Proposal Submission Service User Manual

20/04/2016

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Revision History

Date Updated	Reason for Revision	Revision(s) Made	Revision Version
04/04/2014	Obsolete info about annex forms formatting limitations.	Complete update of section 4.5. UPLOADING THE ANNEX FORMS	1.1
10/04/2014	General review	✓ Update of section 4.5. UPLOADING THE ANNEX FORMS ✓ Glossary updates ✓ Terminology updates throughout the document ✓ Update on adding partners/contact persons in Step 4 of the Wizard ✓ Added references to 1/2-stage calls	1.2
26/05/2014	New features and enhancements in version 1.7	✓ Described the option to update contact person's role and access rights in Step 4 of the Wizard ✓ Updated content, including section *Roles: Proposal Coordinator, Partner, Contact Person,* with notes and info on changing main contact details ✓ Adjusted the content after various functional improvements and fixes in the Wizard functionalities ✓ Added notes about cases with specific contact roles for some calls (Principal Investigator, Main Host Institution Contact, etc.) including section *Roles: Proposal Coordinator, Partner, Contact Person* ✓ Added section *APPENDIX C: CALLS WITH SPECIFIC CONTACT ROLES* to address cases with specific contact roles for some calls (Principal Investigator, Main Host Institution Contact, etc.) ✓ Updated section *INTRODUCTION > Document scope and Structure* ✓ Updated the Glossary after business side feedback	1.3
20/08/2014	New features and enhancements in version 1.8	✓ Added notes on the inavailability of the 're-edit' and 'withdraw' options for proposals submitted for continuously open calls. ✓ Added notes on the specifics when changing Principal Investigator / Main Host Institution roles for calls with fellow contacts. ✓ Updated content after the new invalid PIC error message. ✓ Added a note in Appendix C on the visibility of top-level contact roles when adding/editing another contact role. ✓ Added notes about the limitation in changing a contact person's access rights and about the removal of an existing contact that is currently logged in.	1.4
28/08/2014	Feedback by ERCEA	✓ Incorporated feedback by ERCEA	1.5

28/05/2015	Version 1.11	✓ 1.11 Update	1.11
15/09/2015	Version 1.12	✓ Updated compatibility matrix	1.12
		✓ Added procedure for using off-line forms with Chrome (v.45+) and Edge browsers	
		✓ Updated content in User Action chapters	
02/10/2015	Version 1.12.1	✓ Adobe Acrobat X Pro update	1.12.1
09/11/2015	Version 1.12.1	✓ User Action chapters updated	1.12.1
08/01/2016	Version 1.13.1	✓ User Action chapters updated	1.13.1
20/04/2016	Version 2.0	✓ 2.0 Update	2.0

Table of Contents

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 program initiatives.

Document Scope and Structure

The purpose of the Proposal Submission Guide is to describe how beneficiaries can prepare and submit a Proposal using the Submission system. The document also provides additional reference information about the Service, as well as troubleshooting and configuration advice.

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: TROUBLESHOOTING, COMPATIBILITY & CONFIGURATION ISSUES* provides general information on common issues and solutions relating to system compatibility, configuration, and troubleshooting.

- *APPENDIX B: REGISTRATION* provides instructions on how to register a new account with the European Commission Authentication Service (ECAS).

- *APPENDIX C: CALLS WITH SPECIFIC CONTACT ROLES* contains examples and guidelines related to rare cases with calls that require specific contact roles in the proposal submission process.

- 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 Grant 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 Participant Portal. There you will find a wealth of information including the Horizon 2020 Online Manual, numerous Reference Documents, the Beneficiary Register, a Financial Capacity Self-Check, as well as important information on the participation of Micro, Small and Medium Enterprises (SMEs). 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 Work Programmes, Calls, Topics and Types of Actions. Programmes are listed under the Horizon 2020 title.
2. Select your Partners. Most calls require a consortium of three organisations. Relevant information can be found on the Participant Portal.
3. Register as a user in ECAS (the European Commission Authentication Service). For instructions also see Appendix B at the end of this document.
4. Your organisation and your Partner organisations must register in the Beneficiary Register through the Participant Portal and receive a Participant Identification Code (PIC). Additional information is available in the Beneficiary Register Manual.
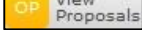
Quick Steps to the Online Submission Process

The following basic user actions are involved in the online submission process. Refer to Chapter 1 for the detailed step-by-step procedures.

1. *Login* to the Participant Portal and *Select your Topic*
2. *Create Draft* of your proposal
3. *Manage Your Related Parties*
4. *Edit Proposal* draft form, download templates, complete all required information, upload files and submit your proposal
5. Following submission, you can *re-edit, download* or *withdraw* your proposal (except for continuously open calls where you can only download the proposal)
6. Invite *Partners* to the process

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 Proposals page in the Participant Portal (you must be logged in). Alternatively, you can access

your proposals from the My Organisations page in the Participant Portal using the action button for the organisation.

Contact and Support

For questions on any aspect of grant applications and the EU Research Framework Programmes, including beneficiary registration and data updates, please refer to the *Horizon 2020 Helpdesk*.

For any IT-related problems that you might experience with the Submission system, please contact the *Research IT Helpdesk.*

Once you have started the submission process, additional contact information is available at the bottom of the submission page.

CHAPTER 2: SUBMITTING YOUR PROPOSAL THROUGH THE ONLINE SUBMISSION SERVICE WIZARD

Once you have your ECAS username and password, your PIC and your Partners' PICs, you can start the submission process by logging in to the Participant Portal and using the European Commission's online Submission Service Wizard.

USER ACTION #1: Log In & Select Your Topic

To log in, perform the following steps:

1. Go to the Participant
   Portal: http://ec.europa.eu/research/participants/portal/desktop/en/home.html

2. Click the **Login** button. You will be prompted to authenticate through the **ECAS login**
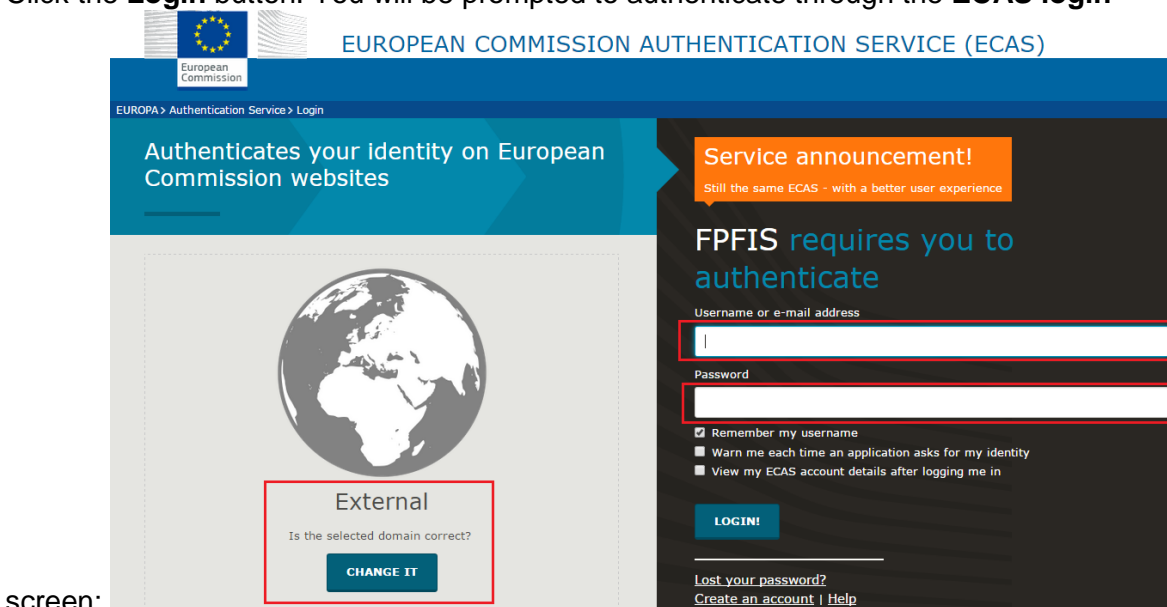
   screen:

3. Ensure that the domain shown is **External** as shown in the image above.
4. If this is not the case, click the **Change it** link.
5. In the domain selection screen that opens, select the **External** option, as indicated in the Image below:
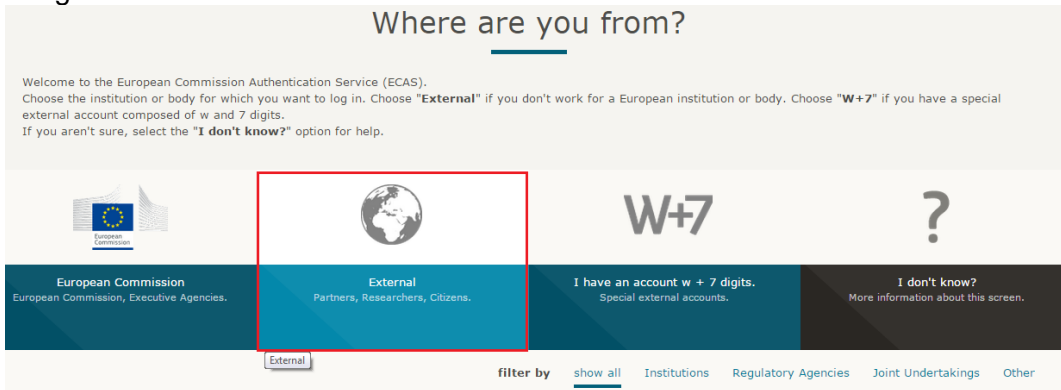
The system will return you to the **ECAS login** screen.
6. In the **ECAS login** screen enter your ECAS user name and password, then click the **Login** button.

To select a call topic, perform the following steps:

1. Once logged in to the Participant 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.)

2. Click on **Funding Opportunities**.
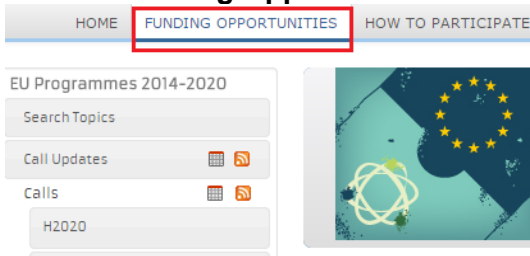
3. **EITHER,** Click on a **Call** category. You can filter the Call results list in the following ways:
To sort the results by type, select from the respective options at the top of the page.The example shown in the image below is for Horizon 2020.
To sort the results by status, select from the respective options below that (Forthcoming, Open

or Closed).

To search by a key word, type a relevant word in the **Filter a call** field to search by, and click the **Filter button**.

You can also sort your results by (Planned) Opening Date, Deadline, Call title, and Call identifier.

The corresponding calls will appear at the bottom of the page.

Click the call to open it, then click the appropriate topic.

Or

Click **Search Topics** to search directly for a specific topic. You can filter your results by selecting the programme or the status. You can also enter keywords in the **Find a topic field** and click the **Search** button. You can also sort your results by (Planned) Opening Date,

Deadline, Call title, and Call identifier.

The corresponding topics will appear at the bottom of the page.

In both cases, the **Call description** page appears.

4. Click the **Submission Service** tab, then click the **START SUBMISSION** button.

USER ACTION #2: Create Draft of your Proposal

You are now in the Online Submission Service wizard.

Carry out the following steps:

1. Enter your organisation's PIC. If you do not have the full PIC number, you can search by name or select from a previously associated organisation.

2. Entering the PIC will automatically populate the name field and highlight the address, as shown in the picture below.

Note: In case the entered PIC is incorrect, the following error message appears:

3. 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 – see below), make sure to add the top-level role (**Main contact**) in the next steps **before you submit your proposal**.

Note: For more information about roles in the system, see section *Roles: Proposal Coordinator, Partner, Contact Person in this document* .

IMPORTANT: Most calls use the standard **Main contact** and **Contact person** roles for the Proposal Coordinator organisation. However, some calls (e.g. *H2020-MSCA-IF-2014* and *ERC-2014*) 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. For more information about calls with special roles, see *Appendix C: Calls with Specific Contact Roles* at the end of this document.

4. Fill in the **Acronym** field.

5. Fill in the **Summary** field.

6. Click next >> .

Note: When you add a partner organisation with a validated PIC to your proposal, this action will be communicated to the LEAR automatically. Whenever a LEAR is informed about the involvement of their organization, you as the person who added the organisation will see the warning message shown in the figure below:

Step 3
Create a Draft Proposal

H2020-SC1-2016-2017

USER NAME
sepsub USER

TOPIC
SC1-HCO-02-2016

TYPE OF ACTION
CSA

WED
13 DEADLINE (Brussels Local Time)
April 2016 17:00:00

93 days left until closure

Check Config

Download Part B Templates

Visit our 'How to' user guide

Visit our 'H2020 Online Manual'

Create a Draft Proposal

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

Your organisation

PIC* ❓ 985226479   Short name* ❓ IBM

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

PIC: 928603893
ASCONIT CONSULTANTS
6-8 espace Henry Vallée, Parc scientifique Tony Garnier
LYON, FR
VAT: 437960677 RCS Lyon

PIC: 934608096
test_registration_eac_tolis
fgdfg
gdfgdgfdg, HR

Warning ✖

Please be aware that the Legal Entity Appointed Representative (LEAR) for the PIC you have chosen will be informed automatically about the involvement of his/her organisation in your proposal.

OK

r organisation PIC [search]

Your Role

Please indicate your role in this proposal

◉ Main contact

◯ Contact person

Your Proposal

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

[next >>]

7. You will be presented with the following **Disclaimer** – click `accept` to accept it and proceed, or `decline` to decline it and cancel the proposal submission.

Submission and Evaluation of Proposals Assent Disclaimer

Please read and accept this disclaimer to proceed with the creation of your draft proposal:

Proposal pre-registration data

1. In order to plan the evaluations, the Commission services need access to a limited amount of information about your draft proposal (the so called pre-registration data) prior to call deadline. The pre-registration data is limited to: call, topic, type of action, Participant Identification (PIC) code of the participating organisation(s), project acronym, short summary and - where applicable - panel and keywords. **Neither the Part B nor any annexe(s) form part of the pre-registration data that can be accessed by the European Commission services before the call deadline.**
2. You do not have to list sensitive/confidential information in the 'Short Summary' (entered on Step 3). Where relevant, sensitive/confidential information can be added to the 'Abstract' field in the Part A administrative form at a later stage in the submission process; this Abstract is not included in the pre-registration data. Therefore, please provide as the 'short summary' the relevant information (keywords, non-confidential information) for the planning of the evaluation.

    ◉ *I agree that the pre-registration data becomes available to the European Commission services prior to call closure.*

    ◯ *I wish that the pre-registration data does not become available to the European Commission services prior to call closure. (Applicants are advised to use this option only in well justified cases, as it hinders the planning of the evaluation process and the timely processing of proposals).*

Part B

3. **File format:** For the Technical Annex (part B) you must use exclusively PDF ("portable document format", compatible with Adobe Acrobat version 5 or higher, with embedded fonts). Annexes might have an obligatory page limit. Please check for the number and type of mandatory or optional annexes for the call in the relevant call documentation. Annexes with excess pages where page limit applies, will receive a watermark upon upload to the system. Users will receive a warning when trying to submit an annex with excess pages.
4. **Time constraints:** Preparation and uploading of the PDF formatted technical annex may take some time. You should ensure that this has been completed in time, well before the call closure deadline.

Submission

5. Proposals must be submitted prior to the call closure deadline. Likewise, modifications to proposals or uploaded attachments are also required to be submitted prior to the call closure deadline or they will not be taken into account. Proposals may be submitted or withdrawn at any time prior to the call closure deadline. There is only ever one version of a submitted proposal, as submission over-writes the previous version.

Personal Data

6. We will process personal data in accordance with Regulation No 45/2001 and according to the "notifications of the processing operations" to the Data Protection Officer (DPO) of the Commission/Agency (publicly accessible in the DPO register). Read more on the Legal Notice of the Participant Portal.

`accept`   `decline`

8. The following message confirms that your draft proposal has been created. You will also receive a confirmation email.

Draft proposal Creative 1 created ✖

Dear sepsub USER,
You have successfully created a draft proposal **Creative 1** for the call **H2020-MSCA-COFUND-2015**.

You can continue editing your draft proposal now or access it at a later time (before the deadline **2015-10-01 17:00:00** Brussels Local Time) from the Participant Portal by accessing the My Proposals tab.

An email containing this information has been sent to this email address: *sepsub.user@gmail.com* (which is associated with your ECAS account *nuseseps*).

Go to My Proposals ⤢   Continue with this proposal

9. Click [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 Participant Portal, click [Go to My Proposals ⤢].

USER ACTION #3: Manage Your Related Parties and/or Edit Contact Details

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.

1. Go to **Step 4 - Manage your Related Parties**, as shown in the picture below:

2. The following message presents the *Consortium Eligibility* requirements for the minimum number of participants.

Consortium eligibility

Call requires at least 3 participant(s) from different EU member states or associated countries, currently you have 1.

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

3. Click **Add Partner** as shown in the picture below:

4. Enter your Partner organisation's name and click **search**.
This will give you a list of organisations matching the term in the search field: Make sure to select an organisation with a valid PIC from the list of search results. You can recognise validated organisations by the 'validated' status message displayed below the organisation's details.

Add partner

Search for an organisation

Please enter the PIC of the organisation. If you do not know it, you may enter a (complete or partial) organisation name (e.g. "Oxford" or "University of Oxford"). Entering additional information like country/city usually leads to better results. You may also search based on VAT number of the organisation in international format (e.g. "GB123456789")

bmw   [search] [clear] [cancel]

Search results for bmw

BMW Car IT GmbH	BMW Motoren Gmbh.	ΑΦΟΙ ΣΤΡΑΤΟΥΔΑΚΗ Ε.Π.Ε
Petuelring 116	Hinterbergerstr. 2	Katsimidi 60
München, DE	Steyr, AT	Thessaloniki, EL
DECLARED	DECLARED	DECLARED
PIC 944816376 [use][CO]	PIC 930047544 [use][CO]	PIC 949907033 [use][CO]

AH Zeisler GmbH	Bayerische Motoren Werke Aktiengesellschaft	FUNDACIO BARCELONA MOBILE WORLD CAPITAL FOUNDATION
Schüttelgrabenring 9	Am Juliusturm 14-38	Avinguda Reina Maria Cristina
Waiblingen, DE	Berlin, DE	Barcelona, ES
DECLARED	DECLARED	DECLARED
PIC 941888722 [use][CO]	PIC 948435640 [use][CO]	PIC 950565566 [use][CO]

| Border, Midland and Western Regional Assembly	BUNDESMINISTERIUM FUER WIRTSCHAFT UND TECHNOLOGIE	EBM WEBSOURCING SAS
The Square	Scharnhorststrasse 34-37	RUE AMELIE 4
Ballaghaderreen, IE	BERLIN, DE	TOULOUSE, FR
SLEEPING	VALIDATED	VALIDATED
PIC 955542345 [use][CO]	PIC 999834776 [use][CO]	PIC 999689470 [use][CO]

More results were found. You can:
- refine your search above
- view the complete search results [here]

[Click here] to register your organisation for a Participant Identification Code (PIC)

5. Select your Partner organisation and click the [use] button. This will make the **Add Contact** window appear.

6. Click on the question mark in the window read the rules
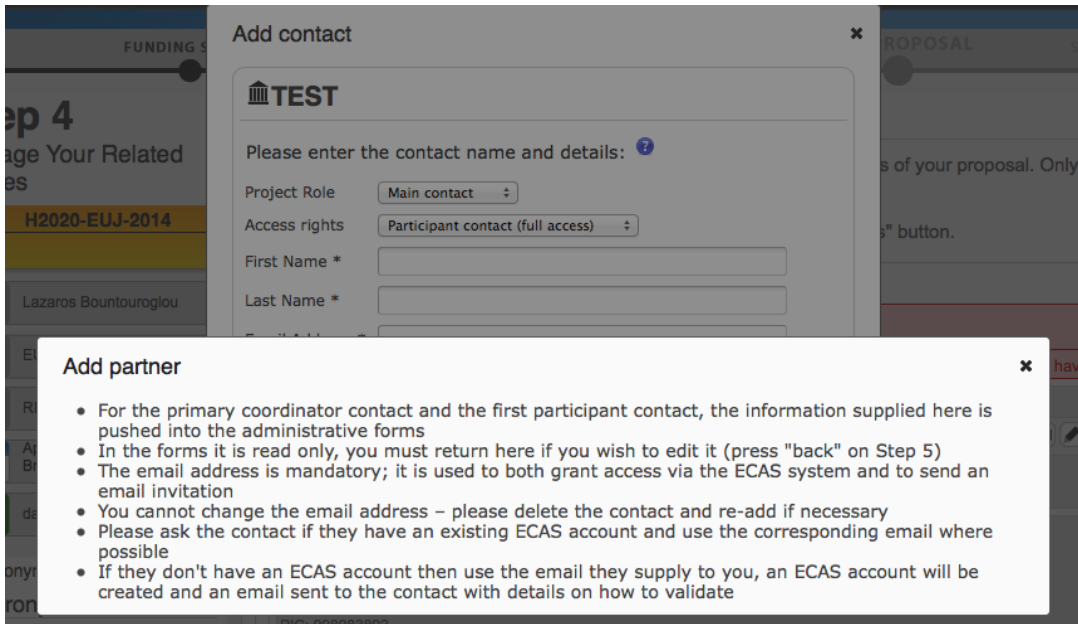
7. Select the appropriate project role of the Partner Contact:
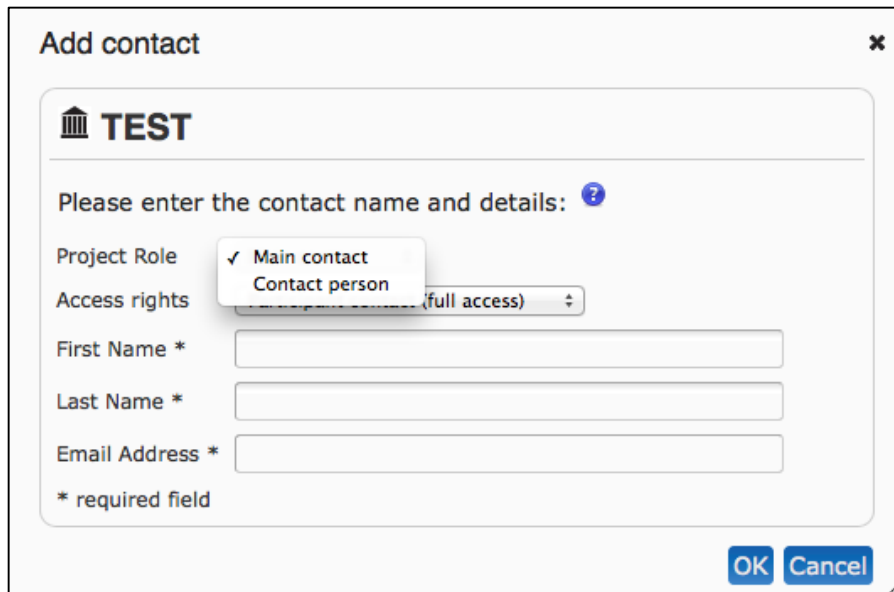
8. Select the access rights that you want to grant to your Partner contact. Only the person assigned the Main Contact role and having full access rights can submit an application.

Note: Once you grant full access rights to a Contact person, he/she 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).

9. Fill in the fields and click OK

Note: If the Contact person does not have an ECAS account yet, the system will use the e-mail provided for that contact to send them an invitation and grant ECAS access.

10. You will see the second contact appear in the Partner section
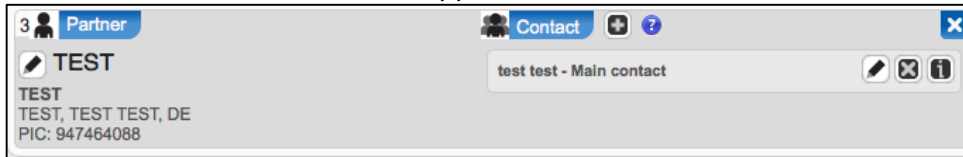
Repeat the same steps for the remaining Partner organisations.

Note: The Proposal Submission System checks automatically if the first and last names of the contact match the name details of the user currently logged in the active ECAS session. Adding a contact with a name that does not match the user name registered in ECAS will give you a warning message

The mismatching name details will then be circled in red colour. If you receive such a message (as shown in the figure below), review your first and last names as they do not match the information registered along with the email address in your ECAS account. In case you wish to change your registered name in the Proposal Submission System, you will have to make these changes in your ECAS account.
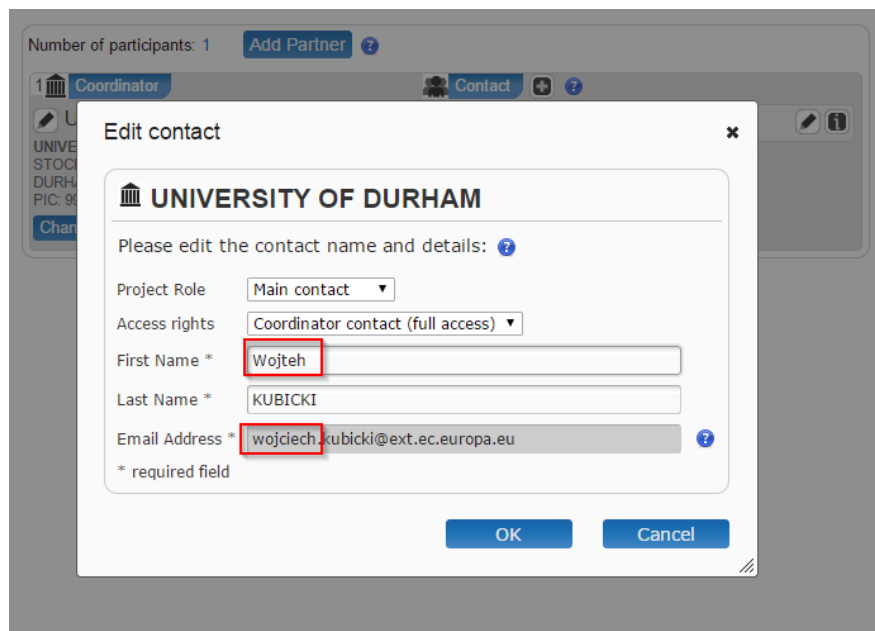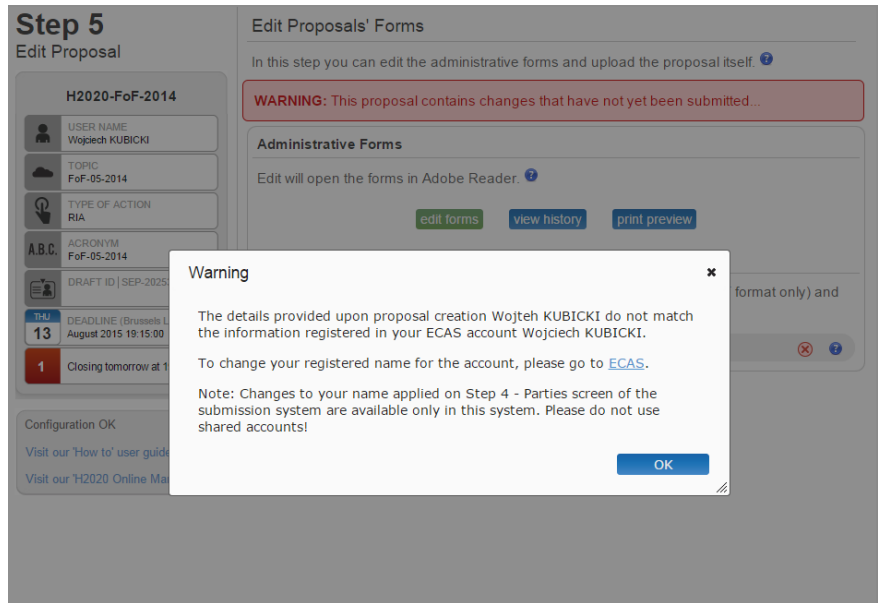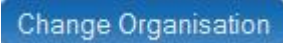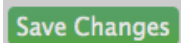
You can perform the following actions for an existing partner organisation using the buttons described below:
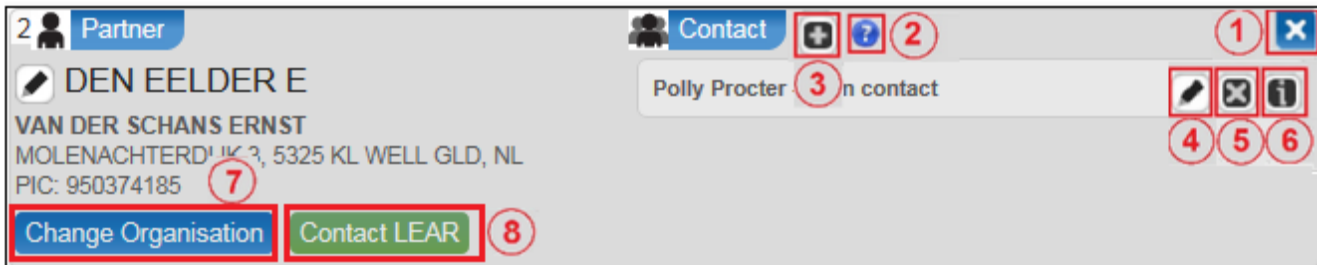
1. **⊠ Delete participant**
   Click this button to delete any participant except the coordinator.

2. **❓ Partner information**
   Click this button to see more information about the partner company.

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 by clicking the pencil icon (5).

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 the company contact. The name field will expand to show the email address and phone number of the contact.

7. Change Organisation
   Click this button to replace the existing organisation (PIC). Coordinator contacts with full access rights can now change the coordinator organisation or the partner organisation. Clicking the **Change Organisation** button will open the PIC search pop-up window, where the user can search for, and select, another organisation.

8. Contact LEAR
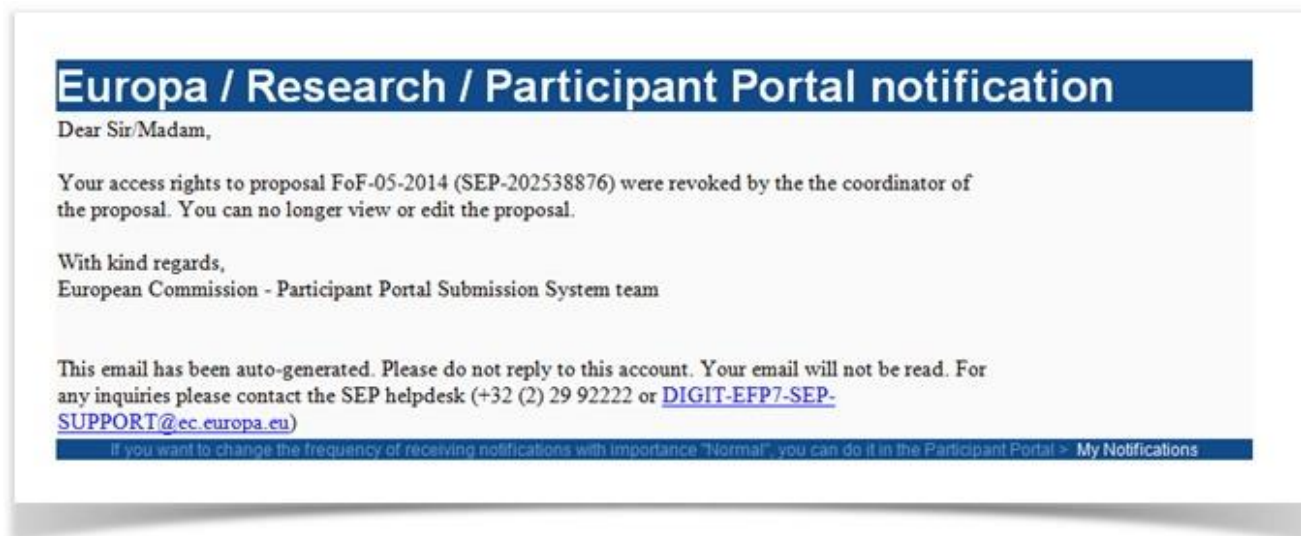   Click this button to contact the LEAR of an organisation.

11. Once you have completed this task, click on Save Changes and then click on next > > to go to User action #4.

Note: At this point, the system will automatically generate emails to all the Partner contacts. The emails include all relevant information and links to access the proposal. The Access rights granted to each Partner contact will determine the level of access that the contact will have.

Improved notification system for deleted contacts

When a contact is deleted from the list of contacts from 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.

Europa / Research / Participant Portal notification

Dear Sir/Madam,

Your access rights to proposal FoF-05-2014 (SEP-202538876) were revoked by the the coordinator of the proposal. You can no longer view or edit the proposal.

With kind regards,
European Commission - Participant Portal Submission System team

This email has been auto-generated. Please do not reply to this account. Your email will not be read. For any inquiries please contact the SEP helpdesk (+32 (2) 29 92222 or DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu)

If you want to change the frequency of receiving notifications with importance "Normal", you can do it in the Participant Portal > My Notifications

Promoting a Partner Organisation to Coordinator Status

Current coordinators (with full access rights) can now swap roles with a partner organisation. Any partner organisation that has provided details of a main contact can be promoted to the coordinator

role. Please note that swapping roles will not be possible if the call requires a fellow coordinating organisation.

Step-by-step procedure:

1. Create a draft proposal with coordinator and a partner organisation.

2. Ensure that partner organisation has a main contact.

3. Drag and drop partner organisation and replace it with the current coordinator organisation.
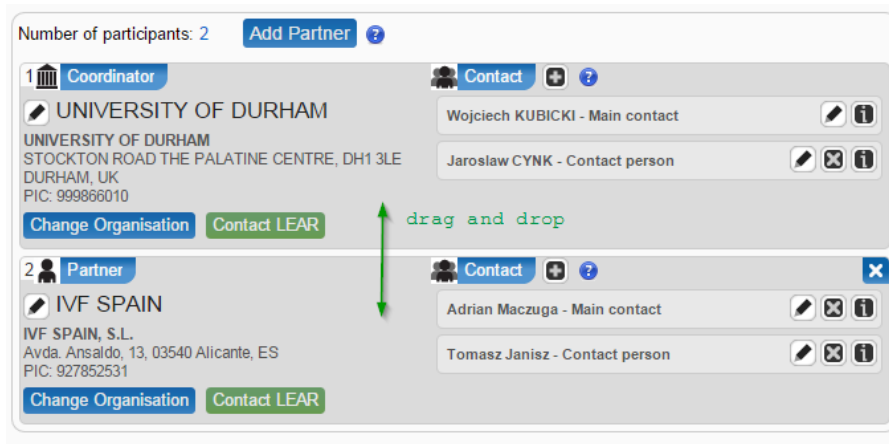
4. Confirm the changes to both roles by clicking the **Yes, change coordinating organisation** button.
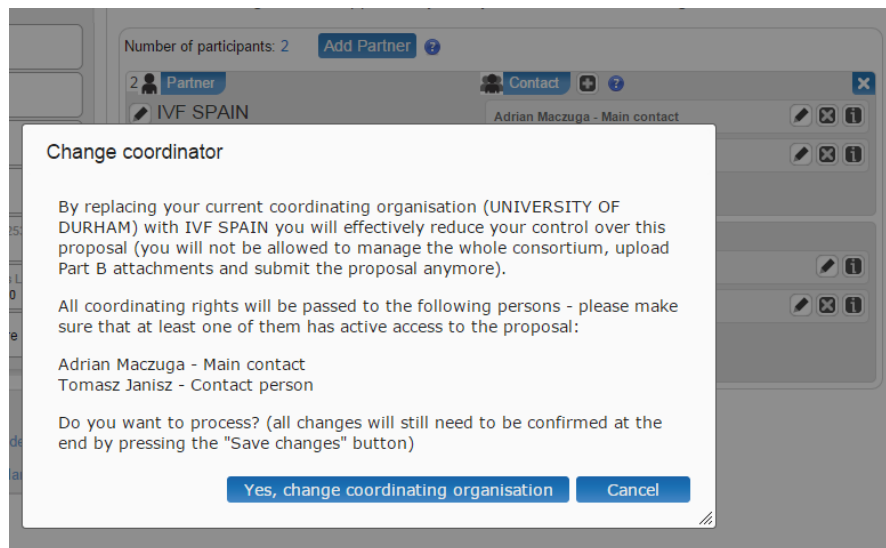
The former partner organisation has now been promoted to coordinator status. The contact persons of both organisations will also receive e-mails informing them that a transfer of access rights has taken place (as shown in the two figures below).

Europa / Research / Participant Portal notification

Dear,

Wojciech KUBICKI replaced the current coordinating organisation of the proposal FoF-05-2014 with one of the partners (see details below). Please note that from now on you will have partner-level access only to the proposal.

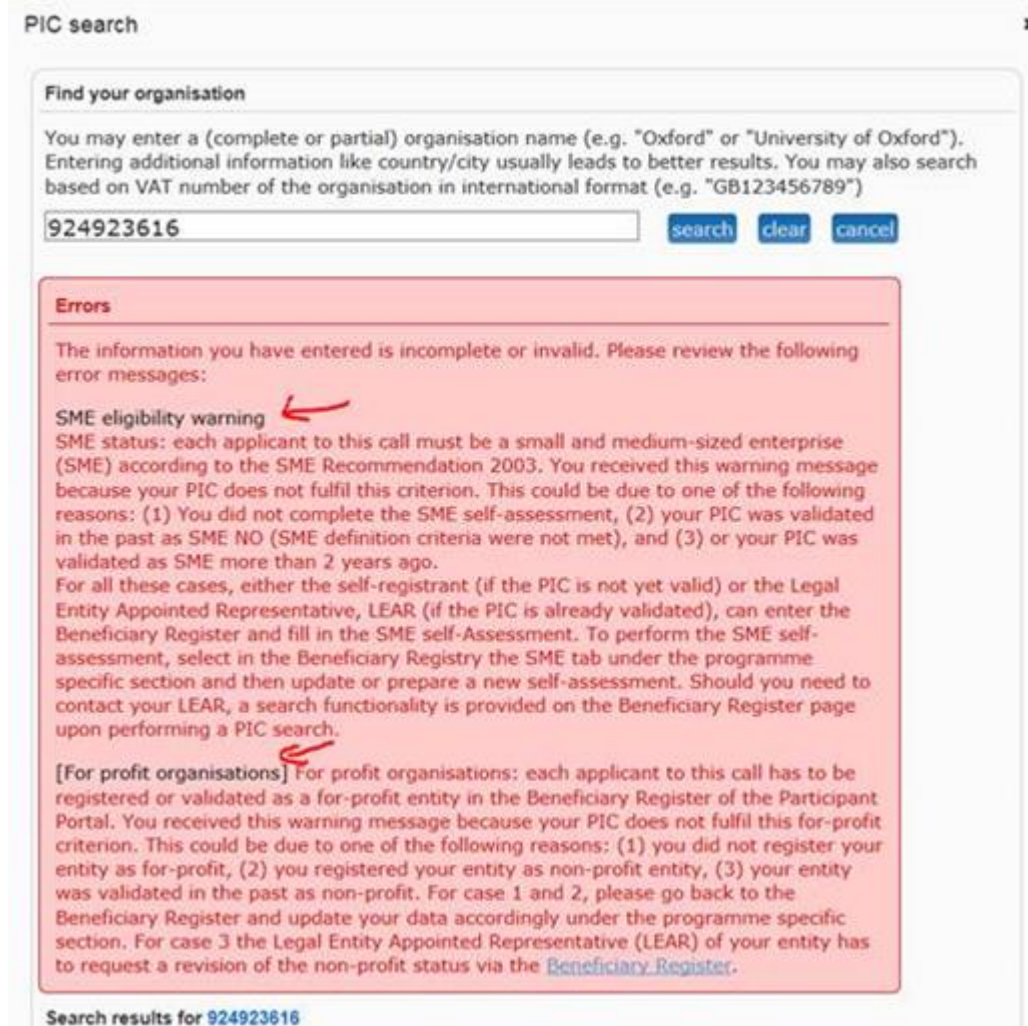|	
Proposal acronym	: FoF-05-2014
Created on	: 2015-08-11 14:30:54
Draft proposal ID	: SEP-202538876
Call	: H2020-FoF-2014
Type of action	: RIA
Topic	: FoF-05-2014
Previous coordinating organisation	: UNIVERSITY OF DURHAM (PIC: 999866010, located in DURHAM, UK)
New coordinating organisation	: IVF SPAIN, S.L. (PIC: 927852531, located in Alicante, ES)

With kind regards,
European Commission - Participant Portal Submission System team

This email has been auto-generated. Please do not reply to this account. Your email will not be read. For any inquiries please contact the SEP helpdesk (+32 (2) 29 92222 or DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu)

If you want to change the frequency of receiving notifications with importance "Normal", you can do it in the Participant Portal > My Notifications

Europa / Research / Participant Portal notification

Dear,

Wojciech KUBICKI replaced the current coordinating organisation of the proposal FoF-05-2014 with one of the partners (see details below). Please note that from now on you will have full coordinator-level access to the proposal.

Proposal acronym	: FoF-05-2014
Created on	: 2015-08-11 14:30:54
Draft proposal ID	: SEP-202538876
Call	: H2020-FoF-2014
Type of action	: RIA
Topic	: FoF-05-2014
Previous coordinating organisation	: UNIVERSITY OF DURHAM (PIC: 999866010, located in DURHAM, UK)
New coordinating organisation	: IVF SPAIN, S.L. (PIC: 927852531, located in Alicante, ES)

With kind regards,
European Commission - Participant Portal Submission System team

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If you want to change the frequency of receiving notifications with importance "Normal", you can do it in the Participant Portal > My Notifications

Error Message *For Profit Organisations* when Searching for an Organisation - Solution

For a number of calls within the Horizon 2020 Program, organisations need to be validated as 'for profit'. Otherwise, the error message below will be displayed and will block the organisation from submitting a proposal for certain calls:

Please follow this procedure step by step in order to have your organisation appear as a For Profit one and be allowed further through the submission process:

1. Go to the Participant Portal and click on the **Modify Organisation** action button to modify the existing information and select the program as shown below:

2. Click the **Organisation data** link. The Organisation data section is displayed.
3. Select the **for-profit** option button, then click the **Submit changes** button.

4. Click the **Legal Status** link. The **Legal Status** section is displayed.

5. Select the **for-profit** option button, then click the **Submit changes** button.

6. To make additional changes to the organisation data, click the **New Request** button:

USER ACTION #4: Edit and Complete Proposal Draft Form, Download Templates and Complete all Required Information, Upload Files, Validate and Submit your Proposal

This step is the core of the submission process. Click on `next > >` or, to access a previously saved draft proposal form, go to the **MY AREA > My Proposal(s)** page in the Participant Portal (you must be logged in) and click ED in the **ACTIONS** column for the respective proposal, as shown in the picture below:

The following picture shows Step 5 of the Online Submission Wizard:

The Action Buttons of the Wizard

The action buttons shown in the picture above are described in the table below

Button	Description
edit forms	*Click to open the PDF form that you want to complete.*
view history	*Click to view in detail the list of all system and user actions. 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.*

Button	Description
print preview	Click to open or download and save the proposal locally on your computer.
Download Part B Templates	Click this button to download templates before the draft proposal is created. Click to download the latest proposal requirements package, in a readily editable (RTF) template. Once completed, you must convert the proposal template into a PDF file.
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 below.

4.1. 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 the ![help] button in the **Administrative Forms** section to read the help instructions for editing the administrative forms of the proposal, as shown in the picture below:

Click **edit forms** to start editing the forms.

> *Please see the Compatibility and Troubleshooting section at the end of this document for more information on your browser displaying the form in the open browser window or download it to your downloads file. If it is downloaded, you can work on the downloaded file offline. THE DOWNLOADED FORM HAS A TIME STAMP FROM THE COMMISSION'S SERVERS AND IT EXPIRES **2 HOURS AFTER IT IS DOWNLOADED** .IF YOU DO NOT COMPLETE, SAVE AND CLOSE THE FORM WITHIN 2 HOURS, YOU MUST DELETE THE OLD FORM, RETURN TO THE WIZARD AND DOWNLOAD A NEW COPY OF THE FORM. The images below display the form inside the browser window. Whether displayed in a browser window or downloaded to work offline, the functionality of all buttons, fields, and the entire process are exactly the same.*

The form may not auto-fit the size of your currently open window, as shown in the picture above.
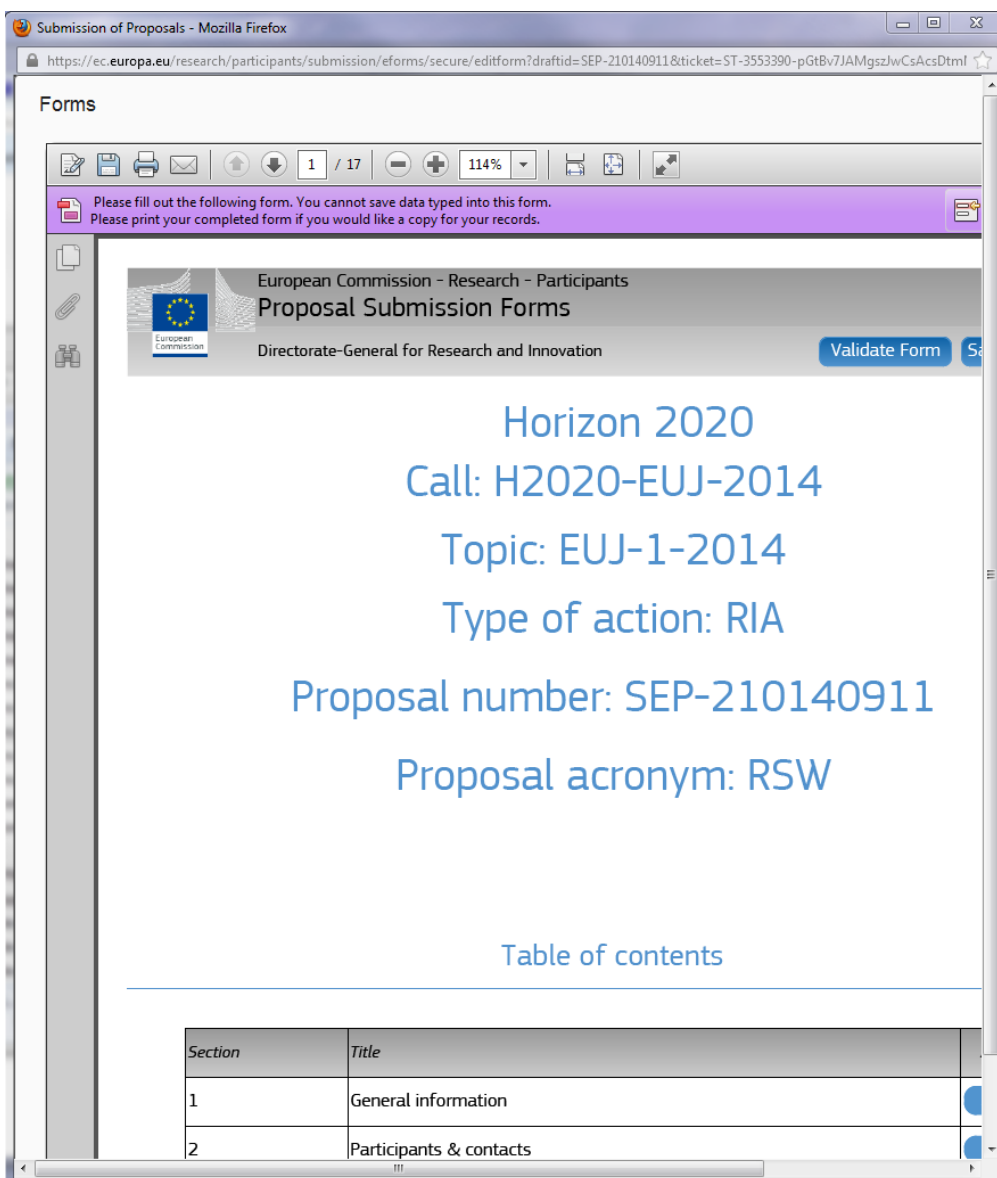
You may need to adjust your window size, or the form size, or both: When adjusting the window size, the form opens on top of the Submission Wizard.
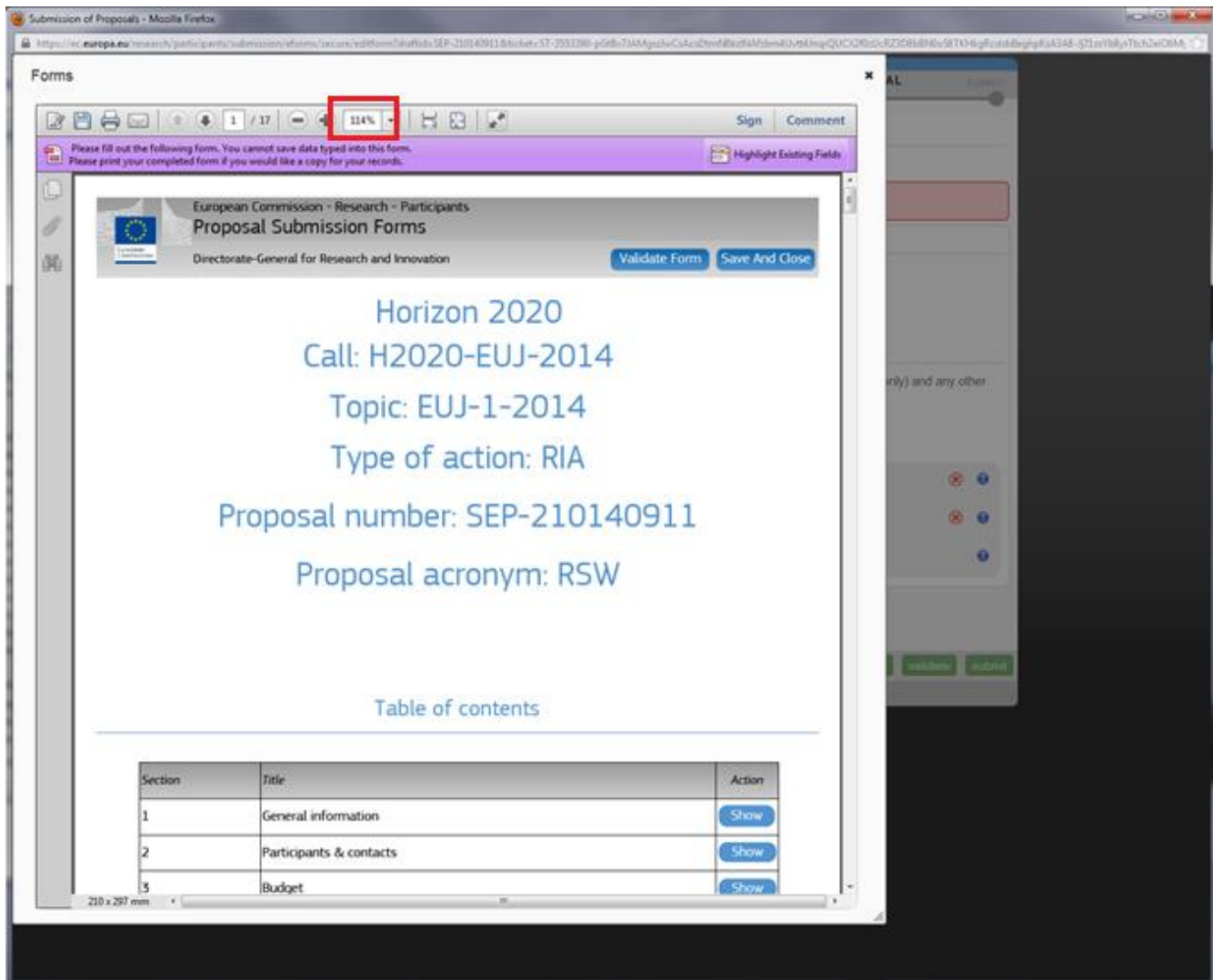
Use the zooming (**+/-**) buttons to zoom in or out of the form.

Alternatively, you can specify the percentage ratio in the % drop-down list: either select a pre-defined percentage from the drop-down list (i.e. 150%) or type the desired percentage directly into the field.

You can also move the mouse cursor to the top of the form and move the form as needed.

What You Need to Know about Completing the Form

Who Can Fill In the Form?

The Main Contact (or the top-level role for calls with specific contact roles – see Appendix C at the end of this document) is the only person that can complete the form, including the budget table and all other administrative details. Partners can preview the form and edit their contact detail information.

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 Step 4. To modify the legal data of the organisation, please read more about it in this Data Update section.

Guidance in the Form

If you click on the question marks in blue, you can read more information about the question or section.

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

Navigation in the Form

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

Validation

The form has built in checks and gives error or warning messages in case fields are not completed. Please click the [Validate Form] button to check your data. Errors and warnings will be listed at the end of the form. Error fields will be highlighted in yellow, whereas fields with warnings will be highlighted in red. Errors mean that mandatory information is missing (such as the Proposal Title) and 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.

Saving of the Data

Before closing the form, click the [Save And Close] button. The save and close function does not validate the information in the form, so it works even if the form is not completely filled in. This will take you back to Step 5, where you can upload the Technical Annex and any additional documents.

You may return to edit the form as many times as you wish before the closing date of the call . Any changes saved on the form need to be resubmitted in order to be received by the European Commission and considered for evaluation.

Technical Requirements

The configuration check tool, located on the bottom left-hand side of the submission system, automatically verifies if your system configuration complies with the minimum requirements.

Action Buttons within the Form

Two action buttons in the PDF form help you find and verify the information easily.

Button	*Description*
Validate Form	*When you click this button, all data fields in the forms will be validated against a set of rules.*
	The system assesses if the available data is valid, checks the data formats, performs computations, and checks interlinked data for consistency.
	Any issues found in the form are reported at the end of the PDF form.
Save And Close	*Click to save the completed administrative form and close it for 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 and Close does not validate the data.

4.2. EDITING AND COMPLETING THE FORM

To start completing the form, scroll down or click the blue `Show` button to navigate to the respective section of your form. This is primarily an administrative form that should include general information, administrative data of participating organizations, budget information by partner, and also Call-specific information.

4.3. FORM VALIDATION, SAVE AND CLOSE

You must click the **Validate Form** button to make sure that your application meets the administrative requirements. The form will run a self check and prompt you in case of errors or warnings, as shown in the picture below:

Validations
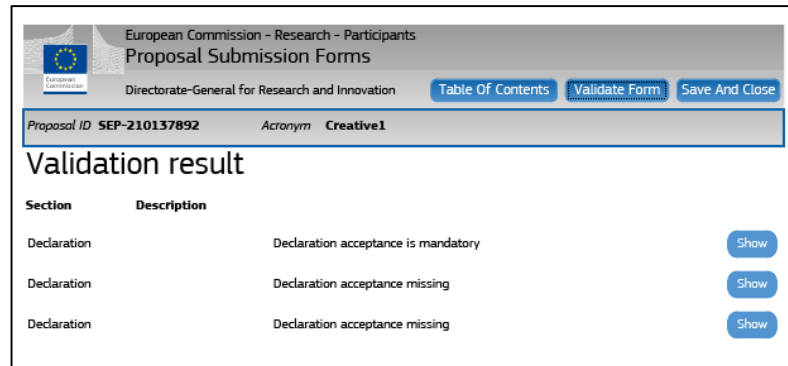
⚠ **The following warnings will not block submission of your proposal, but may affect its eligibility during evaluation:**

Eligibility warnings

- Call requires at least 3 participant(s) from different EU member states or associated countries, currently you have 1.

Close

The validation errors are shown in the picture below …

European Commission - Research - Participants
Proposal Submission Forms
Directorate-General for Research and Innovation   Table Of Contents   Validate Form   Save And Close
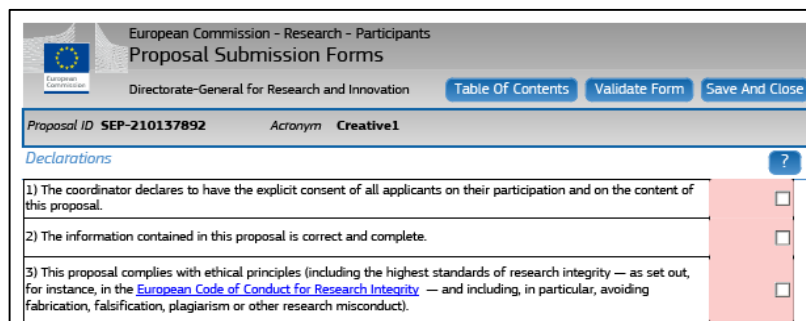
Proposal ID SEP-210137892   Acronym   Creative1

Validation result

Section	Description	
Declaration	Declaration acceptance is mandatory	Show
Declaration	Declaration acceptance missing	Show
Declaration	Declaration acceptance missing	Show

… are highlighted in the body of the form.

European Commission - Research - Participants
Proposal Submission Forms
Directorate-General for Research and Innovation   Table Of Contents   Validate Form   Save And Close
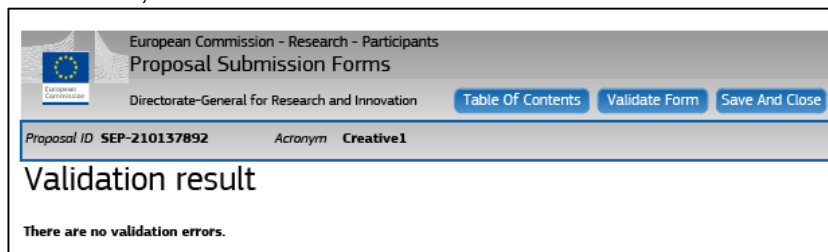
Proposal ID SEP-210137892   Acronym   Creative1

Declarations   ?

1) The coordinator declares to have the explicit consent of all applicants on their participation and on the content of this proposal.   ☐

2) The information contained in this proposal is correct and complete.   ☐

3) This proposal complies with ethical principles (including the highest standards of research integrity — as set out, for instance, in the European Code of Conduct for Research Integrity — and including, in particular, avoiding fabrication, falsification, plagiarism or other research misconduct).   ☐

When all errors are corrected, the validation test will confirm that there are no errors.

European Commission - Research - Participants
Proposal Submission Forms
Directorate-General for Research and Innovation   Table Of Contents   Validate Form   Save And Close

Proposal ID SEP-210137892   Acronym   Creative1

Validation result
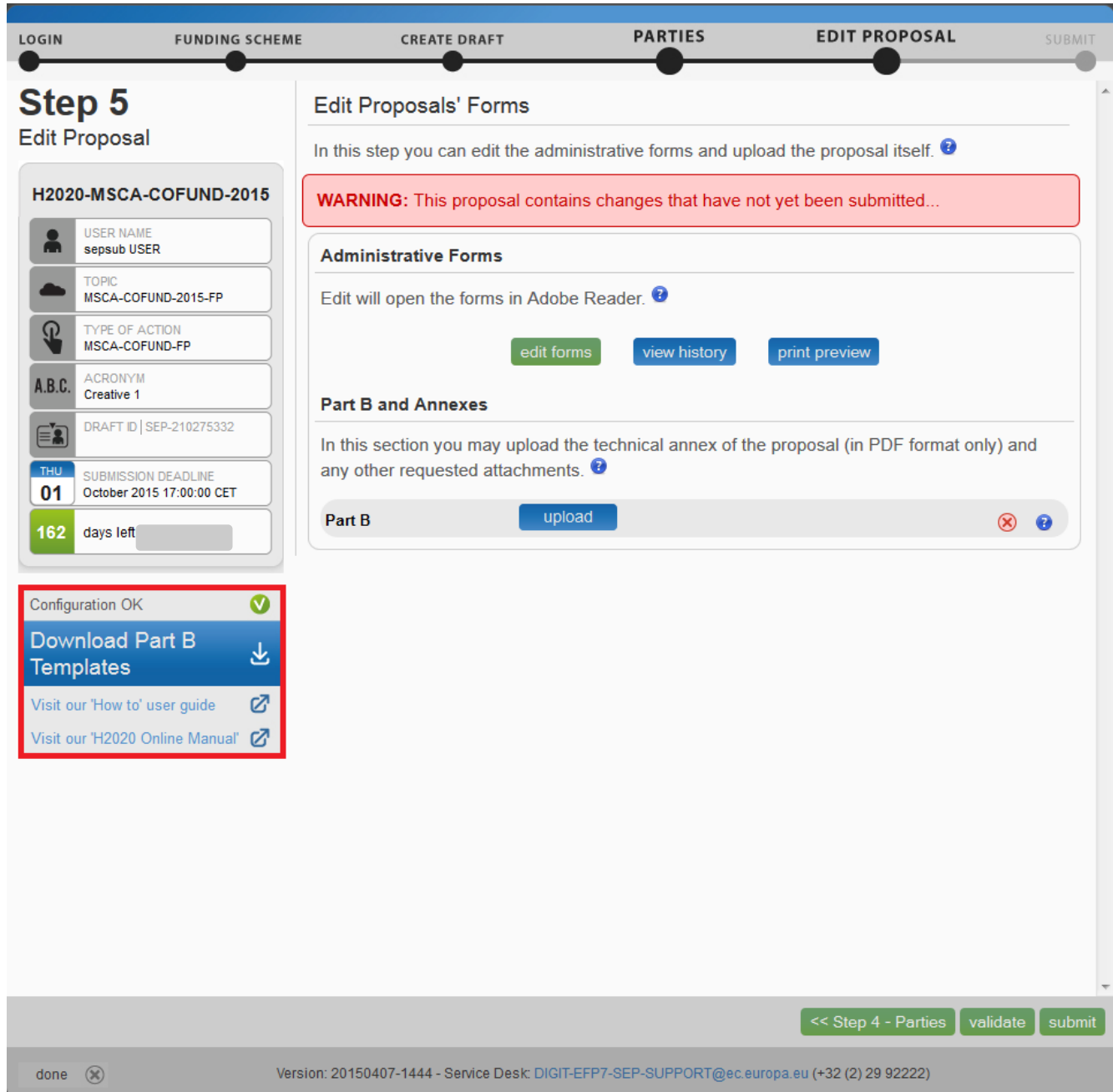
There are no validation errors.

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

4.4. PART B - DOWNLOADING AND COMPLETING THE ANNEX FORMS

Click on **Download Part B Templates** ⬇ to download the latest proposal requirements template in a readily editable RTF file.

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 may want to also check with Enterprise Europe Network and your National Contacts Point for Assistance (see the *Support* menu of the Participant 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.

4.5. UPLOADING THE ANNEX FORMS

When you complete the annex forms, you must prepare them for uploading.

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, minimum font size, PDF format conversion issues, etc.

Make sure that you first familiarize yourself with all the specific annex form limitations and requirements in the documentation available in the respective call's information package on the Participant Portal.

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

Your proposal will be considered ineligible if any one of these formal requirements is not met.

The pictures below show a sample Part B form template with detailed instructions on the front page, including limitations for the page limit, font size, and margins:

**Proposal template
(technical annex)**

*Research and Innovation actions
Innovation actions*

Please follow the structure of this template when preparing your proposal. It has been designed to ensure that the important aspects of your planned work are presented in a way that will enable the experts to make an effective assessment against the evaluation criteria. Sections 1, 2 and 3 each correspond to an evaluation criterion for a full proposal.

⚠**First stage proposals**: In two-stage submission schemes, at the first stage you only need to complete the parts indicated by a bracket (i.e. }). These are in the cover page, and sections 1 and 2.

⚠ **Page limit:** For full proposals, the cover page, and sections 1, 2 and 3, together should not be longer than 70 pages. All tables in these sections must be included within this limit. The minimum font size allowed is 11 points. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).

The page limit for a first stage proposal is 15 pages.

If you attempt to upload a proposal longer than the specified limit, before the deadline you will receive an automatic warning, and will be advised to shorten and re-upload the proposal. After the deadline, any excess pages will be overprinted with a 'watermark', indicating to evaluators that these pages must be disregarded.

Please do not consider the page limit as a target! It is in your interest to keep your text as concise as possible, since experts rarely view unnecessarily long proposals in a positive light.

In the process of completing your annex forms, and prior to uploading them, make sure that your documents comply with the above-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 to 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 in the page layout.

Always make sure to check and apply the guidance for the specific call, available on the Participant 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** get an error message during the upload process. However, when you attempt to **Validate** the uploaded document, the system will display a warning message, advising you to shorten and re-upload the proposal in order to allow for it to be qualified as eligible - as shown in the picture below:

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 receive an automatic Eligibility Warning advising you to shorten and re-upload the proposal, as shown in the picture below:
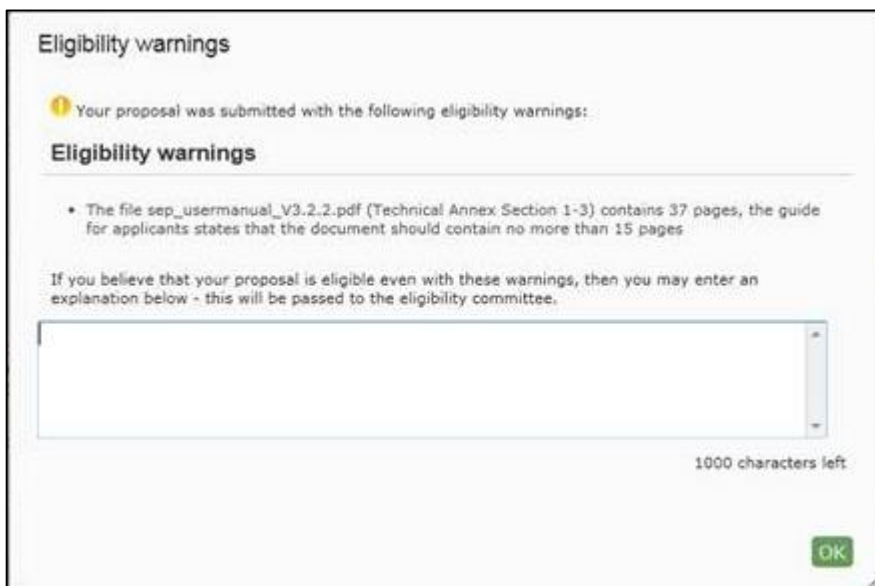
After the deadline, any excess pages will be overprinted with a 'watermark', indicating to evaluators that these pages must be disregarded, as shown in the picture below:

3. **Document file size.** The allowed file size of annex forms may be limited, too. Check the guidance documentation available in the call's information package on the Participant Portal.

   When the document file size exceeds the allowed limit, the system will display an error message immediately during the upload process, as shown in the picture below:
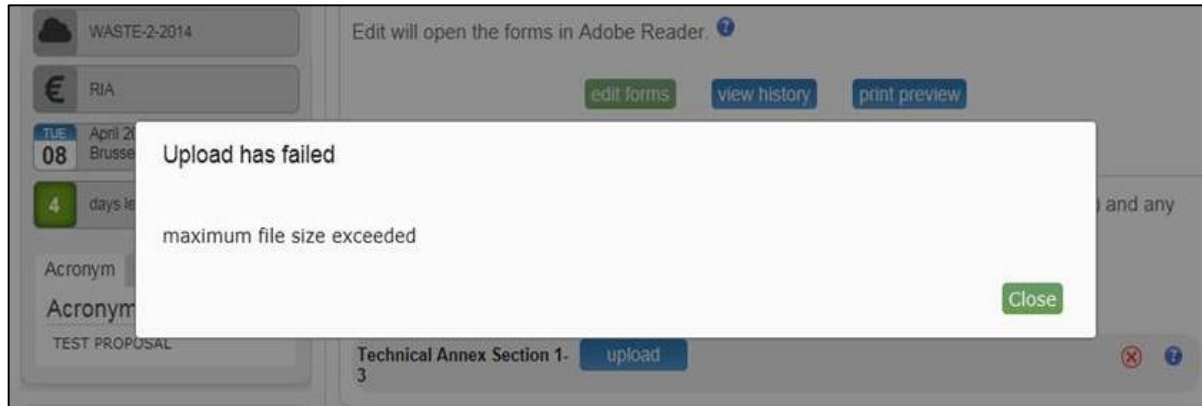
4. **Graphical resolution.** Use a **maximum resolution of 300 dpi** for all graphics and text (photocopy quality). This can dramatically reduce the PDF file size.

5. **Printer-friendliness.**
   - Proposals will be printed out in black-and-white colour on plain A4 paper. If you have used other colours in your annex forms, make sure that they are correctly interpreted and visible as nuances of grey in the output PDF file.
   - Ensure that printing is done at 300 dots per inch and that no scaling is applied to make the page "fit" the window. Print a test copy of your PDF files before uploading them.

6. **Document 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.

7. **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 and printed without any problems! If the Commission encounters a problem when opening or printing a file you have uploaded as part of a proposal, the complete proposal will be considered ineligible.

Once the downloaded templates have been completed and are ready to upload:

1. Click the **upload** button for the respective document in Step 5 of the Submission Wizard.

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

3. Click [Open]. A confirmation message will appear:

Note: If the file uploaded is not in a valid PDF format, an error message will appear instead of a confirmation mail.

4. Click [Close]. The uploaded file will be shown in the list and a green check mark ✅ will appear next to it, as shown in the picture below:

5. Optionally, you can [delete] an uploaded file and replace it with a new file.

4.6. VALIDATE AND SUBMIT YOUR APPLICATION

To make sure that your application meets the requirements click the [validate] button. 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:

Step 5
Edit Proposal

ERC-2016-STG

	USER NAME	Wojciech KUBICKI
	TOPIC	ERC-2016-STG
	TYPE OF ACTION	ERC-STG
A.B.C.	ACRONYM	Test
	DRAFT ID | SEP-23820S
THU 26	DEADLINE (Brussels Lo...	May 2016 17:00:00
56	days left until closure

Check Config

Visit our 'How to' user guide
Visit our 'H2020 Online Mar...

Validations

Your proposal cannot be submitted until the errors below are corrected:

Part A Form

Call specific questions view errors (2)
Declaration view errors (1)
General Information view errors (5)
Participants and contacts view errors (3)
• Please go back to Step 4 to enter this information: Contact address of the Host Institution - First name is a required field
• Please go back to Step 4 to enter this information: Contact address of the Host Institution - Last name is a required field
• Please go back to Step 4 to enter this information: Contact address of the Host Institution Email is a required field
Principal Investigator view errors (9)

Part B and annexes

Mandatory Part B is missing

The following warnings will not block submissions of your proposal, but may affect its eligibility during evaluation:

Part A Form

Budget view warnings (2)
Call specific questions view warnings (5)
Declaration view warnings (4)
Ethics view warnings (1)
General Information view warnings (1)
Participants and contacts view warnings (11)
Principal Investigator view warnings (6)

Close

<< Step 4 - Parties | validate | submit

Each error detail line is a link to the respective section of the form or to STEP 4. For example, clicking the link "Please go back to STEP 4" will take you back to STEP 4, where you can fill in the missing information.

When all information is filled in and no more error message appears , click the   validate   button again to make sure you have not missed anything. Once you get the No Errors validation screen, click on
  submit . Your proposal has now been submitted and the system displays a message to confirm that the proposal has been received.

The Submitted status will also be shown on the **My Proposals** page of the Participant 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 submit , and receives an email confirming that the proposal has been received. Uploading the Annex documents in itself does not finalise the submission process. Therefore, we advise you to upload your proposal as early as possible. There is a serious risk that you will not be able to submit it on time.

You can upload your Annex documents or submit your proposal as many times as you wish prior to the call deadline, but it is strongly advised not to wait until the last few days to do so. Each time you upload a new Annex document, you **must** click submit to save your changes.

USER ACTION #5: The 'Proposal Submitted' Page

Reaching Step 5 means that your proposal has been successfully submitted and therefore sent to the European Commission services for evaluation.

In Step 5 you can carry out the following actions, as indicated in the picture below:

Revise (Re-edit) the Proposal

If you need to revise your proposal, click the re-edit proposal button to go back to Step 5. The Proposal Coordinator may continue to modify the proposal and submit revised versions overwriting each preceding one right up until the deadline.

Note: This option will not be available to you if you attempt to revise a proposal which was submitted for a **continuously open call**.

Download 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 and downloaded.

Click the **download** button to download your proposal.

Note: Depending on the volume of proposals submitted, this can take from a few seconds up to several hours. Please contact the Service Desk if it is not yet available 72 hours after call closure.

Withdraw Submitted Proposal

If the proposal is withdrawn, it will not be considered for evaluation. However, the system will keep the proposal draft and the withdraw action may be reversed by re-submitting the proposal before the specified deadline. You will have to enter a reason for the withdrawal.
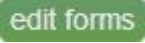
When a proposal is withdrawn, a message is displayed on the screen, as shown in the picture below. The system also sends a submission confirmation e-mail to the Proposal Coordinator, including the details of the withdrawn proposal. Note that the e-mail might get lost in your spam folder or get blocked by the anti-spam system of your organisations, so make sure that you check for it as needed.
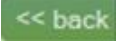
Note: You will not be able to access this option if you attempt to withdraw a proposal, which was submitted for a **continuously open call**.

To complete this action, click [withdraw proposal] ..

PARTNER ACTIONS

To be added, a partner must have both access to ECAS and a PIC. When the Proposal Coordinator

clicks [Save Changes] in Step 4, an automatic email will be sent to all the Partner contacts with the proposal related links.

Once the Partners enter the electronic submission system, it will display Step 5 of the submission

process where the [edit forms] button enables them to access the electronic administrative forms and the rest of the proposal package as their participation requires.

To access the consortium contact details, they will need to click the [<< back] button – thus going back to Step 4 of the submission process.

Completing the forms

When the PDF 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 FORMS** button located at the bottom of the page.

CHAPTER 3: REFERENCE GUIDE TO ROLES, SCREENS & ACCESS TO USER ACTIONS

Roles, Proposal Coordinator, Partner, 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 and 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.

- **Note**: A Proposal Coordinator can **promote a partner organisation** to **Coordinator** status via a drag-and-drop function as long as this partner organisation provided details of a main contact. Once this change has been implemented, all contacts of both organisations will be notified of the **change in access rights**. When swapping roles with a partner, the **original coordinator contact(s) lose(s) the full editing and submission rights** for the proposal. This functionality is not available for ERC/MSCA calls.

- **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.

  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 (e.g. *ERC-2014*

and *H2020-MSCA-IF-2014*) 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. For more information about calls with special roles, see *Appendix C: Calls with Specific Contact Roles* at the end of this document.

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.

In addition, all changes in the **Main Contact** details will be automatically reflected in the Administrative Form.

Role Rights

The following table highlights the differences between a Proposal Coordinator and Partner actions:

Action	Proposal Coordinator	Partner
Select the call	Yes	No
Add, Invite Participants	Yes	No
Submit the proposal	Yes	No
Read complete proposal	Yes	Yes
Define the budget tables	Yes	Yes, with full rights only row for organisation that user belongs to
Create Contacts for a Partner	Yes	Yes, with full rights, only for organisation that user belongs to

The Timeline around the Deadline

Proposals can be submitted multiple times before the call deadline specified in the information package of the call, available from the Participant Portal. Calls deadlines are fixed and will normally not be extended. Only the most recently submitted version will be evaluated, whereas

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 before the deadline.

The Online Submission Wizard: Screens and Access to User Actions

The electronic submission system screen is composed of the following elements:

- A progress bar banner showing the proposal completion progress.
- Buttons for the available actions.
- The ID card of your proposal – shown on the left-hand side of the screen. The information displayed there is completed as the user progresses. You can click on the Acronym, ID, PIC, and Contact tabs.
- Configuration status check tool – it is displayed in the bottom left part of the screen. In the visual example below, the configuration complies with the minimum requirements.
- Navigation buttons available in the bottom right corner of the screen.

The most important pages of the online submission wizard are briefly described below.
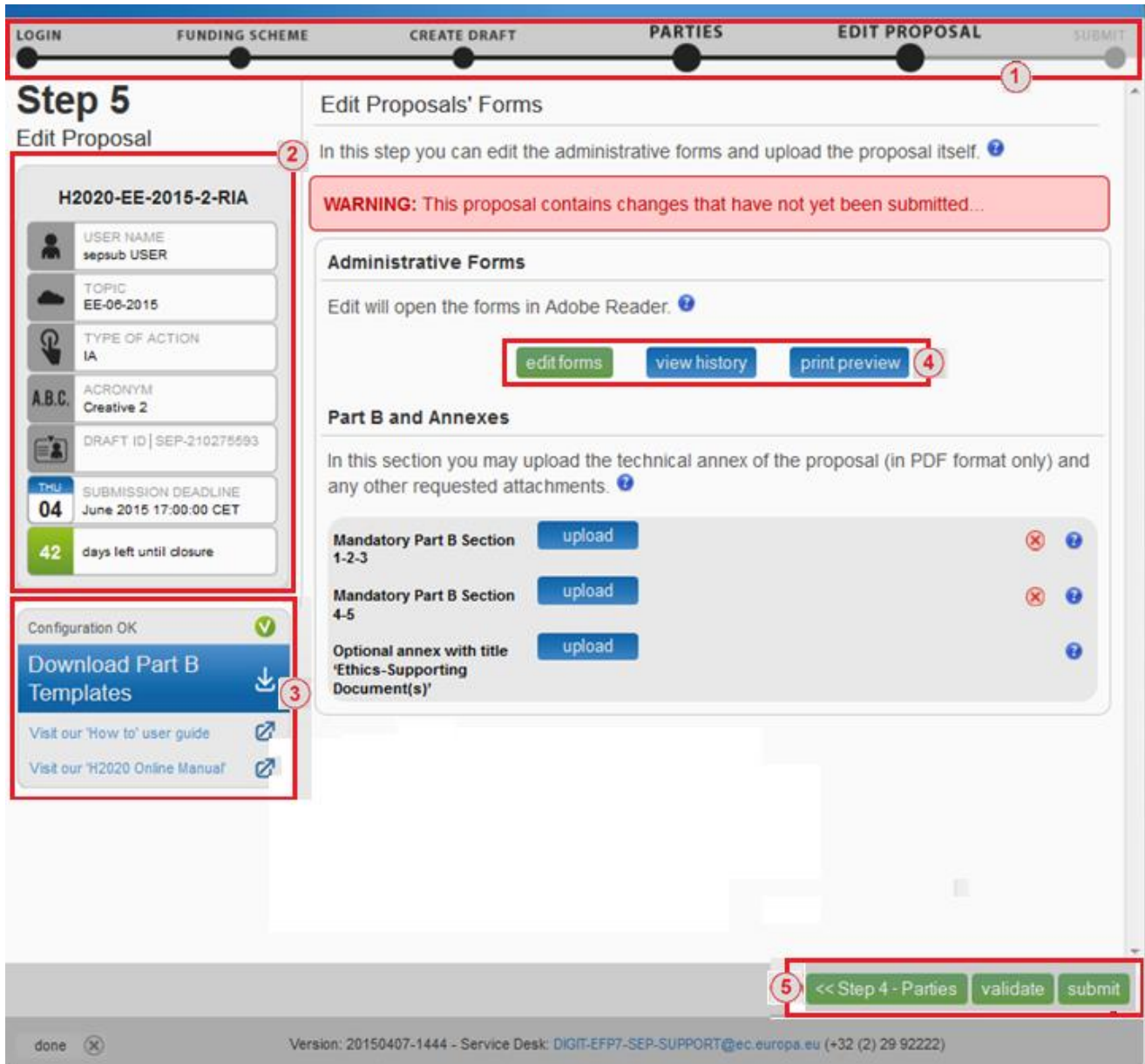
1. Progress bar

2. Proposal information panel

3. Proposal ID card

4. Configuration status check tool

5. Action buttons

Wizard Step 3: CREATE DRAFT

The picture below shows the CREATE DRAFT screen of the wizard:

1. Enter your organisation Search criteria
2. Select a previously associated organisation
3. Click to start the organisation Search procedure
4. Select your role **Main contact** or **Contact person**
5. Enter proposal acronym
6. Enter proposal short summary
7. Click the **Next** button

Wizard Step 4: PARTIES

The picture below shows the PARTIES screen of the wizard:

1. Click to add a new Partner
2. Click to open **Help i**nstructions
3. Warning on the required number of participants
4. Add contact
5. Contact info
6. Edit contact
7. More info
8. **Next** button
9. Edit participant information

Wizard Step 5: EDIT PROPOSAL

The picture below shows the EDIT PROPOSAL screen of the wizard:

1. Click to open general help instructions for editing proposal forms
2. Click to open specific help instructions on forms editing
3. Action buttons
4. Click to open specific help instructions on uploading documents

5. Click to download latest proposal requirements package
6. Click to upload required document
7. Click to delete an uploaded document
8. Indication if the required document was uploaded
9. Indication if a required document is missing
10. Document upload help
11. Navigation and action buttons

Wizard Step 6: SUBMIT

The picture below shows the SUBMIT screen of the wizard:

The Participant Portal: Screens and Access to User Actions

The Research and Innovation Participant 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 page on the Participant Portal.
- Decide on the funding opportunity that you want to apply for.
- Select your Partners – check Partner information in the Beneficiary Register.
- Register as a user in ECAS.
- Register your organisation and your Partner organisations in the Beneficiary Register.
- *Login* to the Participant Portal and *Select your Topic* to access the Online Submission Service.
- Use the *MY AREA* > *My Proposals* / *My Organisations* pages to access your draft and submitted Proposals.

Participant Portal: Before You Log In

Create an ECAS account or, if you already have an account, log in to your ECAS account. Before logging in, familiarize yourself with the grant process, the funding opportunities and check Partner information.

Participant Portal: The ECAS Login Screen

When you click [LOGIN], you will be prompted to log in through the ECAS login screen, as shown in the picture below. This screen appears in the same window and after login (or registration) you will be redirected to the Home page of the Participant Portal.
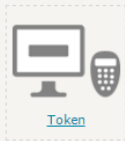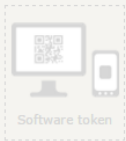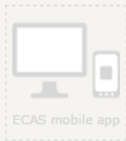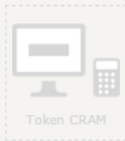
Participant Portal: The ECAS Login Domain Selection Screen

Once logged in, your personalised MY AREA tab appears. Here you can access your Organisations, Proposals, Projects, Notifications, and Experts.

Participant Portal: The HOW TO PARTICIPATE Page

This page is your main source of information as you prepare for submitting your proposal. It allows you to:

- Register your and your Partners' organisations in the Beneficiary Register
- Read the H2020 Online Manual and a number of Reference Documents
- Carry out a Financial Capacity Self-Check
- Check the conditions regarding SME Participation

Participant Portal: The BENEFICIARY REGISTER Page After Login

The Beneficiary Register page is accessible via the HOW TO PARTICIPATE page. It allows you to:

- **Search** through the registered organisations database and check if your desired Partners' organisations are already registered in Participant Portal.
- **Start** (or **Resume**) the organisation registration process via the Beneficiary Register.

Participant Portal: The FUNDING OPPORTUNITIES Page

The Funding Opportunities page is your access point for searching and selecting Calls for proposals.

Participant Portal: The CALLS Search & Selection Page

The CALLS search & selection page for the selected Programme contains a filtering/search panel at the top of the page and a result list of Calls (depending on your filtering criteria) in the form of clickable boxes situated below. If you tick a specific Call box, you will be directed to the Call Details page for that Call. The picture below shows a list of Horizon 2020 calls.

Participant Portal: CALL Details - TOPIC Selection for a CALL

When you select a Call to submit a proposal for, you must select a **Topic** in the **Call description** tab that opens.

These tab pages provide detailed information about the selected Call. To proceed to proposal submission, select a **Topic** from the list.

Participant Portal: Accessing the Submission Service for a Selected Topic

After you select the Call and the specific Topic, click [START SUBMISSION] to start the Proposal Submission process in the Online Submission Wizard, which will open in a new window (see the previous section for a more detailed description of these screens).

The Submission Service tab is your **access point** to the **Online Submission Wizard.**

Select the **Type of Action** from the drop down menu (usually there is just one **Action**) and then click on the **START SUBMISSION** button to go to the **Online Submission Wizard.**

Participant Porta: MY ORGANISATIONS Page After Login

Log in and go to your personalised **MY AREA** tab, where you can access your Organisations and perform different actions related to them – view or modify organisation details, view proposals for these organisations, view roles, and view projects.

Your personalised **MY AREA** tab – click **My Organisations** to see a list of your registered (or draft) organisations (organisations that you have a role with).

In the list of your organisations, you can use the **View Proposals** action button in case you have draft or submitted proposals for that organisation.

In this visual example, the registration process for the organisation in the list is not yet complete, so the system provides an option to continue the organisation registration process.

Participant Portal: The MY PROPOSALS Page After Login

After you log in, you will be able to use your personalised MY AREA tab, where you can access your Proposals – drafts or submitted ones. The visual example below shows a proposal list with two draft proposals:
In the list of proposals, each proposal will have a specific set of action buttons available depending on its state, as described in the **LEGEND** area above the list.

APPENDIX A: COMPATIBILITY & TROUBLESHOOTING YOUR SYSTEM CONFIGURATION

Mandatory System Requirements

The electronic submission system of the European Commission is a web application, so you will need a working Internet connection to use it. Although the system has been tested with a set of typical reference configurations, it is not guaranteed that the system will be fully functional on your computer. The system provides a diagnostic window that will warn you about some possible incompatibilities. To use the electronic submission system, ensure that your computer configuration complies with the following mandatory system requirements:

Component	Mandatory requirements
Adobe Reader	Version X or above, all previous reader installations must be removed prior to installing the latest version
	Adobe Acrobat X Pro needs to be updated to the latest version (10.1.15).
Internet connection	ADSL Line, 512 Kbps or faster
Memory	RAM – 512 MB of more
Screen resolution	Minimum 1024 x 768 of higher
JavaScript	JavaScript must be enabled
Cookies	Cookies must be enabled
Pop-up blocker	No effect
User ID	Valid user ID with the Commission (ECAS account)

Recommended system configuration

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

Operating system	Internet browser	Adobe Pro or Acrobat Reader
Windows Vista & 7	Internet Explorer from 8 to 11 Firefox 3.6 or above Chrome from 10 to 44	Version X or above
Windows Vista 10	Firefox 40 IE 11 Chrome until 44	Version X or above
Mac OSX	Safari 5 or above	Version XI
Linux (Xubuntu 14.04)	Firefox 28.1	Version 9.5.5

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

Troubleshooting Your System Configuration

The primary compatibility issue concerns the seamless viewing and editing of the pdf forms inside

your browser window once you click . Your browser will either display the forms in a window or download them to your computer (after downloading them, you will be able to open them in Acrobat Reader X or XI and complete them. Whether you work on the form inside your browser window or with Acrobat Reader after downloading them, the end result is the same. In either case, as described in User Action 4 above, once you click Validate, the form will perform a check and provide you with the corresponding notices, When you click Save and Close the information will be sent to and saved on the Commission's servers. REMEMBER: *THE DOWNLOADED FORM HAS A TIME STAMP FROM THE COMMISSION'S SERVERS AND IT EXPIRES **2 HOURS AFTER IT IS DOWNLOADED** .IF YOU DO NOT COMPLETE, SAVE AND CLOSE THE FORM WITHIN 2 HOURS, YOU MUST DELETE THE OLD FORM, RETURN TO THE WIZARD AND DOWNLOAD A NEW COPY OF THE FORM.*

LOGIN   FUNDING SCHEME   CREATE DRAFT   **PARTIES**   **EDIT PROPOSAL**   SUBMIT

Step 5
Edit Proposal

H2020-SCC-2015

👤	USER NAME sepsub USER
☁	TOPIC SCC-01-2015
👆	TYPE OF ACTION IA
A.B.C.	ACRONYM YEAH A TEST
🪪	FINAL ID 690721 DRAFT ID SEP-210274840
TUE 05	SUBMISSION DEADLINE May 2015 17:00:00 CET
12	days left until closure

Configuration OK ✓

Download Part B Templates ⬇

Visit our 'How to' user guide ↗

Visit our 'H2020 Online Manual' ↗

Edit Proposals' Forms

In this step you can edit the administrative forms and upload the proposal itself. ❓

Administrative Forms

Edit will open the forms in Adobe Reader. ❓

[edit forms]   [view history]   [print preview]

Part B and Annexes

In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments. ❓

Technical Annex Section 1-3	[upload]	workflows.pdf	[delete]	✓	❓
Technical Annex Section 4-5	[upload]	Technical_Annex.pdf	[delete]	✓	❓
Optional annex 3: Ethics - Supporting Document(s)	[upload]				❓

[<< Step 4 - Parties] [validate] [submit]

done ⊗   Version: 20150407-1444 - Service Desk: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

The bottom left side of your wizard will indicate whether your system is configured to display the form directly in your browser window:
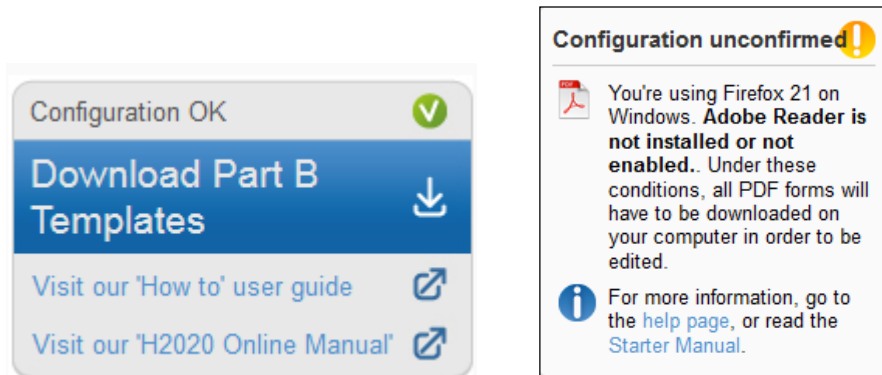
Configuration OK: your system meets the minimum requirements and all PDF forms will open directly in your browser.

Configuration unconfirmed: your browser does not meet the minimum requirements and all PDF forms will be downloaded and opened offline, outside your browser.

What to do if your system configuration is not OK?

1. Make sure you have the correct version of Adobe Reader installed (see compatibility section above) and set up as your default PDF handler. If you have an older version of Adobe Reader, uninstall it before installing the new version. To download Adobe Reader, go to Adobe Reader Download and follow the instructions.

2. Most browsers have their own built-in PDF viewers. If your browser's built-in PDF viewer is not allowing you to properly open, view and edit the Administrative form in step 5, it is recommended that you disable your browser's PDF viewer and instead use the corresponding Adobe Reader plug-in. This way you will be able to open up, view and edit the form within the browser. As stated above, you can also complete the form offline and then save it to the Commission servers,.

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

On Windows

Internet Explorer 7, 8 and 9

The steps to enable the Adobe PDF plug-in vary depending on your version of Internet Explorer.

- Select Tools and click Manage Add-ons.
    - (Or select Tools > Internet Options, click the Programs tab, then click Manage Add-ons.)
- In the Show pop-up menu, select All Add-ons.
    - (In some versions the option reads: Add-ons That Have Been Used by Internet Explorer.)
- Scroll to the section of add-ons for Adobe Systems and select Adobe PDF Reader.
- If the status of Adobe PDF Reader is set to Disabled, click the Enable button.
- Click OK to confirm.

Firefox 3.6 up to 18

- Select Tools and click Options.
- Click the General tab, then click Manage Add-ons.
- Click the Plug-ins tab (purple/blue icon). (The layout of this dialog box differs depending on the version.)
- Find and select Acrobat or Adobe Reader:
- If the Disable button is displayed (as shown above), the add-on is enabled and no action is required.
- If the Enable button is displayed, click Enable.

Firefox 19 and above

Please note that Firefox 19 and above has a built-in PDF viewer. You will need to enable the Adobe PDF reader plugin.

- Click Tools and then click Options
- Select Applications
- In the Content Type column, find Adobe Acrobat Document and click to select it
- In the Action column, click the corresponding drop-down arrow and select "Use Adobe Acrobat (in Firefox)".
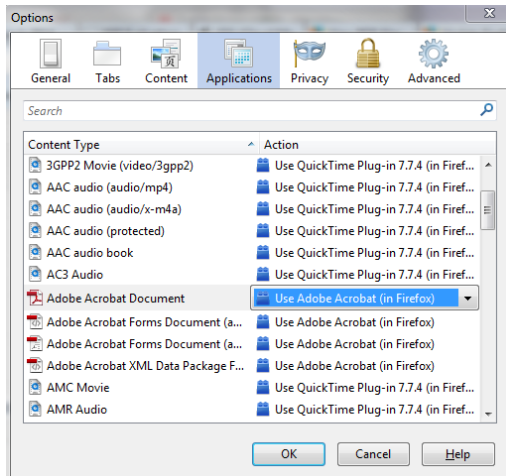
Google Chrome

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

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

Older Google Chrome version plugins page:
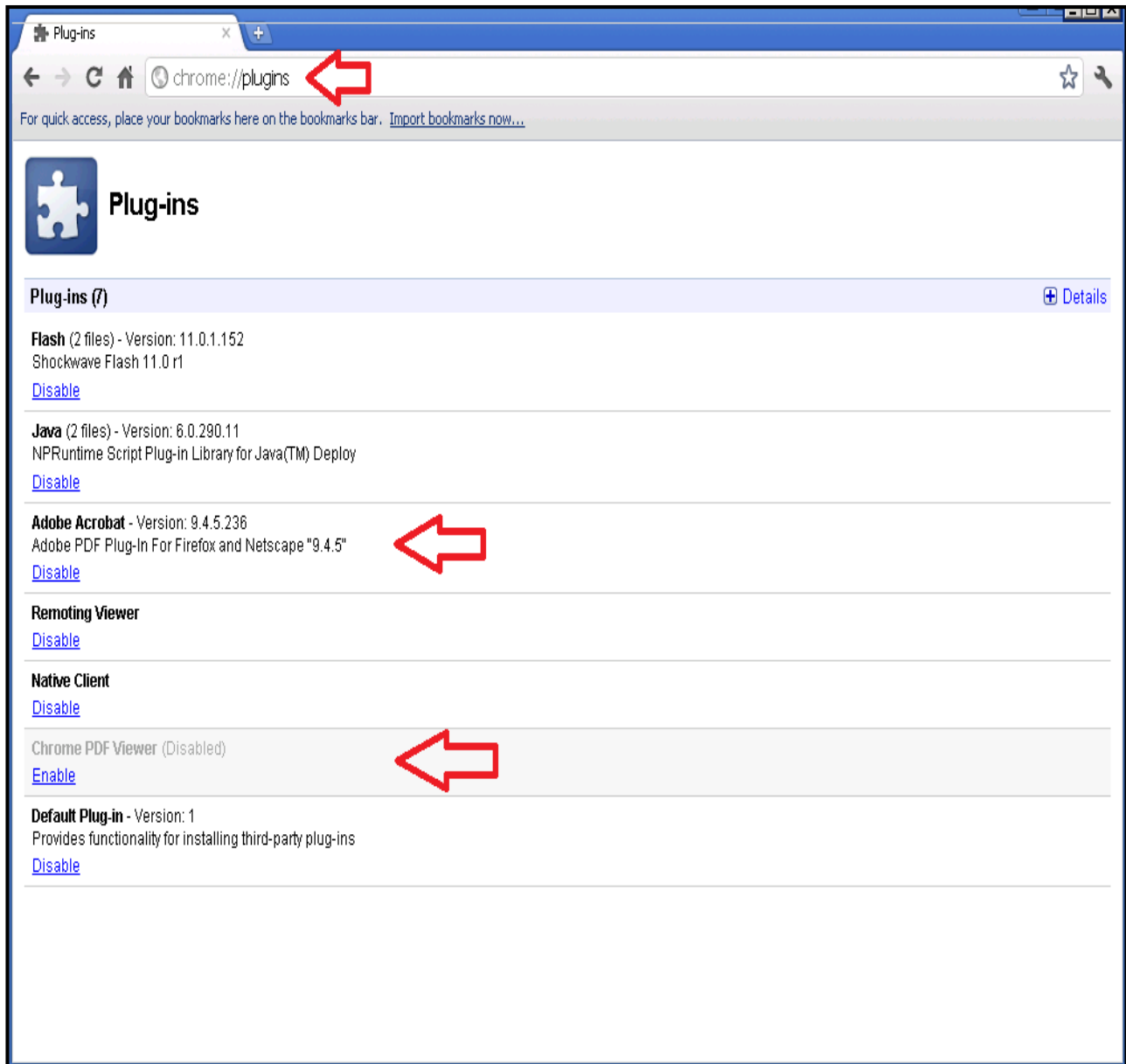
Latest Google Chrome version plugins page:
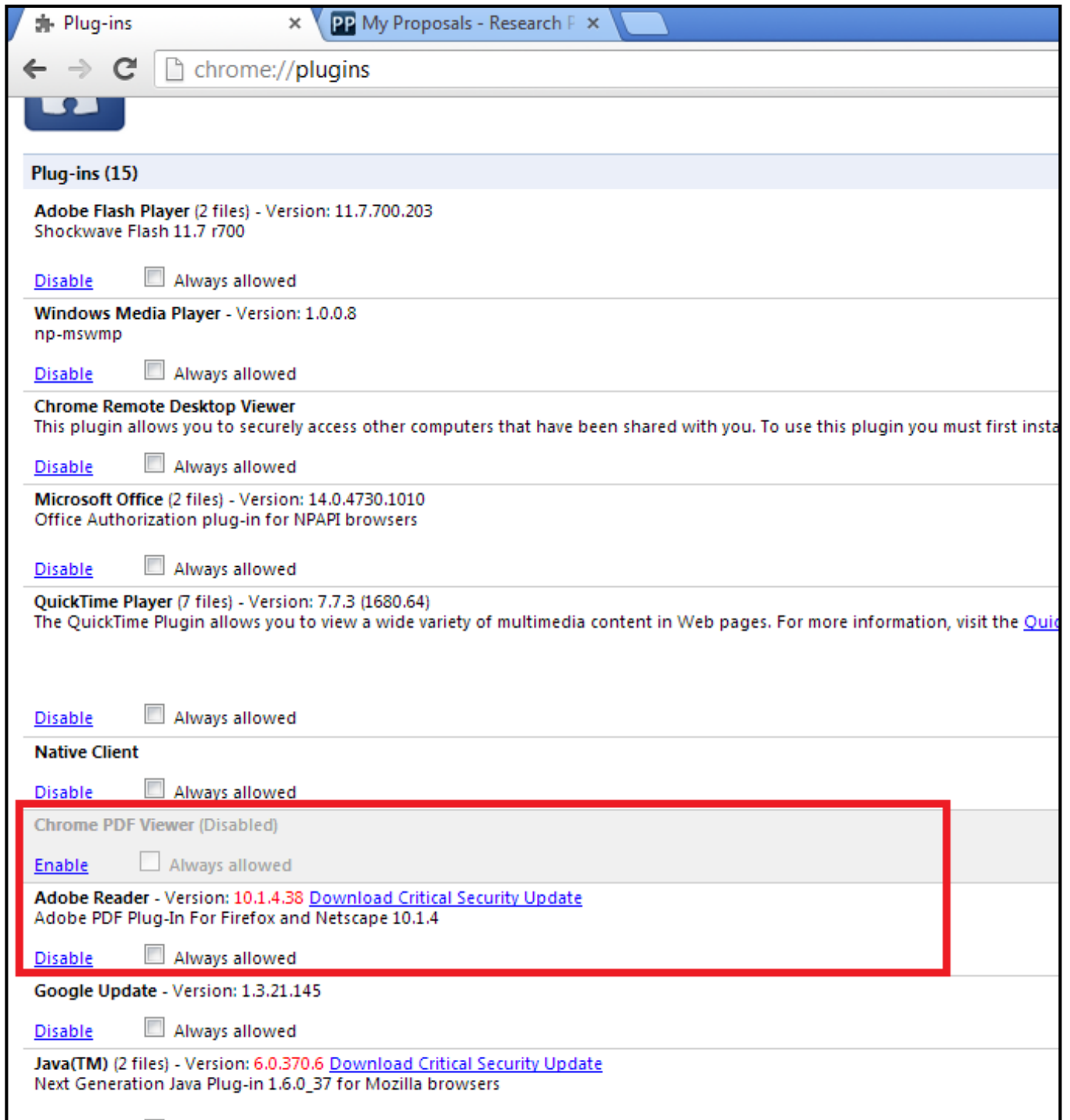
Manage your settings to use the offline form with Chrome

Adobe plugin support for Google Chrome ends with version 45. Plug-in support will also be discontinued for Microsoft Edge. Because of this, it will no longer be possible to work with Part A forms online. It will, however, still be possible to work in the offline mode. This section aims to

facilitate the configuration of Chrome and Adobe to be able to work in offline mode. You can, however, still work with the offline forms using Adobe Acrobat X Pro in version 10.0.0. All screenshots shown in this section feature the Adobe Acrobat Reader 10 or higher.

It is advised to work rather in online mode using alternative browsers that support the Adobe Reader plugin rather than working in the offline mode. You can find the list of browsers supported in the "Minimum Technical Requirements" page.

Important information for users working in the online mode:

You may use previous versions of Chrome (version 43 or 44) when working in the online mode. To work in the online mode, you will need to update Adobe Acrobat X Pro to the latest version (10.1.15).

Please note that you will have to update Adobe Acrobat X Pro to the latest version (currently: 10.1.15) and check your Firefox settings accordingly as shown in the figure below.
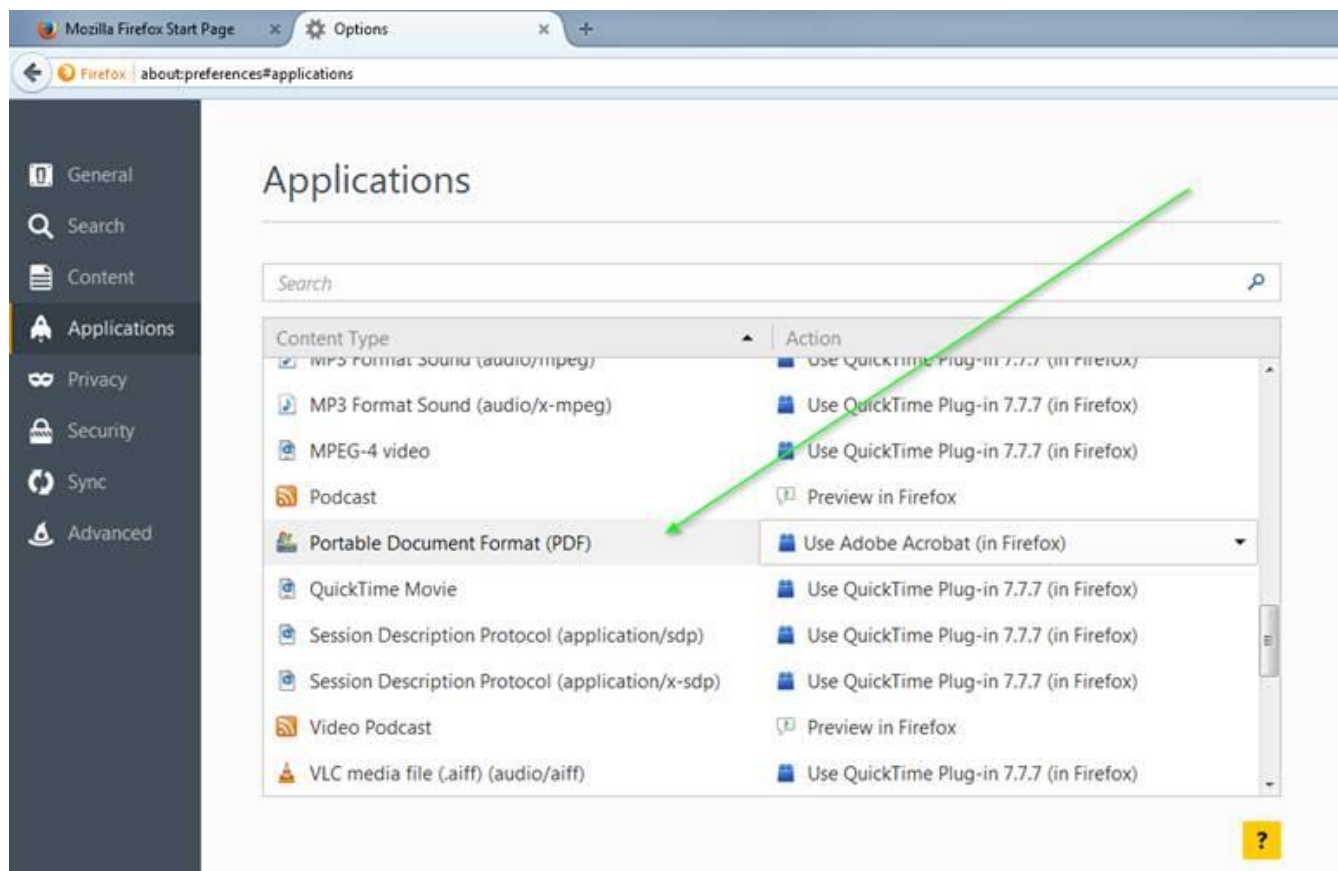
Open a new tab in your browser and go to Tools > Options > Applications and select 'Use Adobe Acrobat in Firefox'.

You can download the latest version of Adobe Reader here:
https://www.adobe.com/support/downloads/product.jsp?product=1&platform=Windows

- **Set Adobe Reader as default PDF viewer in your system**

If Adobe Reader XI (or X) is not set as PDF viewer in your system then perform the following steps:

Open Adobe Reader and navigate to Edit -> Preferences:
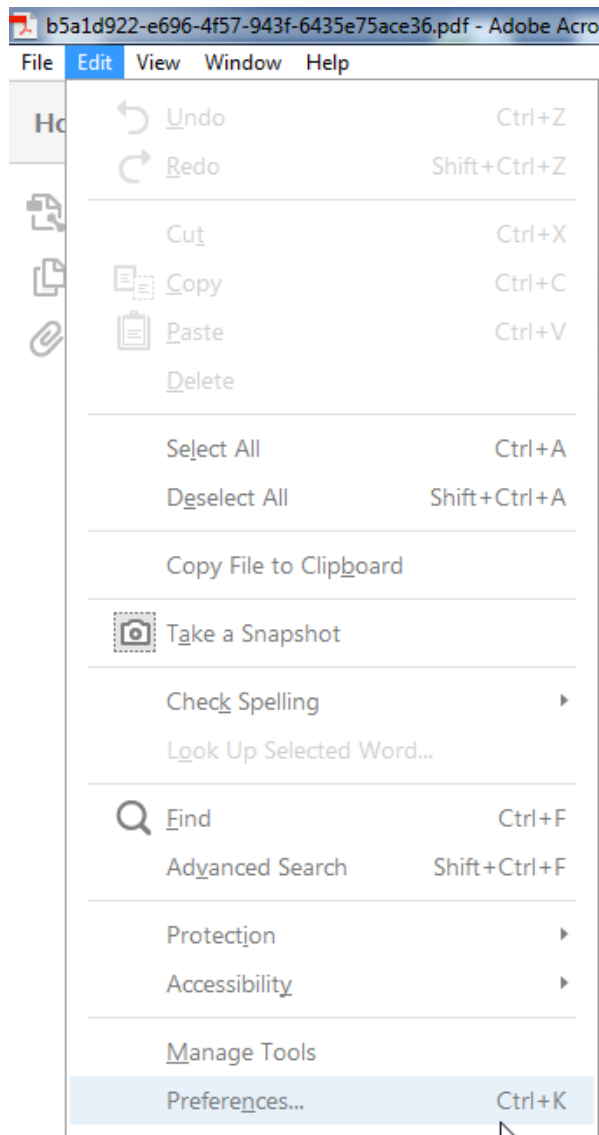
Select <General> and press <Select as Default PDF Handler>:
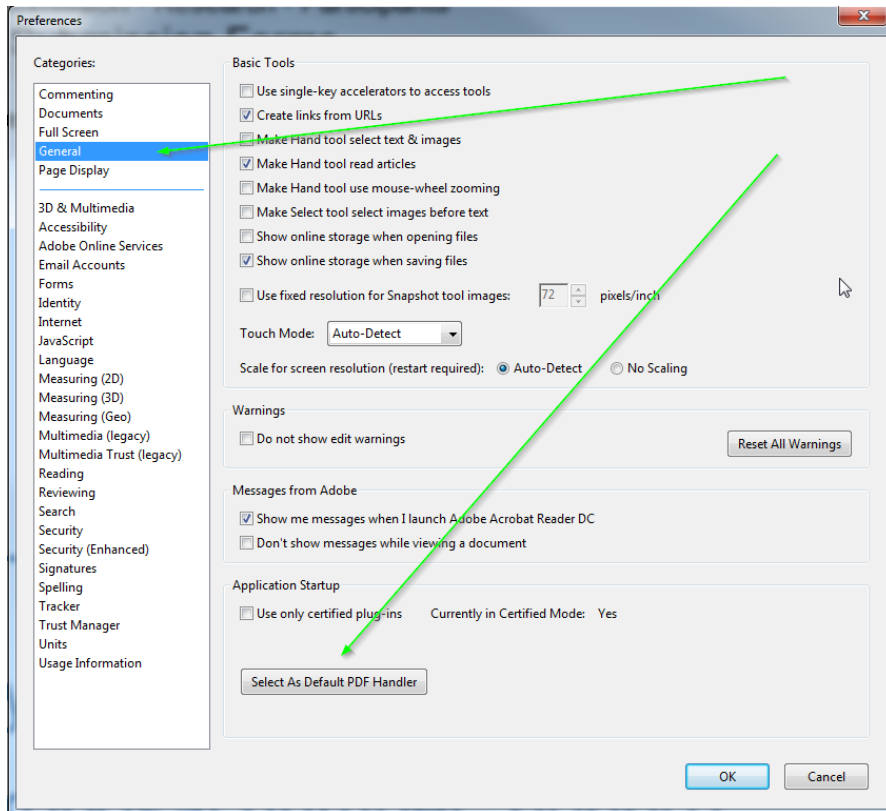
In Adobe Reader XI and X also the following popup window appears. Select Adobe Reader XI MUI (or X) and press <Apply>.
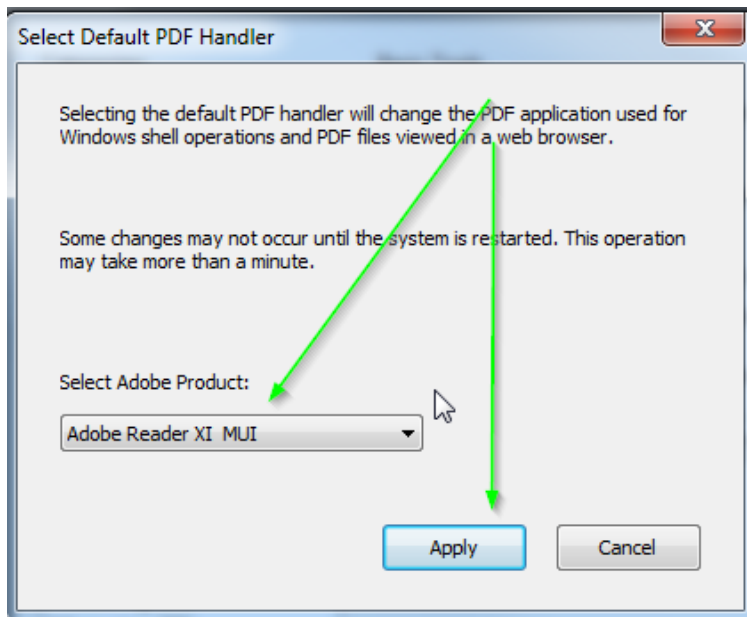
If the <User Account Control> popup window appears then press <Yes>.

Double Click any PDF file stored locally in your PC and check whether it opens in Adobe Reader. If not, restart your system.

- **Disable Chrome PDF Viewer**

The configuration shown below concerns Chrome version 45 and is expected to work from Chrome version 42 to version 46.

If you received the following warning message, then disable your browser's PDF viewer following the steps described below.

Open Chrome browser and navigate to "chrome://plugins/"

Disable Chrome PDF Viewer.
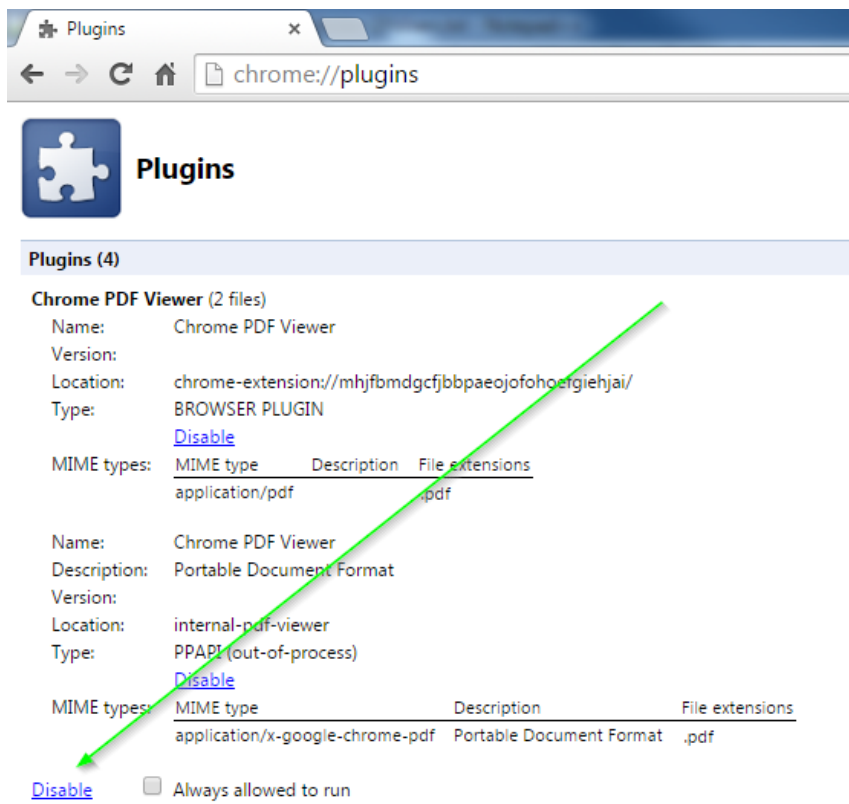
Restart your computer.

Safari 5

- Choose Action menu > Preferences and click Security. (The Action menu is near the upper-right corner of the Safari window, and looks like a gear.)

- Make sure that the "Enable plug-ins" checkbox is selected

Safari will by default display PDF files using the Adobe Reader plug-in.
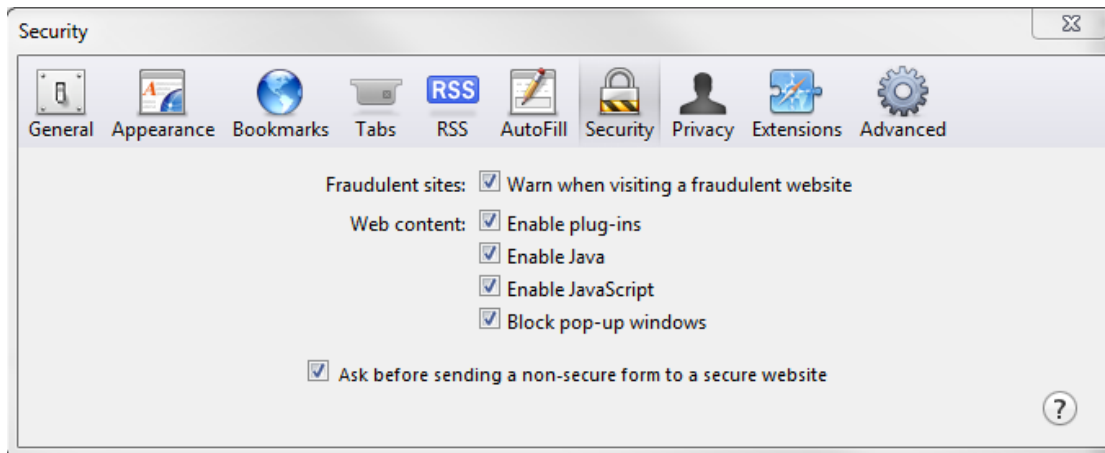
Opera 19

The latest Opera version will not display the pdf forms inside the browser. It will automatically download them in your download folder. You will need to open and work on them using the Adobe Reader or Adobe Pro application. When you are ready to click on the embedded Validate Form link or on the embedded Save and Close link, make sure your computer is connected to the internet, so that the information can be automatically validated or uploaded and saved to the Commission's servers.

On OS X

In OS X, the latest versions of Adobe software, Acrobat 10.1.x or XI and Reader 10.1.x or XI support viewing of PDF files only inside the Safari browser. Other browsers, such as Firefox, Chrome and Opera, are not supported. We suggest you use Safari.

If Safari does not display PDF forms in the browser window, uninstall all older versions of Adobe Reader and download the most recent one. First close Safari and then install Reader. Launch Safari to open the PDF files inside the Safari window. If you install Adobe Reader 10.1.x without first closing Safari, Safari will not display the PDF file inside its browser window until it is re-launched. For further help, please see http://helpx.adobe.com/acrobat/kb/troubleshoot-safari-plug-acrobat-x.html

These are the respective error messages on the bottom left side of your wizard window for Firefox, Chrome, Opera and Safari
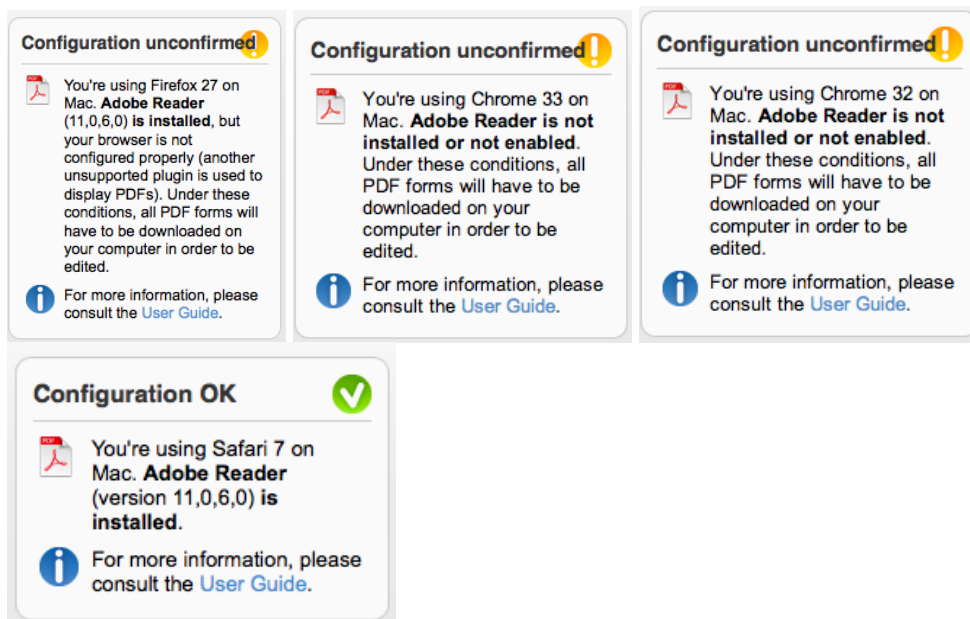
The PDF viewer browser plug-ins for Firefox, Chrome and Opera will not work because the form format is not supported by the plug-ins, and it will not display. These browsers will automatically download the form to your download folder and you will be able to complete it offline.

Setting Adobe reader in Safari 7 and above

Trust the PDF plug-in globally

1. Select **Safari > Preferences > Security > Manage Website Settings**.
2. From the left panel, select **Adobe Reader** or **Adobe Acrobat**.
3. From the **When visiting other websites** pop-up menu, choose **Always Allow**.
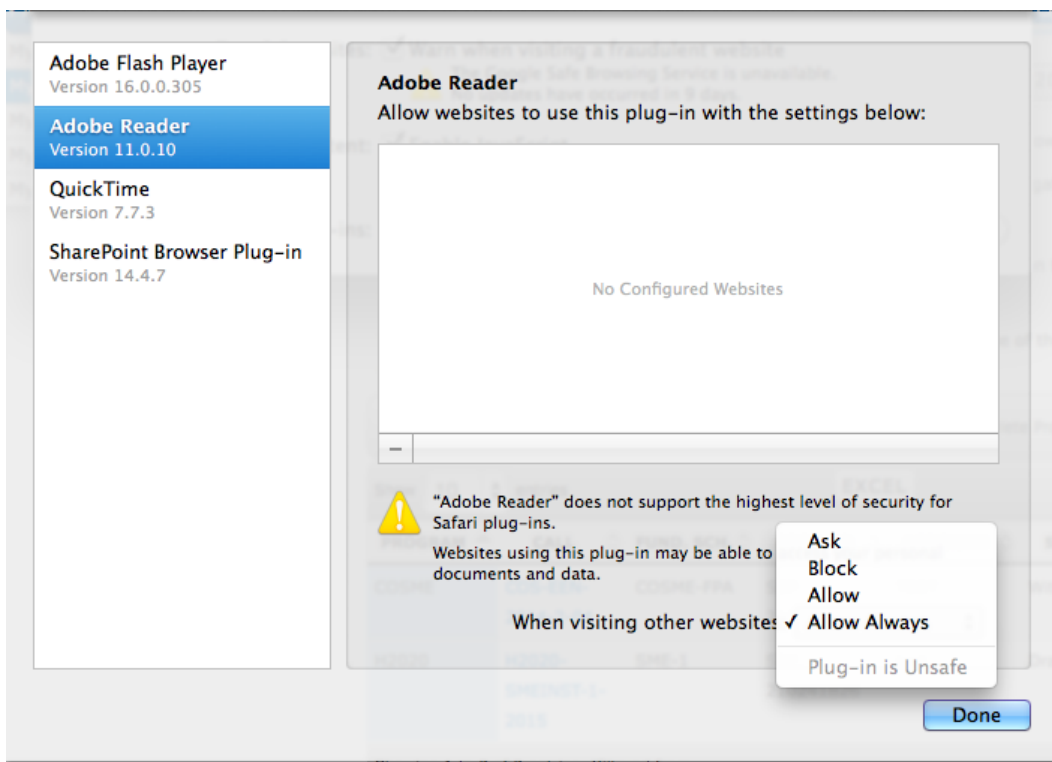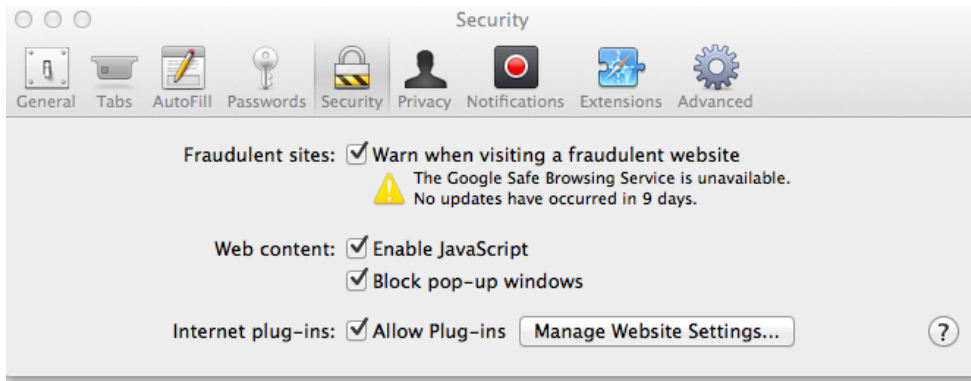
To open the form, Adobe reader must be set as the default PDF reader.

Setting Adobe reader as the default PDF viewer

1. In the Finder, select a PDF, and choose **File > Get Info**

2. Click the arrow next to **Open With**

3. Select either **Adobe Acrobat** or **Adobe Acrobat Reader**
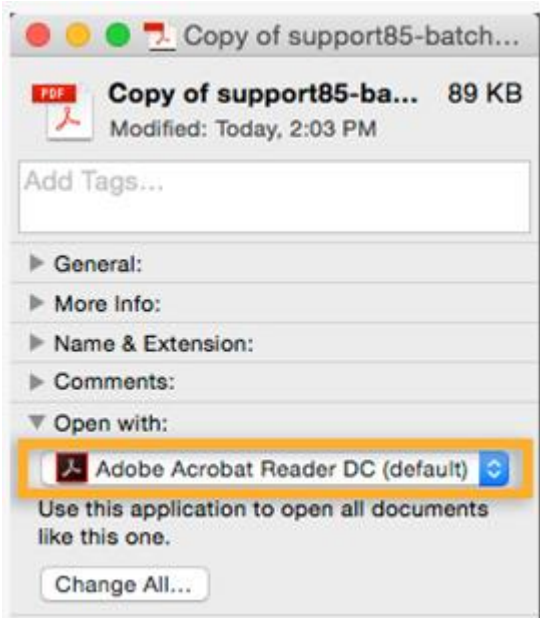
4. Click the **Change All** button

5. When asked if you want to change all similar documents, click Continue

Troubleshooting Document Structure

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:

• Click the signature located at the table of contents page

• Click 'Signature Properties…' in the Signature Validation Status window
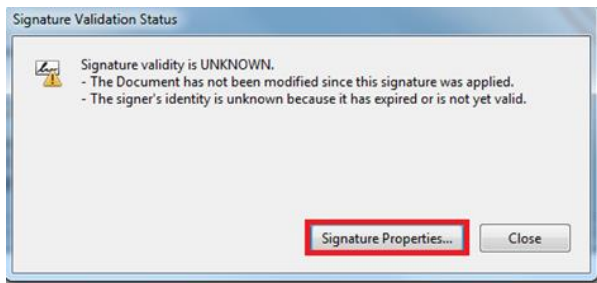
• In the Signature Properties window click ' Show Signer's Certificate…'
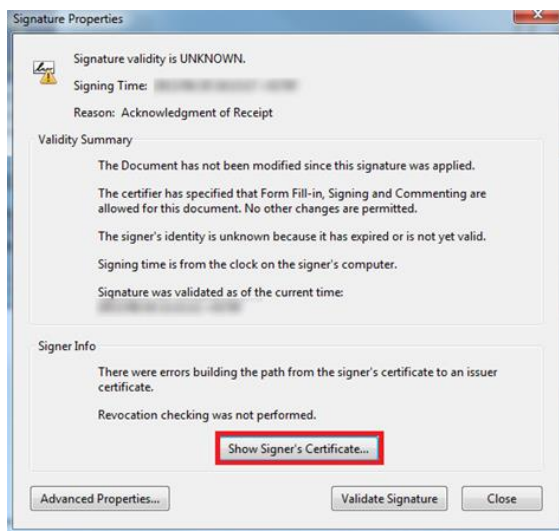
• Select 'Trust' tab and Click 'Add to Trusted Identities' in the Certificate Viewer window

---
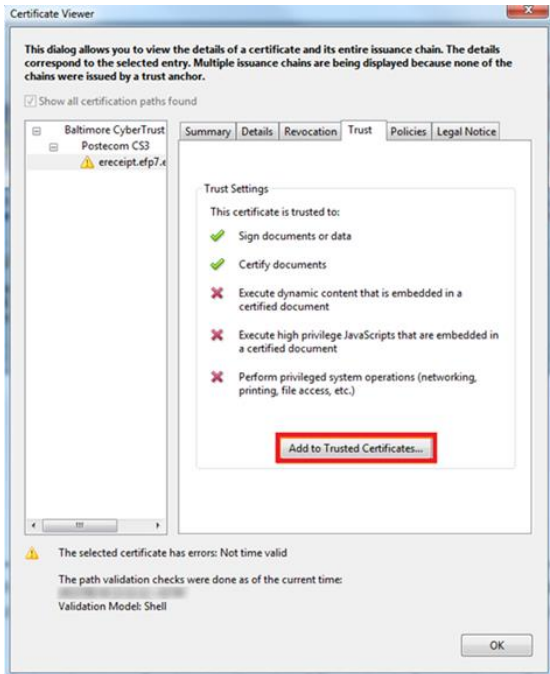
• Click 'OK' to confirm in the Acrobat Security pop-up window
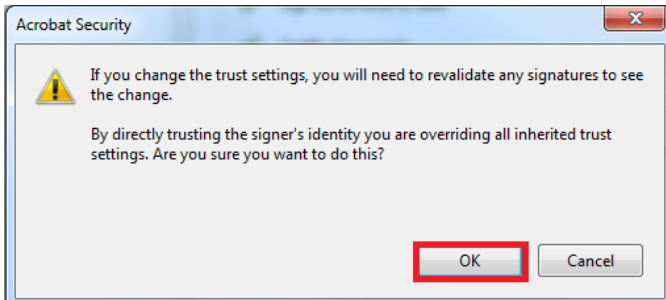
• The Import Contact Settings window should be displayed
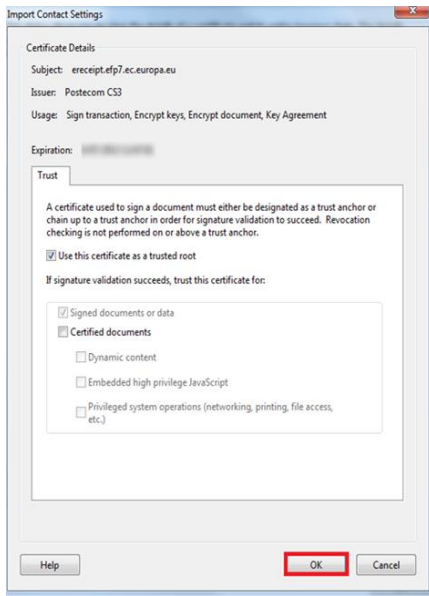
• Tick 'Use this certificate as a trusted root' and click OK (note: ticking 'Certified documents' is not required)

• In the Signature Properties window click first'Validate Signature' and then 'Close'
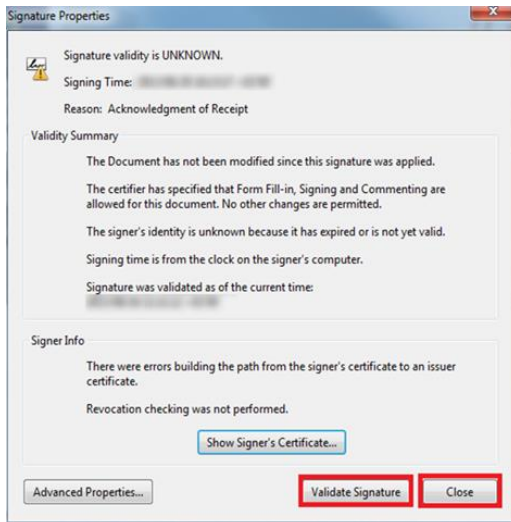
• The Commission digital signature or eReceipt should be validated
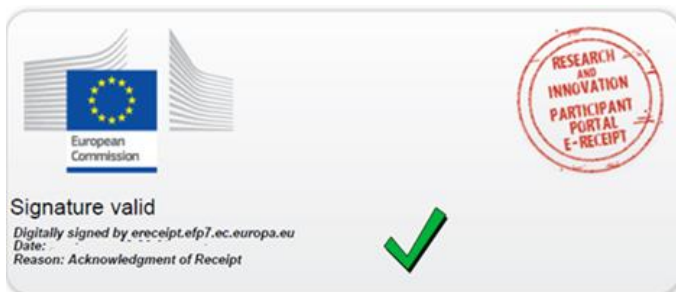
APPENDIX B: ECAS REGISTRATION

To use the Online Submission Service, you need to have a personal user account with the European Commission Authentication Service (ECAS).

To create an ECAS account, follow the instructions below.

Note: For additional information, see the H2020 Online Manual.

ECAS registration steps:

1. Go to the Participant Portal:
   http://ec.europa.eu/research/participants/portal/desktop/en/home.html

2. Click REGISTER.

3. The ECAS **Sign Up** screen appears:

All fields in the registration form are mandatory.

4. Optionally, click the link **[Help for external users]** if you need additional instructions.

5. Choose a username and enter it in the **Choose a username** field.

6. Enter your **First name** and your **Last name**.

7. Enter your **E-mail**. When registration is complete, a confirmation email will be sent to this email address.

8. Enter your e-mail address again in the **Confirm e-mail** field. You will receive an error message and you will have to enter the email again if it does not match the e-mail address provided in Step 3.

9. Select the **E-mail language** that you want the European Commission to use for e-mail communication with you.

10. In the **Enter the code** field, enter the five characters shown in the blue box above the field. For security reasons, the characters are not displayed clearly and may not be copied from the blue box.

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

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

b. Click 🔊 to hear an audio recording of the characters. You will need to use your computer speakers or headphones – make sure you have adjusted the volume to a comfortable level.

11. Click the privacy statement link under the **Enter the code** field and read it in the window that opens. If you agree with it, close the privacy statement window and select the respective check box under the **Enter the code** field.

12. Click [Sign up].

13. 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.

14. The following message will appear to confirm that your account has successfully been created:

> **Sign Up**
>
> Thank you for registering, you will receive an e-mail allowing you to complete the registration process.
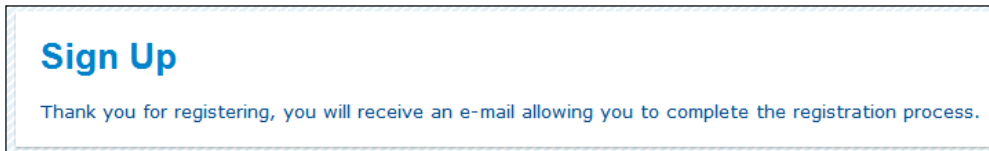
15. The system will send you a confirmation email to the email address you provided in the sign-up form. Open the email and click the activation link provided to activate your account. The link will expire after 90 minutes.

    Note: Make sure to check your spam folder if you cannot find the confirmation email in your inbox.

16. Enter a valid password following the instructions on the screen.

17. The following message confirms the creation of your account:

> **Successful login**
>
> You are now logged in to ECAS.
>
> To stop the automatic single sign-on, click Logout or close all browser windows.
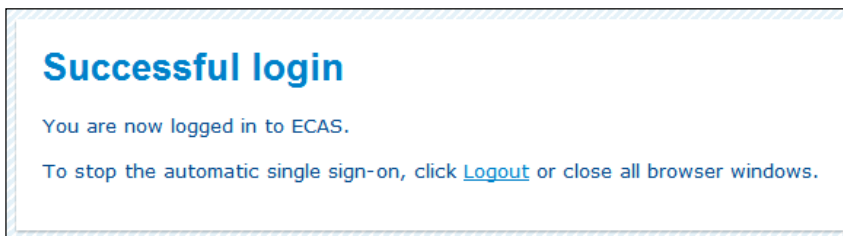
18. To log in to your new account, go back to the Participant Portal: (http://ec.europa.eu/research/participants/portal/desktop/en/home.html) and click [🔒 Login].

APPENDIX C: 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. The call roles are specific to the call. 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.

Call: H2020-MSCA-IF-2014

Contact roles:

- *Researcher* (one person with this role is mandatory for the proposal submission)
- *Supervisor* (one person with this role is mandatory for the proposal submission)
- *Contact*

The following picture shows the Step 3 screen for the **H2020-MSCA-IF-2014** call:

IMPORTANT: Make sure that you have assigned the mandatory Researcher role before you submit the proposal. You can add **only one** *Researcher* - if you need to re-assign this person to another role/e-mail and then assign another person as a *Researcher*, you must first change the current *Researcher* role to *Contact person* before you can add a new *Researcher*.

Note: Once you have added the *Researcher* role, the remaining contact roles will only be displayed when you add or edit another contact role.

Call: ERC-2014-CoG (call with Fellow contact roles)

Contact roles:

- *Principal Investigator* (one person with this role is mandatory for the proposal submission)
- *Main Host Institution Contact* (one person with this role is mandatory for the proposal submission)
- *Contact person*

The following picture shows the Step 3 screen for the **ERC-2014** call:

LOGIN **FUNDING SCHEME** **CREATE DRAFT** **PARTIES** **EDIT PROPOSAL** SUBMIT

Step 3
Create a Draft Proposal

H2020-MSCA-IF-2015

👤	USER NAME
☁	TOPIC MSCA-IF-2015-EF
👆	TYPE OF ACTION MSCA-IF-EF-ST
THU 10	DEADLINE (Brussels Local Time) September 2015 17:00:00
9	days left until closure

Configuration OK ✓

Download Part B Templates ⬇

Visit our 'How to' user guide ⬀
Visit our 'H2020 Online Manual' ⬀

Create a Draft Proposal

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

Your organisation

PIC* ❓ [   ]   Short name* ❓ [   ]

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

PIC: 956171778 EPSS Av. Einstein 1 Bruxelles, BE	PIC: 546471196 European Office Skelleftea kommun Tradgardsgatan 6 Skelleftea, SE VAT: SE212000264301
PIC: 999618272 Uni-Lublin PL MARII CURIE SKLODOWSKIEJ 5 LUBLIN, PL VAT: PL7120103692	PIC: 926143973 Central Washington University 400 E University Way Ellensburg, US
PIC: 942338608 Laboratori Victoria SRL Via Gian Battista Vico 2/c Pistoia, IT VAT: 01459190474	PIC: 939050502 BRAINOMIX LIMITED PRAMA HOUSE 267 BANBURY ROAD SUMMERTOWN OXFORD, UK VAT: GB139561493

Search for your organisation PIC [search]

Your Role

Please indicate your role in this proposal

- ⦿ Researcher
- ○ Supervisor
- ○ Contact

Your Proposal

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

Acronym* [   ]   Please restrict acronym to latin characters only

Short Summary (max. 2000 characters)* Character count: [   ]

Scientific Panel* [Please select ▼]

[next >>]

cancel ⊗

Version: 20150826-1621 - Service Desk: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

Note: The following limitations regarding the assignment and reassignment of contact roles apply:

- There can only be one *Principal Investigator* role assigned to a proposal for a call. This means that if you initially created a proposal for a call as a *Contact person* assigned in Step 3 of the submission wizard, and you then add a *Principal Investigator* contact role, **you would not be allowed** to change the *Contact person* role to *Principal Investigator* because the latter role already exists.

- If you create a proposal for a call as a *Contact person* assigned as the initial contact in Step 3 of the submission wizard, and you then add a *Main Host Institution* contact to the proposal, you **will be able** to change the *Contact person* to *Main Host Institution* after a confirmation prompt that the main contact would change, as shown below:
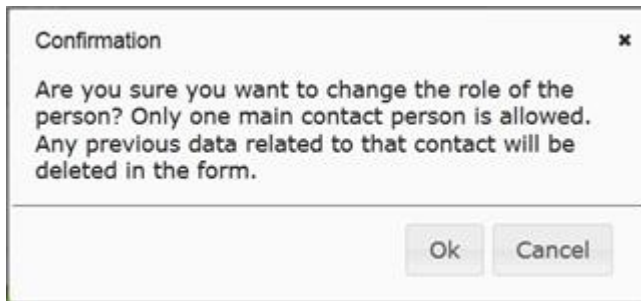
Note: 'Main contact' in this context means *Principal Investigator* contact or *Main Host Institution* contact.

Note: Once you have added the top-level contact role (*Principal Investigator*), the remaining contact roles will only be displayed when you add or edit another contact role.

GLOSSARY

Term	Definition
Applicant	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
Beneficiary	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
Beneficiary Register	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 Beneficiary Register is accessible from the **Beneficiary Register** page of the Participant Portal: http://ec.europa.eu/research/participants/portal/desktop/en/organisations/register.html The Beneficiary Register also provides an organisation search tool where you can check if your organisation has already been registered as a participant.
Call	An invitation to 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. All calls are announced in the EU's Official Journal and are published on the FP7 section of the CORDIS website. **Call for proposals** 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 are officially published in the European Union Official Journal and on participant portal. **1-stage calls** For most calls, you submit a full proposal by the given deadline. **2-stage calls** Some calls have a 2-stage submission procedure, as follows: ✓ Stage 1: You submit an outline proposal (standard maximum 15 pages, unless otherwise specified in the respective work programme, and on the proposal template in the submission system). This is evaluated against criteria set out in the call/topic. Note: **For continuously open calls**, your stage-1 proposal will be evaluated as soon as it is received, and there will be a closure date for submitting your full proposal in stage 2. Proposals submitted for continuously open calls cannot be re-edited or withdrawn. ✓ Stage 2: If your proposal passes stage 1, you will be invited to submit your full proposal within a given period. If required by the relevant work programme, at this stage you will also receive the stage-1 Evaluation summary report (ESR). ✓ Rejected proposals: If your proposal does not pass stage 1, you will be informed of this in writing, along with the evaluation summary report.

Term	Definition
Consortium agreement	The Consortium Agreement provides the legal basis for the internal relationship and responsibilities among the beneficiaries, and must be consistent with the provisions of the Grant Agreement. The Consortium Agreement is mandatory for all projects unless specifically excluded by the terms of the call for proposals. Such agreements do not affect the rights of the Commission/REA arising from the Grant Agreement and the corresponding obligations of the beneficiaries vis-à-vis the Commission/REA
Consortium	A Consortium is a group of Participants, one of which is identified as the Proposal Coordinator in the proposal submission. The Consortium is represented to the Commission by a nominated Proposal Coordinator Contact, who is normally an employee of the Proposal Coordinator Organisation but who acts on behalf of all for most aspects of the project. 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. • LEARs in the Consortium may revoke the Partner Contact representing their organisation in the Project.
Deadline	For each particular call, this is the moment after which proposals cannot be submitted to the Commission. At this point the Submission system closes for the respective call. Deadlines are fixed and strictly enforced.
ECAS	The European Commission's Authentication Service - it is the system for logging in to a whole range of web sites and online services run by the European Commission. Once you use ECAS to log in to a Commission website, you will not need to identify yourself again for other Commission websites until you browser session expires.
Entry into force date	It is the date when the grant agreement enters into force. In general, this is the date when the last party has signed the grant (it can be the coordinator or most commonly the Commission).
ERC	European Research Council
Ethics issues	Ethics issues are to be addressed by project proposals that involve the collection/experimentation with humans (including clinical trials), and/or human tissue, the collection or processing of personal data, human surveillance and intervention of any kind of experimentation with animals, genetic information, etc. Proposals that raise research ethics issues or those that do not address them adequately are usually identified by the scientific evaluation as needing additional attention by an Ethics Screening and/or Ethics Review Panel (ethics screening and ethics review are parts of the ethics review process). Ethics in H2020 is important throughout the project lifecycle, from the concept and the initial design until the dissemination of results. If there are ethics issues associated with or raised by a project, the applicants must describe how these will be dealt with in Annex I to Grant Agreement.
Finalize GPF	For the GPFs to be finalised and correctly sent to the Commission/REA, three forms have to be signed manually: · One Form A2.5, 'Our Commitment,' per beneficiary has to be signed by the authorised representatives of the coordinator and each participant; · Form A2.6, 'Data Protection and Coordination Role,' has to be signed by the coordinator's authorised representative; · Form A4, 'Bank Account,' must bear the bank stamp and the signature of the bank representative (if the account is not already validated by the Commission/REA, which will be checked by the Project Officers) as well as the account holder's signature, with date. The finalised GPFs are submitted to the Project Officer in one unbound copy on white paper with original signatures.
Host Organisation	The target organization of a Marie Currie (MC) proposal, an institution where the work described in the proposal will take place, and the organization that will be receiving funding associated with the proposal. (Also

Term	Definition
	see: Fellow)
Indirect cost method ICM	It is the method for determining indirect costs (the so-called ICM). Please note that the choice of an ICM for a legal entity depends on its legal status and accounting methodology and it is usually valid for the entire duration of FP7. In FP7 all departments, faculties or institutes which are part of the same legal entity must use the same system of cost calculation (unless a special clause providing for derogation for a particular department/institute is included in the GA).The choice of the ICM should be carefully assessed. If a change of the ICM is required, it will have an effect only on future grants with the exception of the correction of mistakes, further details are given in the Amendments Guide. (ftp://ftp.cordis.europa.eu/pub/fp7/docs/amendments-ga_en.pdf).
Legal Entity Appointed Representative *LEAR*	The LEAR is a person nominated in each legal entity participating in Research (H2020, FP7) programmes. This person is the contact for the Commission related to all questions on legal status. He/she has access to the online database of legal entities with a possibility to view the data stored on his/her entity and to initiate updates and corrections to these data. The LEAR receives a Participant Identification Code (PIC) from the Commission (see below), and distributes this number within his/her organisation.
Operator	Internal user responsible for the management of the application and of the operational call.
Panel Review	When there are insufficient funds to award grants to all proposals that achieve a qualifying score in the evaluation, a review panel will: ✓ review the scores and comments for all proposals within a call to check for consistency across the evaluations ✓ if necessary, propose a new set of marks or revise comments, and resolve cases where evaluators were unable to agree The panel may comprise experts from consensus groups, new experts, or a combination of the two. There may be one panel covering the whole call or several panels covering different parts of the call. Each panel will be responsible for one or more ranked lists, as defined by the indicative budget and call conditions set out in the work programme. The panel will recommend a priority order for proposals with the same score, using the procedure given in the work programme.
Part A	This is the part of a proposal deals with administrative data. It is completed using the web-based electronic Submission system.
Part B – Template download and submission	This is the part of a proposal that explains the work that must be carried out and the roles and aptitudes of the participants in the consortium. This part is uploaded to the electronic Submission system as a PDF file.
Part B template	The template documents are intended to provide you the topics that you will need to expand upon as part of the supplied by the Commission and are downloadable in step 4 of the Submission wizard. They are in RTF format consisting of a template of all chapter headings, forms and tables required to prepare a proposal Part B.
Participant	The Participant (short form of 'Participating Legal Entity') is a legal entity that has registered, or has a registration application pending, to participate in current or future proposals for research projects. A Participant must be validated (corporate) as a legal entity, uniquely identified within the Participant database by its Participant Identification Code (PIC). Participant registration is made through the <u>Beneficiary Register</u> on the Participant Portal and subject to a rigorous validation process that may last several weeks. 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. Also named 'Proposal Project Participant' A "participant" is a legal entity taking part in an indirect action (i.e. a specific FP7 project undertaken by one or more participants) and having the rights and obligations defined by the Grant Agreement entered into with the European Commission (on behalf of the European Union). [from the Guide to Intellectual Property Rules for FP7 projects v.3]

Term	Definition
Partner	Individuals and legal entities such as companies, consortia, universities, university departments, etc. are allowed to submit proposals requesting financial support. The 'Partner' assists the Proposal Coordinator in preparing the proposal. To avoid the existing confusion, a difference is made between a Partner Contact and a Partner Organisation. The Partner Contact is either an individual or empowered individual of an organisation having the responsibility to assist the Proposal Coordinator in the submission of a proposal. The Partner Organisation is the organisation to which the Partner Contact belongs or is linked to, and/or that has given the Partner Contact the responsibility to assist in the preparation of a proposal. Any company, university, research centre, organisation or individual, legally established in any country, who participates in a collaborative project (known as an indirect action) provided that the minimum conditions laid down in the rules for participation in a research programme have been met, including any additional conditions laid down by specific programmes or individual work programmes. E.g., Beneficiary, 3rd party, researcher, principal investigator (for ERC projects)
Participant Identification Code *PIC*	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.
Participant Portal **PP**	The Research and Innovation Participant Portal 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. If you want to participate in a project proposal, your organisation needs to be registered with the Commission. Registration is available from the Participant Portal Beneficiary Register page where you can check if your organisation is already registered; if not, you can start the registration process on the same page and you will be redirected to the Beneficiary Register to complete the process. The same process applies for beneficiary registration data updates – you access your organisation from the Participant Portal My Organisations page and from there you can go to the Beneficiary Register to update your organisation data. If your proposal is successful, you will also need to know about the following (see the H2020 Online Manual available from the Participant Portal): • the checks carried out on the information you provide on registering • appointing a representative (LEAR) • the checks that may be carried out on your organisation's financial viability
Project start date	The relevant provisions of the Grant Agreement determine the start date of the project. This may be the first day of the month following the entry into force of the Grant Agreement, a specific fixed date as negotiated or a date to be notified by the coordinator within [x] months from entry into force of the Grant Agreement. Where the Consortium requires a specific fixed start date for the project that precedes the entry into force of the Grant Agreement, full details regarding the justification for the request should be given in writing to the Project Officer prior to the finalisation of Annex I to the Grant Agreement and of the GPFs. The Commission/REA may refuse this request if no sufficient and acceptable justification is provided. Costs can be incurred from the start date of the project but not before. Where the start date of the project precedes the entry into force of the Grant Agreement, future beneficiaries take the risk that the Grant Agreement might not be signed. In such a case, costs will not be reimbursed by the Commission/REA.
Proposal	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. Proposal is a proposed project. Proposals are submitted following a call for proposals by consortium/partners with the goal to be selected and funded by the Commission. Proposal In order to get EC funding for a project, applicants have to write a complete and detailed proposal describing

Term	Definition
	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"
Proposal Coordinator	Individuals and legal entities such as companies, consortia, universities, 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. 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. The coordinator is a specific role of a beneficiary. The coordinator is the main driver and responsible for the project and normally it is the one communicating directly with the Commission. The coordinator submits the periodic reports and requests for amendments. It is usually the beneficiary responsible for redistributing the funds among further beneficiaries participating in a common project. Also named 'Proposal Project Coordinator' Broader Term: Beneficiary, Partner
Proposal ID	An identifier assigned to a proposal after it was submitted. Once a proposal is funded, its Proposal ID becomes its Project ID
REA	Research Executive Agency
Security aspect letter SAL	Security Aspects Letter (SAL)': "a set of special contractual conditions, issued by the contracting authority, which forms an integral part of a classified contract involving access to or generation of EU classified information, and that identifies the security requirements or those elements of the classified contract requiring security protection", as defined in section 27 of Commission Decision 2001/844/EC, ECSC, Euratom. In the case of a proposal involving classified information (background and/or foreground), a Security Aspect Letter (SAL) and its annexed Security Classification Guide (SCG) must be part of the proposal.
Security classification guide SCG	The SCG will cover: – The level of classification of background and foreground; – Which participant will have access to what information; In addition, the following documents will be requested: – A copy of the Facility Security Clearances (FSC) (or the FSC requests). The validity of the FSC will be checked by the European Commission' Security Directorate through the appropriate formal channel with the National Security Authorities (NSAs) involved; – Formal written authorization by the relevant security authorities to use the classified background;
Security considerations	Security issues may be an important component of the research proposal evaluation procedure, especially in the FP7 Security Topic. All proposals received by the Commission/REA should clearly describe the security issues raised by the proposal, if any, and how they will be addressed in order to be in conformity with national, European and international regulations. For further references see Appendix 4 in negotiation guidelines. Synonym: security issues
Security considerations	A security-sensitive RTD action is an action that may need to handle classified information. A "security considerations" flag will be associated with a proposal:

Term	Definition
flag	• when the applicant declares a proposal as sensitive; • if the expert evaluators, the Commission, or members of the relevant "Programme Committee" (except for the Security Topic) detect or suspect any of the following conditions: – Classified information is, or may be, used as background information – Some foreground is planned to be classified Whenever a "security considerations" flag is associated with a proposal, the circumstances of the planned work will be further scrutinised according to the procedures for security scrutiny.
Security scrutiny	Special procedures will apply to security-related research, due to the sensitive nature of the subjects addressed, and the particular capability gaps that need to be addressed to protect Europe's citizens. RTD actions will be classified if they are considered as sensitive. These procedures will apply to all RTD actions under the theme 'Security' in the Specific Programme 'Co-operation'. They apply to other themes if so specified in the relevant call.
Special clause *(SC)*	A special clause is inserted in the Grant Agreement and is applicable where required.
Stage	A sequence of a submission and an evaluation procedure. A call for proposals can follow a one-stage or two-stage procedure. For one-stage calls, proposals are directly evaluated after being submitted. For two-stage calls, the proposal coordinator submits a short proposal that is evaluated; successful proposals are invited to submit a full proposal. The number of stages in the procedure and the type of proposal that is to be expected for each stage are configurable items.
Step	A round in the evaluation procedure. The evaluation of a proposal might be performed in one or two (or even more) steps. A first evaluation step may be based on a limited set of evaluation criteria, while another subsequent step may be based on the remaining evaluation criteria.
Submission	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.
SEP IT System	The Participant Portal Proposal Submission and Evaluation System.

Types of Action	Horizon 2020 calls can have different types of action (funding schemes).
	The type of action specifies:
	   ✓ the scope of what is funded
	   ✓ the reimbursement rate
	   ✓ specific evaluation criteria to qualify for funding
	See the H2020 Online Manual for more information.