



Electronic Proposal Submission System

EPSS Online preparation and submission guide

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Table of Contents

1	EPSS – Online Preparation –User’s Guide.....	3
1.1	Getting a user ID and password.....	3
1.2	Login.....	4
1.2.1	Initial Login.....	4
1.2.2	Subsequent Logins.....	4
1.3	General.....	5
1.4	Proposal Setup.....	6
1.5	Part A.....	8
1.6	Part B and Annexes.....	10
1.6.1	Part B.....	10
1.6.1	Annexes.....	11
1.7	Validation.....	13
1.8	Submit Proposal.....	14
1.9	The History.....	16
2	EPSS Checklist.....	17
3	Note for Macintosh users.....	17
4	EPSS-EPT Frequently Asked Questions (FAQ).....	18

EPSS help desk

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Dutch, Greek)

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1 EPSS – Online Preparation –User’s Guide

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

The System requirements are:

- A connection to the Internet,
- A screen with a 1024x768 resolution^[1] and small fonts,
- Internet Explorer 5.0 and above or
- Netscape Navigator 7.0 and above or
- Opera 6.0 and above or
- Safari browser for the Macintosh user (see Note on p.17)

1.1 Getting a user ID and password

Access to the EPSS is call- and instrument-specific, i.e. you have to first choose for which call for proposals and for which instrument within the call you want to prepare a proposal. Access is provided via the respective CORDIS call page (see <http://fp6.cordis.lu/fp6/subprop.cfm>). On the call page, go to the box "Prepare and submit a proposal for this call"; choose the instrument you want to apply for from the dropdown list and press "Go". You will arrive at the EPSS start page. Click on "Register", fill in the registration form and submit it. The EPSS will send you coordinator and partner usernames and passwords **by e-mail**.

The login and password is linked to only one proposal (for the call and for the instrument you have chosen). For each other proposal you want to prepare you have to register again, following the procedure described above.

^[1] Screen resolution of 640 x 480 or VGA will prevent the forms from being completely displayed on screen, preventing access to the save button

1.2 Login

1.2.1 Initial 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-fp6.org/epss/login.jsp>
- Introduce the Coordinator User ID
- Enter the Coordinator Password
- Change the Coordinator Password
- Enter the Partner Password
- Change the Partner Password

Distribute the Partner username and the modified Partner password to your partners –if any.

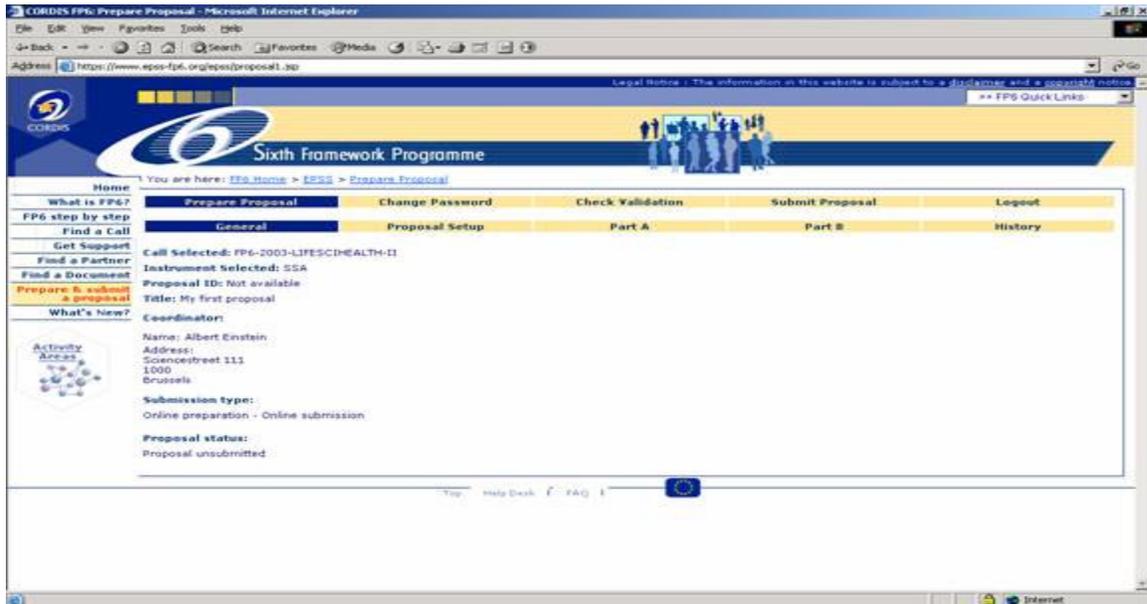
1.2.2 Subsequent Logins

- Go to <https://www.epss-fp6.org/epss/login.jsp>
- Introduce the –Coordinator or Partner- User ID
- Enter the –modified Coordinator or Partner- Password

Note: By entering the proposal as a partner, you can only access your A2 Form for editing. Partners can view all proposal information but only edit A2 forms.

Tip: Reduce typing errors: Write logins and passwords in a text program and copy/paste them into the fields. This prevents mis-typing errors.

1.3 General



Now, you may prepare the proposal. By clicking on the “**General**” Tab, you can find information about:

- The selected call
- The selected instrument
- The Coordinator’s Details
- The submission Type (online preparation/online submission)
- The proposal’s status

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

Note:

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

Go to “**Proposal setup**”.

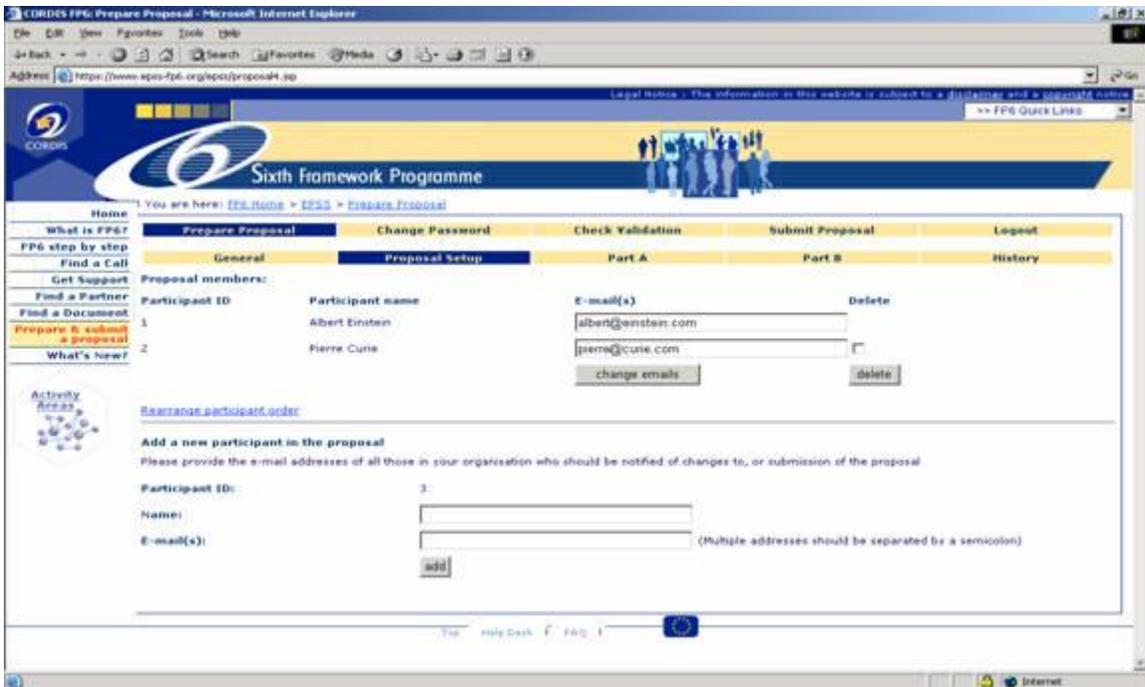
1.4 Proposal Setup

The screenshot displays the 'Proposal Setup' interface in a Microsoft Internet Explorer browser. The page title is 'CORDIS FP6: Prepare Proposal'. The navigation menu includes 'Prepare Proposal', 'Change Password', 'Check Validation', 'Submit Proposal', and 'Logout'. The 'Proposal Setup' section is highlighted, showing a list of participants. The first participant is 'Albert Einstein' with email 'albert@enstein.com'. A second participant, 'Pierre Curie', is being added with email 'pierre@curie.com'. The page includes a sidebar with 'Activity Areas' and a footer with 'The ... Help Desk ... FAQ' and the European Union flag.

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

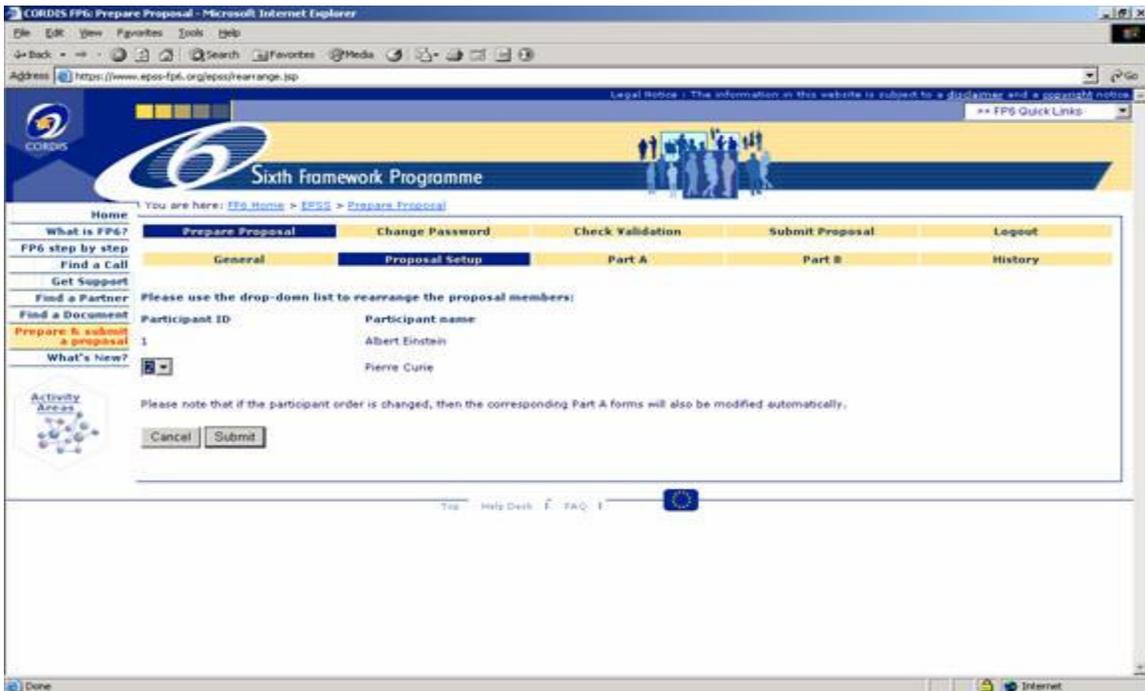
- Make sure that the co-ordinator e-mail address is correct.
- To add a partner to the proposal, type in the partner name and e-mail address in the relevant fields and click on “**add**”.
- If you include multiple e-mail addresses, you must separate them with a semi colon ‘;’
- The partner gets added to the proposal.
- The system automatically creates the appropriate number of A2 forms for all the participants that are defined for the proposal.

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



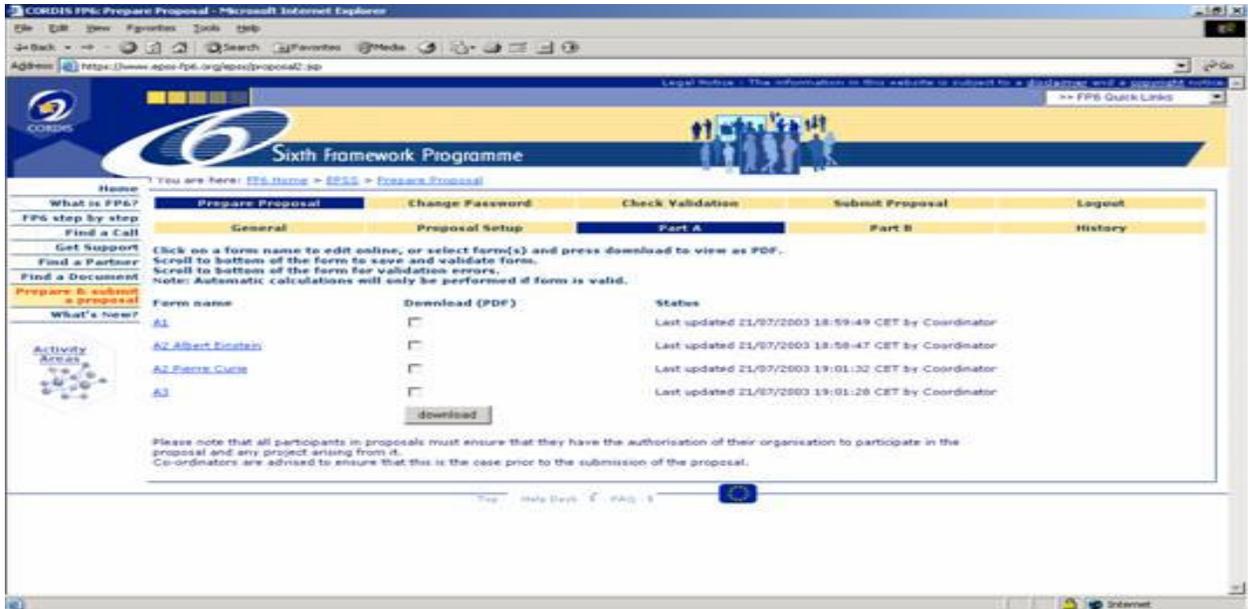
By clicking on the “**Rearrange participant order**” link you can change the order of the participants.

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



1.5 Part A

This section deals with the administrative forms of the proposal or Part A.



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

Part A shows the overview of forms A1, A2, A3 (and A4 for certain instruments). Click on the links below “Form link” to access the forms.

The screenshot shows a web browser window titled 'A1 - Microsoft Internet Explorer'. The form contains the following fields:

- Keyword 2: Natural sciences
- Keyword 3: Technological sciences
- Free Keywords: Medicine, Cancer, Blood
- Abstract (up to 2000 characters): I tell you here how to prepare a proposal

At the bottom, there is a 'Validation Errors' section with the following messages:

- No value specified for mandatory field "Proposal Acronym"
- No value specified for mandatory field "Proposal Title"
- No value specified for mandatory field "Duration in months"
- No value specified for mandatory field "Abstract (up to 2000 characters)"

Buttons for 'Save Form' and 'Validate' are located at the bottom of the form.

- Fill the fields with data. (Fields with bold captions are mandatory fields)
- 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 you will find “no validation errors” at the bottom of the form.

The screenshot shows a web form in a Microsoft Internet Explorer window. The form contains the following elements:

- Keyword 2:** A text input field containing "Social sciences".
- Keyword 3:** A text input field containing "Technological sciences".
- Free Keywords:** A text input field containing "Medecine, Blood, Cancer".
- Abstract (up to 2000 characters):** A large, empty text area for entering an abstract.
- Validation Errors:** A section at the bottom left showing "No Validation Errors".
- Buttons:** Two buttons at the bottom: "Save Form" and "Validate".

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

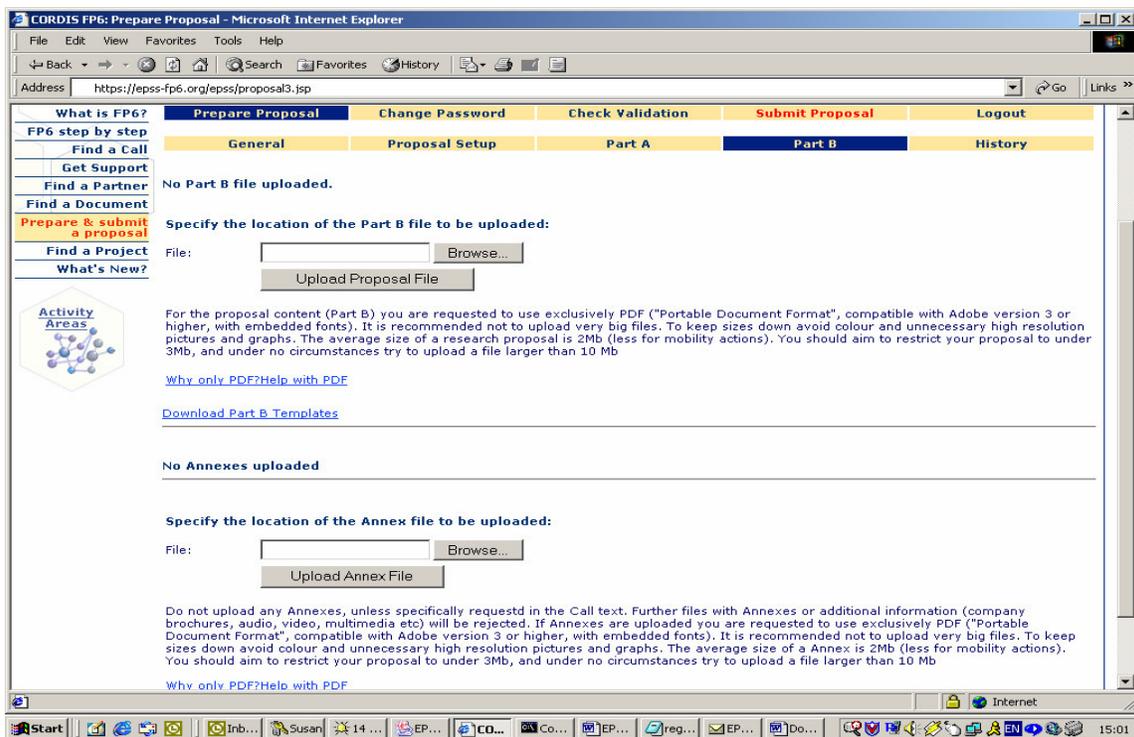
Note: The “**Save Form**” button performs form validation as well.

Fill out all forms for which you are responsible.

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

Tip Save early and often. Saving will also validate the form.

1.6 Part B and Annexes



1.6.1 Part B

For the proposal content (part B) you are requested to use exclusively PDF (“portable document format”, compatible with Adobe Acrobat version 3 or higher, with embedded fonts). Other file formats will not be accepted by the system. Both commercial and free tools to convert files to PDF format are widely available on the WEB. Also zipped (or otherwise compressed) archives will not be accepted (PDF is self-compressing, there is no gain in zipping). Technical problems resulting from the use of other formats may lead to your proposal being excluded.

Unless otherwise specified in the call 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.

Using only PDF format for submission of part B

Why?

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

How?

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

The format of part B of a proposal (the description of the content of the proposal) for the specific call is specified in the so called "Part B Template" file. By clicking on the link "**Download Part B Templates**" the proposer downloads the template file (RTF format) and uses it as a guide to structure the proposal Part B section appropriately. Open the template Part B RTF file and edit it. Save the file, convert it to PDF and then add it to the proposal. The Part B filename should not contain any special characters or spaces. It can only contain Latin letters (a-z), digits (0-9), the underscore (_), the dash (-) and the dot (.) character.

Part B checklist:

- Part B is in PDF format (compatible with Adobe Acrobat version 3 or higher, with embedded fonts))
- Filename ends in .pdf
- Filename does not contain any special characters
- The proposal contains no unnecessary coloured or high resolution pictures. It will be printed in Black and White at 300dpi for evaluation.

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

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

1.6.1 Annexes

For the majority of instruments and project types in FP6, 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. The Annex filename should not contain any special characters or spaces. It can only contain Latin letters (a-z), digits (0-9), the underscore (_), the dash (-) and the dot (.) character. The Annex filename must be different from the Part B filename.

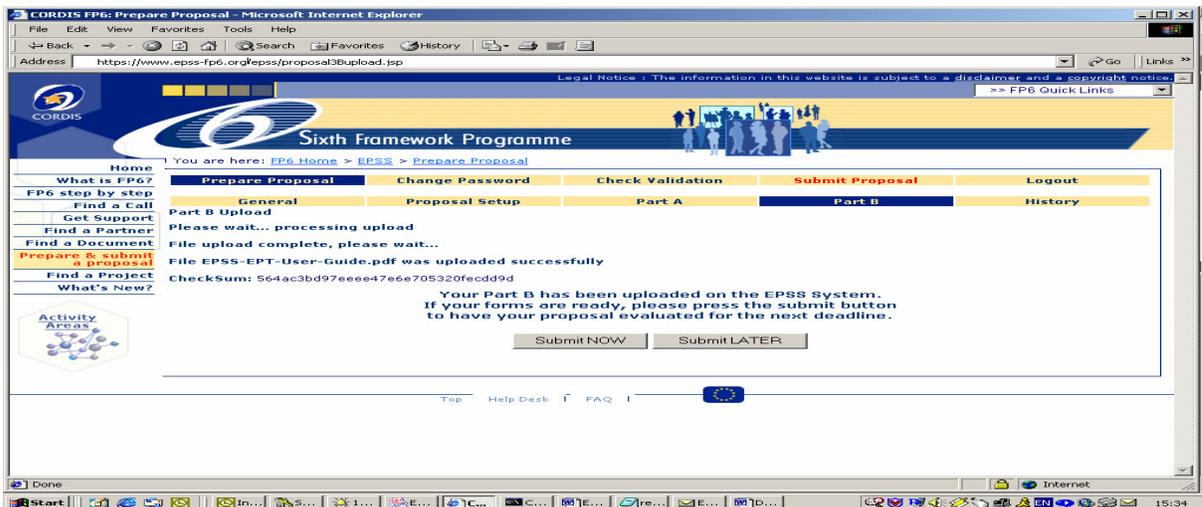
Note: In case of uploading annexes to the EPSS, please make sure that the name of the annex file is NOT identical with the name of your part B file

Note: Before being saved to the EPSS database, the Part B 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.

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

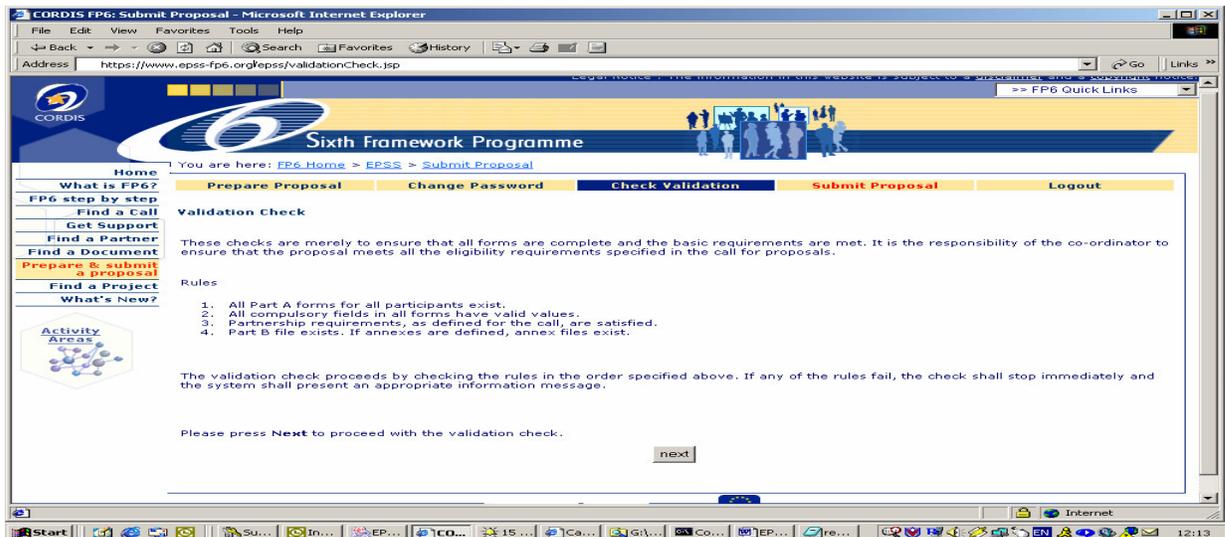
Tip In some rare instances, the proposal may be altered while in transit on the Internet. To check that the uploaded file has been received unaltered, perform a download of the part B.

Upon successful upload of a file the following screen appears:



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

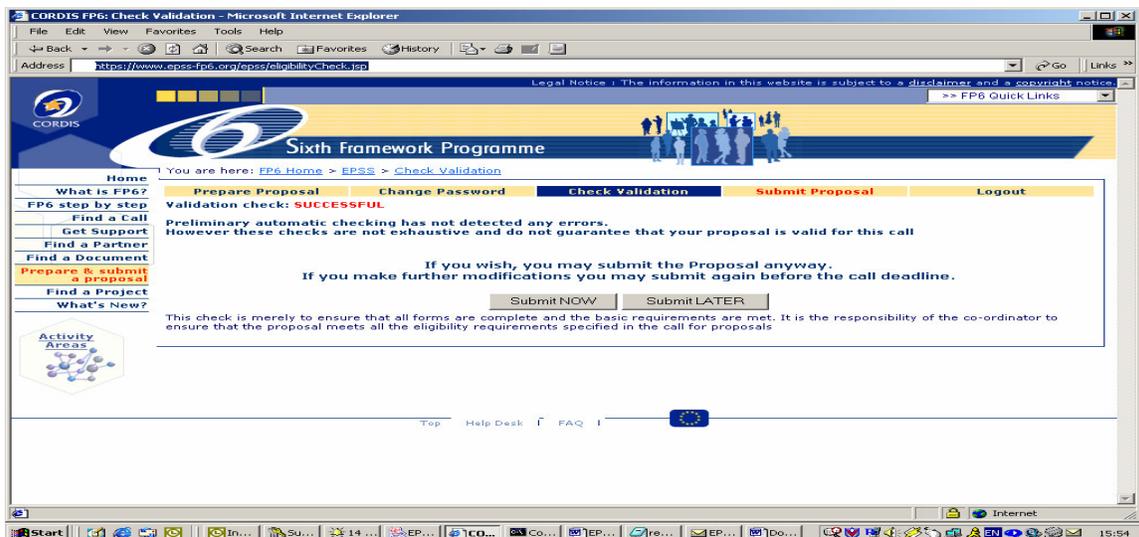
1.7 Validation



Click on this tab in order to validate the entire proposal. Possible errors are indicated and can easily be found and resolved.

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**.

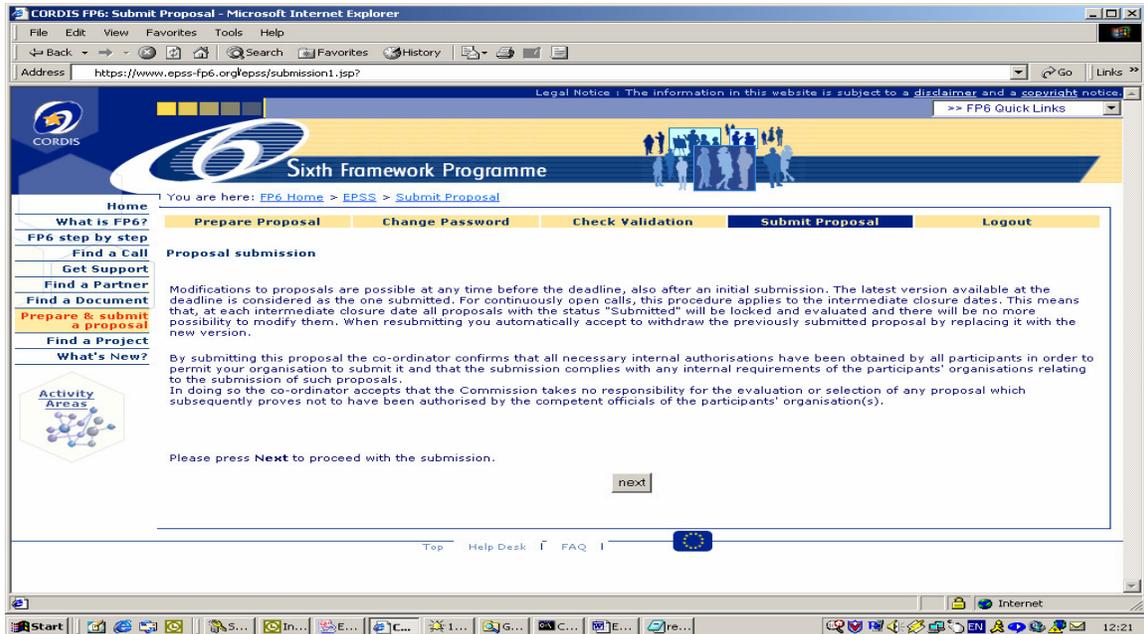
If you cannot locate validation errors please contact the EPSS help desk immediately on +32 2 23 33 760 or support@epss-fp6.org.



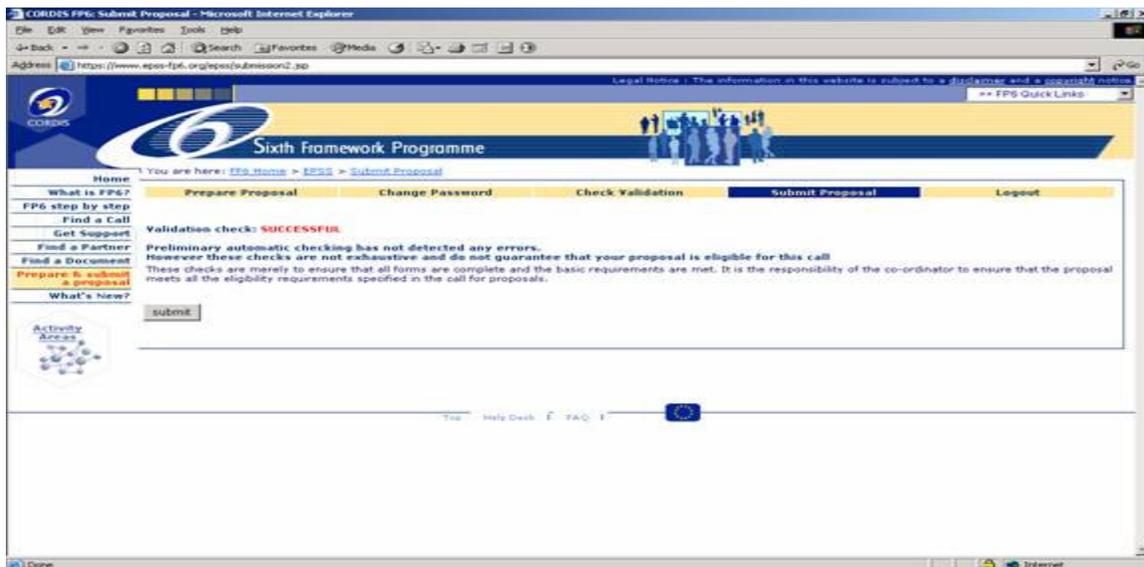
1.8 Submit Proposal

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

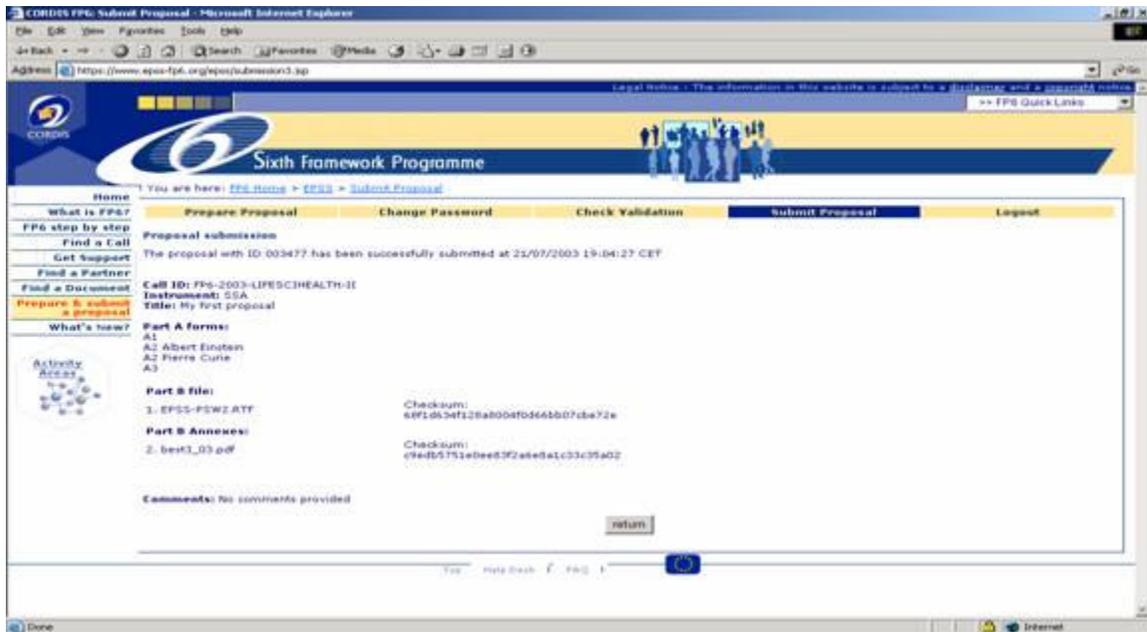
By clicking on the “**Submit Proposal**” button the screen that follows appears:



Press on “next”.



An automatic validation check will verify the proposal again. When finished press on “submit”:



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

Tip

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

1.9 The History

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

An example of the history record before proposal submission:

The screenshot shows the 'History' tab selected in the EPSS system. The page displays a table of modification history with columns for 'Date and time', 'Action / Form modified', and 'Modified by:'. The actions listed include document creation, form creation, and partner modifications.

Date and time	Action / Form modified	Modified by:
21/07/2003 18:56:05 CET	Document best3_03.pdf created	Coordinator
21/07/2003 18:55:36 CET	Document EPSS-PSW2.RTF created	Coordinator
21/07/2003 18:41:14 CET	Form A2 Pierre Curie created	EPSS
21/07/2003 18:41:13 CET	Partner Pierre Curie created	Coordinator
21/07/2003 18:37:17 CET	Password of Partner modified	Coordinator
21/07/2003 18:37:17 CET	Password of Coordinator modified	Coordinator
21/07/2003 18:33:22 CET	Form A3 created	EPSS
21/07/2003 18:33:22 CET	Form A2 Albert Einstein created	EPSS
21/07/2003 18:33:22 CET	Form A1 created	EPSS
21/07/2003 18:33:22 CET	Partner Albert Einstein created	EPSS

And after the submission:

The screenshot shows the 'History' tab selected in the EPSS system after proposal submission. The table of modification history now includes the submission of the proposal and subsequent form modifications.

Date and time	Action / Form modified	Modified by:
21/07/2003 19:04:27 CET	Proposal submitted	Coordinator
21/07/2003 19:01:32 CET	Form A2 Pierre Curie modified	Coordinator
21/07/2003 19:01:32 CET	Form A3 Albert Einstein modified	Coordinator
21/07/2003 19:00:31 CET	Form A2 Pierre Curie modified	Coordinator
21/07/2003 18:59:49 CET	Form A1 Albert Einstein modified	Coordinator
21/07/2003 18:59:30 CET	Form A1 Albert Einstein modified	Coordinator
21/07/2003 18:59:47 CET	Form A2 Albert Einstein modified	Coordinator
21/07/2003 18:56:05 CET	Document best3_03.pdf created	Coordinator
21/07/2003 18:55:36 CET	Document EPSS-PSW2.RTF created	Coordinator
21/07/2003 18:41:14 CET	Form A2 Pierre Curie created	EPSS

2 EPSS Checklist

1. Choose the call and instrument for which you want to apply
(<http://fp6.cordis.lu/fp6/calls.cfm>)
2. Via the respective CORDIS call page, register with EPSS in order to obtain a login and password well in advance of the call
(<http://fp6.cordis.lu/fp6/subprop.cfm>)
3. Use the provided username and password to prepare and submit the proposal
(<https://www.epss-fp6.org/epss>)
4. Proposal Setup – Enter Participants,
5. Fill in the Part A Forms and save the forms,
6. Upload the Part B file (and annexes, if required) .
7. Validate the proposal.
8. SUBMIT THE PROPOSAL!

3 Note for Macintosh users

The combination of OSX and Microsoft Internet Explorer causes problems while uploading files. The directory delimiters which Internet Explorer uses are recognized as “invalid characters” by the EPSS.

Better results can be obtained using the SAFARI Browser (you can download it from <http://www.apple.com/safari/>). It handles the files without their pathname.

4 EPSS-EPT Frequently Asked Questions (FAQ)

EPSS support Contact details: support@epss-fp6.org / +32 2 233 3760 (from 08:00 to 20:00 CET and certain Saturdays from 09:00 to 17:00 CET)

This FAQ covers questions about using the EPSS online and the EPT offline preparation tool.

Index

A. General Questions:

1. [What are my options for submitting a proposal?](#)
2. [What are the Minimum Requirements for the EPSS Online Version?](#)
3. [What is the difference between a Coordinator and a Partner?](#)
4. [Do I need to register to use the online EPSS system?](#)
5. [I have lost my password, what should I do?](#)
6. [What is the EPT?](#)
7. [Do I have to register to download the forms / EPT?](#)
8. [How can I print a form?\(Online preparation\)](#)
9. [What do the evaluators see?](#)

B. Coordinators:

1. [How should I proceed as a coordinator? \(Roadmap\)](#)
2. [I have just registered and the system asks me to change my password. Is that normal?](#)
3. [During the registration procedure I have stated that the proposal will be submitted and prepared online. Is there any way I can change that?](#)
4. [I uploaded a wrong Part B, is it possible to delete it?](#)
5. [I uploaded a wrong Annex file, is it possible to delete it?](#)
6. [I have used the EPT to prepare my proposal. I try to upload it using the online submission system \(EPSS\) but I cannot find the appropriate button.](#)
7. [Is there any limitation on the size of the uploaded files?](#)
8. [When should I submit?](#)
9. [During submission the proposal validation check has failed. Can I still submit the proposal?](#)
10. [What happens with the filled in forms when I edit a partner in the list?](#)
11. [Which file format may I use for Part B?](#)
12. [Should I ZIP the Part B?](#)
13. [Are there any restrictions on file names?](#)
14. [May I annexe other files?](#)
15. [How can I check my submitted proposal?](#)
16. [When working with the EPT Tool, is there any restriction as to where the proposal data should reside?](#)

C. Partners:

1. [How should I proceed as a partner? \(Roadmap\)](#)
2. [Why I cannot edit the A1 / A3 / A4 \(if applicable\) forms?](#)
3. [How do I find my Part A form?](#)
4. [I cannot upload the Part B file.](#)
5. [Can I change my password?](#)
6. [I am trying to login but the system does not accept my password.](#)

Questions and Answers

A. General Questions:

1. What are my options for preparing and submitting a proposal?

You can prepare and submit an application online using the EPSS system, offline using the EPT Tool (software that you have to download and install on your computer) or, if allowed by the call on paper. You are strongly recommended to use the online EPSS system for preparation and submission of your proposal.

2. What are the Minimum Requirements for the EPSS Online version?

Proposers will access EPSS through Web Browsers.
The Minimum Requirements are:

- An SVGA screen, i.e. a screen with a resolution of 1024x768 pixels, small fonts
- A connection to the Internet
- Internet Explorer 5.0 and above or
- Netscape Navigator 7.0 and above or
- Opera 6.0 and above or
- Safari browser for the Macintosh users.

3. With respect to using the EPSS, what is the difference between a Coordinator and a Partner?

- Coordinators register for a specific call, define the participants of the proposal, edit electronic forms, send usernames and passwords to partners, upload Part B files/annexes and, finally, they submit the proposal.
- Partners use usernames and passwords for a specific call (that they receive from the coordinator), edit their own forms and send their annexes to the coordinator. Partners can not submit the proposal.

4. Do I need to register to use the online EPSS system?

Only coordinators should register. Partners obtain the information to access the system from their coordinators.

5. I have lost my password, what should I do?

You have to click on the "Forgot your password?" link in order to reset it to the original one. Note that only coordinators can request new passwords. If you are a partner and forgot your password, you should contact your coordinator.

6. What is the EPT?

EPT is the electronic proposal tool, a software programme to be installed on your computer. Note that it has to be used in combination with the appropriate forms that need to be downloaded for the call in question. It can be used to prepare the proposal offline (including all the appropriate forms). When the proposal is ready you can submit it online (using the EPSS) or print it and send on paper. On-line submission is recommended.

7. Do I have to register to download the forms / EPT?

Registration is not compulsory. However, if you wish to submit online, you must register (even if you prepare the proposal using the EPT).

8. How can I print a form? (Online preparation)

It is not possible to print a form directly from the online EPSS. You need to download the desired form first as a PDF file. To download a specific form, tick the corresponding “DOWNLOAD (PDF)” box next to the form. Then click the download button and follow the onscreen instructions. **Note:** To open the*.pdf file, you need the **Adobe Acrobat Reader**.

9. What do evaluators see?

Most proposals are printed in black and white at a resolution of 300dpi before evaluation. You should download your proposal and check particularly the legibility of pictures and diagrams under these conditions.

B. Coordinators:

1. How should I proceed as a coordinator? (Roadmap)

Coordinator steps:

1. Register on the CORDIS website for a specific call.
2. Login to access the online EPSS.
3. Change the passwords for the coordinator and the partners.
4. Send the usernames and passwords to the partners.
5. Set up the proposal by entering the number of participants, their participant id, name and email addresses.
6. Edit Part A forms.
7. Edit and upload the Part B file.
8. Upload other annexes, if required.
9. Validate proposal to ensure basic checks are satisfied.
10. Submit the proposal.
11. Logout.

2. I have just registered and the system asks me to change my password. Is that normal?

Yes, the first time you login the system asks you to change the coordinator’s and partner’s passwords for security reasons.

3. During the registration procedure I have stated that the proposal will be submitted and prepared online. Is there any way I can change that?

No, the decision is final and cannot be changed after the registration finishes. If you changed your mind you should register again, as for a new proposal.

4. I uploaded a wrong Part B, is it possible to delete it?

You cannot delete a Part B file but you can overwrite it. If you upload another Part B file the previous one will be overwritten. Please remember that you must re-submit (press the SUBMIT button) after you have uploaded the new part B.

5. I uploaded a wrong Annex file, is it possible to delete it?

Yes it is possible to delete Annex files. Please note that Annex files are only permitted where they are specifically requested in the call text. All others will be ignored.

6. I have used the EPT to prepare my proposal. I try to upload it using the online submission system (EPSS) but I cannot find the appropriate button.

This situation has two possible causes. Either you are not the coordinator of the proposal and therefore you cannot upload the proposal or during the registration procedure you have defined that the proposal will be prepared online and submitted online (see point 3) . If you wish to upload the proposal that you have prepared offline, you must register again choosing the offline submission option.

7. Is there any limitation on the size of the uploaded files?

In order to have a fast upload process and avoid possible timeout errors, it is recommended not to upload very big files. To keep sizes down, make sure that your Part B file is in PDF, avoid colour and unnecessary high resolution pictures and graphs. The average size of a research proposal is 2MB (less for mobility actions). You should aim to restrict your proposal to under 3MB, and under no circumstances try to upload a file larger than 10 MB

8. When should I submit?

You may submit your proposal at any time before call closure. As soon as you have a consolidated version you should submit it! You may continue to improve the proposal and re-submit the improved version as often as you wish up to the call closure. The submission takes place by clicking on the “Submit” button, simply uploading or saving data is not sufficient! Do not tempt fate by waiting until the last moment!

9. During submission the proposal validation check has failed. Can I still submit the proposal?

It depends on the reasons for the failure. The proposal validation check could have warnings (e.g. fields left blank) or errors (e.g. missing Part B). In the former case you can continue the proposal submission and also provide some comments regarding the warnings. In the latter case the submission is not possible.

10. What happens with the filled in forms when I edit a partner in the list?

- *Deleting a Participant:* The Participant Numbers and the Participant Types remain unchanged and the deleted Participant leaves a gap in the numbering. (e.g. if Partner 5 out of 8 is suppressed then there will be participants 1,2,3,4,6,7 and 8 but no Participant 5). **Note:** when deleting a Participant, all associated Part A forms are deleted as well. For example, when deleting Partner 5, the A2 form for Partner 5 will also be deleted. Make sure that you save the A3 form after adding or deleting partners
- *Moving a Partner to another position:* **Use this function to either re-arrange the participant order or to fill a gap after deleting a participant.** The Participant number will be modified automatically to reflect the change. **Note:** when moving Partners, the associated Part A forms are automatically modified to indicate the new Participant number.

11. Which file format may I use for Part B?

For the proposal content (part B) you are requested to use exclusively PDF (“portable document format”, compatible with Adobe Acrobat version 3 or higher, with embedded fonts). Other file

formats will not be accepted by the system. Both commercial and free tools to convert files to PDF format are widely available on the WEB. Also zipped (or otherwise compressed) archives will not be accepted (PDF is self-compressing, there is no gain in zipping). Unless otherwise specified in the call 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.

12. Should I ZIP the Part B?

NO! PDF files are already compressed. Send the Part B only in PDF format.

13. Are there any restrictions on file names?

Use only alpha-numeric characters and the “_” character. Do not use spaces and do not use any special characters such as /, \, *, punctuation characters etc..

14. May I annexe other files?

Do not annexe any other files unless they are specifically requested in the call text.

15. How can I check my submitted proposal?

After you have submitted, you are advised to download the proposal and print it in black and white at 300dpi resolution – Check the result: this is how your proposal will be seen by the evaluators.

16. When working with the EPT Tool, is there any restriction as to where the proposal data should reside?

The EPT requires that the data (Part B, proposal package etc) reside on the local hard disk. You can store and save the Part B to remote devices such as network drives or solid-state memory devices (e.g. Memory sticks), but when the EPT needs to access the data, it must first be copied to the local hard disk. This is strongly suggested because bad quality of communication between the local computer and the remote device might result in problems.

C. Partners:

1. How should I proceed as a partner? (Roadmap)

Partner steps:

1. Receive username and password from the coordinator.
2. Login for accessing the online EPSS.
3. Edit your Part A2 form.
4. Validate your Part A2 to ensure basic checks are satisfied.
5. Logout.

2. Why can I not edit the A1 / A3 / A4 (if applicable) forms?

Individual partners can only edit forms that apply to themselves such as A2. Only the proposal coordinator can edit all the other forms.

3. How do I find my Part A form?

After logging in, navigate to the Part A tab and edit the form that indicates your name as provided by the coordinator.

4. I cannot upload the Part B file.

Only the coordinator has the permission to upload Part B files. The partners can only download the files.

5. Can I change my password?

No, only the coordinator can change passwords.

6. I am trying to login but the system does not accept my password.

Contact the proposal coordinator to check if he/she has changed the partner's password.