Administrative
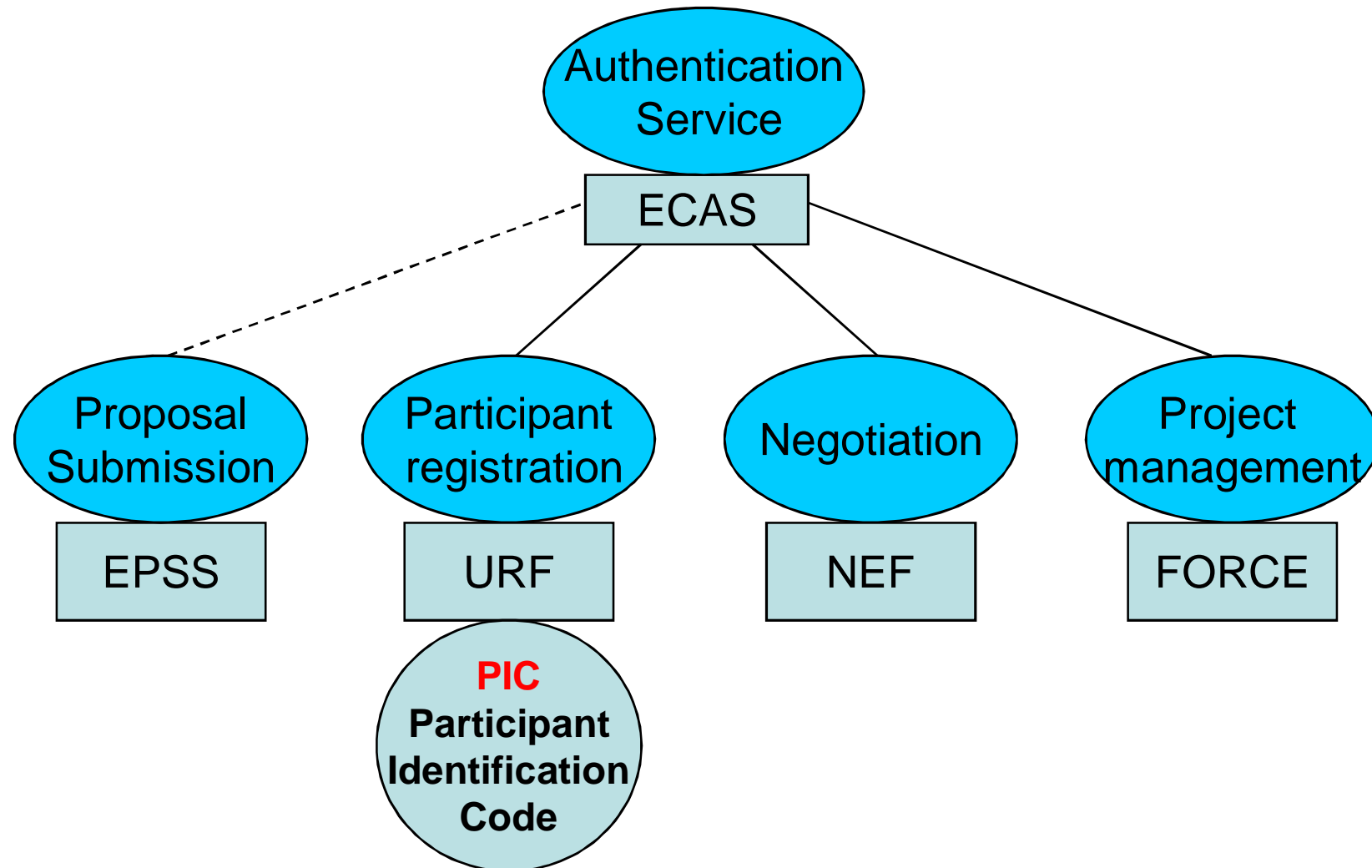# aspects of FP7 proposals

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SEVENTH FRAMEWORK
PROGRAMME

www.kpk.gov.pl

Participant Portal

Authentication Service

ECAS

Proposal Submission

Participant registration

Negotiation

Project management

EPSS

URF

NEF

FORCE

PIC
Participant Identification Code
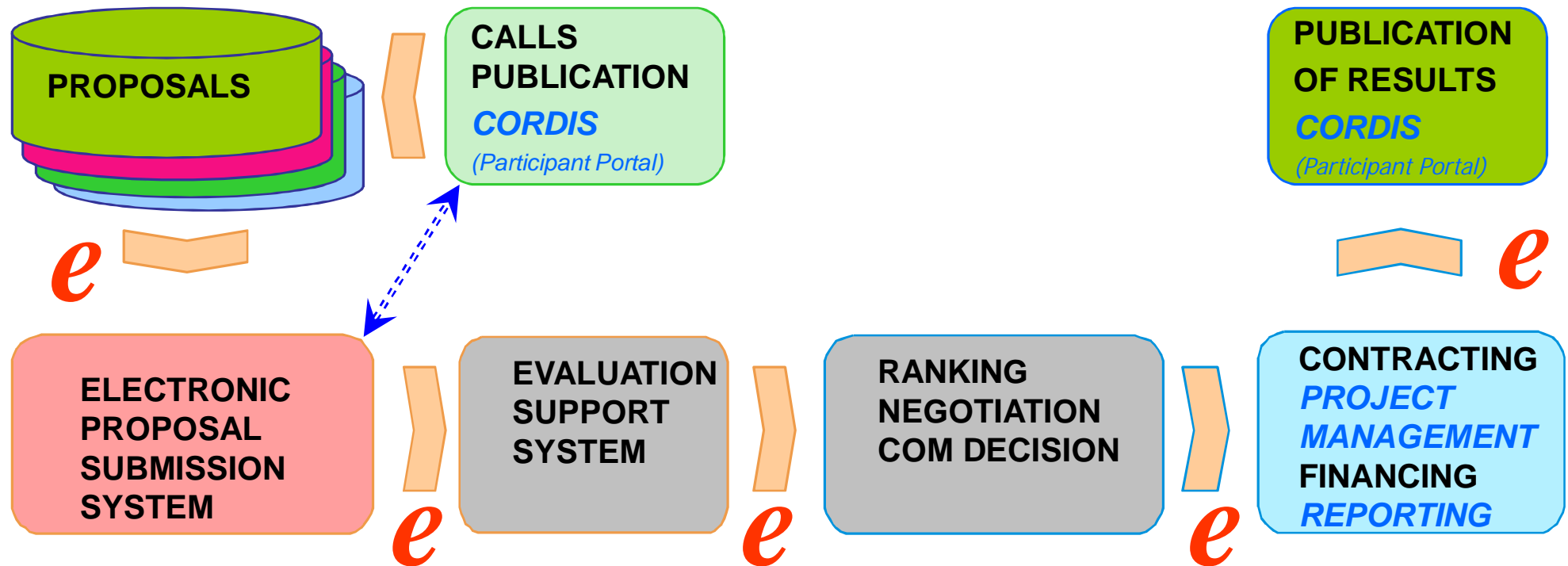
EPSS
Electronic Proposal Submission System

What is the EPSS ?

→ EPSS = Electronic Proposals Submission System

→ An electronic system enabling project coordinators to prepare and submit their proposal online through the Internet using a web site accessed seamlessly from Cordis (*Participant Portal in the future*) or accessed directly once the participant is registered

→ Operating 7 days a week, operating 24 hours a day, free of charge to the participants, supporting most IT configurations, avoiding paper based submission costs and issues

EPSS in the FP7 process chain

SEVENTH FRAMEWORK PROGRAMME

PROPOSALS

CALLS PUBLICATION *CORDIS* *(Participant Portal)*

PUBLICATION OF RESULTS *CORDIS* *(Participant Portal)*

e

ELECTRONIC PROPOSAL SUBMISSION SYSTEM

EVALUATION SUPPORT SYSTEM

RANKING NEGOTIATION COM DECISION

CONTRACTING *PROJECT MANAGEMENT* **FINANCING** *REPORTING*

e

e

e

e
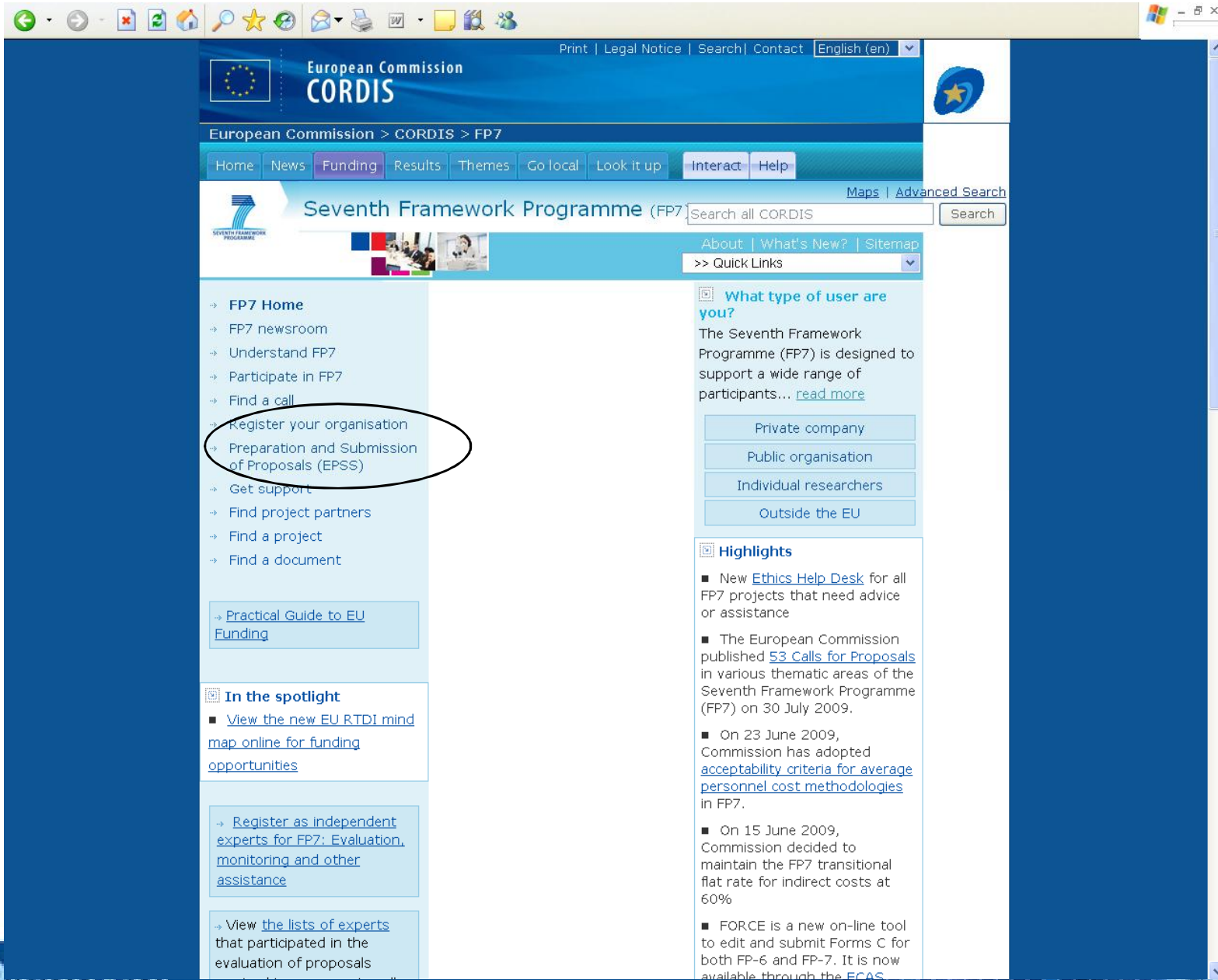
e : electronic information transfer

Step 1:
Obtaining an account
from the EPSS

http://cordis.europa.eu/fp7

Registration with PIC

Registration without PIC

➔ EPSS registration mail

➔ The EPSS registration email, which contains the access codes to prepare and submit the proposal, will be sent to the email address you define during the registration.

➔ First login

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

➔ Go to **https://www.epss-fp7.org** to login
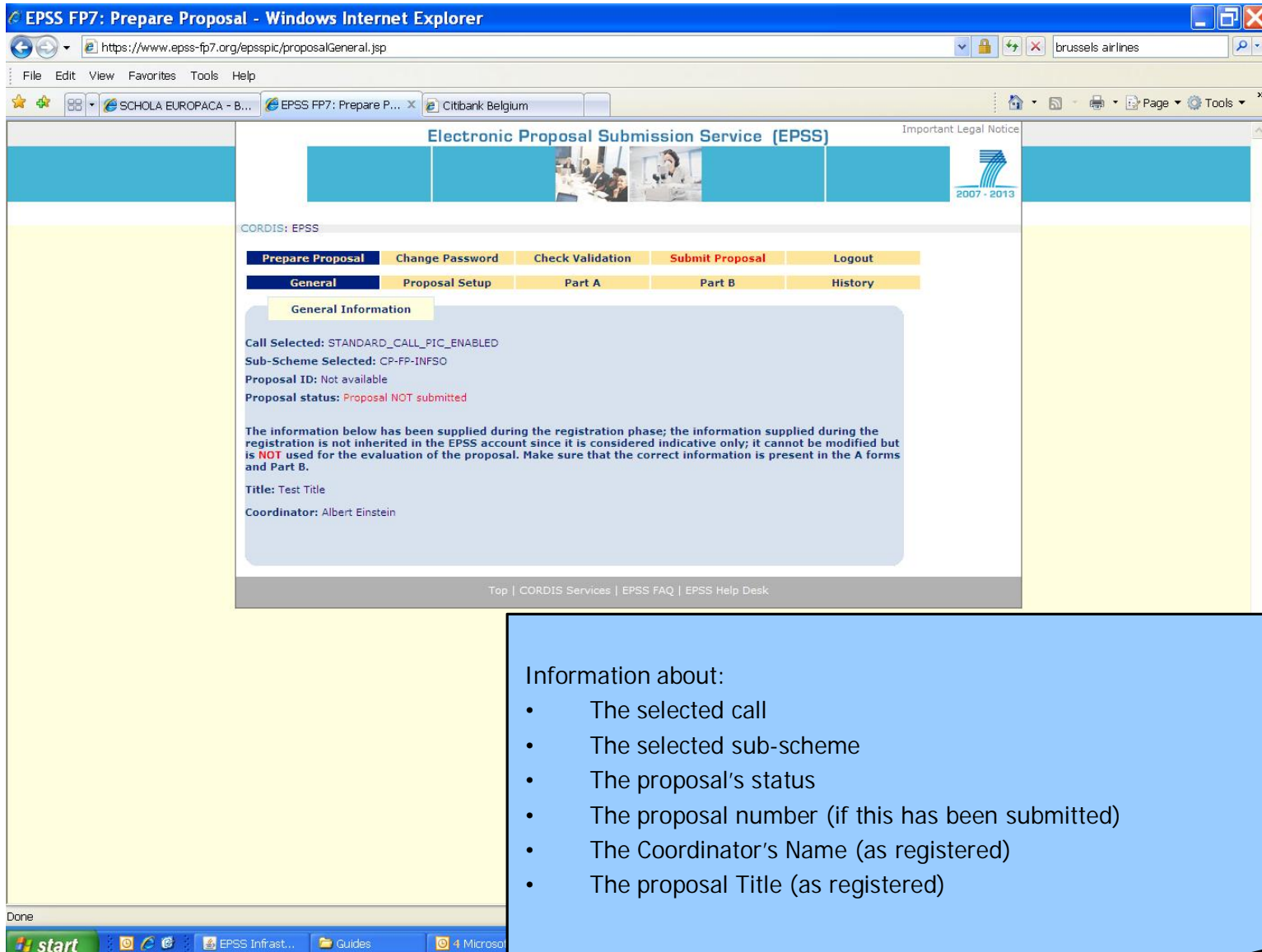
➔ Subsequent logins

➔ Go to **https://www.epss-fp7.org**

➔ Introduce the –Coordinator or Other participant- User ID

➔ Enter the –modified Coordinator or Other participant- Password

➔ **Note: By entering the proposal as another participant, you can only access your A2 Form for editing. Other participants can view all proposal information but only edit A2 forms.**

Step 2:
Proposal setup

Information about:
- The selected call
- The selected sub-scheme
- The proposal's status
- The proposal number (if this has been submitted)
- The Coordinator's Name (as registered)
- The proposal Title (as registered)

Add participant with PIC

Electronic Proposal Submission Service (EPSS)

Important Legal Notice

2007 - 2013

CORDIS: EPSS

| Prepare Proposal | Change Password | Check Validation | Submit Proposal | Logout |
| General | Proposal Setup | Part A | Part B | History |

Proposal Participants

Participant ID	Organisation short name	A2-Link	A3-Link	E-mail(s)	
1	Test	📁	📁	Albert.Einstein@company.org	Edit details

Add Participant

Participant Identification Code   PIC info?

PIC [_____]   Clear PIC-data

Organisation Short Name * [_____]
Participant E-mail(s) * [_____]

Top | CORDIS Servic...

In the proposal setup section you define the number
of other participants that participate in your project.
Note: The first participant is always the co-ordinator.

To add another participant to the proposal, you may provide
the relevant participant's PIC number and must provide
a participant short name and e-mail address.
If a PIC is provided then the corresponding data will be retrieved
from the database once the corresponding A2 form is opened.

You shall make sure that the responsible participant opens the corresponding
A.2 form in order to finish validation.

Add participant without PIC

Electronic Proposal Submission Service (EPSS)

Important Legal Notice

2007 - 2013

CORDIS: EPSS

| Prepare Proposal | Change Password | Check Validation | Submit Proposal | Logout |
| General | Proposal Setup | Part A | Part B | History |

Proposal Participants

Participant ID	Organisation short name	A2-Link	A3-Link	E-mail(s)	
1	Test			Albert.Einstein@company.org	Edit details

Add Participant

Participant Identification Code   PIC info?

PIC [   ]   Clear PIC-data

Organisation Short Name * [Part1]

Participant E-mail(s) * [a.b@company.be]

Method of determining Indirect Costs   Cost model info?

Status of your organisation   Status info?

Non Profit Organisation ○ yes ○ no
Public Body ○ yes ○ no
Research Organisation ○ yes ○ no
Higher, secondary education establishment ○ yes ○ no

Actual Indirect Costs
Actual Indirect Costs calculated using a Simplified Method
Standard Flat Rate of 20%
Transitional Flat Rate (p.t. 60%)
Lump Sum (only for ICPC)

The following information is also requested by filling manually – mandatory fields marked with red asterisk:

- The legal status of organization
- The Method of determining the Indirect Cost
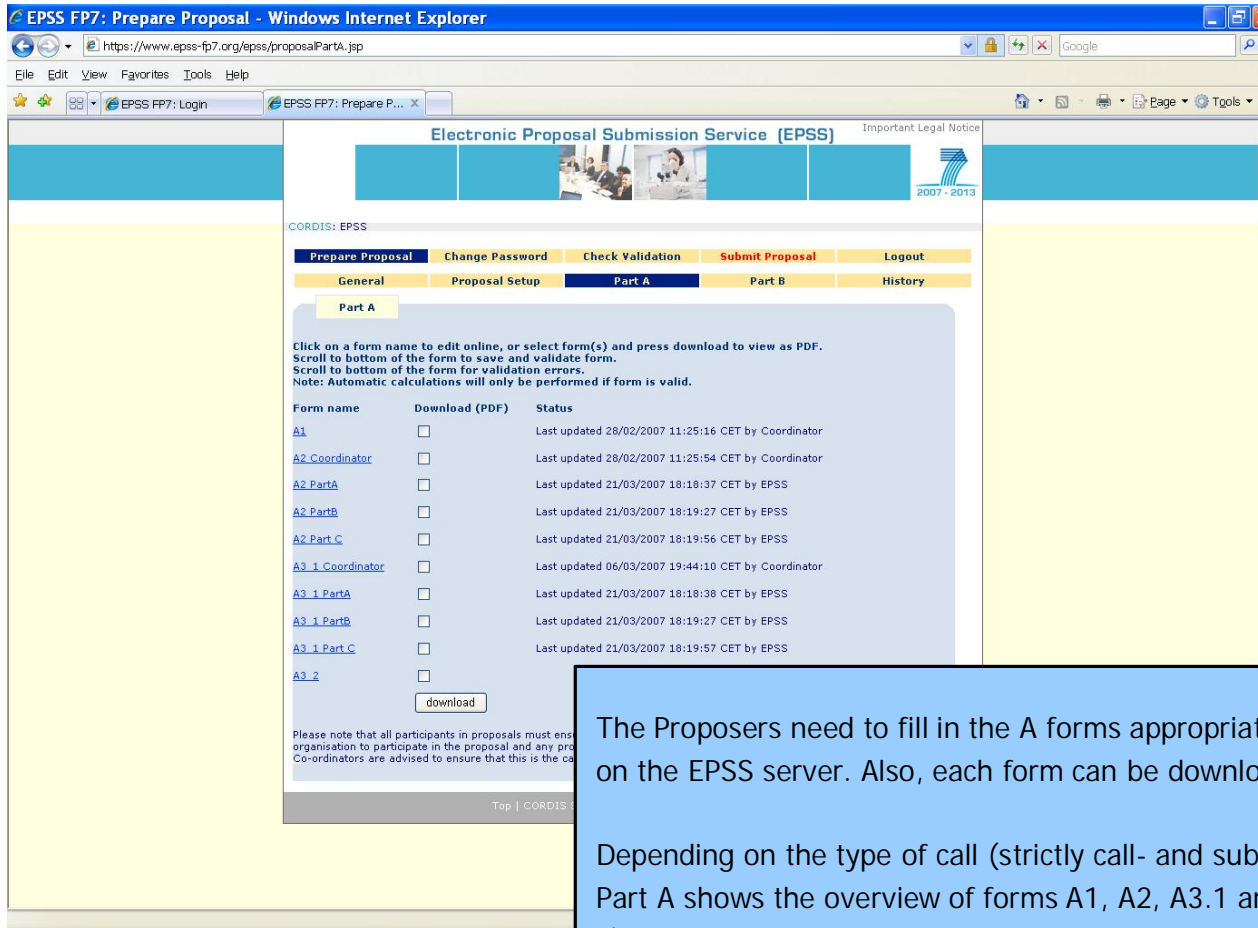- Click "Add Participant".

Once a participant is added, the system automatically creates an A2 form and either an A3.1 form or extra rows in the A3/A4 form depending on the call.

Those forms are accessible via the A2-Link, A3-Link buttons, but they can also be found after clicking in the "Part A" Tab.

Step 3:
Part A – Administrative forms

Part A – Administrative forms

The Proposers need to fill in the A forms appropriately and save them on the EPSS server. Also, each form can be downloaded as a PDF file.

Depending on the type of call (strictly call- and sub-scheme-specific), Part A shows the overview of forms A1, A2, A3.1 and the summary A3.2 (certain subschema also have an A4 form or don't have the A3.1/A3.2 forms).

Note: If a participant has been added with the use of PIC, then a set of fields on the A2 form will already be pre-filled with information as retrieved from the database. Only some of these fields are editable.

A1 AlbEin - Windows Internet Explorer

https://www.epss-fp7.org/epss/formProcessor.jsp

HEALTH-2007-1.1-1

Free Keywords

fffff

Abstract (max. 2000 char.)

TTTTTT

Similar proposals or signed contracts?

a) Has this proposal (or a very similar one) been previously submitted to a call for proposals of the 7th EU RTD Framework Programme?

○ yes ○ no

IF YES
- please give the call identifier
- please give the proposal or contract number (if known)

Is this proposal (or a very similar one) currently being submitted to another call under FP7?

○ yes

IF YES please give the call identifier

Validation Errors

No Validation Errors

Save Form

Done

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

- Fill in the fields with data. All fields on the forms are mandatory ("-" or "0" are the values that designate the "none" or "Non applicable" value)
- The acronym will be used to identify your proposal efficiently in the call.
- It should be of no more than 20 characters (use standard Latin alphabet and numbers only; no spaces, symbols or special characters please). The same acronym should appear on each page of the part B of your proposal.

Press the "Validate" button at the bottom of the form:
- The validation is looking for formal errors in the forms
- If it finds errors, it indicates which fields are wrongly filled.

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

Part A2.1 – Participants

Step 4:
Part B – Proposal content and annexes

➔ The format of part B of a proposal (the description of the content of the proposal) for the specific call is specified in the so called "Part B Template" file.

➔ Use exclusively PDF ("portable document format", compatible with Adobe Acrobat version 5 or higher, with embedded fonts). Other file formats will NOT be accepted by the system.

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

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

➔ There are some calls though (i.e. calls for the Marie Curie funds) that request two separate Part B files namely Section 1 and Section 2. If this is the case, then all instructions remain the same with the only difference that the user will have to provide 2 separate files. Format and naming convention applies for these files.

➜ For the majority of instruments and project types in FP7, part A and part B form the complete proposal, so it might be that this section does not appear for your case.

➜ For some particular actions, additional annexes can be required. In this case, you can use the Annex Upload section to locate and upload them. You should not annex any other files unless this is specifically requested in the Call Text. For the Annex content the only supported format is PDF (and XLS in specific calls). The Annex filename must be different from the Part B filename. Please respect the maximum size limit of 10 MB.

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

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

Part B – Successful upload

If the proposal is ready you should click on "Submit NOW" and all buttons that follow in order to submit it.

If not, then click on "Submit LATER" or any other of the Tabs in order to continue with its preparation.

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SEVENTH FRAMEWORK PROGRAMME

➜ Upload your proposal early in the process and press the "submit" button and all buttons that follow in the subsequent pages. Doing this ensures that an interim version of the proposal text (the part B) is already present on the system. Remember that the system allows multiple uploads of the proposal text and this facility should be used to avoid the call closure rush.

➜ In some rare instances, the proposal may be altered while in transit on the Internet. To check that the uploaded file has been received unaltered, perform a download of the part B.

➜ Practice the conversion of the file to the PDF format. The conversion may take an extended period of time if the page layout is complex or contains graphics. There is no point in creating a PDF document with a resolution higher than 300 DPI and in black and white. Nuances of grey may be reproduced but should be avoided for legibility purposes
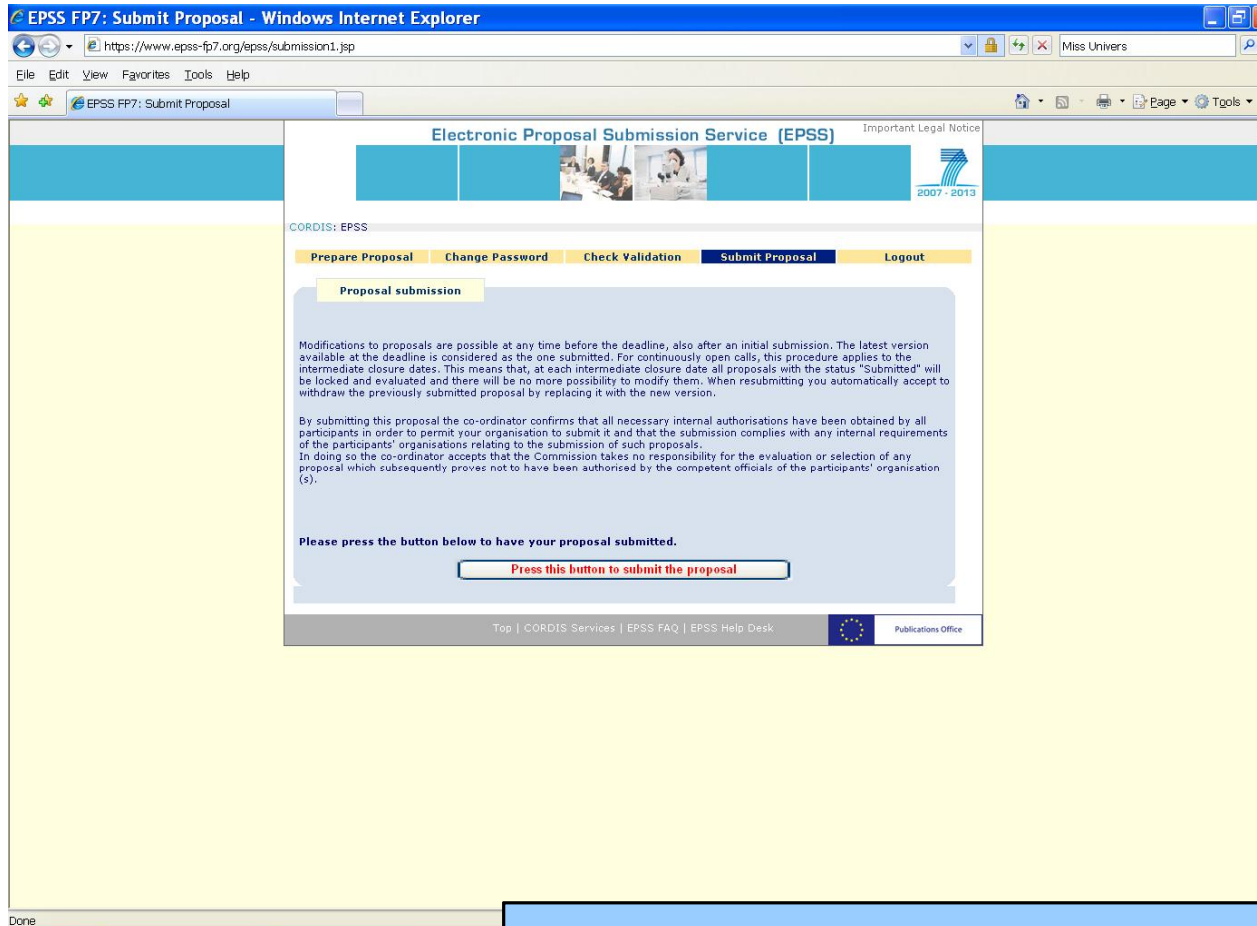
Step 5:
Validation
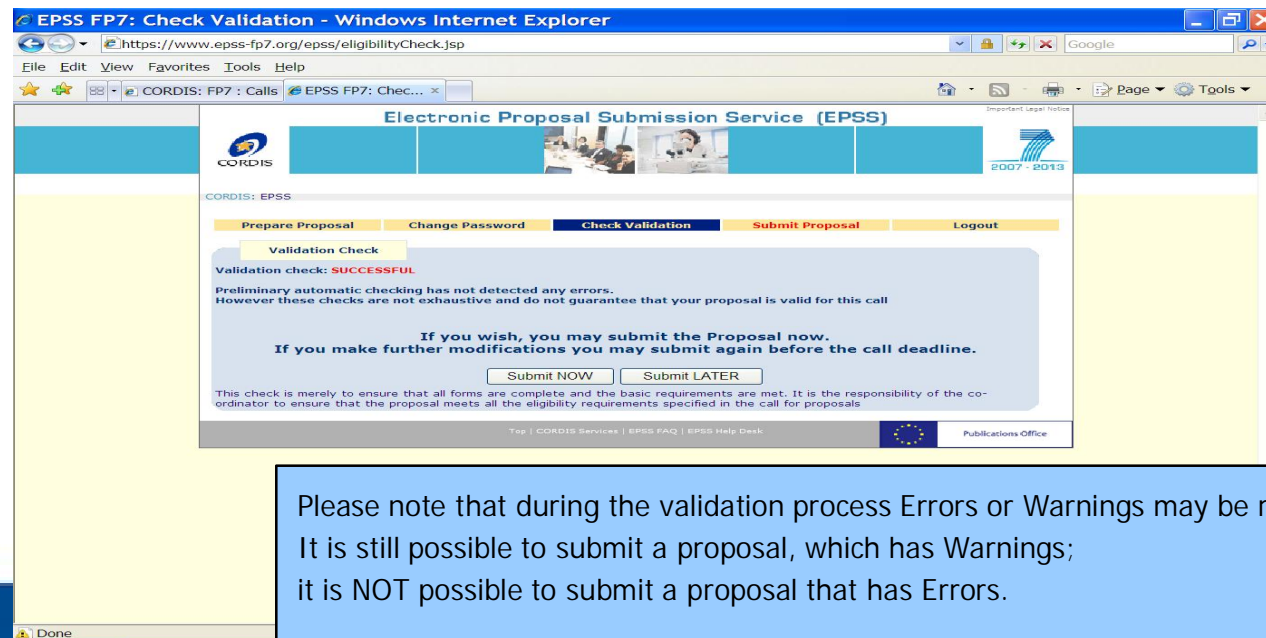
Please note that during the validation process Errors or Warnings may be reported.
It is still possible to submit a proposal, which has Warnings;
it is NOT possible to submit a proposal that has Errors.

Step 6:
Submission

Submit proposal
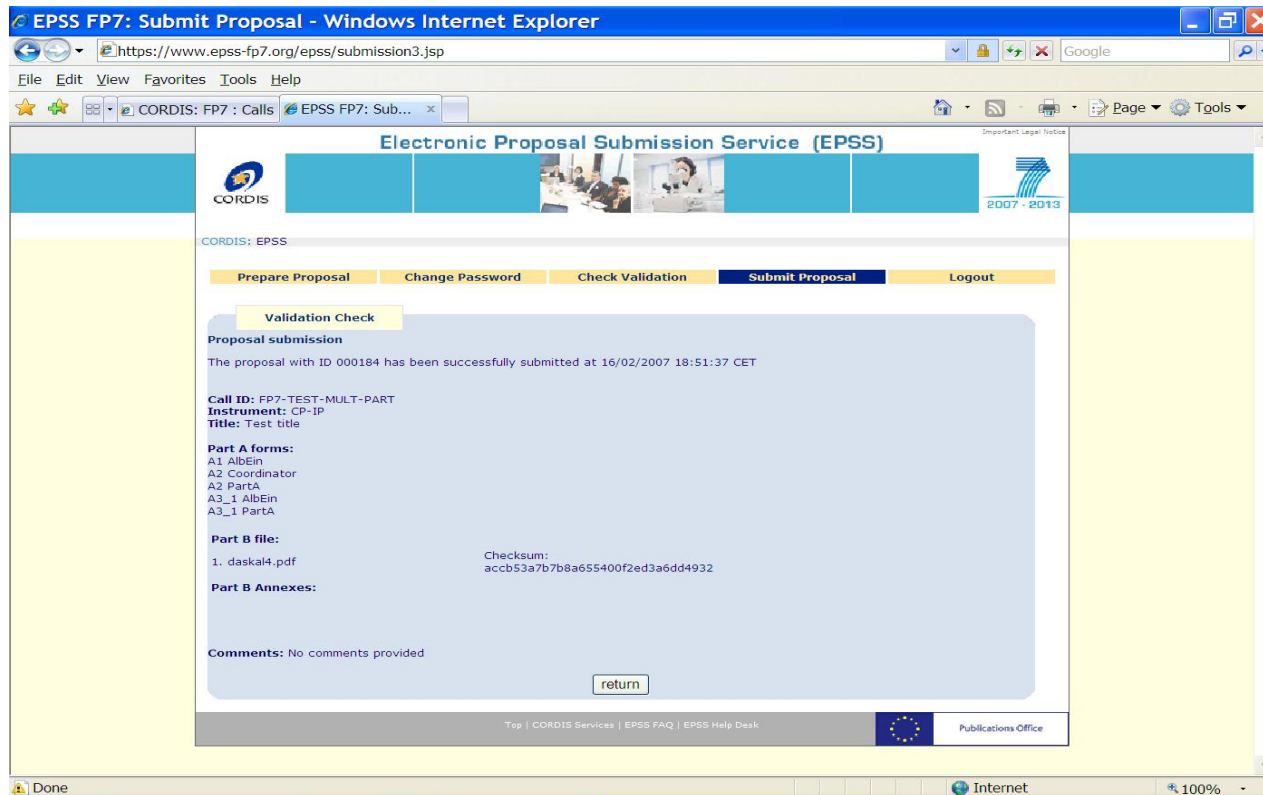

In order to complete the proposal submission the proposer must select the "Submit Proposal" section

Without explicit submission, all the uploaded data (Forms, Part B, and Annexes) are simply saved in the EPSS database without forming a proposal package and without being recognized as a submitted proposal.
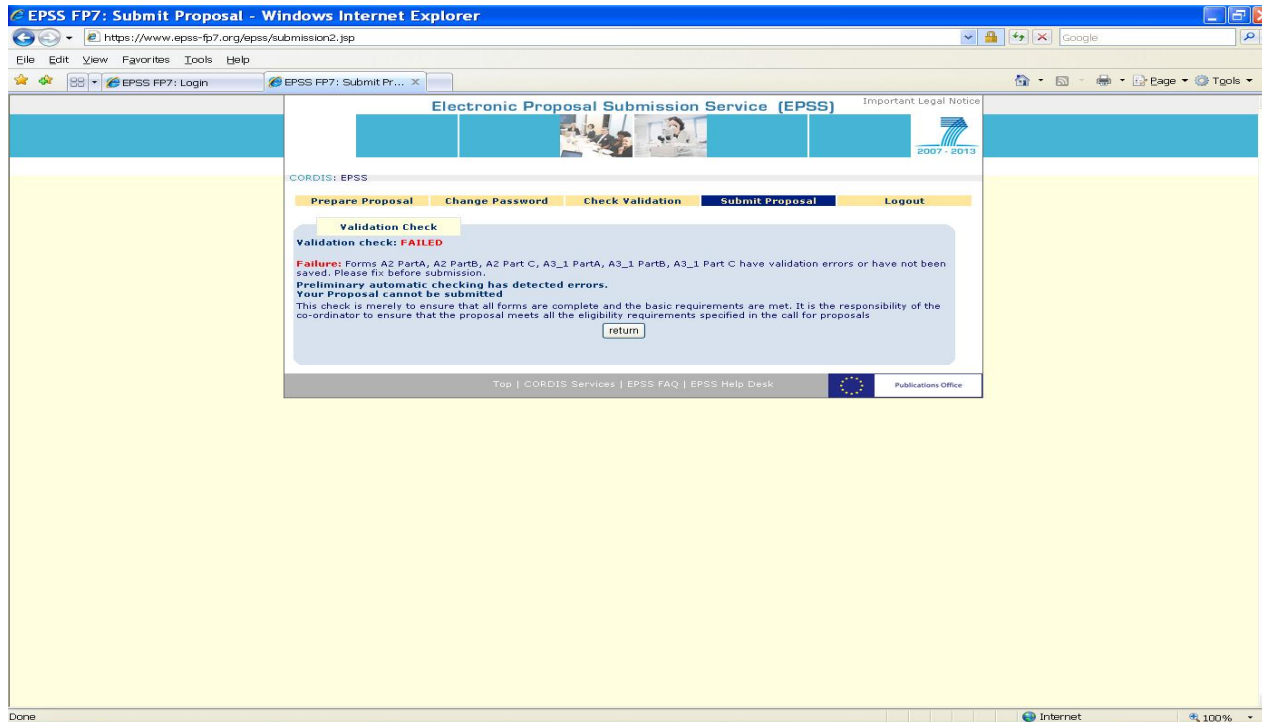
Successful submission

Unsuccessful submission

Conclusion
Using the EPSS successfully

How should I proceed as a coordinator?

- ➔ Access the Cordis website for a specific call, register on the EPSS
- ➔ Check your electronic mail for the EPSS access details & FAQ
- ➔ Login for accessing the online EPSS
- ➔ Change the passwords for the coordinator and the partners
- ➔ Send the partner's username and password to the partners
- ➔ Set-up the proposal by indicating the number of participants, their participant id, name and email addresses, once in the registration process and after in the proposal setup screen
- ➔ Edit Part A forms (object, participants, budget)
- ➔ Upload the Part B file (detailed proposal text)
- ➔ Upload Part B annexes if needed or required
- ➔ Validate proposal to ensure basic checks are satisfied
- ➔ Submit the proposal
- ➔ Download the submitted file and check it is what you wish to submit
- ➔ Verify that the system gives a proposal number
- ➔ Logout and check your email for a confirmation mail

➔ The submit button disappears at 17:00:00.000, CET if you refresh the page

➔ No special characters in file names. Stick to 'A-Z', '0-9', '-'

➔ The system allows multiple submissions. Use the facility but do not abuse.

➔ Do not change budgets at the last moment: this may prevent you from getting the proposal submitted on time

➔ Do not upload the proposal at the last moment: this invalidates the previous submission

➔ Monitor CORDIS: the two systems are independent

In case of doubt, get support <u>early</u>:
contact the EPSS help desk on
+32 2 23 33 760 <u>or</u> support@epss-fp7.org
(workdays from 08:00 to 20:00)
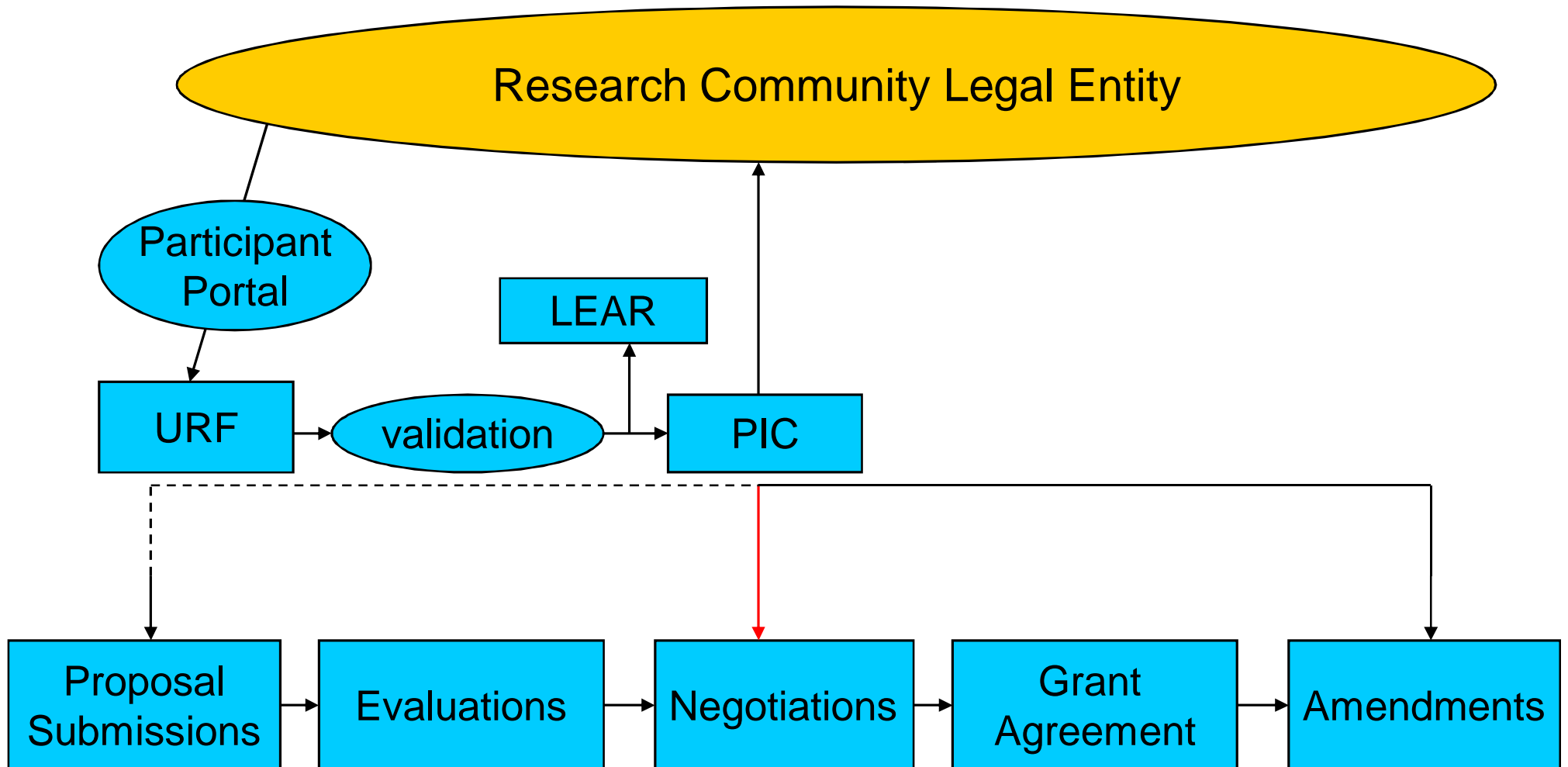
- **STEP 1: Use the <u>search</u> facility to check whether your organisation is already registered.**

- **STEP 2: If your organisation is not yet registered, you will need to obtain a Portal Account to begin the registration process. Please <u>register</u> with ECAS to obtain an ECAS account and password.**

- **STEP 3: <u>Register</u> your organisation using your ECAS account details. Submit your registration information to <u>the Central Validation Team (CVT)</u>.**

- **STEP 4: CVT will then complete the necessary steps to <u>identify</u> your organisation. During this period, it is possible to <u>upload</u> additional documents.**

- **STEP 5: After identification, the CVT begins a <u>verification</u> process that will eventually lead to <u>the appointment of a Legal Entity Appointed Representative</u> (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to <u>upload</u> up to 10 Mb of additional supporting documents.**

- **When your data has been validated by the CVT the organisation data may be maintained only by the LEAR.**

- **Upon registering your organisation, you will receive a <u>Participant Identification Code</u> (PIC).**

- A copy of official document showing legal name, address, registration number
- A copy of VAT registration document
- Balance sheet
- Profit and loss account
- Statutory audit report on financial statements.

URF

www.kpk.gov.pl

LEARs have **better control** of data:

• Document upload and management (e.g. balance sheet or viewing previous correspondence)

• LEARs can access the list of projects that their organisations are currently working on, including project details.

• Access via the Participant Portal

LEAR

Important links:

Participant portal:
http://ec.europa.eu/research/participants/portal

Technical helpdesk of URF:
DIGIT-EFP7-SUPPORT@ec.europa.eu

Mail box of Central Validation Team:
REA-URF-VALIDATION@ec.europa.eu

Questions about FP7
www.ec.europa.eu/research/fp7

SEVENTH FRAMEWORK
PROGRAMME

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JOINT SUPPORT OFFICE (JSO)

FOR ENHANCING UKRAINE'S

INTEGRATION INTO THE

EU RESEARCH AREA (ERA)

ECORYS Research and Consulting
ΕΠΙΣΕΥ ICCS
AEA
Hungarian Science and Technology Foundation

This project is funded by
the European Union

A Project implemented by an
ECORYS-led Consortium