



# Electronic Exchange Platform

## Technical Guidance Online Application

(version 17 March 2016)



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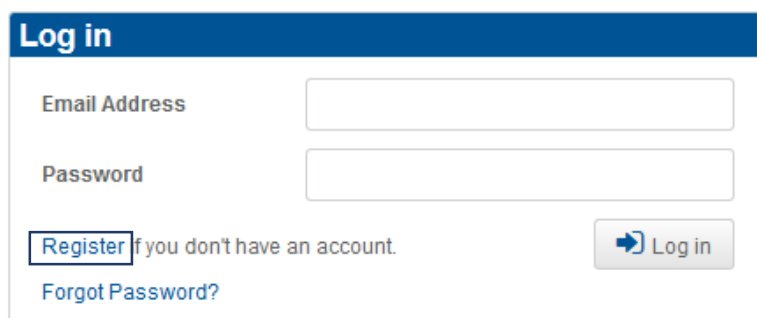
This guidance contains key technical information on the operation and use of the Electronic Exchange Platform (EEP) of the Urban Innovative Actions Initiative (UIA). Applicants are requested to complete and submit their application form (AF) via the EEP. Therefore it is highly recommended to read this document carefully before using the EEP. This technical guidance complements the UIA Guidance which is also available on the UIA website.

## I. Technical information and system requirements

The EEP is a web application which can be accessed with recent versions of most common browsers (e.g. Internet Explorer 10, Firefox, Chrome). The functionality of the system follows the common standards of web applications for entering and submitting data.

## II. Access and registration

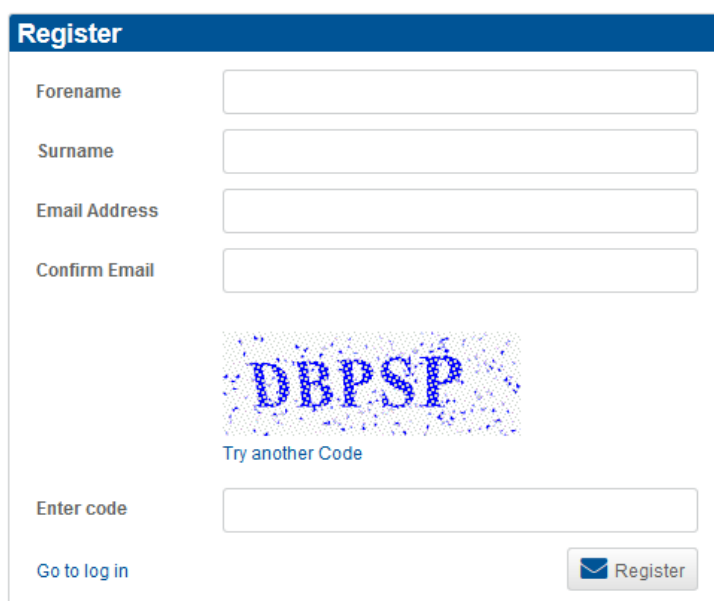
- A. Link to the EEP: <http://eep.uia-initiative.eu>



The 'Log in' form has a blue header with the text 'Log in'. Below the header, there are two input fields: 'Email Address' and 'Password'. Below the 'Email Address' field, there is a link 'Register' followed by the text 'if you don't have an account.' and a link 'Forgot Password?'. To the right of these links is a 'Log in' button with a blue arrow icon.

- B. To use the EEP, each applicant (or user) must first register by clicking on [Register](#)

- C. In the registration form, the following fields need to be filled in:



The 'Register' form has a blue header with the text 'Register'. Below the header, there are four input fields: 'Forename', 'Surname', 'Email Address', and 'Confirm Email'. Below the 'Email Address' field, there is a CAPTCHA image with the text 'DBPSP' and a link 'Try another Code'. Below the CAPTCHA image, there is an 'Enter code' input field. At the bottom left, there is a link 'Go to log in'. At the bottom right, there is a 'Register' button with a blue envelope icon.

- D. Following the registration, a confirmation email is automatically sent to the email address provided in the registration form. In order to activate the account and receive a password, the applicant must click on the link included in the email.





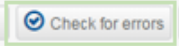



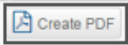
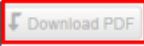
- E. Upon reception of the email with the password, the applicant can log on the EEP (see step A for the login interface) and directly accesses an empty AF:

- F. Any user can modify her/his password by clicking on her/his name in the upper right corner of the screen. Beware this function is available only once a project proposal has been created.

### III. Filling in the AF

The menu of the application form looks as follows:

Important aspects have to be remembered when filling in the AF:

- Guidance to fill in the application form is always indicated by  and is **available in 24 languages**. In order to select the language of your choice, a drop down menu is available 
- All fields in all AF tabs are **mandatory**.
- After clicking on  all fields not filled in are shown on top of the page. Although automatic checks are foreseen in the EEP, **it is still the applicant's responsibility to verify that the AF is properly and completely filled in**.
- When a section is completely filled in, the  status turns into 
- Data should be saved regularly by clicking on  in order to avoid losing them in case of technical issues (e.g. interruptions of the internet connection). If not saved, filled in data is lost when changing of AF tab.
- Fields in the EEP have **character limitations**.
- The order of the work packages and activities follows the order in which they were added in the EEP. This order cannot be changed.
- A pdf of the AF can be created and downloaded at any moment by clicking on  and then on . The creation of the pdf document may take several minutes.
- It is strongly recommended that applicants fill in the Application Form in clear English, although it may also be submitted in any of the official EU languages. It should be noted that the Strategic and Operational Assessment of the Application Forms submitted will be done on the basis of the English version (to be translated in English by an external service provider contracted by the Permanent Secretariat (PS) in case the Application Form is submitted in another language). The quality of the translation will be not guaranteed.


## IV. Particular issues

### A. Partners contribution sources


The partners' contribution sources can be filled in only once the project budget is finalized at the level of the Work Packages (WP). It must be done per partner.

1. In the description of a partner, click on "add contribution sources".



Source(s) of Contribution 

Add a source of this partners contribution here.

 Add Contribution Source

- The total contribution to reach per partner is indicated by “contribution target”. As many contribution sources can be added as necessary.

Source(s) of Contribution ⓘ					
Name of Organisation/ Source of Contribution ⓘ	Legal Status ⓘ	% of Total Partner Contribution ⓘ	Amount (€) ⓘ	Cash or In-kind Contribution ⓘ	Comment ⓘ
<input type="text" value=""/>	<input type="text" value="Please Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="Please Select"/>	<input type="text" value=""/>
0 / 200 characters					0 / 500 characters
Total (€)		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>		Contribution Target <input type="text" value="91,400.00"/>

## B. WP Management

The activity “Capitalisation” is compulsory and should be added manually in the WP management.

*Title:* Capitalisation

*Activity description:*

- 1) Involvement of UIA experts for:

- Advice and guidance on the substance of the action, especially regarding the innovative content
- Assistance in the development of documentation and outputs that will capture and disseminate lessons learnt, good practices, etc. To the wide European audience
- Support to ensure that the action remains on track and is in line with the agreed proposal

- 2) Participation to the activities of the Urban Development Network

- 3) Participation to national/international conferences to share lessons learnt and good practice on ongoing basis

*Deliverables:*


- Thematic deliverables produced by UIA Experts on ongoing basis
- Other deliverables related to capitalization activities

## C. WP Communication


Activities under this WP are standardized and a list of 7 activities is proposed.

1. Among the 7 activities listed, only one is compulsory: the final dissemination activity.

A 3.7.	Final dissemination activity (mandatory)	<input type="text" value=""/>	Start date	End date
	40 / 200 characters	0 / 500 characters	<input type="text" value=""/>	<input type="text" value=""/>

- The applicant is free to choose among the activities relevant for his project, and fill them in.
- For each selected activity, deliverables should be described – it is possible to add as many deliverables as planned by the project by clicking on 

4. The applicant is also free to delete the activities which he does not intend to implement. In order to delete an activity, click on the “close” sign on the right side

5. Likewise, it is possible to add a type of activity which is not included in the list –click on  Activity at the end of the list of activities

#### D. WP Investment

The WP Investment has a slightly different logic than the other WPs. the budget can be filled in only once all the individual investments have been added. Besides filling in all the necessary fields, the following steps are compulsory:

- A. Create the Investment WP and save it (after giving it a name for instance)

- B. Select all participating partners in the WP

- C. Create the individual investments by clicking on “+ investment”

- D. Select all participating partners in each investment
- E. You can now fill in the budget in the WP Investment

## V. How to add users

Once the tabs “Summary” has been filled in and saved, new users can be created.

- A. By clicking on **Dashboard**, the applicant accesses the following overview:

The dashboard shows the project details for 'iyèhui' (Index Number: UIA01-035). It includes a 'Project History' table and a 'Project Users' table.

Project History		
Title	Version	Last Update
Application Form	1	albert.mascotte@eu.com 25/02/2016 11:32

Project Users			
Number	Name of organisation in original language	Email	Status
MUA		Albert.Mascotte@eu.com	Active

- B. By clicking on **Modify Users**, an overview of all users related to the project is displayed:

The 'Modify Users' page shows a list of project users for 'iyèhui', Application Form version 1.

Number	Institution Original	Email	Status
PP		Albert.Mascotte@eu.com	Active

- C. A new user can be added with a click on **+ New User**
- D. Once the requested information is filled in, a click on **+ Add User** is necessary.

The 'Add User' form contains the following fields:

- Partner:** A dropdown menu with 'Please Select' as the current selection.
- Role:** A dropdown menu with 'Please select' as the current selection.
- Email Address:** A text input field.

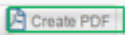

At the bottom, there are two buttons: **+ Add User** and **Cancel**.

- E. The new user will receive an email with an activation link. After clicking on the link, the account is activated and a password is issued.



## VI. Submission of the AF


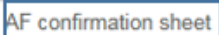
The screenshot shows the top navigation bar of the UIA application. On the left is the UIA logo. To its right, the 'Active Project' section displays 'Acronym: test' and 'Index Number: UIA01-036', with an 'Unload' button. Below this is a navigation menu with 'Dashboard' (highlighted with a yellow box), 'My Projects', and 'User Management'. A breadcrumb trail shows 'Home > Application Form > Confirmation'. A progress bar follows, with steps: Summary, Partners, Description, Workplan Per Work Packages, Project Budget, Risk Management, Confirmation (highlighted with a green box), and Overview. At the bottom, there are buttons for 'Save', 'Check for errors', 'Submit' (highlighted with a red box), 'Create PDF' (highlighted with a green box), and 'Download PDF'.



- A. Before submitting the AF, it is recommended to save the final version as a pdf file by clicking on 
- B. Only if all automatic checks are successfully passed the AF can be officially submitted by clicking on 
- C. After submission, the applicant will receive an automatic confirmation email. Please note that the submission of the project proposal is finalized only after the upload of the confirmation sheet.

## VII. Upload of the Confirmation Sheet

To complete the submission of the project proposal, the Confirmation Sheet (the last page of the AF pdf) must be printed, signed, scanned and uploaded.

The screenshot shows the 'AF confirmation sheet' upload page. The top navigation bar is identical to the previous screenshot. The breadcrumb trail is 'Home > Application Form > AF confirmation sheet'. Below the breadcrumb is a red tab labeled 'AF confirmation sheet' and a 'Back to list' button. The main content area is divided into two sections: '1. Templates' and '2. Upload'. The '1. Templates' section has a 'Template Name' field with 'AF confirmation sheet' selected. The '2. Upload' section has a 'Document Type' dropdown menu set to 'Confirmation Sheet'. Below this is a 'File Name' field with a 'Select' button (containing a magnifying glass icon). At the bottom left of the upload section is an 'Upload' button (containing a cloud icon).

- A. The user clicks on  and then on 

- B. The user selects the scanned Confirmation Sheet by clicking on 
- C. the user uploads the Confirmation Sheet by clicking on 

## VIII. Helpdesk and technical support

For any problems you might experience with the EEP, please contact the helpdesk at [info@uia-initiative.eu](mailto:info@uia-initiative.eu)