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1. Submission Process Summary

[MAIN PARTNER] Selecting a funding opportunity and creating an application

- Main partner (MP) creates application
- Click 'Save Draft' in order to be assigned a Call ID number
 - o A Partner Form is automatically created for the MP
 - o MP can invite other partners (organizations) to participate in the created application
 - The invited partner(s) receive(s) an email and accept(s)/decline(s) the invitation
 - If they accept, a Partner Form is created for them to complete.

[MAIN PARTNER] Completing your Partner Form

- Fill out ALL questions
- Click on '**Submit**'
- Upload duly filled out co-signature
 - o Go to 'Co-signature' Tab
 - o Fill out the Legal Authorised person contact details of your OWN organisation
 - o IMPORTANT – click 'Save'
 - o Download pdf
 - o Physically/digitally sign the document
 - o Upload duly signed document
 - o IMPORTANT – click on 'Submit'

[INVITED PARTNER] Completing your part of the application (Partner Form)

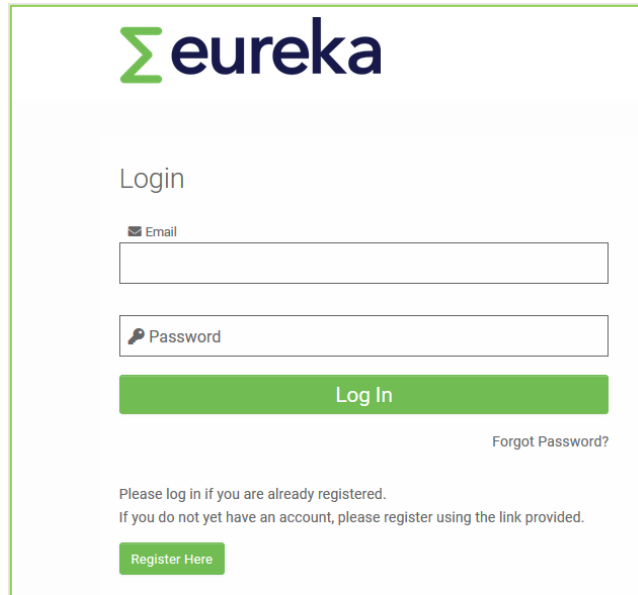
- Fill out ALL questions
- Click on '**Send to Main**' for approval
- **MP to check Partner's form: if MP is happy with the content – click on 'Accept'**
- Partner receives an mail requesting to upload duly filled out co-signature
 - o Open Partner Form
 - o Go to 'Co-signature' Tab
 - o Fill out the Legal Authorised person contact details of their OWN organisation
 - o IMPORTANT – click on 'Save'
 - o Download pdf
 - o Physically/digitally sign the document
 - o Upload the duly signed document
 - o IMPORTANT – click on 'Complete'
- Only then, the Invited Partner becomes an Active Partner in the application

[MAIN PARTNER] Submitting your application

- Check that ALL questions have been correctly filled out
- Check that a minimum of 2 Partner Forms are Completed (signature uploaded + clicked on 'Complete')
- Click on 'Safe & Validate'
 - o If no error message appears and you are 100% sure that all info is correct (budget, duration, work packages, etc.), click on 'Submit'

2. Accessing the platform

<https://eureka.smartsimple.ie>



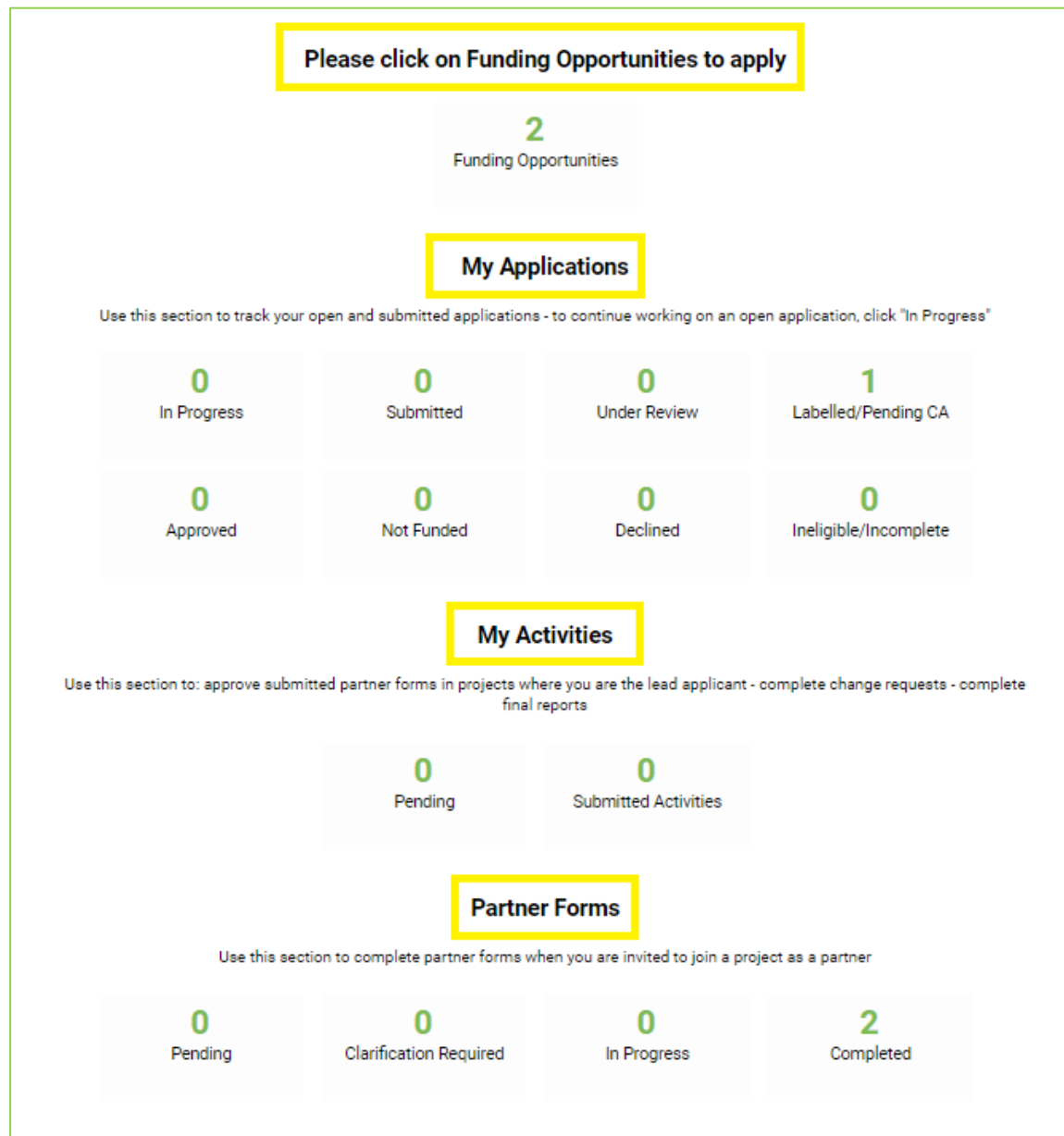
The screenshot shows the eureka login interface. At the top is the eureka logo. Below it is the heading 'Login'. There are two input fields: 'Email' with an envelope icon and 'Password' with a key icon. A green 'Log In' button is positioned below the password field. To the right of the button is a link for 'Forgot Password?'. Below the login fields, there is a message: 'Please log in if you are already registered. If you do not yet have an account, please register using the link provided.' At the bottom left is a green 'Register Here' button.

- Not yet registered, click on '**Register Here**'
- Already registered – **Log in**
- Forgot your password:
 1. Click on '**Forgot Password?**'
 2. Enter your email address
 3. Email is sent to the user with instructions to reset password (check SPAM folder)

IMPORTANT

Only 1 user can work in the same application at a time; the application is locked for other users in the meantime.

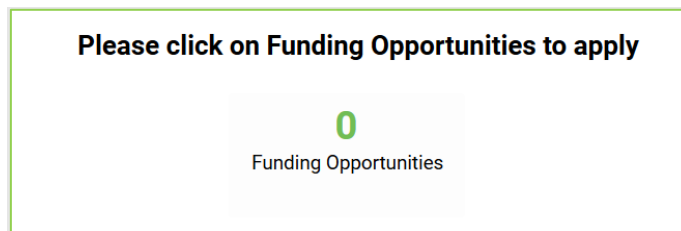
3. Overview of your dashboard



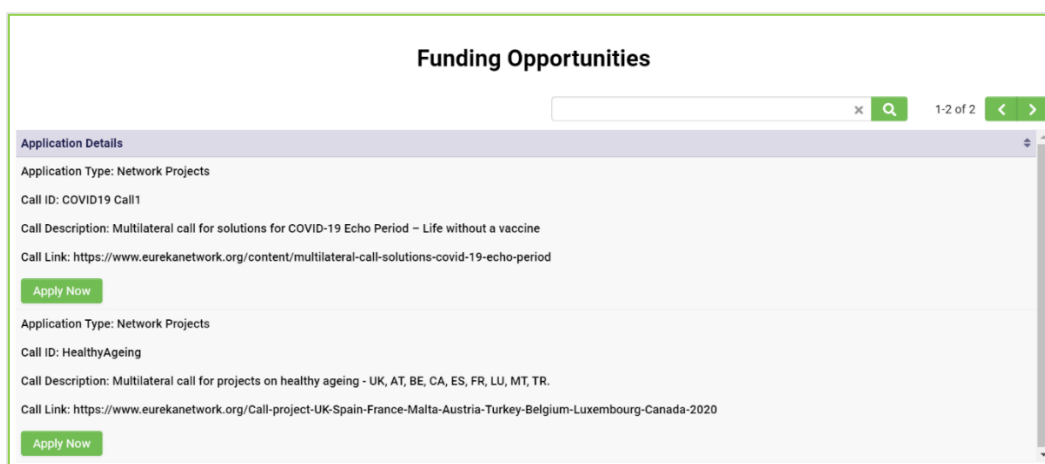
- **Please Click on Funding Opportunities to Apply:** this section enables you to check the funding opportunities available.
- **My Applications:** this section enables you to track the statuses of your application(s).
- **My Activities:** this section enables you to track your pending/submitted tasks.
- **Partner Forms:** this section enables you to track the status of your own Partner form(s).

4. [MAIN PARTNER] Selecting a funding opportunity and creating an application

- Click on 'Funding Opportunities' on the dashboard



A list of ongoing calls will be displayed:



- Select the call you want to apply for by clicking on 'Apply now' (make sure you select the correct funding opportunity – it is not allowed to transfer information from one funding opportunity to another). An empty application is displayed:

- **First** click on **“Save Draft”**: a call ID number will be assigned to your **(Remember to SAVE DRAFT on a regular basis)**.

IMPORTANT

Make sure you do not create DUPLICATE applications for the same funding opportunity. You can verify it on your dashboard > My Applications > In Progress.

To remove duplicates, click on the “Withdrawn” button.

5. [MAIN PARTNER] - Completing an application

Once you have saved your application, you can start filling out the required information for each of the five different sections:

Main Partner Form:

- Click on **Open** to complete the Partner form of the Main Participant:
- **PITCH**: This chapter paints a picture of the project in less than one page. It gathers the general information of the project, including a set of questions (what, why and how) as well as the main information about the partners (country, contact data).
- **IMPACT – THE BUSINESS CASE**: Information about the main output of the project and how it (and other results) will be commercialized, taking competitors into consideration.
- **EXCELLENCE – INNOVATION AND R&D**: Information about the technological developments to be undertaken in the project in comparison with existing technologies.
- **QUALITY AND EFFICIENCY OF THE IMPLEMENTATION**: Information about the management of the project and the added value of international cooperation.

How to complete your Partner form

Open your Partner Form: Go to your dashboard, scroll down and click on **"Pending"**

This is the view of your partner form:

PARTNER DETAILS
PARTNER FORM

* What are your core business activities and expertise (technological and managerial)?

250 words left

* In which sectors do you operate?

250 words left

* Explain your contribution to the project.

250 words left

* With reference to the work package descriptions, list each of your tasks in the project.

250 words left

BACK
Save Draft
Submit

- First, **'Save Draft'**.
- Fill out the work package table


Click on **'Add Budget Detail'** in order to start completing the table with the work packages details (to add several work packages, click **'+'**).

* Enter the person hours and full cost associated with your participation in this project

Add budget details

Budget Details

Work Package Name	Person months	Personnel costs (€)	Overheads (€)	Travel (€)	Materials (€)	Other (€)	Subcontracting (€)	Total
<div> BACK </div>								



Please press the "+" button to add more rows. Please enter both your own and your partners workpackages.

Work Packages

Work package Name	Person Month	Personnel costs (€)	Overheads (€)	Travel (€)	Materials (€)
<div> + </div>					

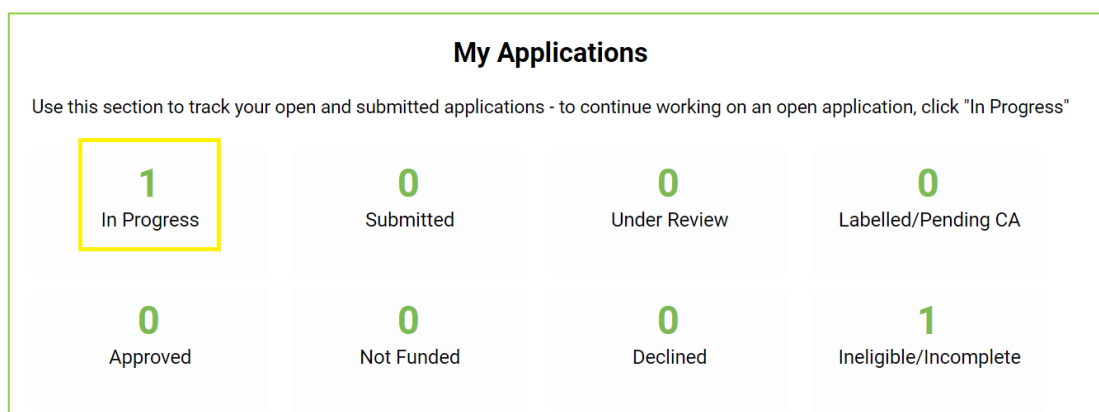
- Once you have duly filled out your form, click on **submit**: the co-signature form will become available.
- **Complete your Partner Form by uploading your duly filled out co-signature**

The screenshot shows the 'CO-SIGNATURE' tab of a form. At the top are three tabs: 'PARTNER DETAILS', 'PARTNER FORM', and 'CO-SIGNATURE'. Below the tabs is an information box with an 'i' icon and text: 'Please click "Save Draft" before downloading your Agreement. Please then Sign It and Upload it to the field provided'. The form contains three required fields: '* Name' (filled with 'John Doe'), '* Title' (filled with 'Dr.'), and '* Company Position' (filled with 'CEO'). Below these is the 'Agreement Document' section, which includes a green button 'Download Co-Signature Document' and a section for '* Upload Co-Signature Document' with an upload icon button. At the bottom are two green buttons: 'Save Draft' and 'Submit'.

- Fill out the 3 fields (name – title – function of the **Legal authorised person**)
- **Click on 'Save Draft'**
- Download pdf version
- Sign the printed version
- Upload duly signed document
- **Click on 'Submit'**

At this point, your partner form has been completed.

To return to an open application, click 'In Progress'.



IMPORTANT:

- save your draft on a regular basis in order not to lose any information.
- If you have made a correction, save your draft in order to see the changes (end date – months calculation will only be changed after application is saved)
- date format: DD/MM/YYYY

6. [MAIN PARTNER] Inviting partners to your application/reviewing partner forms

Once you have created your application, you can invite other organisations to join the project (**double check the application number before sending the invitation – this is important when you have created multiple applications**).

- Click on **'Invitations'** on the left-hand side.



- Inviting partners:
 - Click on **'+'** to create a new invitation and fill in your partner's coordinates (IMPORTANT: make sure you assign a role to your partner).
 - To remove an invitation, simply click on **'X'** button.
 - Once done, click on **'Invite'** (multiple participants can be invited). Your application partner(s) will then receive an email with your invitation.

2020-15016/NP/COVID19 Call1

Prefix	First Name	Last Name	Email	Role	Status	
Ms.	AAA	BBB	...@asss	Application Partn	Draft	X
Mr.	BBB	CCC	...@asda	Application Partn	Draft	X
Ms.	CCC	DDD	...@ksj	Application Partn	Draft	X

+ →

Save Invite

All the accepted invitations which have completed their Partner Form (see explanation below) will be incorporated into the **overview of the consortium** table available in the pitch section.

- **Reviewing partners' forms:**

When a partner submits their partner form, a new pending activity will show up on your dashboard.

My Activities

Use this section to: approve submitted partner forms in projects where you are the lead applicant - complete change requests - complete final reports

1
Pending

0
Submitted Activities

Pending					
#	Application ID	Activity Type	Status	Created Date	Deadline Date
1	2020-15016/NP/COVID19 Call1	Partner Forms	Submitted to Main	18/04/2020 15:31	

You need to open and review the form. Three different actions are possible:

- > **'Send for clarifications'**: send to the partner when certain points are unclear for the lead applicant (these points are specified in the **'REVISIONS'** tab).
- > **'Approve'**: the partner form is filled out correctly and no changes are required.
- > **'Save Draft'**: click on it in order not to lose information.

2020-15016/NP/COVID19 Call1 (Partner Forms)

View PDF of Application
PDF of Partner Form

CONTACT DETAILS
PARTNER FORM
REVISIONS

Partner Name:

Country: Belgium

Save Draft
Send For Clarifications
Approve

7. [MAIN PARTNER] How to fill in the Application's Work Package Table (pitch section)

This will only be possible once all partners have completed their individual Work Packages tables (partner forms). The main partner needs then to calculate and enter the overall overview of the application's work package costs table by adding up the figures from all partners, including the main.

'Open' the application. Then 'Open' the "Partner and Applicant Work package cost table".

2020-15016/NP/COVID19 Call1

PITCH IMPACT - THE BUSINESS CASE EXCELLENCE - INNOVATION AND R&D QUALITY AND EFFICIENCY OF THE IMPLEMENTATION CO SIGNATURE

* Overall Budget (€)

Overview of the Consortium

Partner Name	Organisation Name	Organisation Country	Organisation Type

* Partner and Applicant Work package cost table

Open

Work Packages

Work package Name	Person Month	Personnel costs (€)	Overheads (€)	Travel (€)	Materials (€)	Other (€)

* What do you want to do?

Save Draft Save & Validate Submit Withdrawn

Please press the "+" button to add more rows. Please enter both your own and your partners workpackages.

Work Packages

Work package Name	Person Month	Personnel costs (€)	Overheads (€)	Travel (€)	Materials (€)	Other (€)	Subcontracting (€)	Total (€)
test	3	€3.00	€3.00	€3.00	€3.00	€3.00	€3.00	€18.00
	3	€3.00	€3.00	€3.00	€3.00	€3.00	€3.00	€18.00

+

Save Close

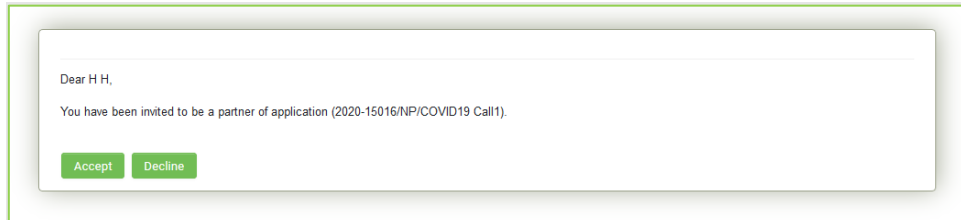
* Partner and Applicant Work package cost table

To add a work package = '+'

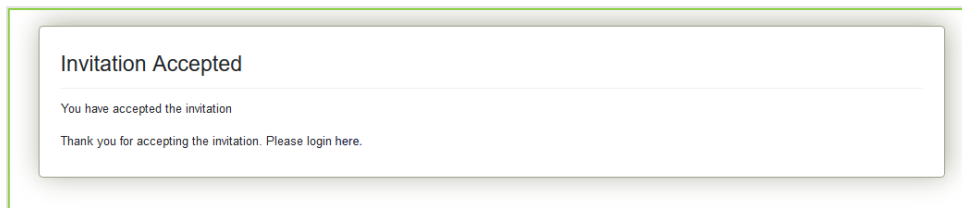
To remove a work package = 'x'

8. [INVITED PARTNER] Complete your part of the application (Partner Form)

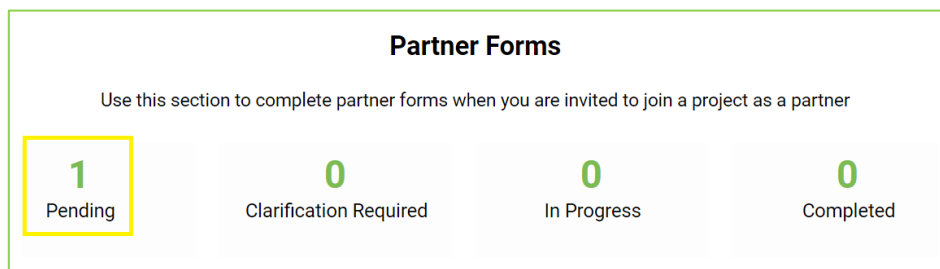
When you have been invited to participate as a partner in a project, you will get a notification by email. By following the instructions of this email, you will be directed to the platform, where you can **Accept/Decline** the invitation.



- If you accept the invitation, then click **'here'** in order to be directed to your partner form.



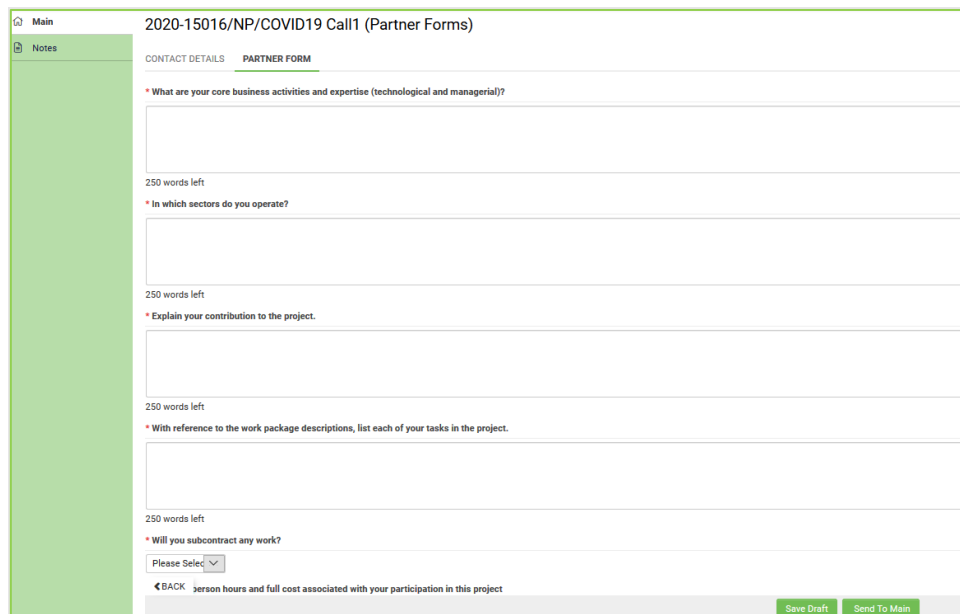
- Once you have logged into the system, click on **'Pending'** Partner Forms at the bottom of your dashboard



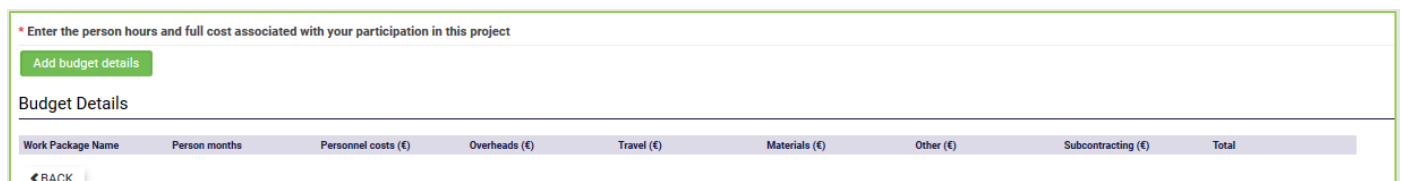
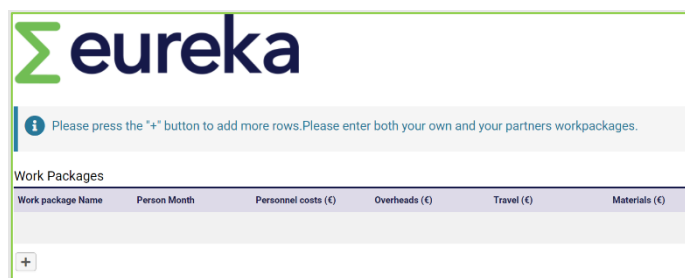
- Fill out your form.**
Click **'Open'**

Pending							
<input type="text"/> 1-1 of 1							
#	Application ID	Activity Type	Primary Contact	Organization	Project Acronym	Status	Created Date
1	2020-15016/NP/COVID19 Call1	Partner Forms	Isabel de V	1980	AAA	Draft	18/04/2020 15:31
							Open

This is the view of your partner form:



- First, **'Save Draft'**.
- **Fill out the work package table**
Click on **'Add Budget Detail'** in order to start completing the table with the work packages details (to add several work packages, click **'+'**).

- Once you have duly filled out your form, **'Send to Main'** in order for the main partner to review it and approve it (the main partner could eventually ask for clarifications).

IMPORTANT: Save draft regularly in order not to lose information.

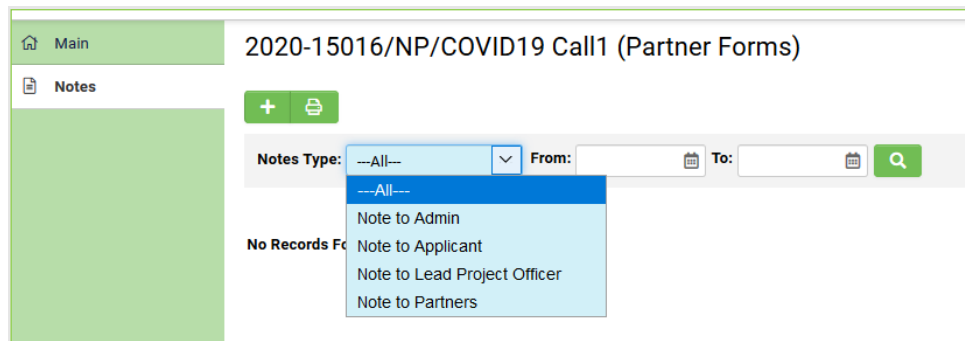
- **Completing your Partner Form**

The Partner is informed by mail when the partner form has been approved by the main applicant. **At this point, the Co-signature tab will become available.**

The screenshot shows the 'CO-SIGNATURE' tab of a form. At the top, there are three tabs: 'CONTACT DETAILS', 'PARTNER FORM', and 'CO-SIGNATURE'. Below the tabs is a grey header bar with an information icon and text: 'Please click "Save Draft" before downloading your Agreement. Please then Sign It and Upload it to the field provided'. The form contains several sections: 'Name' with a text input field; 'Title' with a text input field; '* Company Position' with a text input field; 'Agreement Document' with a green button labeled 'Download Co-Signature Document'; 'Stamp Partner PDF' with a download icon; a 'File Name' dropdown menu showing 'Application_Preview.pdf'; and '* Upload Co-Signature Document' with a green upload button. At the bottom left is a 'BACK' button, and at the bottom right are three buttons: 'Save Draft', 'Complete', and 'Delete'.

- Fill out the 3 fields (name – title – function of the **Legal authorised person**)
 - **Click on 'Save'**
 - Download pdf version
 - Sign the printed version
 - Upload duly signed document
- Partner must click **'Complete'** = important in the 'save & validate' process before submission.

9. Communication between parties (Notes feature)



The **'notes' functionality** allows one-on-one communication between the participants involved in a project. Any clarification or reflection can be sent as a note to Admin/Applicant (=Main Partner)/Lead Project Officer/Partners, where appropriate.

To access the note feature, open your application, click on 'Notes' on the left-hand side, then:

1. Click on New Note (**'+' icon**): the text box is displayed.
2. Select the type of note (the receiver of this note) from the drop down.
3. Type the note body.
4. Click **'Save'**: your note will be sent, and the receiver will be notified by email.

10.[MAIN PARTNER] How to submit your application

Checking Points:

- ✓ Your application meets ALL eligibility criteria for the funding opportunity.
- ✓ The Overall Application's Work Packages table is completed (**'Pitch' section**)
 - The application costs = overall work packages cost table
- ✓ Files to be uploaded:
 - GANTT (**mandatory for the main partner**- implementation section)
 - Other documents can be uploaded as annexes at the end of Pitch section, when required. Please always read the relevant **CALL TEXT** carefully (call texts are published in the EUREKA public website – <https://www.eurekanetwork.org/open-calls/>) additional annexes may be required there.
 - Co-signature document (**mandatory for ALL participants, including the Main**): The Lead organisation to check whether he/she has received the email for each partner stating that they have 'completed and co-signature uploaded'.

Click **'Save & Validate'** before submitting your application in order to automatically check whether all required information is filled out.

An error message will appear when additional actions are required. Click on the error message which will redirect you to the field that contains the error (e.g. when a text field has too many characters, text needs to be shortened).

If no error message appears, click on **'Submit'** (Please note that after submission, you will no longer be able to make changes in your application).

Before the deadline, submitted application forms and partner forms can be re-opened by admin upon request at projects@eurekanetwork.org.

11. Evaluation Stage

Once your application has been submitted, it will go through the evaluation stage. This stage will be performed by the National Project Coordinators (NPCs). No activity is requested to you at this stage, but you could get some messages from your NPC if some additional information is needed.

When the assessment of your project is done, it will move to the status **Labelled** or **Declined** (unqualified), the score are above threshold or not. If the proposal is declined, your NPC will contact you directly.

You'll be notified by email if your application has received the Eureka **Labelled** status after being positively evaluated (above quality threshold). At this point, your application will enter the Financial Status Check phase done by the National Project Coordinators (NPCs, from National Funding Bodies).

Financial Status Check

This check is done to report if the funding for your proposal in each country is confirmed. You should contact your NPC to know if your application has been awarded with national public funding.

- If the Public funding has been declined and/or self-funding is not possible, the proposal will move to the **Not funded** status.
- If public funding has been confirmed for all partners involved and/or alternatively those not publicly funded decide to self-fund, AND a **signed Consortium Agreement** has been submitted by the main partner at projects@eurekanetwork.org, the proposal will get the '**Ready for Endorsement**' status.

All applications with Ready for Endorsement status will be submitted to the High Level Representatives Group (HLG). They will acknowledge the Eureka label and only then the proposal will move to the **Endorsement** status. This will be done in the HLG meetings which take place every 3-4 months (usually October, January, March and June).

Once this is done, the project will enter the monitoring stage.

