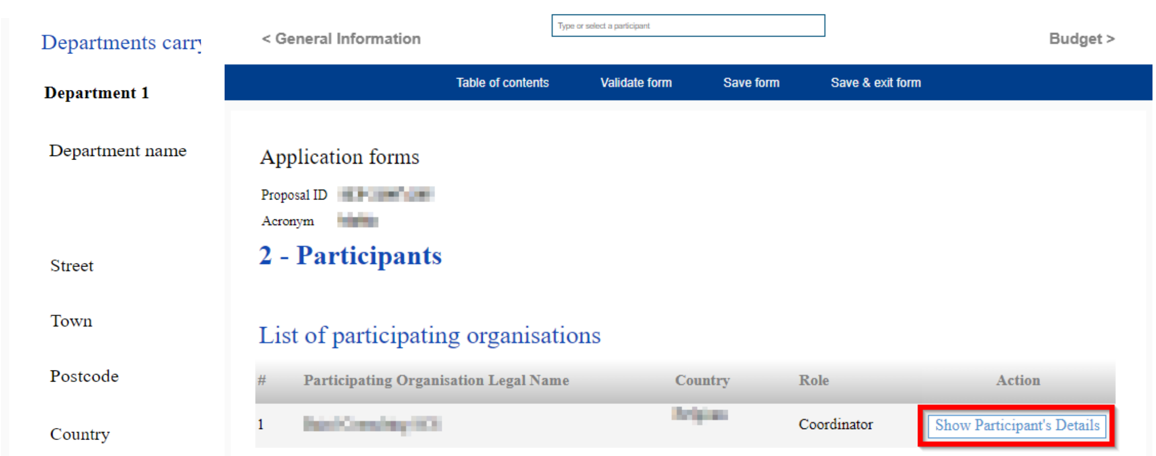


Then, fill in the corresponding fields for each section:

When filling the form, if you need a clarification about a section you can click on the question mark buttons to get a text explaining about what to provide for that field/section:



In order to provide the basic information of the Department carrying out the proposed work, click on **Show** the Participants section, then on **Participant's details** and scroll down to page 2:



There, you can also select the **Same as proposing organisation's address** or the **Not applicable** checkboxes, as well as adding a Department by clicking on **Add a Department.**

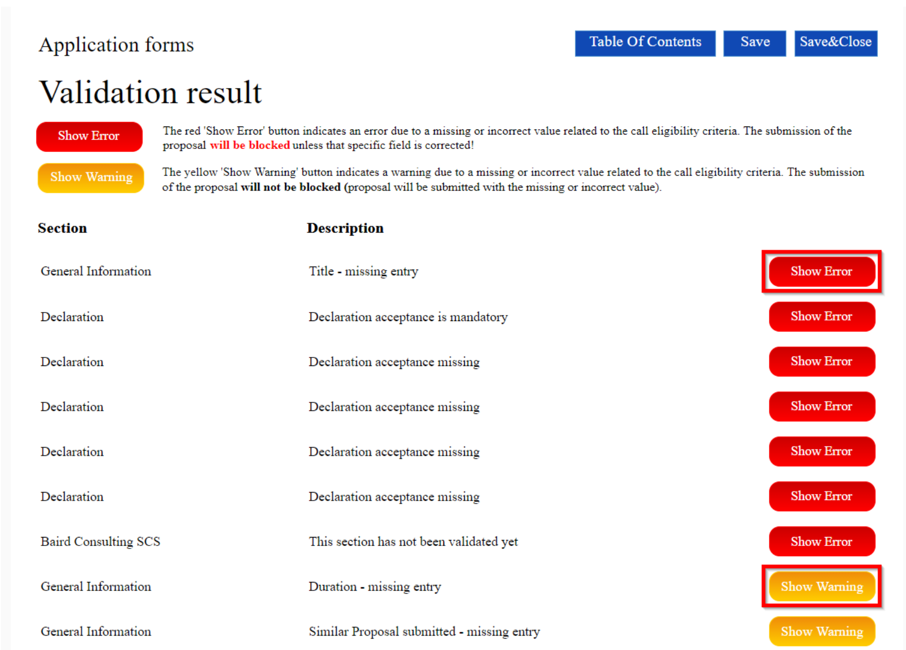
> **Important note:** If changes are applied to the consortium data (**Participants** screen) while the form is open or after having been edited, you need to reopen the form and validate it before being able to submit your proposal. Check [Validating, saving and closing the form](#) to know how to do so.

Validating, saving and closing the form

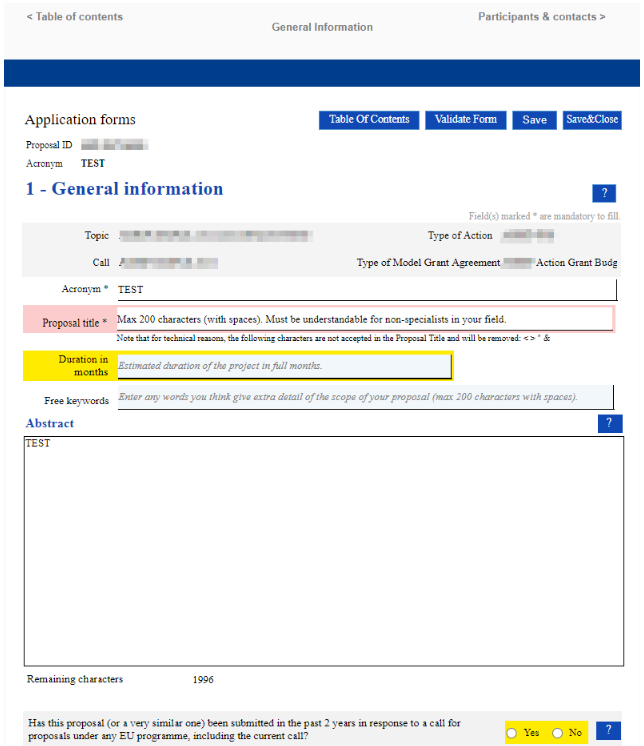
You can click the Validate Form button to make sure that your proposal form is correct and complete. Validating the form must be done before being able to submit.If you do not run it via the **Validate Form** button, when you finish filling the form you will automatically arrive to the validation step, as the last step in completing the form.

Note: For the calls with multiple participants, every participant's page needs to be visited at least once to be able to validate the section. Otherwise, you will receive a blocking error: "This section has not been validated yet".

You will be presented with any errors/warnings. Validate your results by reviewing the indicated errors/warnings. Click on the **Show Error** / **Show Warning** buttons to go to the affected parts:



The error/warning will be highlighted for you in the form. Amend contents accordingly. Any errors must be corrected in order to be able to submit your proposal. Warnings will not prevent you from submitting.



If the errors/warnings are related to missing data for the participating organisations or main contacts in the consortium, the **Show Error / Show Warning** buttons will take to the part in the form where you find those problems, but to fix this specific issues you need to **Save and close** the form and go back to the Participants screen in the wizard. After any change in **Participants**, you need to re-validate the form.

When all issues are fixed, click the Save&Close button. Your form has now been saved on the Commission servers, but it is not yet submitted. Your proposal submission takes place next.

Part B - Downloading and completing the annex forms

Click on Download part B templates to download all the latest proposal requirements templates as editable files.

The template describes the information that must be included in your application and how to structure that information. You will need to complete this package as thoroughly as possible. You can receive assistance from the contacts listed in the *Get Support* section on the topic page from the Funding & Tenders Portal. It is important that you remain within the file size and page limits that a proposal may have. Once you have completed your proposal based on the downloaded template, you must convert it into a PDF file, which you will then upload as an Annex form of the proposal. This is referred to as **Part B** of your proposal.

In the **Part B and Annexes** section, you will see a small coloured vertical line at the left side of the different fields to upload documents: if this line is green, it means that the field is completed successfully and, if the line is red, it means the field is incomplete.

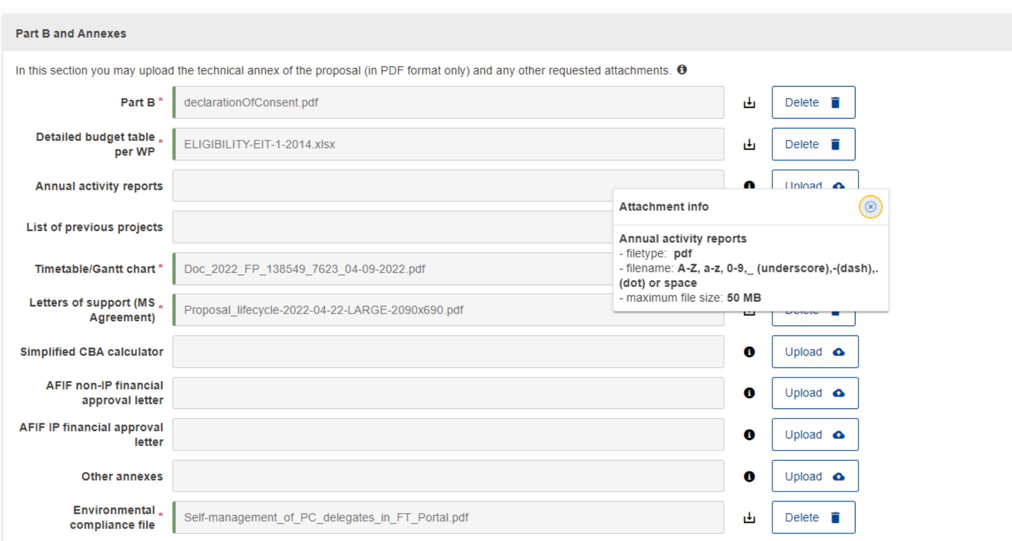
Part B - Uploading the annex forms

When you complete the annex forms, you must prepare them for uploading. Only the coordinator of the proposal can upload files in Part B. All annexes must be in PDF format, except if a different format is specifically mentioned in the attachment info (under File type). The the file name cannot contain other than Latin characters (a-z, A-Z), numbers (0-9), dot (.), dash (-), underscore (_) and spaces.

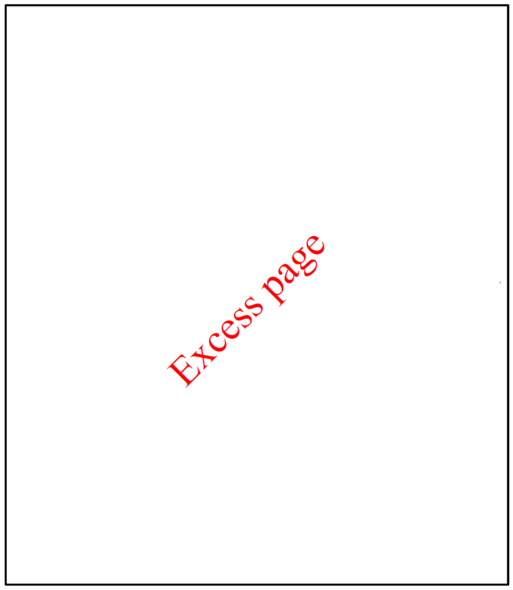
A number of limitations and requirements are in place for each of the forms, depending on the call – such as, page size and page limit, document size limit, etc.

> ⚠ **Important:** Please avoid encrypting and/or using digital signatures in your PDF forms, as technical issues may occur in the process of uploading them. Also, make sure that you upload flat PDF files (PDF Portfolio and other formats are not supported). Finally, double-check that the files that you upload can be opened without problems, and that they are fully readable (no words are missing or cut) and don't contain links to webpages.

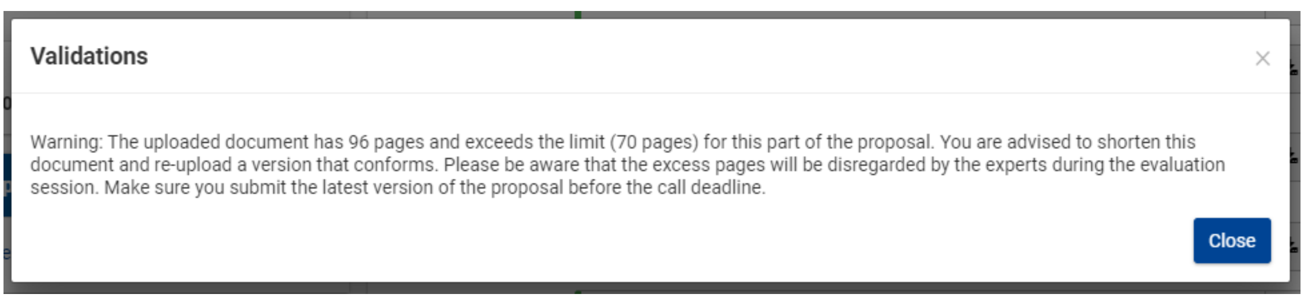
Note: Make sure that you first familiarize yourself with all the specific annex form limitations and requirements in the documentation available in the respective call information package on the Funding & Tenders Portal. Depending on the file, <u>your proposal could be considered ineligible if any of these formal requirements are not met. Click the question mark for each attachment in order to display the specific limitations applying to that specific attachment</u>:



The breach of certain limitations, such as document size limits, could result in failure to upload. As a result, you may need to amend the documents and upload them again. If you exceed the page number limit, when applicable, you will be still able to upload the document but all of the excess pages will contain just a watermark as content.



You will also see the following warning, informing that the content of those water marked pages will be dismissed during the evaluation session:



In the process of completing your annex forms, and prior to uploading them, make sure that your documents comply with the mentioned requirements and recommendations, as generally outlined below:

1. **PDF conversion issues and checks:**
   - Before you start the conversion to PDF, **clean up** your document - accept all tracked changes, delete internal review notes or comments, check for any formatting issues, and so on. The document to be converted into PDF must **only** contain the final, "clean" content.

- Check that your PDF conversion software has successfully converted **all the pages** of your original document (e.g. check for any problems with page limits, tables, graphics or footnotes).
- Check that your PDF conversion software has not cut down pages with **landscape** orientation to fit them into **portrait** orientation format.
- Check that **captions** and **labels** have not been lost from your diagrams.
- **Embed all fonts** in the PDF file (math symbols, non-Latin alphabet text, etc.).

2. **Limitations in document page number, font size, and page margins:** each form template, depending on the specific call, may impose certain limitations in the document formatting with regard to the maximum number of pages in the document, the minimum/maximum font size allowed, and/or the minimum margins you must allow for the page layout.

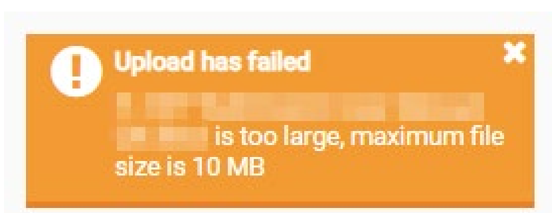
   Always make sure to check and apply the guidance for the specific call, available on the Funding & Tenders Portal, as well as the instructions at the beginning of the annex form templates for each specific call.

   If you attempt to upload an annex form that contains more pages than the specified limit, you will **not** be blocked by the system. However, after the upload, the system will display a warning message, advising you to shorten and re-upload the proposal.

   If the number of pages in one of the uploaded documents still exceeds the allowed limit and the deadline has not yet expired, you will see an Eligibility Warning advising you to shorten and re-upload the file.

3. **Document files size:** the allowed file size of annex forms may be limited, too. Check the guidance documentation available in the Topic page information package on the Funding & Tenders Portal.

   When the document file size exceeds the allowed limit, the file will not be uploaded and the system will display an error message immediately during the upload process, as shown in the picture below:



4. **Graphical resolution:** use a **maximum resolution of 300 dpi** for all graphics and text (photocopy quality). This can considerably reduce the PDF file size.

5. **Documents file name and security:**
   - Ensure that the annex forms file names contain alphanumerical characters only (A-Z, 0-9).

- Do not protect the uploaded files with a password.
- Make sure that the uploaded files are not electronically signed nor encrypted.

6. **Post-upload verification:** once you upload your files, check their quality - download them to check whether the file transfer was successful and if the file is complete. If not, make the necessary corrections and upload again.

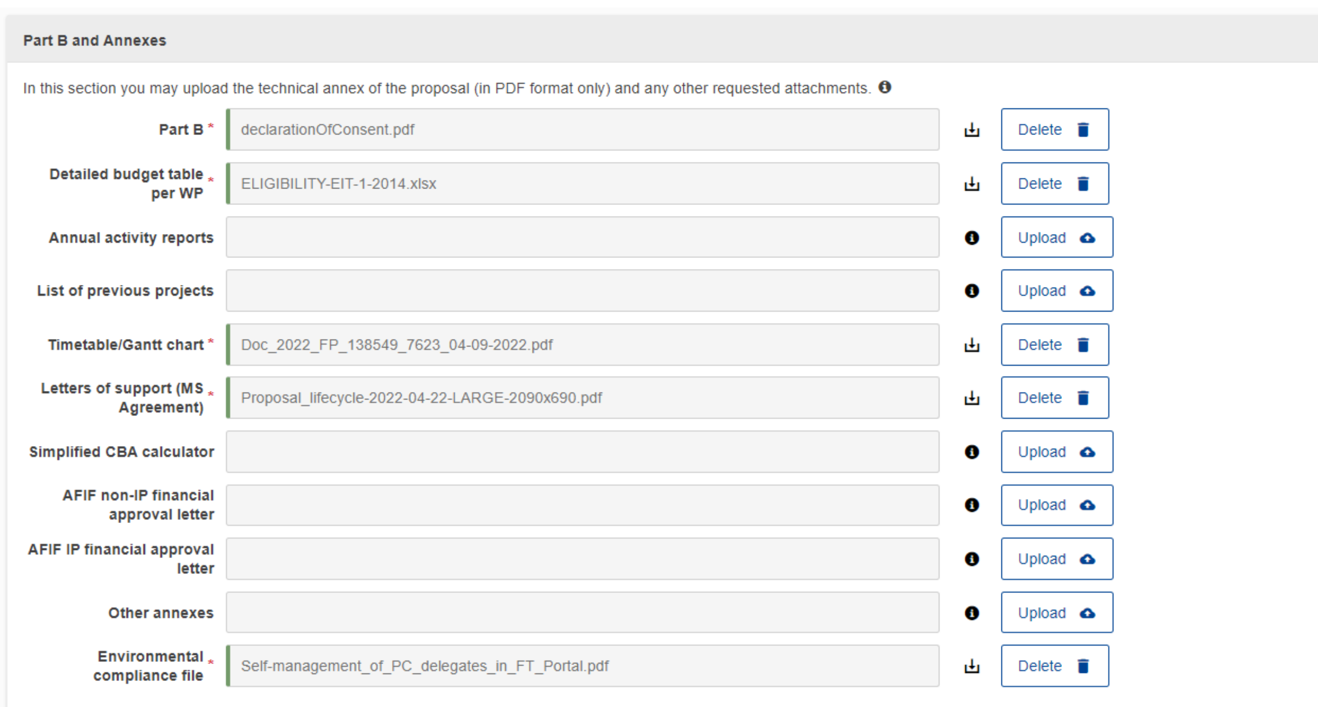
Note: Make sure that the files you upload can be opened without any problems. If the Commission encounters a problem when opening a file you have uploaded as part of a proposal, the complete proposal may be considered ineligible if it is one of the required annexes.

Also note that only one file per category can be uploaded. That means that if you have several documents (e.g. CVs) they need to get merged in a single PDF file with a maximum size of up to 10MB.

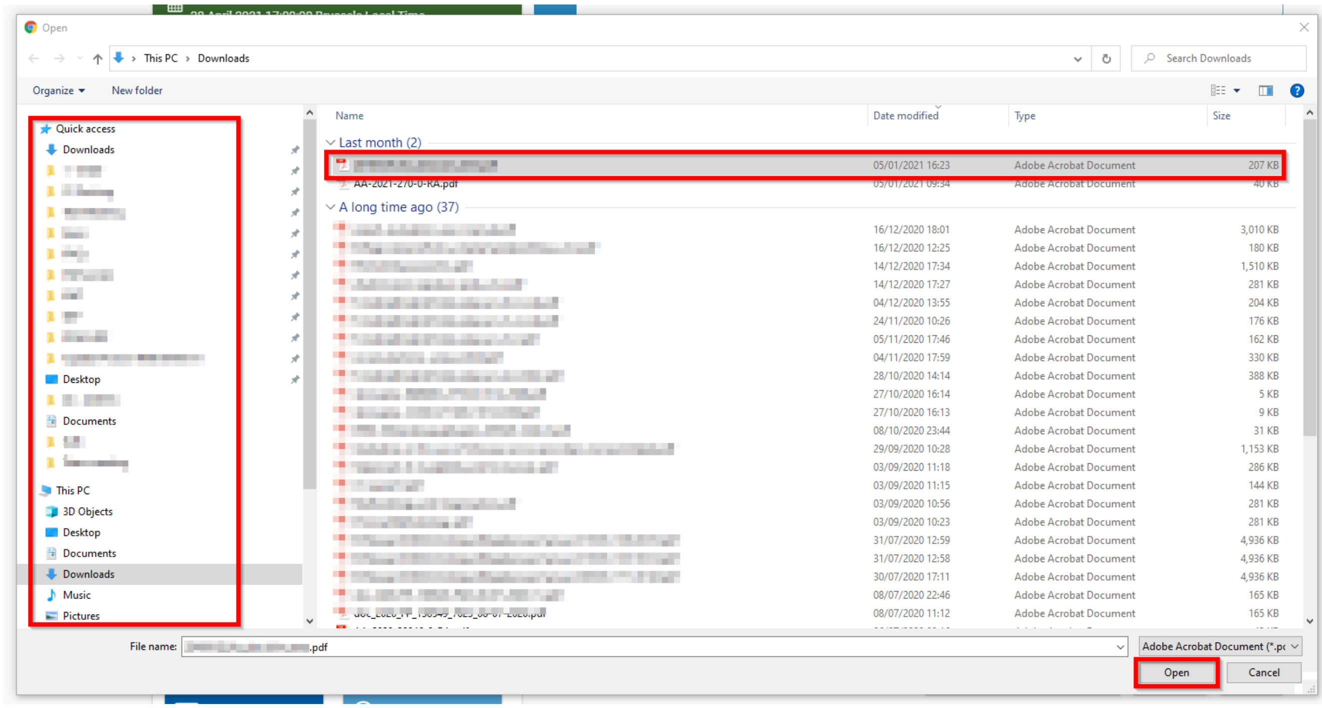
Once the downloaded templates have been completed and are ready to upload, follow these steps to upload them:

1. Click the 

button for the respective document in Proposal forms of the submission wizard:



2. Select the file to upload from the **Open** window. If your file has blank spaces in its name, the system will upload it filing the blank spaces with "_".



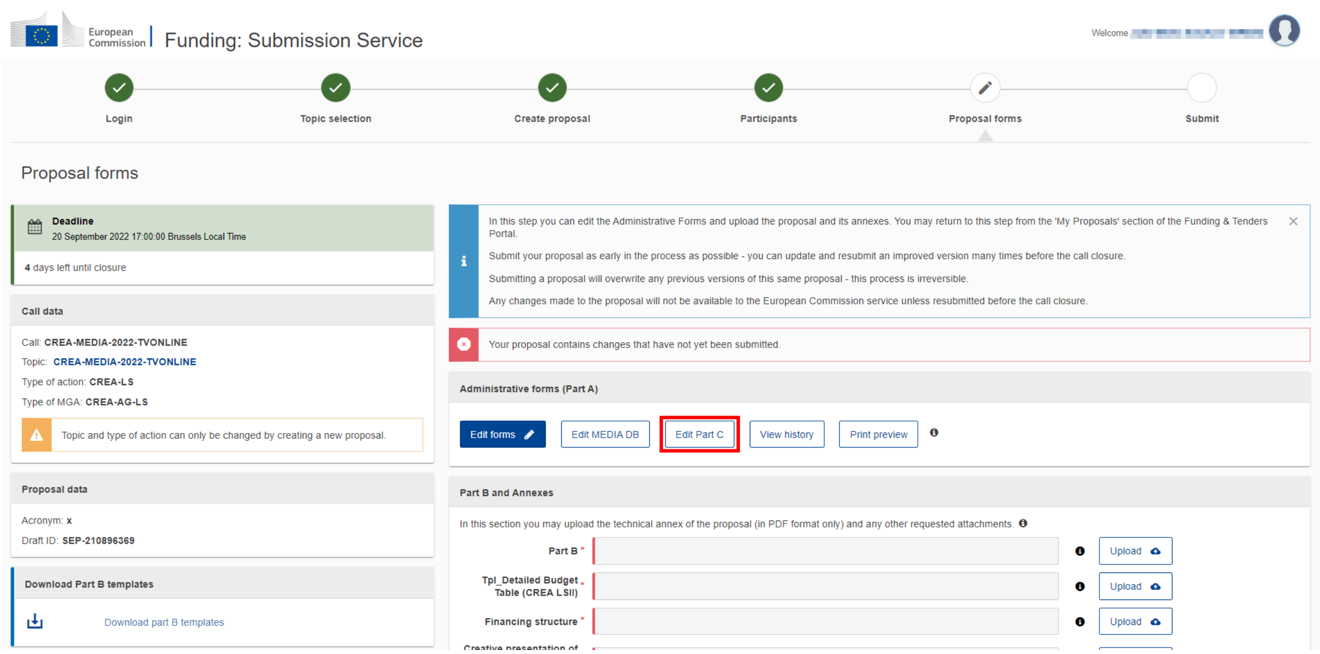
3. Click on Open.

Note: If the file uploaded is not in a PDF format, an error message will appear, you need to convert the file into PDF before uploading:

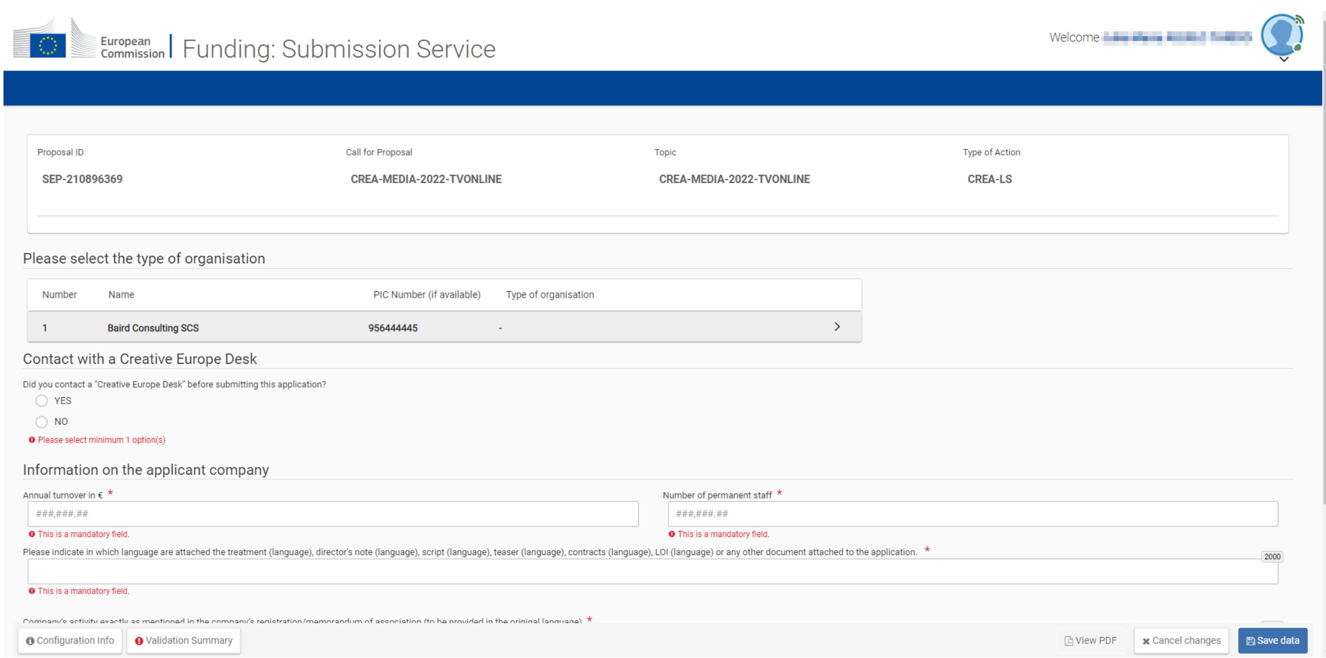
4. Optionally, you can click on Delete an uploaded file to remove it and replace it with a new file.

Part C

Depending on the type of call, filling in an additional form will be required: [Part C](#).
This web form can be found in the wizard as shown below:



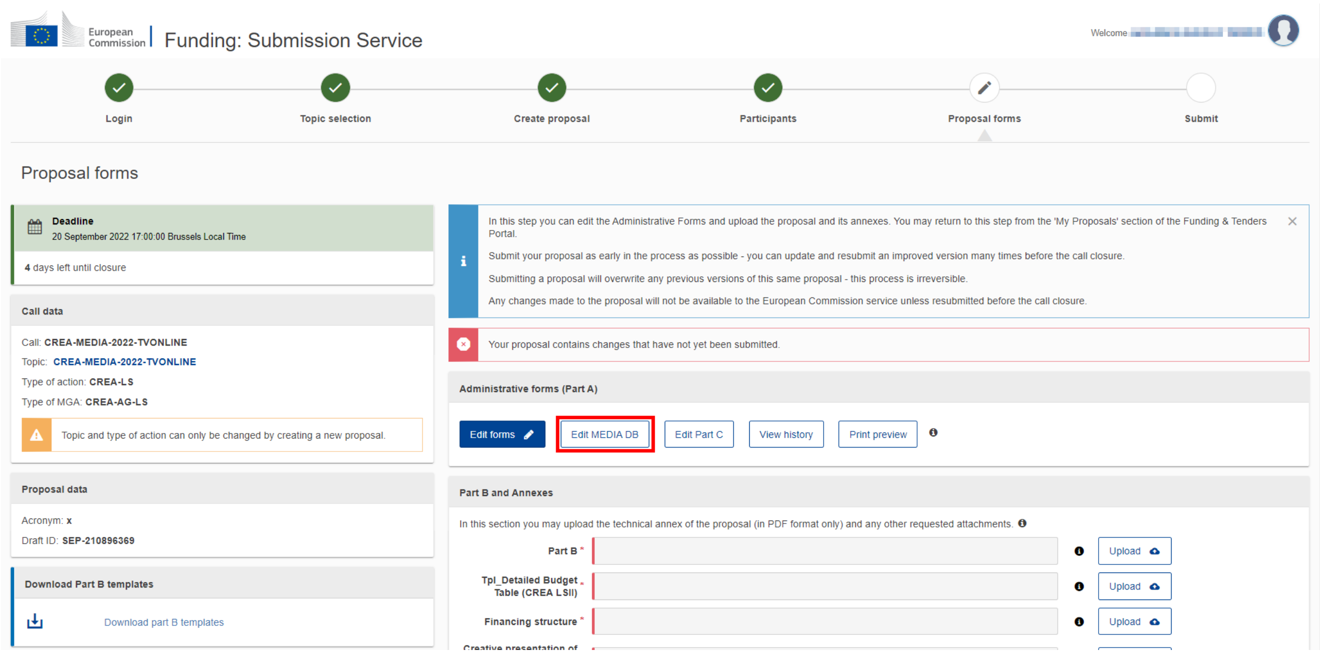
After clicking on the **Edit Part C** button, the web form will open:



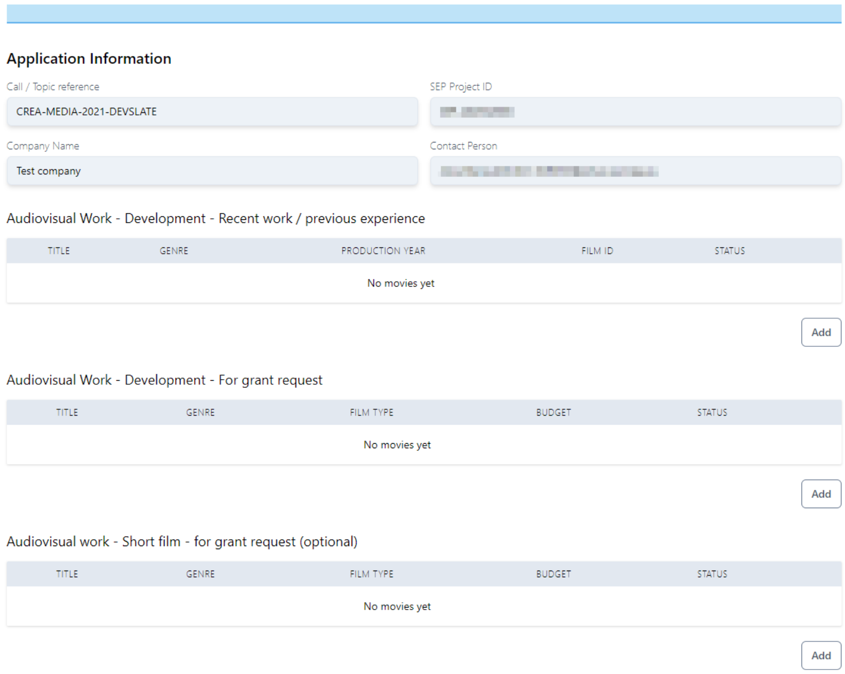
When you have completed it, click on the **Save data** button.

MEDIA DB

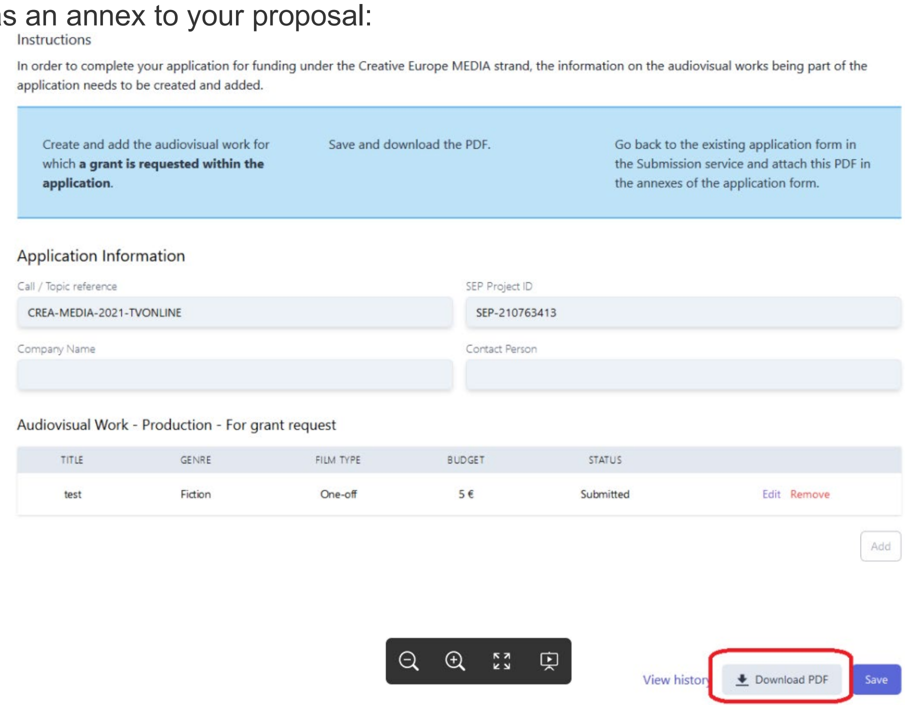
For some calls (i.e. CREA), you may be required to provide additional information about media works, which are part of the application. In these cases, you will see an additional **Edit MEDIA DB** button. This button will lead you to an online form, where you can enter all the required information about the media works considered in the application:



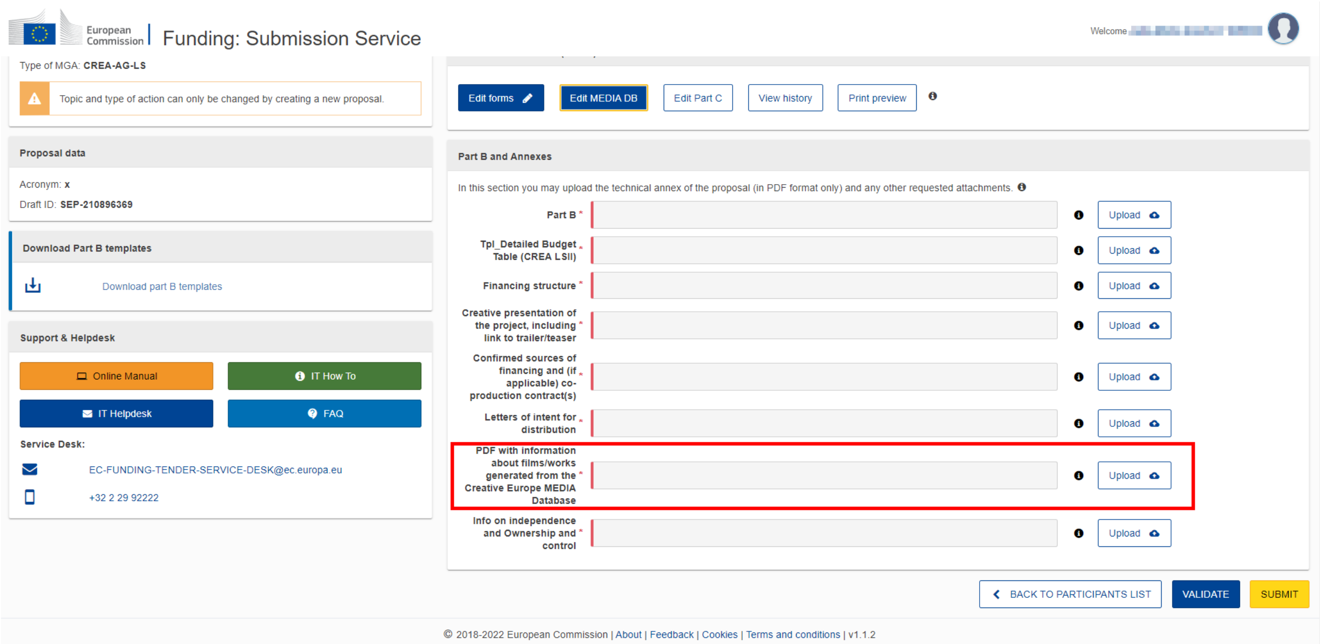
When you have clicked on the button, the Creative Europe MEDIA database page opens. Follow the specific application instructions provided in the form itself (the sections and the instructions in the form will be different from call to call):



When you have completed the form, click on the **Download PDF** button to download the file that you need to upload as an annex to your proposal:



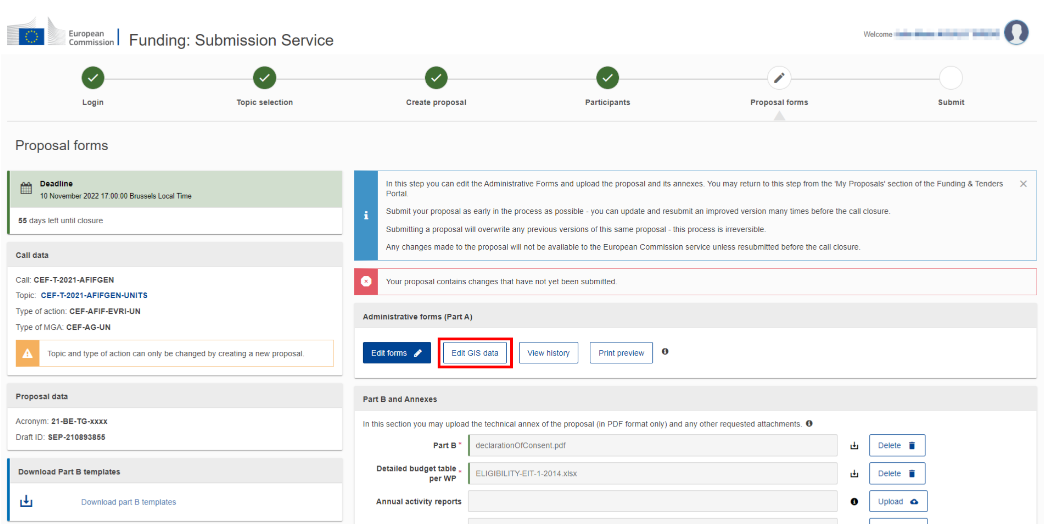
Then, go back to the Submission system (**Proposal Forms** step). Scroll down to the Part B and annexes section, locate the entry for the MEDIA DB information and upload the PDF file.



GIS data

For some calls (i.e. CEF), you may be required to provide information about the location of your proposal. In these cases, you will see an additional **Edit GIS data** button. GIS stands for Geographical Information System and you can find more about it here.

Clicking the **Edit GIS data** button will lead you to the tool.

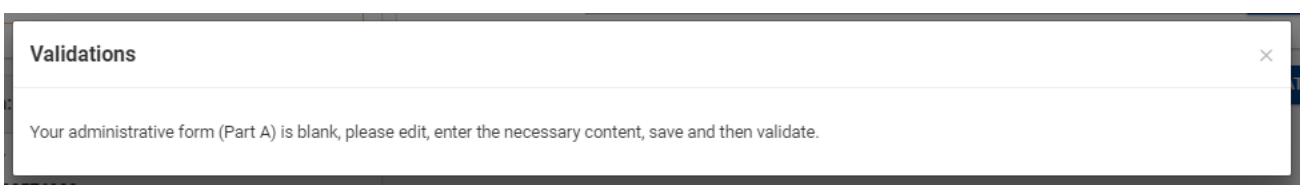


Access to the part C, MEDIA DB and GIS data forms

	Part C button	MEDIA DB button	GIS button
View/Edit mode	All full-access rights contacts of the Coordinator.	All full-access rights contacts of the Coordinator.	All full-access rights contacts.
View mode	All contacts that are not full-access rights contacts of the Coordinator. All contacts of the Partners.	All contacts that are not full-access rights contacts of the Coordinator. All contacts of the Partners.	Team member contacts.
The button is **disabled**	After call closure date.	After call closure date.	Never, only View mode after call closure.

Validate and submit your proposal

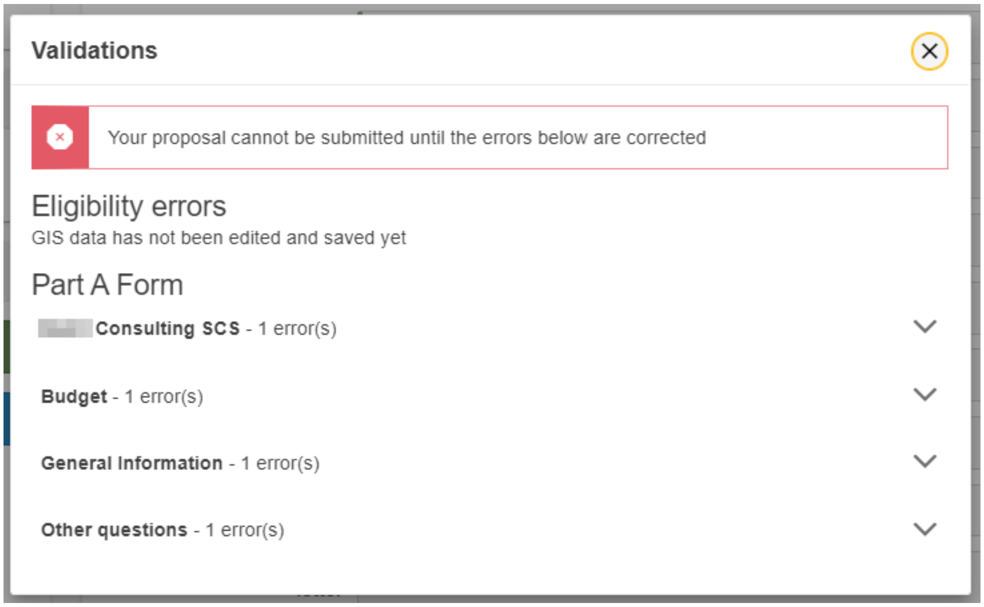
To make sure that your application meets the requirements run a validation of your draft proposal. To do so, you click on the VALIDATE button at the bottom of the submission application. In order to make your application meet the requirements of partners, file sizes, number of pages, etc., you will be prompted to correct any errors that have been detected in the forms. Any errors will be displayed as indicated below:



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

When you run a validation from the submission application via **Validate**, you run a validation of your whole draft proposal. This includes all fields in **Part A**, the uploaded files under **Part B and Annexes** and the presence of a saved **Part C** (if available for the call).

The following screen shows the results of validating the whole draft proposal:

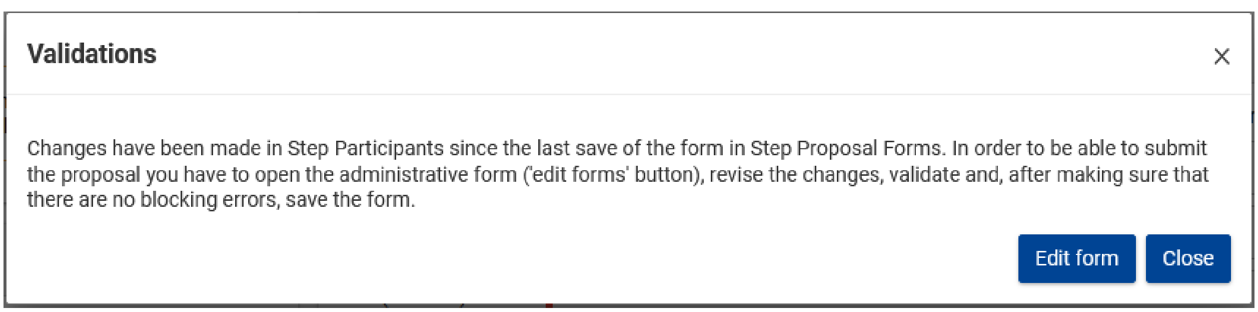


You have links for the errors and warnings. Clicking on them will expand the details for the error with new links. By clicking on these new links, you will access the affected parts in the form.

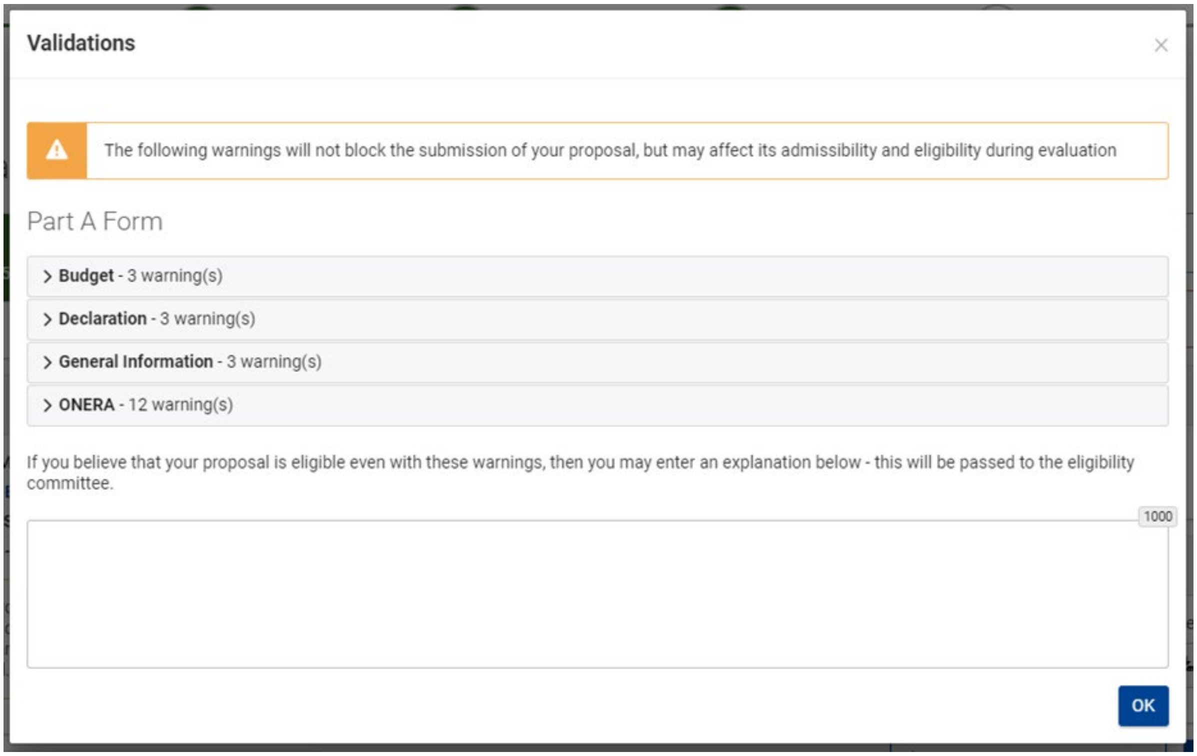
You are advised to run both validations in different moments. When filling in the form, use the **Validate form** functionality within the form. Before submitting your proposal, run a validation from the submission application to check if your application is ready to be sent by clicking on the action button **Validate**.

Part of the validation can include reviewing previous steps, such as the **Participants** screen, or they can be related to the Part B annexes, and not only the form Part A.

When the issue is that the consortium has been modified after having edited the form Part A, you will get the following message. Click **Edit Form**, review the participants section and click on **Save and Close**. Then click on **Validate** again, back in the **Proposal Forms** screen.



If only warnings are found, and not blocking errors, you may submit any way. After submitting, you will have the opportunity to enter a justification for the remaining warnings:



The Submitted status will also be shown on the **My Proposal(s)** page of the Funding & Tenders Portal. The Proposal Coordinator will also receive a submission confirmation e-mail, including details about the submitted proposal. Note that the e-mail could end up in the spam folder or get blocked by the anti-spam software of your organisation, so make sure that you check your inbox regularly.

The submission is completed when the Proposal Coordinator clicks on SUBMIT, and the confirmation email has been received. Uploading the Annex documents only, does not finalise the submission process.

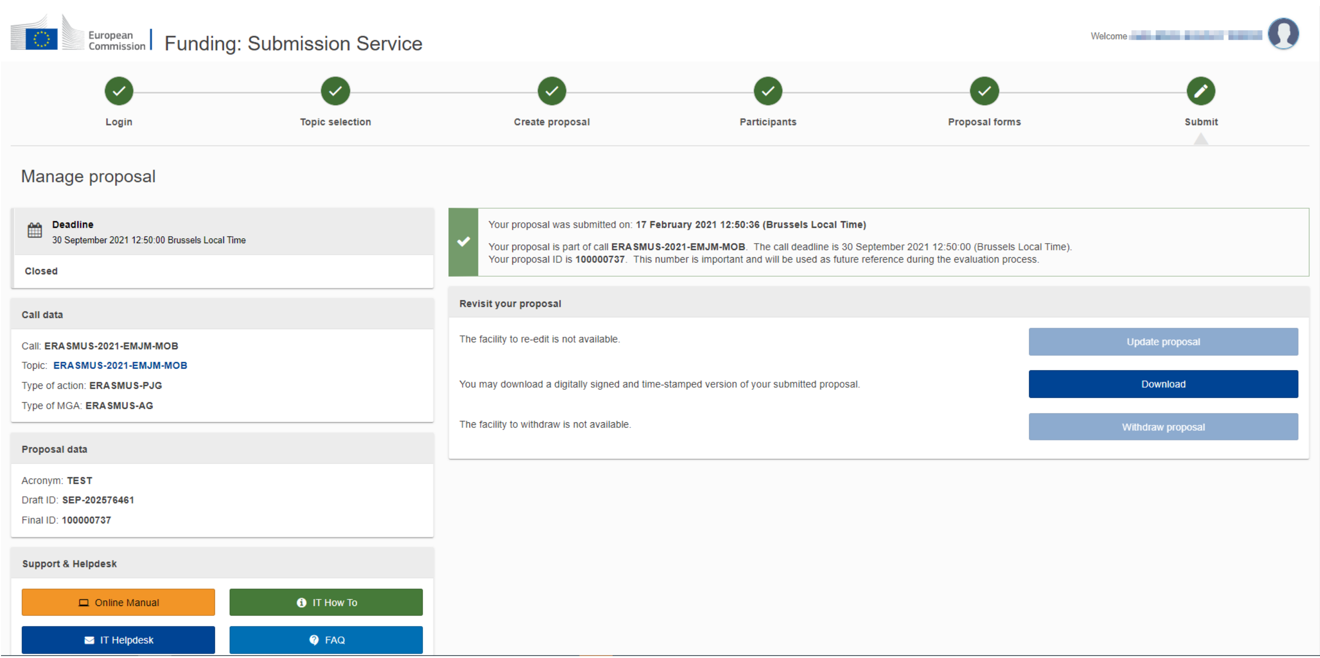
It is highly recommended to submit your proposal as early as possible and **at least 48 hours prior to the call deadline**. This will avoid being confronted with incompatible local IT configuration settings shortly before the call deadline, when insufficient time would be left to handle it. There is no reason in delaying the submission for confidentiality concerns as the system does not allow any access to the proposals before call deadline or cut-off (other than to selected data that is part of the Terms and Conditions for the Submission of Applications). You can submit the proposal as many times as you wish up to the deadline. Every submitted version will replace the previously submitted one.

Each time you upload a new Annex document, you **must** click SUBMIT to formally submit your changes.

Submit

Reaching **Submit** screen means that your proposal has been successfully submitted and therefore sent to the European Commission services for evaluation.

In this screen, you can carry out the following actions, as indicated in the picture below:



Update the proposal

Note: It will not be possible to edit proposals for calls which are already closed. This also applies to Continuous Calls.

If you need to revise your proposal, click the Update proposal button to go back to **Proposal forms**. The Proposal Coordinator may continue to modify the proposal and submit revised versions overwriting each preceding one right up until the deadline.

eReceipt: download the submitted proposal package

After submission of the proposal, it is advised to download your proposal in order to check that it has been correctly submitted.

A digitally signed and time-stamped version of the latest submitted version of your proposal can be viewed / downloaded.

Click the Download button to download your proposal.

Note: Depending on the volume of proposals submitted, this signed and time stamped version can take from a few seconds up to several hours to be visible in the submission application. If you cannot wait, alternatively you can go back to the Proposal forms and use the print-preview button to download the form A, except if the call has reached already the deadline and the status is closed.

Withdraw a submitted proposal

If your proposal is withdrawn, it will not be considered for evaluation. However, the system will keep the proposal draft and the withdraw action may be reversed by re-submitting the proposal before the call deadline. You will have to enter a reason for the withdrawal.

When a proposal is withdrawn, a message is displayed on the screen informing that the proposal currently holds that status. An e-mail is also sent to the Proposal Coordinator, including the details of the withdrawn proposal. Note that the e-mail might get lost in your spam folder or get blocked by the anti-spam system of your organisations, so make sure that you check for it as needed.

To complete this action, click on the Withdraw proposal button.

If you wish to withdraw a proposal after the deadline, you need to request it via the IT Helpdesk.

For more information see the Online Manual.

Partners

To be added, a partner must have both an EU login and a PIC for his/her organisation. When the Proposal Coordinator clicks SAVE in the **Participants** screen, an automatic email will be sent to all the Partner contacts with the proposal related links.

A partner contact without an EU Login will be prompted in the proposal notification email to register in the application.

Dear Manolo SCHMIDT,

has invited you to register to EU Login in order to access "PPW".

To accept the invitation, follow the link below:
<accept invitation>

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

Sent to you by EU Login

Once the Partners enter the electronic submission system, they will launch into the **Proposal forms** screen of the submission process where the Edit forms button enables them to access the electronic administrative forms and the rest of the proposal package and maintain the parts related to their organisation, only.

To access the consortium contact details, they will need to click the BACK TO PARTICIPANTS LIST button – thus going back to the **Participants** screen of the submission process.

Completing the forms

When the form is opened, the partner will have to verify or fill in their administrative form and make sure to correct any validation errors. To check for validation errors, partners must use the **Validate form** button located at the top of the form. The process is the same as explained under the section Validating, Saving and Closing the Form above

Please note that only the proposal coordinator will be able to upload files for the Part B.

Chapter 3: Reference guide to roles, screens and tasks

Roles: Proposal Coordinator, Partner and Contact Person

The roles that are available in the system are the Proposal Coordinator, Partners, and Contact Persons (optionally). The Proposal Coordinator and each of the Partners have a Main Contact and can optionally have one or more additional Contact Persons. Depending on the proposal you participate in, you might act on behalf of one or more of these roles and your current role will determine the actions you will be able to carry out, as well as determine the information that you will be required to provide.

- **Proposal Coordinator**: the Proposal Coordinator acts as the single point of contact between the participants and the Commission for any given proposal. The Proposal Coordinator is generally responsible for the overall planning of the proposal; for building up the consortium that will do the work, and (s)he is always the first participant. Note that for some calls, only one participant is needed and the participant will be the Proposal Coordinator of the given proposal by default.

- **Partner**: if you are a Partner to a proposal, you will be invited by the Proposal Coordinator to fill the administrative forms that contain the contact and address details. Most of the fields will be pre-filled with information already provided to the Commission services in order to save time and to ensure better data quality.

- Partners may also have **Affiliated Entities** linked to them (through a permanent legal or capital link or as members of an association; former Linked Third Parties). Affiliated Entities are allowed to fully participate in the grant and claim costs. They must comply with all eligibility conditions (same as a Partner).

- **Associated Partners**: this kind of participating organisation contributes to the project but cannot claim costs. They are normally not linked to any Partner and do not need to comply with the eligibility conditions.

- **Contact Person**: optionally, a Proposal Coordinator or a Partner may decide to delegate some of the work involved in filling in or reviewing parts of the proposal submission forms to one or more additional Contact Persons. You can grant each Contact Person full access rights or read-only access to the forms data. A Contact Person will only be entitled to edit/view the parts of the proposal that his/her organisation is responsible for.

  Note: A Contact Person with full access rights cannot change their own access rights level to 'read-only' – this can only be done by the Proposal Coordinator or another user with full access rights.

  However, a **contact person with access rights to a proposal** will be **notified** whenever they are **deleted from the list of contacts** pertaining to an organisation. When an entire organisation (including all of their contacts) is deleted, all contact persons will receive an email informing them that their access rights to this particular proposal have been revoked.

- **Calls with Specific Contact Roles**: most calls use the standard **Main Contact** and **Contact person** roles for the Proposal Coordinator organisation. However, some calls may require more specific roles, such as **Principal Investigator**, **Main Host Institution Contact, Researcher**, **Supervisor**, **Applicant**, and so on. Calls of this type are pre-configured accordingly so that the proposal submission forms for them contain special sections to address the specific roles and the respective data as needed. Likewise, the Proposal Submission Wizard for these calls will display the respective role options, as configured for each call.

Changing Main Contact information

Only one **Main Contact** is allowed for each organisation. However, for business reasons, you may need to change the **Main Contact** person details after the initial **Main Contact** assignment. For example, you can edit the **Main Contact** details of the existing person, or you can assign an existing **Contact Person** as the **Main Contact** replacing the original one, or you can first delete the **Main Contact** and then add a new one, etc.

When the information about the existing **Main Contact** changes (or when you delete it), the system will display a confirmation prompt warning you that you would lose the previous **Main Contact** data. If you change an existing **Contact Person** as a **Main Contact**, or if you add a new contact person in the Main Contact role, the previous **Main Contact** will automatically become a **Contact Person** – the two roles will be reversed.

Role rights

Differences between a Proposal Coordinator's and a Partner's actions:

Action	Proposal Coordinator	Partner
Select the call	Yes	No
Add, Invite Participants	Yes	No
Submit the proposal	Yes	No
Read complete proposal	Yes	Yes
Define the budget tables	Yes	Yes, with rights to fill in only the row for their organisation.
Create Contacts for a Partner	Yes	Yes, with rights to fill in only the information for their organisation.

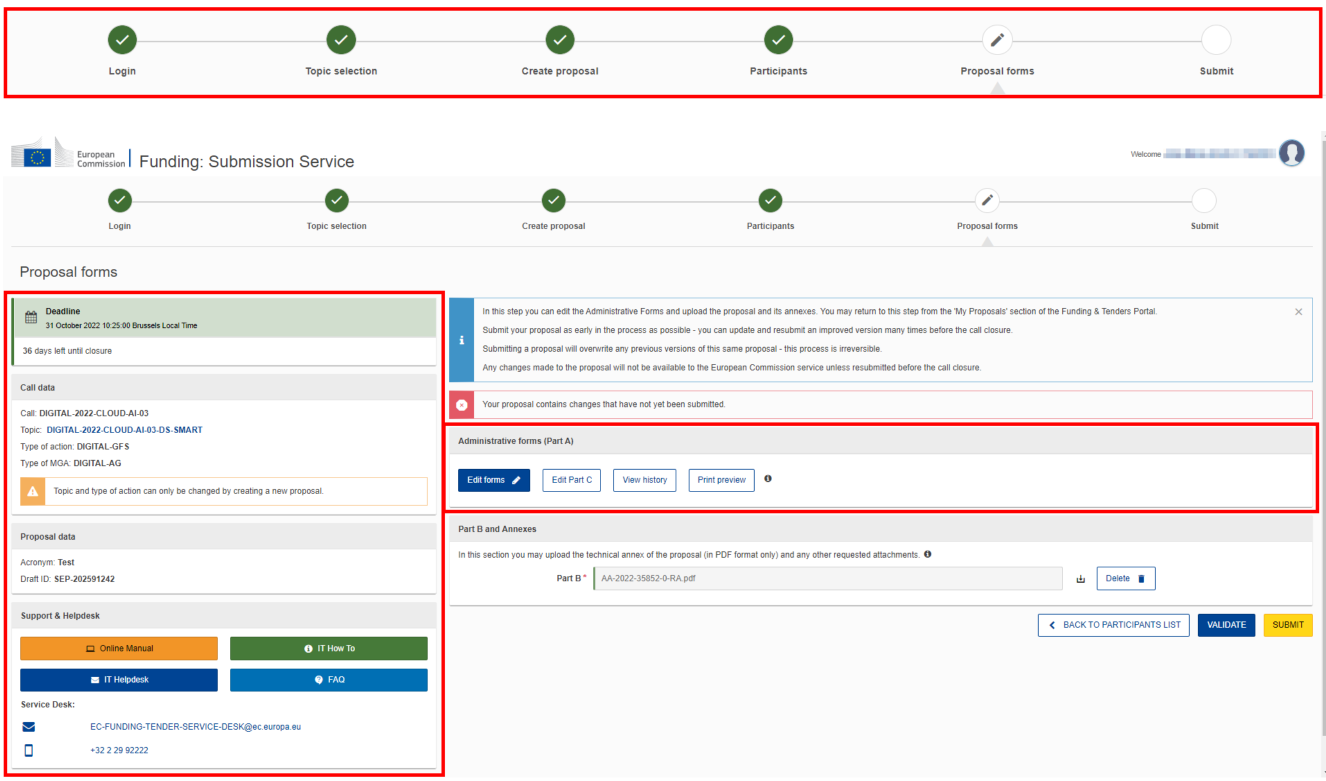
The timeline around the deadline

Proposals can be submitted multiple times before the call deadline specified in the information package of the call, available from the Funding & Tenders Portal. Calls deadlines are fixed and will normally not be extended. Only the most recently submitted version will be evaluated, and each newly submitted version overwrites the previous one. After the call deadline, the proposal can no longer be modified and no further participants can be invited. Practise the proposal submission procedure well before the deadline to ensure a risk-free submission of your proposal and proper correction of errors and warnings.

After the deadline, the proposal remains available in read-only mode and can be accessed by the coordinator and the proposal participants.

The online submission system: available actions per screen

The electronic submission system screen is composed of different elements. See below to get familiar with them:



- **Progress bar**

  A progress bar banner, which shows the proposal completion progress. It shows in which step of the process you are right now, marked with a red indicator. The previous steps are colored in green once you have completed them, taking into account that the first two steps are performed in the Funding and Tenders Portal prior to accessing the submission wizard.**Proposal information panel**

Displayed on the left hand side of the screen, it is the ID card of your proposal. The information displayed there is completed as the user progresses. It also shows useful information such as the submission deadline for the corresponding call.

- **Configuration status check tool**

  It is displayed at the bottom left part of the screen. In the visual example above, the configuration complies with the minimum requirements.

  This part also allows downloading the Part B templates in RTF format, and it includes links to the help wiki site and the Online Manual.

- **Action buttons**

  Buttons for the available actions. They will be different depending on the step in which you are. The ones above, corresponding to the **Proposal forms** screen, are connected to editing the administrative form Part A and uploading the Part B documentation. In the **Participants** screen, they will consist of actions to add/remove partners, etc.

- **Proposal navigation buttons**

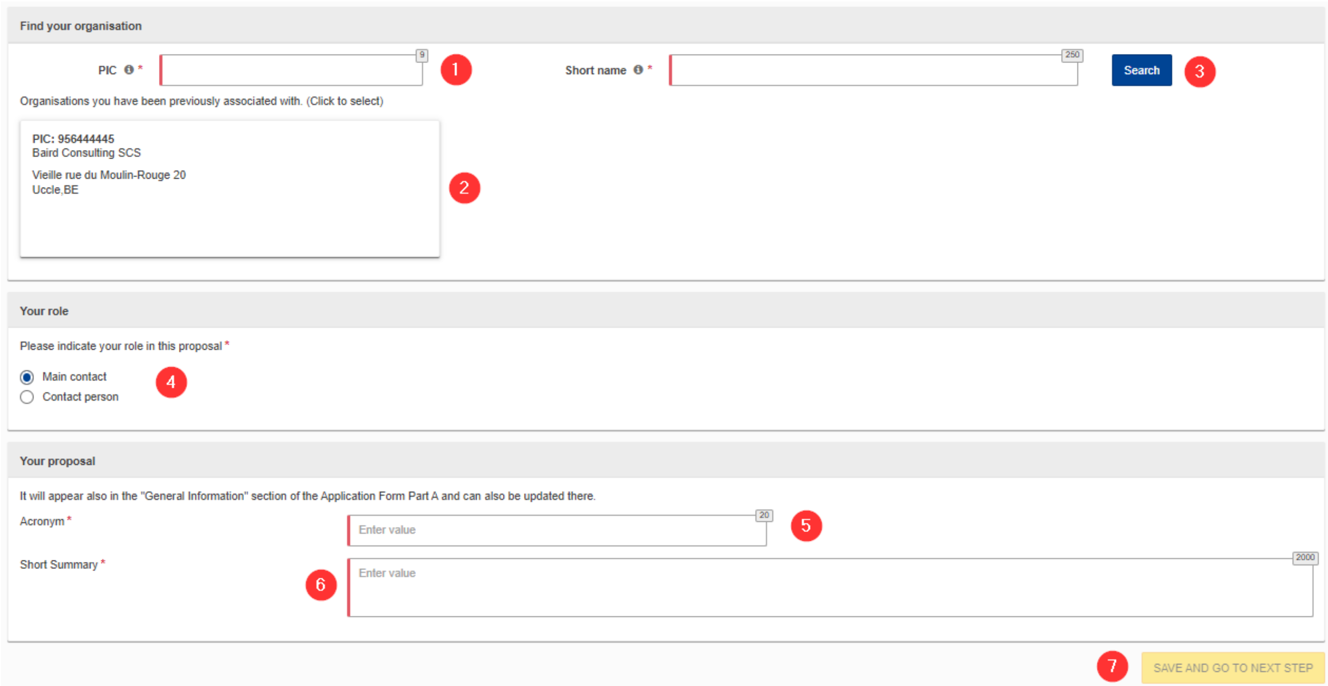
  Available at the bottom right corner, they allow you to go from one step to another, validate the content of the proposal and to submit your proposal.

  There are no more navigation buttons in the **Submit** screen, where only action buttons will be available as explained in the Submit section.

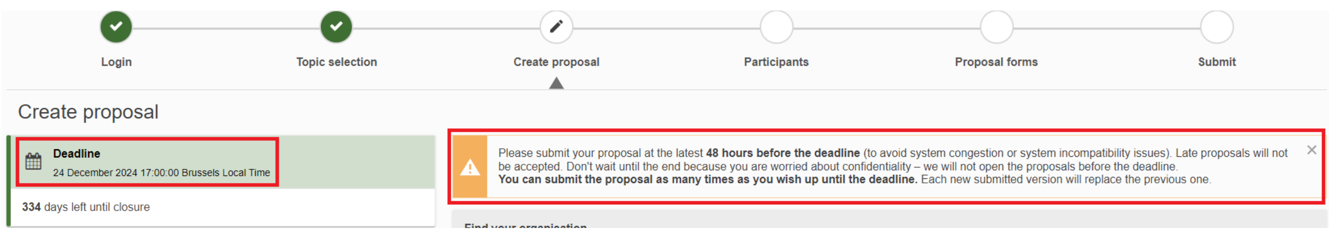
Create proposal

The picture below shows the **Create proposal** screen of the wizard. 7 actions are available there, each one indicated below with a number shown in the image that follows:

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



A warning will be displayed suggesting that you submit your proposal at the latest 48 hours before the deadline. For Continuous Calls, you should ignore this notification.



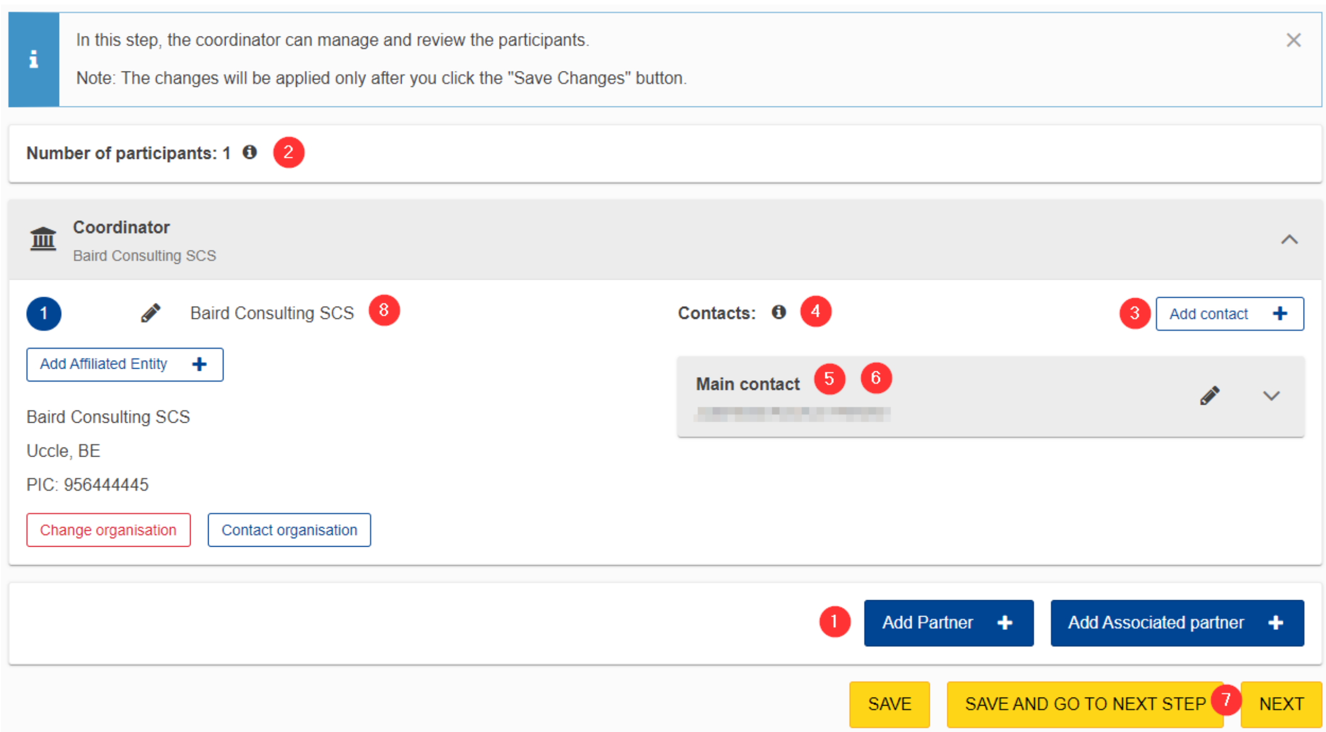
Participants

The picture below shows the **Participants** screen within the wizard. You will be able to perform these 8 actions, indicated on the picture via a number:

1. Click on the **Add Partner** button to add a new Partner.
2. Click to display guidance on the Participants section of proposals.

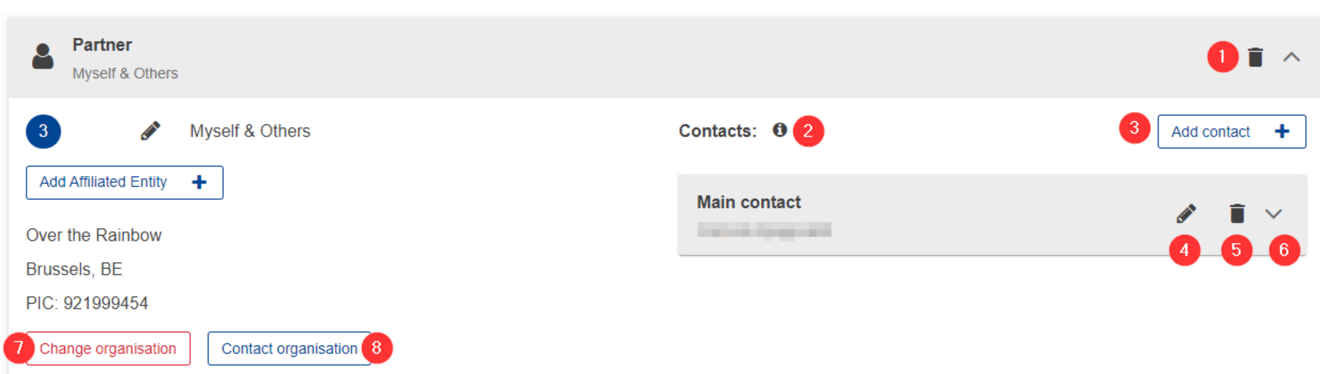
   Warning on the required number of participants. It will be different from call to call.
3. Add contact: it will allow you to specify a contact for that organisation.
4. Displays information about Main contacts, access rights and invitation sent by the system.
5. Edit contact, allowing you to modify the contact details (i.e. name, access right and project role) or remove it.
6. Displays the email address and access rights in the project for a given contact.

7. **Save and go to next step** button, allowing you to move into the **Proposal Forms** screen.
8. Edit participant name within the project.



Buttons in the Participants screen

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



1. **Delete participant**

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

2. **Info**

   Click this button to display a help window explaining how you can manage the contact person(s) and what the **Main Contact person** role means, as well as what kind of access rights the contacts you provide will receive.

Add contact (where applicable)

You can manage the list of organisations and access right of persons at Step Participants. You may identify and give access to as many contact persons of the selected organisations as you wish. The identification is based upon the e-mail address of the person. When you add a contact person, you will be prompted to supply the contact details: name, e-mail, phone.

Main contact person: Each organisation needs to have one main contact person identified; the main contact person will have to fill in full contact details in the administrative form. The 'Main Contact Person' for the coordinating organisation (Participant no. 1) will become the primary contact person for the Services. Other contact persons may also be identified and may receive read-only or full access rights. Contact persons with full access rights of the coordinator (Participant no. 1) will be called 'Coordinator contacts' in the Funding & Tenders Portal, while for the other participants 'Participant Contacts'; contact persons with read-only rights will be called 'Team Members'. Other contact persons are listed with basic details in the administrative form.

Access rights: The main contact person and contact persons of the coordinator with full access rights have the same level of rights: they can manage the list of participants and contacts, edit any part of the administrative part of the proposal and upload any attachments (eg. technical annex), and submit the proposal. Contact persons with read-only rights can only view/download the information. Participant contacts with full access rights can only edit their section of the administrative form and view all proposal data.

Access rights can be revoked by the Coordinating Organisation contacts. The person who created the proposal cannot be deleted.

Invitation: All contacts will receive an e-mail and a notification to the Portal about the invitation to the proposal upon saving the data at Step Participants.

3. **Add contact**

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

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

5. **Delete existing contact**

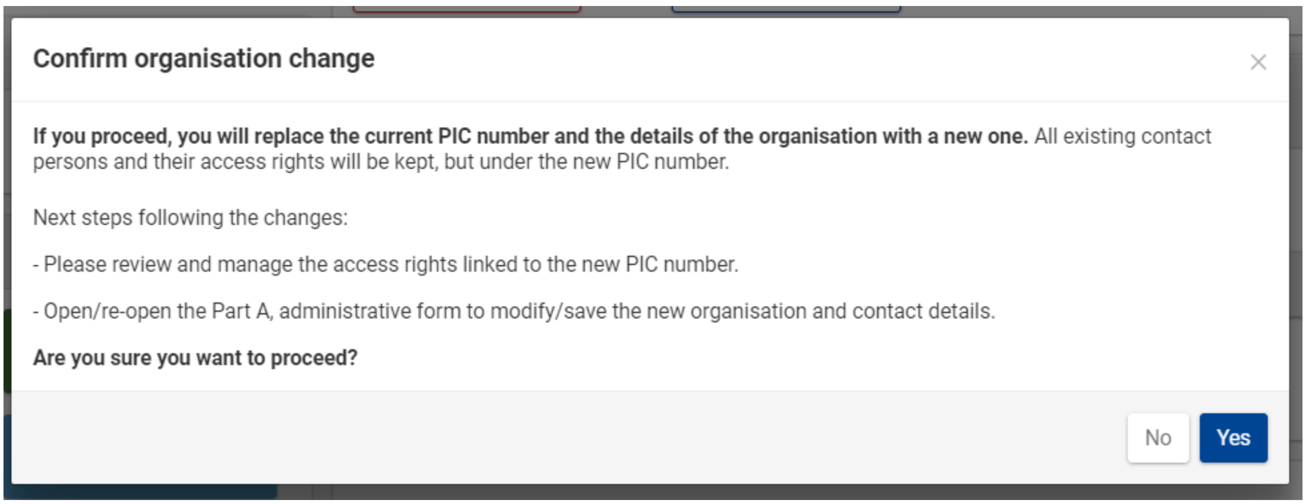
   Click this button to delete an existing contact.

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

6. **Contact information**

   Click this button to see more information about that specific contact. The name field will expand showing the email address and access level of the contact within the proposal.

7. **Change organisation**
   Click this button to replace the existing organisation (PIC). Upon clicking on this button, following message will be displayed:



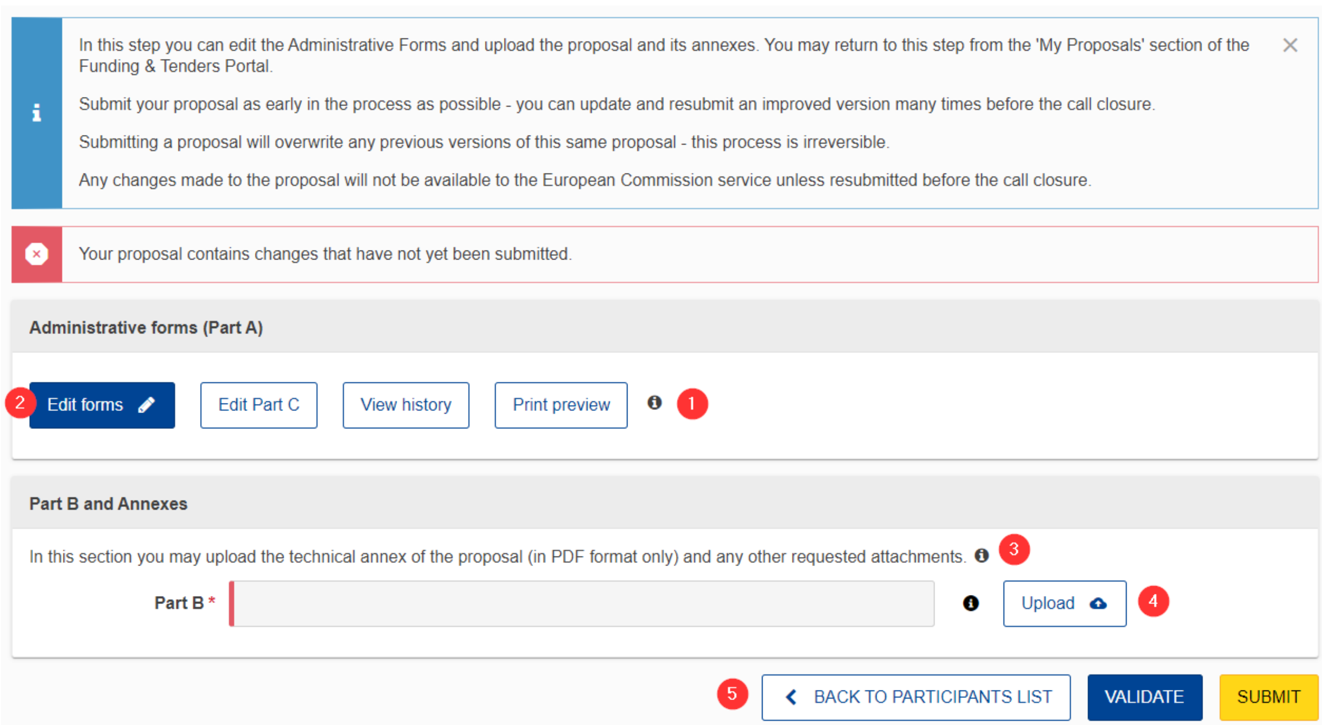
   After clicking **Yes**, you will get the **PIC search** window.
   Coordinator contacts with full access rights can change the contacts for the new selected partner if needed.

8. **Contact organisation**
   Click this button to contact the LEAR or/and the Account administrator of an organisation.

Proposal forms

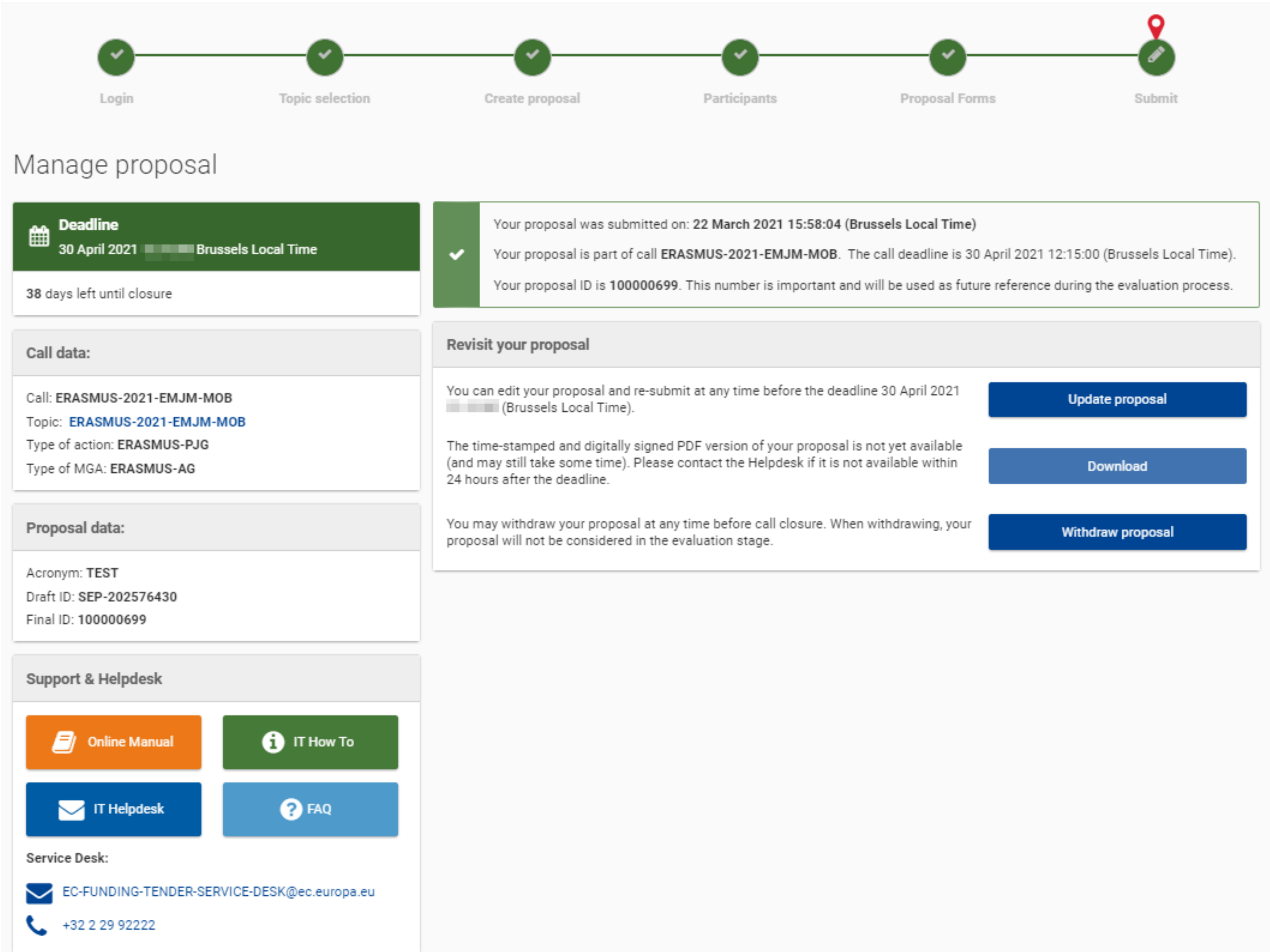
The picture below shows the **Proposal forms** screen of the wizard:

1. Click to open guidance on editing the Administrative forms (Part A).
2. Action buttons for the Administrative forms in Part A.
3. Click to open guidance on annexes and Part B forms.
4. Click to upload required Part B document.
5. Navigation buttons.



Submit

The picture below shows the **Submit** screen of the wizard. There are basically 3 actions that you can take in this screen:



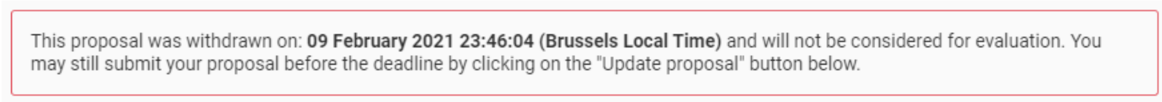
1. **Update proposal**: allowing you to change the content of your proposal. Please note that you will need to submit again for the changes to be reflected. Also, this action is available only until the call closure date/time is reached.

2. **Download**: allowing you to download a digitally signed copy of your proposal. This will not be available immediately after submission. If the copy is not available yet, you will get a message asking you to wait a bit longer.

3. **Withdraw proposal**: this allows you to withdraw your proposal so that it does not go to the validation phase.

   If the call is still open when withdrawing, the entered data will be available and you will able to edit and submit again. The button **Update proposal** will be again active for such an aim.

   If withdrawn, a message in red will appear on the screen, informing that the proposal will not be considered for evaluation.



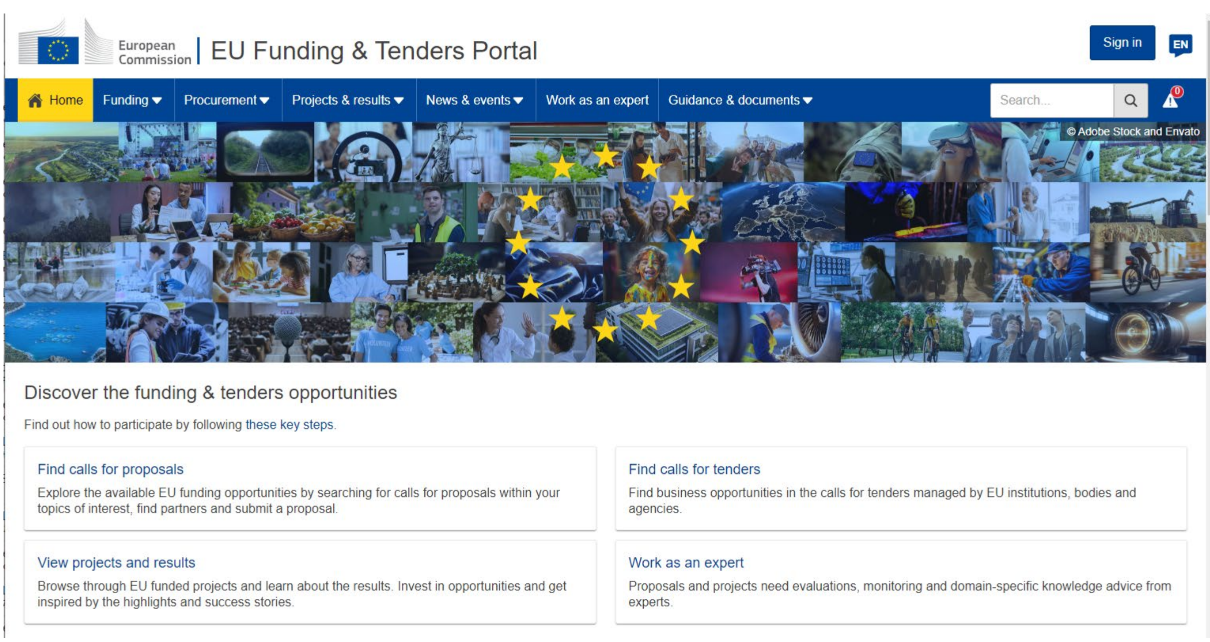
The Funding & Tenders Portal: screens and access to submission tasks

The Funding & Tenders Portal is your entry point to the Online Submission Service. It allows you to carry out the following actions:

- Familiarize yourself with the overall research and innovation grant process by first consulting the **How to participate** tab on the Portal.
- Decide on the funding opportunity that you want to apply for.
- Select your Partners – check Partner information in the **Participant register** section.
- Register as a user for the EU Services by creating an EU Login.
- Register your organisation and your Partner organisations in the Participant register section.
- Log into the Funding & Tenders Portal and select your topic to access the Online Submission Service.
- Use the My Person Profile, My Proposal(s) and My Organisation(s) pages to access your draft and submitted proposals.

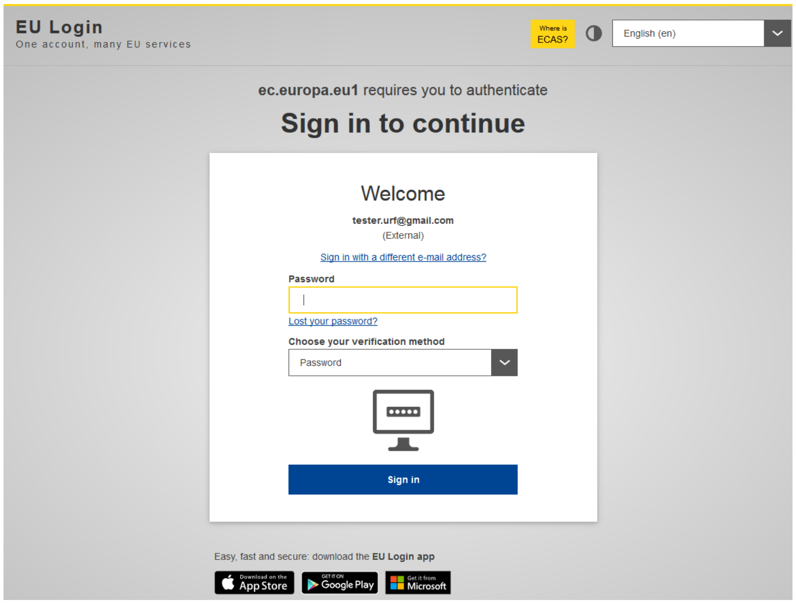
Funding & Tenders Portal: before you log in

Create an EU Login or, if you already have an account, log in with your registered email address. Before logging in, familiarize yourself with the grant process, the funding opportunities and check the Partner information:



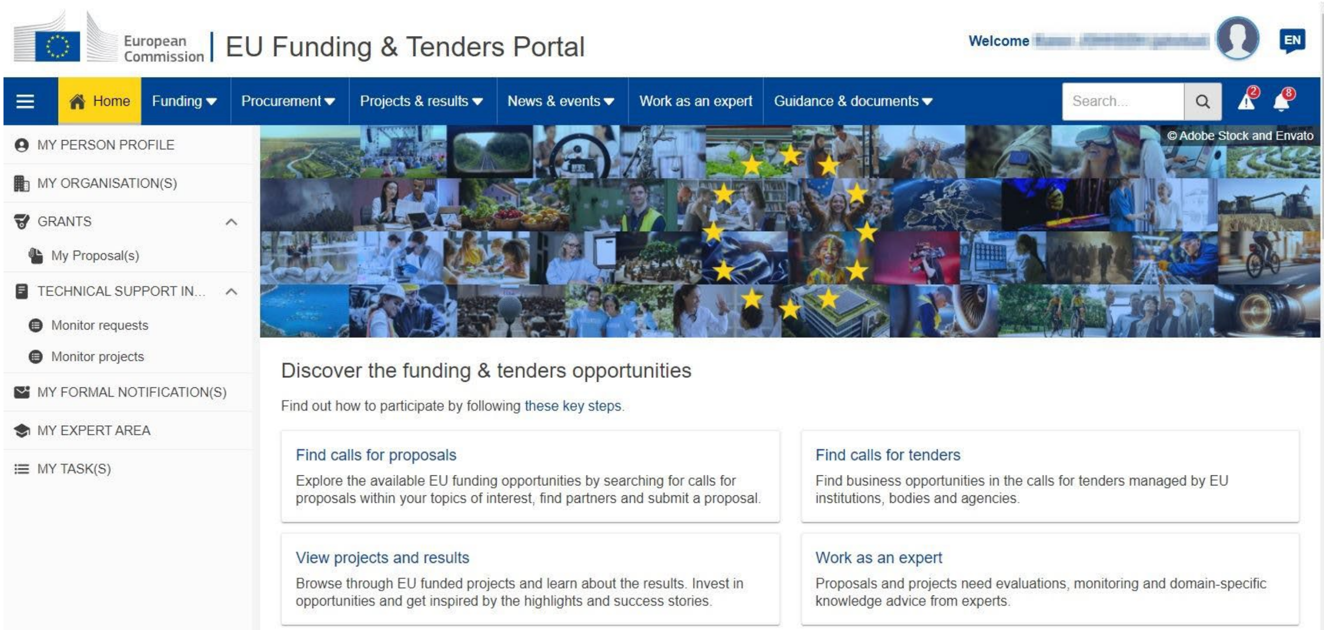
Funding & Tenders Portal: the EU Sign in screen

When you click Login, you will be prompted to log in through the EU login screen, as shown in the picture below. This screen appears in the same window. After entering your credentials and logging in, you will be redirected to the homepage of the Funding & Tenders Portal:



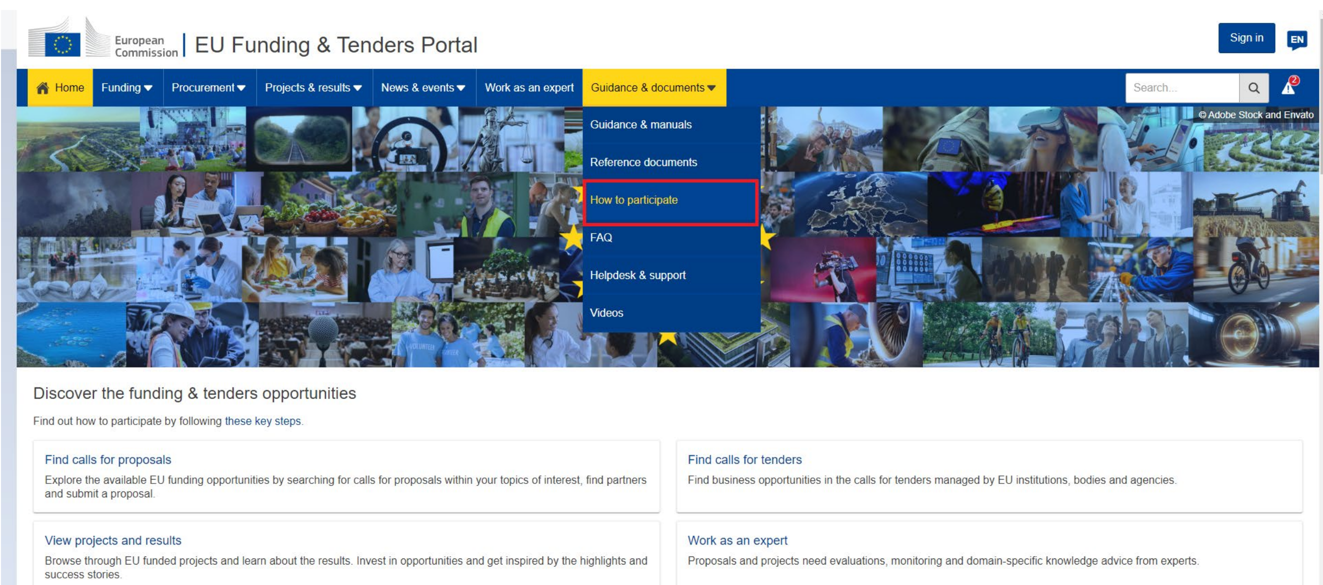
Funding & Tenders Portal: the EU Login and My Person Profile

Once logged in, your personalised **My area** displays on the left. Here you can access your Organisations, Proposals, Projects, Notifications, etc. Please note, this area shows only the section for which there is existing data. For instance, if you do not have any proposals yet, you will not see **My Proposal(s)** on the left:



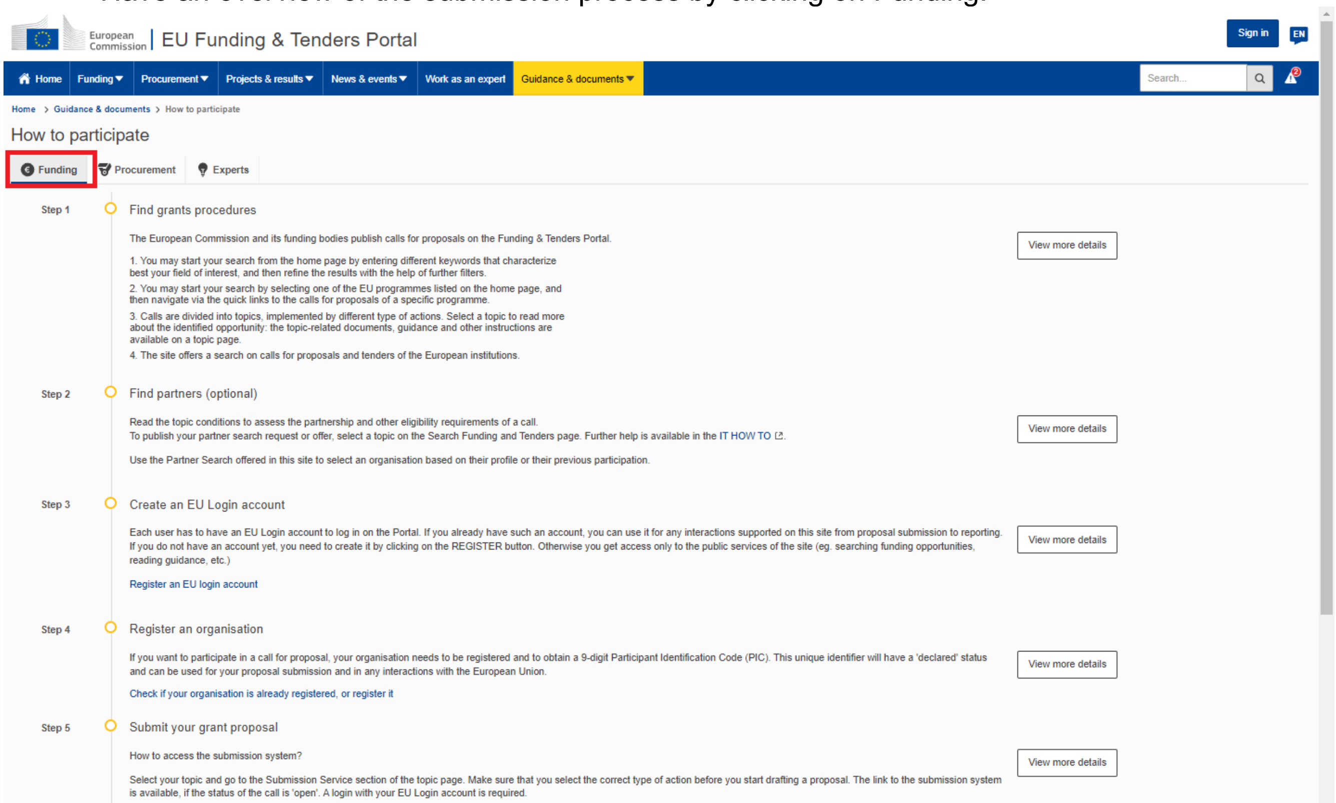
Funding & Tenders Portal: the How to participate page

From the upper menu select Guidance & documents then click **How to participate** . This page is your main source of information as you prepare for submitting your proposal:



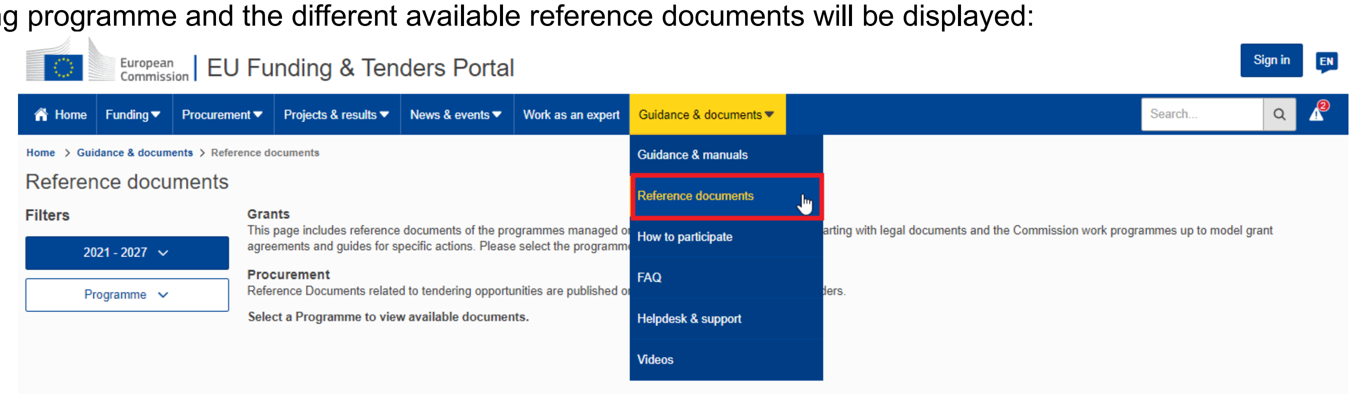
From this page, you may:

- Have an overview of the submission process by clicking on Funding:



Funding & Tenders Portal: the Reference Documents page

From the upper menu click **Guidance & documents** then select **Reference documents.** Select a funding programme and the different available reference documents will be displayed:



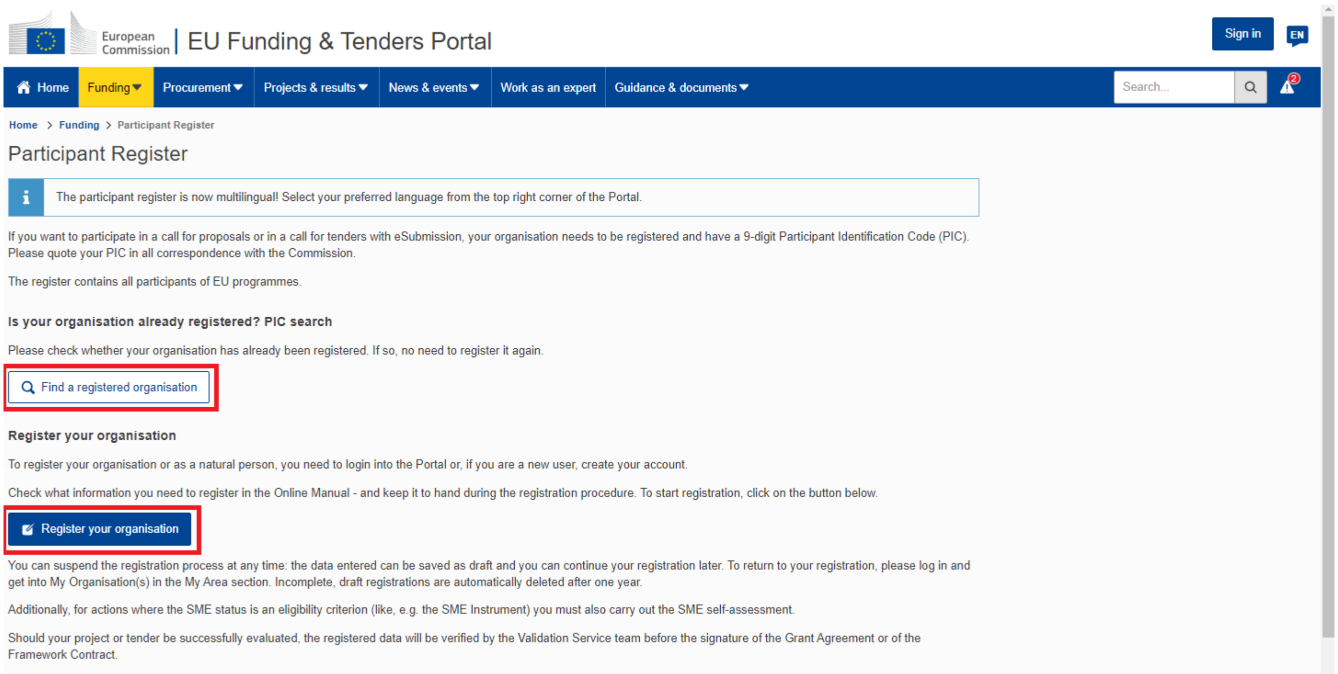
From the upper menu click **Guidance & documents** then select Register an organisation via the [Participant register](#) section, by selecting **Participant register** under **How to participate**.

- Look for potential partners using the [Partner Search] functionality.

Funding & Tenders Portal: the Participant register page

The Participant register page is accessible from the upper menu and clicking Funding. . It allows you to:

- **Search** the registered organisations database and check if your desired Partners' organisations are already registered with the European Commission.
- **Start** (or **Resume**) your organisation registration process via the [Participant Register] application.



Appendix A: Compatibility and system configuration

Recommended system configuration

The electronic submission system of the European Commission is a web application. Therefore, a working Internet connection is needed in order to use it. Although the system has been tested with a set of typical reference configurations, it is not guaranteed that the application will be fully functional on your computer. The system provides a diagnostic window that will warn you about some possible incompatibilities.

To use the electronic submission system, ensure that your computer configuration complies with the following mandatory system requirements:

Component	**Recommended configuration**
Internet connection	DSL Line, 2.0 Mb/s or faster
Memory	RAM – 4 GB or more
Screen resolution	Minimum 1680 x 1050 of higher
JavaScript	JavaScript must be enabled
Cookies	Cookies must be enabled
Pop-up blocker	Website should be white-listed in the pop-up blocker
User ID	A valid EU Login account
PDF Reader	A PDF reader application will be needed in order to use the functionality of print preview, as well as being able to check the annexes in Part B, since they have to be uploaded in PDF format.

Recommended browsers

The following table shows the operating systems and browsers actively supported by the system. This configuration will provide you with a fully enhanced experience:

Operating system	Internet browser
Windows 7, 8 & 10	Chrome 120 or newer Firefox 121 or newer Microsoft Edge 120 or newer (was 44)
Mac OS X from 10.10 **(laptops and desktops)**	Chrome 120 or newer Firefox 115 or newer Safari 17.2 or newer
Mac iOS **(iPhone, iPad and iPod)**	Safari 17.2 or newer

Note: The use of mobile devices for online submission of research proposals is not supported for now.

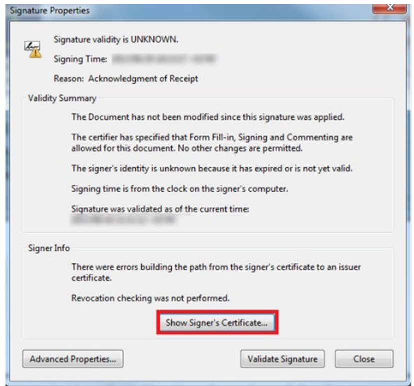
Troubleshooting document structure (eReceipt: *Signature not verified* message)

You receive the following message: "The European Commission digital signature (eReceipt) of the submitted proposal is not validated" after downloading your submitted proposal.

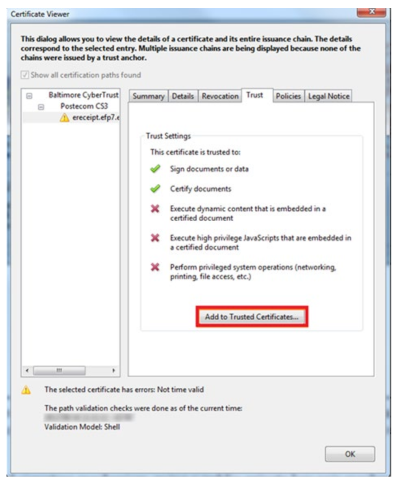
The following procedure is only applicable for Windows operating systems. After downloading the submitted proposal:

1. Click **signature** located at the table of contents page.
2. Click **Signature Properties…** in the Signature Validation Status window:

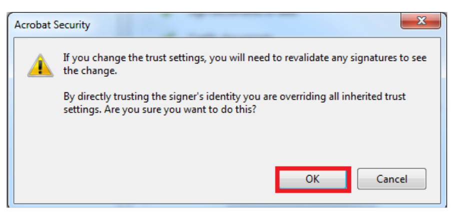
3. In the Signature Properties window click **Show Signer's Certificate…**



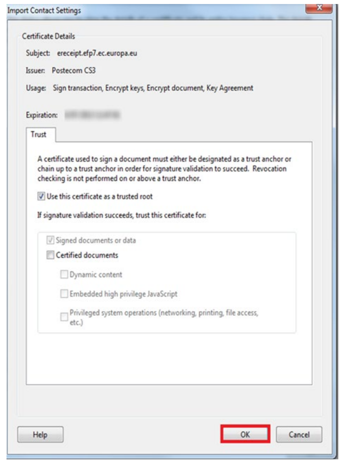
4. Select the **Trust** tab and Click **Add to Trusted Identities** in the Certificate Viewer window:



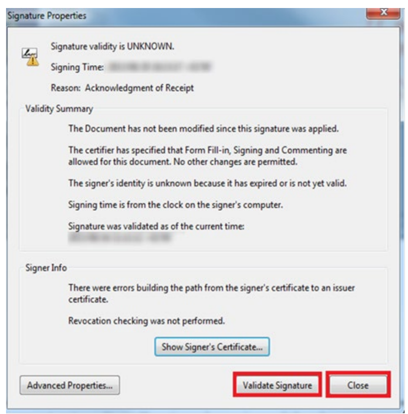
5. Click **OK** in the Acrobat Security pop-up window to confirm.:



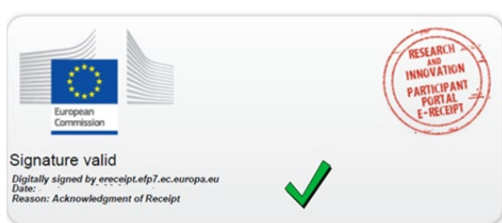
6. The **Import Contact Settings** window should be displayed:



7. Tick **Use this certificate as a trusted root**; and then click **OK**.
   Note: ticking **Certified documents** is not required.
8. In the **Signature Properties** window click first **Validate Signature** and then **Close**:



9. The Commission digital signature or eReceipt should be validated now:



Appendix B: EU Login registration

To use the Online Submission Service, you need to have a personal user account with the European Commission Authentication Service (i.e. an EU Login).

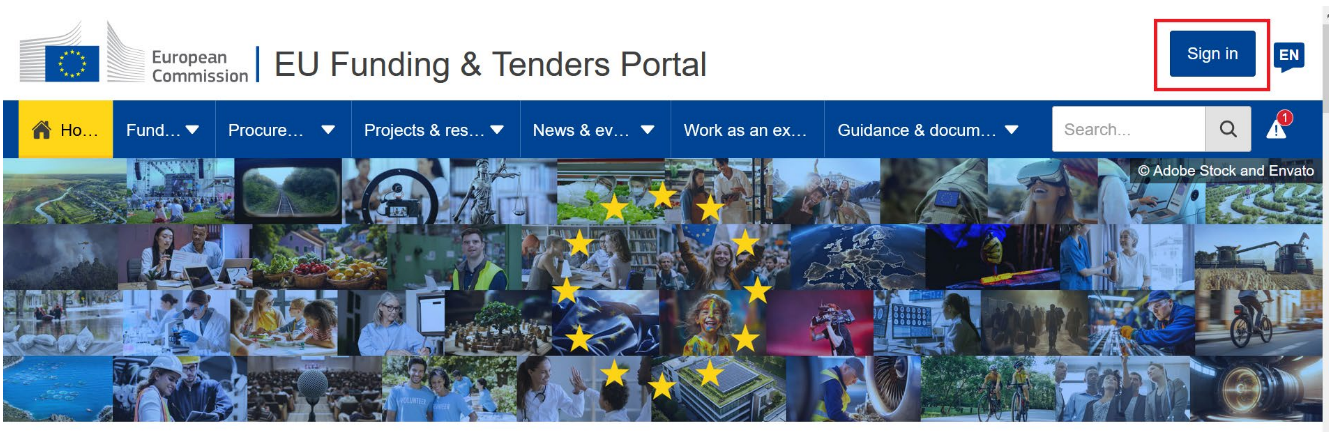
To create an EU login, follow the instructions below.

Note: For additional information, see the Online Manual.

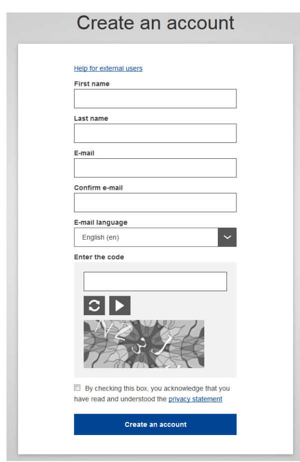
EU Login registration steps:

1. Go to the Funding & Tenders Portal:

   https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home



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



All fields in the registration form are mandatory.

4. Optionally, click the link https://webgate.ec.europa.eu/cas/help.html if you need additional instructions
5. Enter your **First name** and your **Last name**.
6. Enter your **E-mail**. When registration is complete, a confirmation email will be sent to this email address.
7. Enter your e-mail address again in the **Confirm e-mail** field. You will receive an error message and you will have to enter the email again if it does not match the e-mail address provided in the **Submit** step of thesubmission wizard.
8. Select the **E-mail language** that you want the European Commission to use in the e-mail communications sent to you.
9. In the **Enter the code** field, enter the five characters shown in the blue box above the field. For security reasons, the characters are not displayed clearly and may not be copied from the blue box.

   If you cannot read the characters in the blue box or if you are entering them but you are receiving an error message, try the following:

   a. Click to reload a different character combination and enter it in the **Enter the code** field.

   b. Alternatively, click on to hear an audio recording of the characters in English. You will need to use your computer speakers or headphones – make sure you have adjusted the volume to a comfortable level.
10. Read the privacy statement by clicking on the link. If you agree with it, close the privacy statement window and tick the privacy statement box acceptance under the **Enter the code** field.
11. Click Create an account .
12. If you have not provided the required information in the fields, or you have entered a wrong code or an email address in an incorrect email format, the system will prompt you to go back and correct the errors before you can sign up.
13. A message displays confirming the creation of the account. The system will send you a confirmation email to the email address you provided in the sign-up form. Open the email and click the activation link provided to activate your account. You have a maximum of 24 hrs, starting from the time the message was sent, to create your password.

    Note: Make sure to check your spam folder if you cannot find the confirmation email in your inbox.
14. Enter a valid password following the instructions on the screen.
15. A message on the screen will confirm that the password has been changed ('changed' in this context means that your password has been set).

16. Click on **Proceed** to log in automatically to your new account, or go back to the Funding & Tenders Portal:
    http://ec.europa.eu/research/participants/portal/desktop/en/home.html
    Then click Login.

Glossary

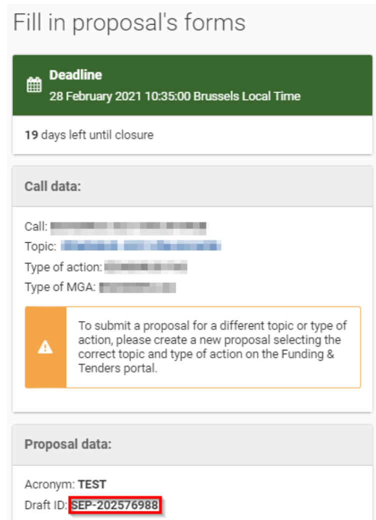
This is a glossary concerning the current document; check here the Funding & Tenders glossary for more terminology:

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/glossary

<table>
<tr><th>Term</th><th>Definition</th></tr>
<tr><td>Applicant
Back to text</td><td>Generic term for any person/organisation that prepares and/or submits a proposal. There are two types of applicants:
• The Proposal Coordinator
• The Partner
The Proposal Coordinator role is allowed to register and to submit the proposal, while the Partner role is only involved in the preparation of the proposal.
Synonyms: Partner</td></tr>
<tr><td>Beneficiary/ Participant
Back to text</td><td>A beneficiary or beneficiary of the European Union funds refers to the legal entity that signs a grant agreement and/or procurement contract (i.e. the grant beneficiary and/or contractor) with an "entity managing EU funds". Depending on the management mode this entity may be the European Commission, a beneficiary country, an international organisation, or a Community or national agency.
Subcontractors or suppliers as well as partners/consortia members of the beneficiaries are not concerned (http://ec.europa.eu/europeaid/work/funding/beneficiaries_en.htm)
Synonyms: Participant
Broader term: Partner</td></tr>
<tr><td>Call
Back to text</td><td>An invitation for third-parties to submit a proposal in order to get funding. Calls cover specific research areas and are always issued in the context of a Work Programme.
Call for proposals
Procedure to invite applicants to submit project proposals with the objective of receiving funds from the European Union.The European Commission publishes calls for proposals. It is an official invitation to submit a project proposal for a specific area of a framework programme by a specific date. Calls specify very clearly what is required in the Work Programme. Calls for proposals on the Funding & Tenders Portal.</td></tr>
<tr><td>Consortium
Back to text</td><td>A Consortium is a group of Participants, one of which is identified as the Proposal Coordinator in the proposal submission. A nominated Proposal Coordinator Contact, who is normally an employee of the Proposal Coordinator Organisation, but acting on behalf of all for most aspects of the project, will represent the Consortium to the EU. In the context of a running project, the following constraints shall hold:
• There shall be exactly one Proposal Coordinator Contact within each Project Consortium.
• The Coordinator Contact identified in the Project proposal shall be a person, nominated from within the Coordinator Organisation, to be recognised by the Commission as the primary point of contact between it and the Consortium.
• Each Partner in the Consortium shall nominate a Partner Contact as its representative in the Project, who shall also be identified to the Commission.</td></tr>
<tr><td>Deadline</td><td>For each particular call, this is the moment after which proposals cannot be submitted to the Commission. At this point the Submission system closes for the respective call. Deadlines are fixed</td></tr>
</table>

Term	Definition
Back to text	and strictly enforced.
ECAS	The old name for the European Commission's Authentication Service. Its name has been changed into EU Login, but you could encounter some documents or screens still referring to the EU Login as ECAS. See **EU Login** below for more information.
EU Login Back to text	It is the system for logging into a whole range of web sites and online services run by the European Commission. Once you use your EU Login to enter the Commission website, you will not need to identify yourself again for other Commission websites until you browser session expires (i.e. single sign-on). To stop the automatic single sign-on you need to click **Logout** or close all your open browser windows.
Funding & Tenders Portal **F&T Portal** Back to text	The Funding & Tenders Portal, replacing the Research and Innovation Participant Portal as from 2019, is the single entry point for interaction with the research Directorates-General of the European Commission, it hosts a full range of services that facilitate the monitoring and the management of proposals and projects throughout their lifecycle, including calls for proposals, and access to the submission and evaluation of proposals service.
Legal Entity Appointed Representative **LEAR** Back to text	The LEAR is a person nominated in each legal entity participating in funding programmes. This person is the contact for the Commission related to all questions on legal status. S/he has access to the online database of legal entities with a possibility to view the data stored on his/her entity and to initiate updates and corrections to these data.
Part A Back to text	This is the part of a proposal dealing with administrative data. It is completed using the web-based electronic Submission system.
Part B – Template Back to text	This is the part of a proposal that explains the work that must be carried out, and the roles and aptitudes of the participants in the consortium. This part is uploaded to the electronic Submission system as a PDF file. The template documents are intended to provide you the topics needing development as part of the proposal. They are supplied by the Commission and downloadable in **Proposal forms** of the Submission wizard. They are provided in RTF format, consisting of a template of all chapter headings, forms and tables required to prepare a proposal Part B.
Part C Back to text	Depending on the type of call, filling this additional web form will be required.
Participant register Back to text	An electronic system that enables organisations to register their details once and then use this registration for one or more participations, thus eliminating the need to provide the same information for multiple proposal submissions. The Web interface of the Participant register is accessible from the **Participant register** page of the Funding & Tenders Portal: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register The Participant register also provides an organisation search tool where you can check if your organisation has already been registered as a participant.
Participant Back to text	The **Participant** (short form of **Participating Legal Entity**) is a legal entity Individuals and legal entities such as a companiyes, consortia, universitiesuniversitiy, university departments, etc. are allowed to submit proposals requesting financial support. The 'Proposal Coordinator' leads the submission process of the proposal and is the only applicant recognised by the Commission.

Term	Definition
	To avoid the existing confusion, a difference is made between a **Proposal Coordinator Contact** and a **Proposal Coordinator Organisation**. See **Proposal Coordinator** below for more information. If you want to participate in a project proposal, your organisation needs to be registered with the Commission. Registration available from the Funding & Tenders Portal via the Participant register page, where you can check if your organisation is already registered. If not registered, you can start the registration process on the same page and you will be redirected to the Participant register to complete the process. The same process applies for participant registration data updates – you access your organisation from the Portal / My Organisation(s) page and from there you can go to the Participant register to update your organisation data. If your proposal is successful, you will also need to know about the following (see the Online Manual available from the Portal under the **Support** section): • the checks carried out on the information you provide on registering • appointing a representative (LEAR) Ideally, a LEAR is identified to be responsible for provision and maintenance of the Participant's legal and financial data. However, until a LEAR is identified and validated, this data may be maintained by the person who initially registered the organisation.
Participant Identification Code PIC *Back to text*	The Participant Identification Code (PIC) is a 9-digit unique identifier for every validated organisation. Participants will not have to submit their legal and financial information (and supporting documents) each time they submit a proposal or negotiate a grant agreement, but just their PIC. However, if there has been a substantial change in the legal or the financial information since validation took place, they could be requested to provide supporting documents for the change via the **Participant register**.
Proposal *Back to text*	A set of documents submitted by third-parties in response to a particular call, in an effort to get funded by the EC after evaluation. The main elements of a proposal are the administrative forms and the proposal text. A proposal is a proposed project. Proposals are submitted following a call for proposals by consortium/partners with the goal to be selected and get funded. In order to get funding for a project, applicants have to write a complete and detailed proposal describing the objectives, planned activities and relevance with the corresponding Call's Activity(-ies). Proposals are individually evaluated by a team of independent experts. Only the very best project proposals will get funding. A description of the planned research activities, information on who will carry them out, how much they will cost, and how much funding is requested should be included in the proposal description.
Proposal Coordinator *Back to text*	Individuals and legal entities such as companies, consortia, universities, etc. are allowed to submit proposals requesting financial support. The Proposal Coordinator leads the submission process of the proposal and is the only applicant recognised by the Commission. To avoid the existing confusion, a difference is made between a Proposal Coordinator Contact and a Proposal Coordinator Organisation. The **Proposal Coordinator** Contact is either an individual or empowered individual of an organisation having the responsibility to request financial support via the submission of a proposal. The **Proposal Coordinator Organisation** is the organisation to which the Proposal Coordinator Contact belongs or is linked to, and/or that has given the Proposal Coordinator Contact the responsibility to submit a proposal to request financial support. Broader Term: Beneficiary, Partner

Term	Definition
Proposal ID *Back to text*	An identifier assigned to a proposal after it was submitted. Once a proposal is funded, its Proposal ID becomes its Project ID. Drafts of proposals are assigned a Draft ID, different from the final one when submitting. Both of them display on the left side in the tool.  This ID can be provided to the helpdesk for troubleshooting purposes.
Submission *Back to text*	The formal act to submit a proposal to the Commission via a web based application. Proposals can be modified and submitted several times as long as the call has not been closed. After call closure the submission is prohibited and proposals are locked. Eligible proposals are thereafter made available to the evaluation system. For Continuous Calls, proposals can be saved and edited throughout a specified period. Once submitted the proposal will be sent immediately for evaluation after which re-editing will not be possible at any time. The **Submission System** is the tool used for sending a proposal for an open call. It is accessible via de Funding & Tenders Portal, and it is often referred as **SEP IT System**.
SEP IT System *Back to text*	The Funding & Tenders Portal Proposal Submission and Evaluation System.
Types of Action *Back to text*	The type of action specifies: ✓ the scope of what is funded ✓ the reimbursement rate ✓ specific evaluation criteria to qualify for funding See the Online Manual for more information.
Topic *Back to text*	Calls for proposals are subdivided into topics. A topic defines a specific research and innovation subject or area for which applicants are invited to submit proposals. The description of a topic comprises its specific scope and expected impact of the projects to be funded, and also the type of project, evaluation criteria and deadline for submission of proposals.