Technical guidance for the Electronic Exchange Platform (EEP)

This guidance contains key technical information on the operation and use of the Electronic Exchange Platform (EEP) of the European Urban Initiative (EUI). 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 EUI Guidance which is also available on the EUI website.

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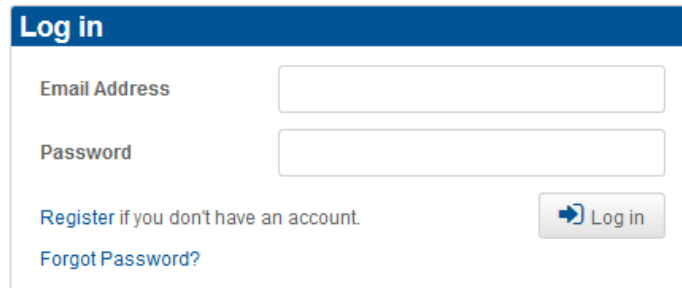
TECHNICAL INFORMATION AND SYSTEM REQUIREMENTS

The EEP is a web application which can be accessed with recent versions of most common browsers (e.g. Google Chrome, Microsoft Edge, Mozilla Firefox). The functionality of the system follows the common standards of web applications for entering and submitting data.
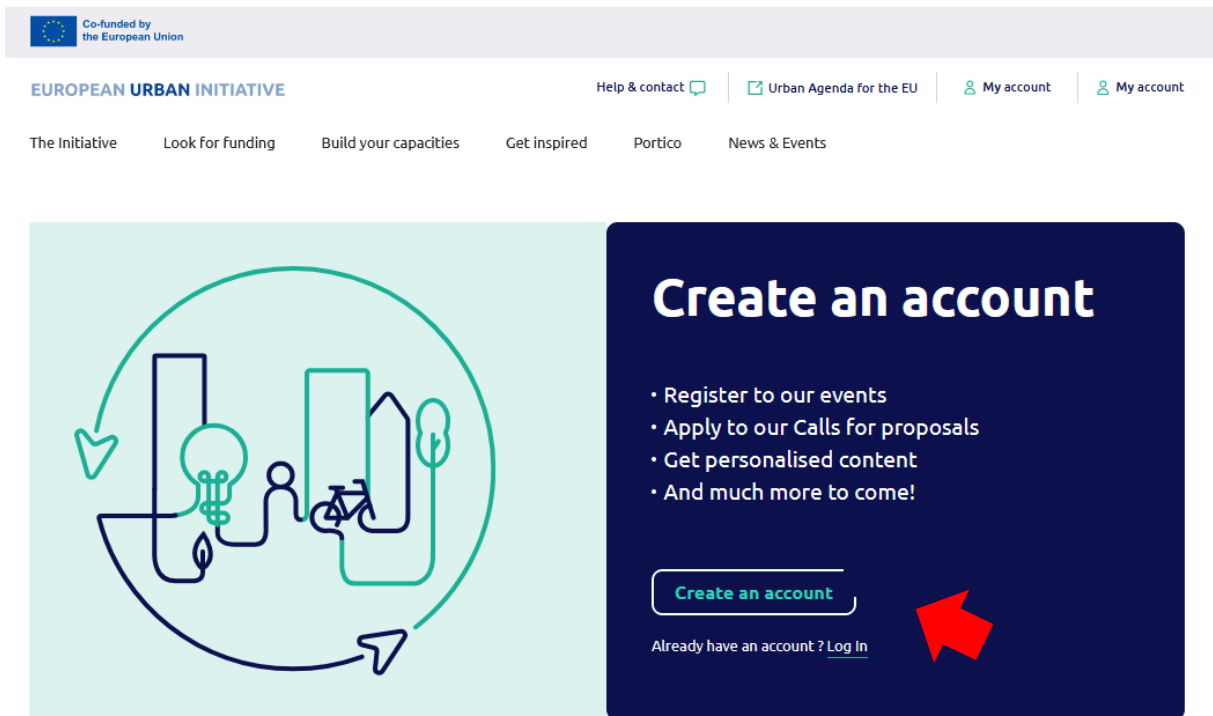
1. ACCESS AND REGISTRATION

The EEP can be accessed at the following link: https://eep.urban-initiative.eu

To use the EEP, each applicant (or user) must first create a personal account by clicking on "Register" on the EEP homepage.

The user will be automatically redirected to the EUI website, where the account creation will take place.

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(see next page preview of the registration form)

After having filled in and submitted the registration form, a confirmation email is automatically sent to the email address provided in the form. To activate the account, the applicant must click on the link included in the email.
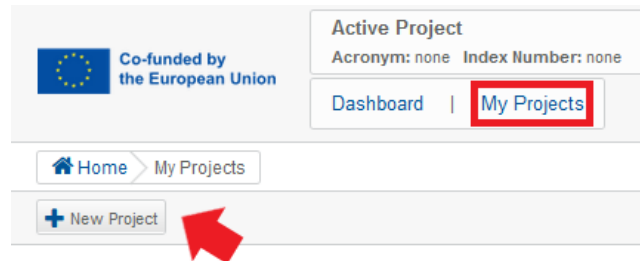
Any user can modify her/his password by clicking on her/his name in the upper right corner of the screen.
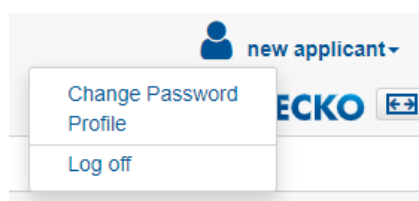
A password recovery function ("Forgot password?") is also available on the EEP homepage.

2. FILLING IN THE APPLICATION FORM

To create your Application Form (AF) click on "+ New Project" under the section "My Projects" of your dashboard.
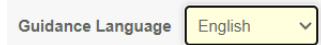

The menu of an AF looks as follows:

The following important aspects must be remembered when filling in the AF:

▷ Guidance to fill in the AF is always indicated by blue info bubbles 🛈 and is **available in 24 languages**.

To select the language of your choice, a drop-down menu is available on the top right side of the AF menu: Guidance Language English ⌄

▷ All fields in all AF tabs are **mandatory**. After clicking on ⊘ Check for errors applicants can check if the fields are correctly filled in.

When a section is correctly filled in, the "error/warning" symbol ❗ alerting the presence of inconsistent/missing information turns into a "green light" ✔ .
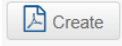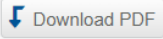
Although automatic checks are foreseen in the EEP, **it is still the applicant's responsibility to verify that the AF is properly filled in**.

▷ **Data should be saved regularly** by clicking on 🖫 Save to avoid losing them in case of technical issues (e.g. interruptions of the internet connection). Do not use the "Enter" key of your keyboard to save data while filling the forms as it may lead to unexpected results. Always use the commands provided by the EEP interface.

Always remember to save the data before leaving a section in the AF; otherwise changes will be discarded!

▷ Being inactive for a long period may automatically end your session for security reasons and unsaved data will be lost.

▷ Fields in the EEP have **character limitations**. Characters in excess will not be considered. Please note that the punctuation and spaces between words or paragraphs are considered as characters.

▷ The sequential order of the predefined Work Packages and activities follows the order in which they were added in the EEP AF template. This order cannot be changed by the applicant.

▷ The current call for proposals has different topics. In part A – Summary, an applicant has to select first one topic. Based on this, the EEP will automatically indicate in relevant drop-down menus the associated result and output indicators (respectively in part C – Description and part D – Workplan).

Should the applicant decide to modify at a later stage the topic selected in part A - Summary, the result and output indicators should be adjusted accordingly. The "error/warning" symbol ❗ is alerting the presence of inconsistent/missing information in parts C and D. It remains the responsibility of the applicant to carefully revise and countercheck all the information present in the sections addressing result and output indicators (e.g. description, baseline, target value, etc.).

▷ The tab 'Compare' (menu) is not active during the application phase; the latter is not meant to compare different drafted versions of a proposal.

▷ A PDF of the AF can be created at any moment by clicking on [Create] and then downloaded via [Download PDF] .

The creation of a PDF may take several minutes.

3. PARTICULAR ISSUES IN PART D – WORKPLAN

3.1. WORK PACKAGE PROJECT PREPARATION AND INITIATION PHASE

The Work Package (WP) Project Preparation and Initiation Phase is predefined by the system. The only involved and responsible partner on this WP is the Main Urban Authority (Project Partner 1). The end date of this WP is the last day before the start of the project implementation phase.

3.2. THEMATIC WORK PACKAGES AND INVESTMENTS

A Thematic Work Package (WP) has a slightly different logic than the others, as the latter can include one or several "investment" items.

Applicants are allowed to include investments within relevant Thematic WPs if needed and properly justified. As a rule, investments shall be foreseen in the EUI-IA projects only to the extent that they are necessary for the achievement of the project's outputs and results. Find more information on Investments on the EUI Guidance (2.2.6 Thematic Work Packages).

To add an "investment" item under a Thematic WP, please follow these steps:

a. Create first a Thematic WP and save it (the only compulsory field required for creating such WP is the field "Title").

b. The button "+ Investment" becomes then active on the same page. By clicking on it, a new dedicated tab appears. All the fields in this tab are editable. To validate the creation of an "investment" item, fill in all the required fields and click on Save.

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(see next page view of the above-mentioned tab)

Once the new "investment" item is saved, you can see a summary table of the investment(s) back in the Thematic WP page. You can modify an investment at any time by clicking on the related item in the table.

Please note that the budget assigned for the investment will be added automatically in the "Indicative budget breakdown per activities and investments" at the end of the Thematic WP page.
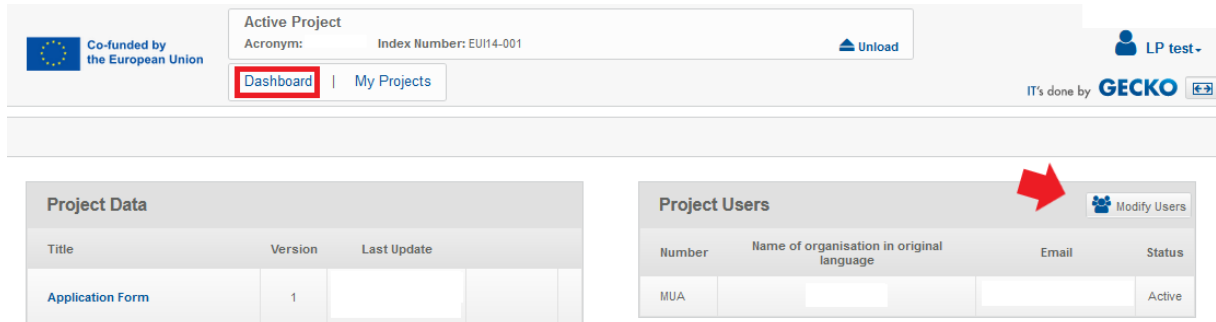
3.3. CLOSURE WORK PACKAGE

The Work Package (WP) Closure is predefined by the system. The only involved and responsible partner on this WP is the Main Urban Authority (Project Partner 1). The end date of this WP is the last day of the third month after the end of the project implementation phase.

4. HOW TO ADD USERS TO YOUR PROJECT APPLICATION FORM

New users can be added to the project AF as soon as the proposal is created in the system. To do so, the lead applicant should access the Dashboard and click on the button "Modify users" in the table "Partner Users".
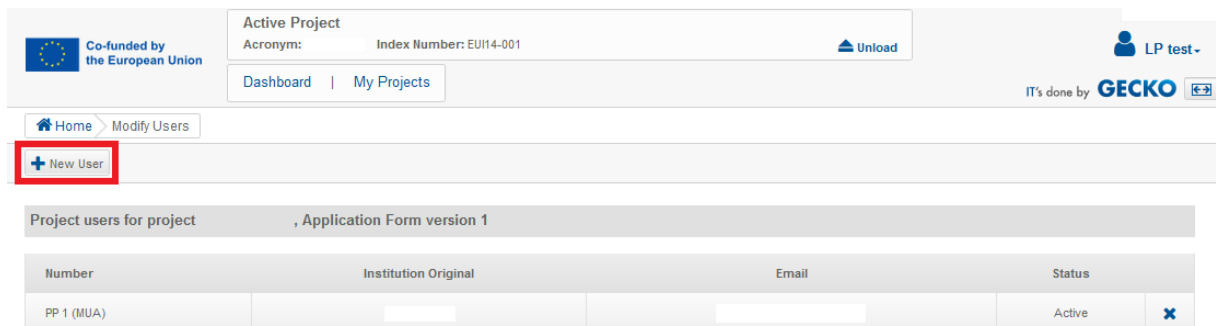
An overview of all users related to the project is then displayed. A new user can be added by using the button "+ New User" and then filling in all the requested fields.

The new user will receive an automatic email to complete her/his account creation (see section 1 of this document).

➢ Point of attention: AF submission

New users get automatically edit rights – i.e. an user can modify/fill in all the AF sections and submit it. We strongly recommend to identify and designate the user responsible for the submission of the AF beforehand.

➢ Point of attention: risk of overwriting information
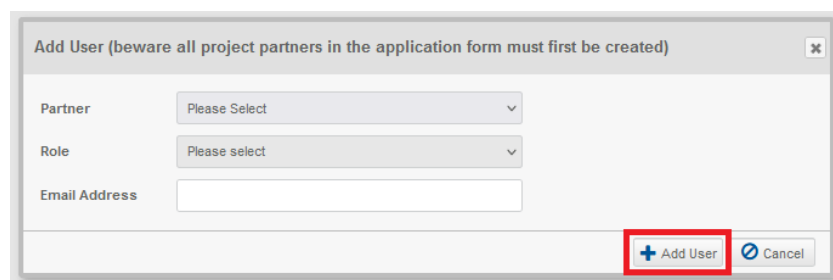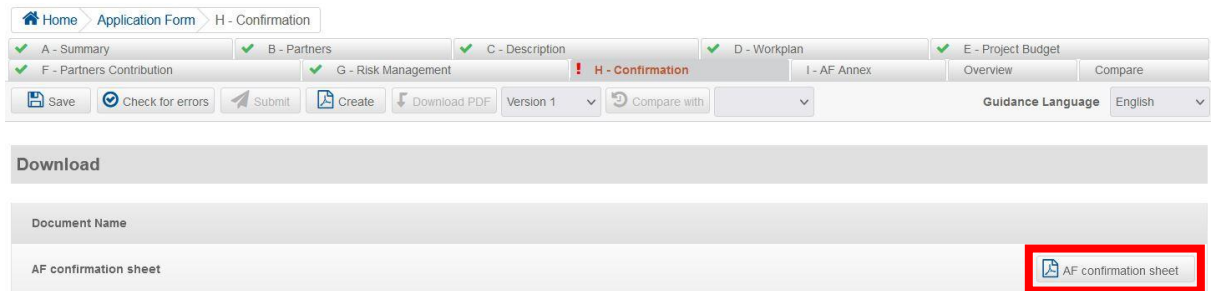
To a certain extent, it is possible for different users to work in parallel (at the same time) on the same AF. When working in parallel, users have to make sure though that they are not working simultaneously in the same section or sub-section as there is the risk to overwrite information.

Granting access rights to new users should be done parsimoniously, and coordinating who is working when in the AF is crucial for a smooth use of EEP during the application phase.

5. HOW TO UPLOAD THE CONFIRMATION SHEET
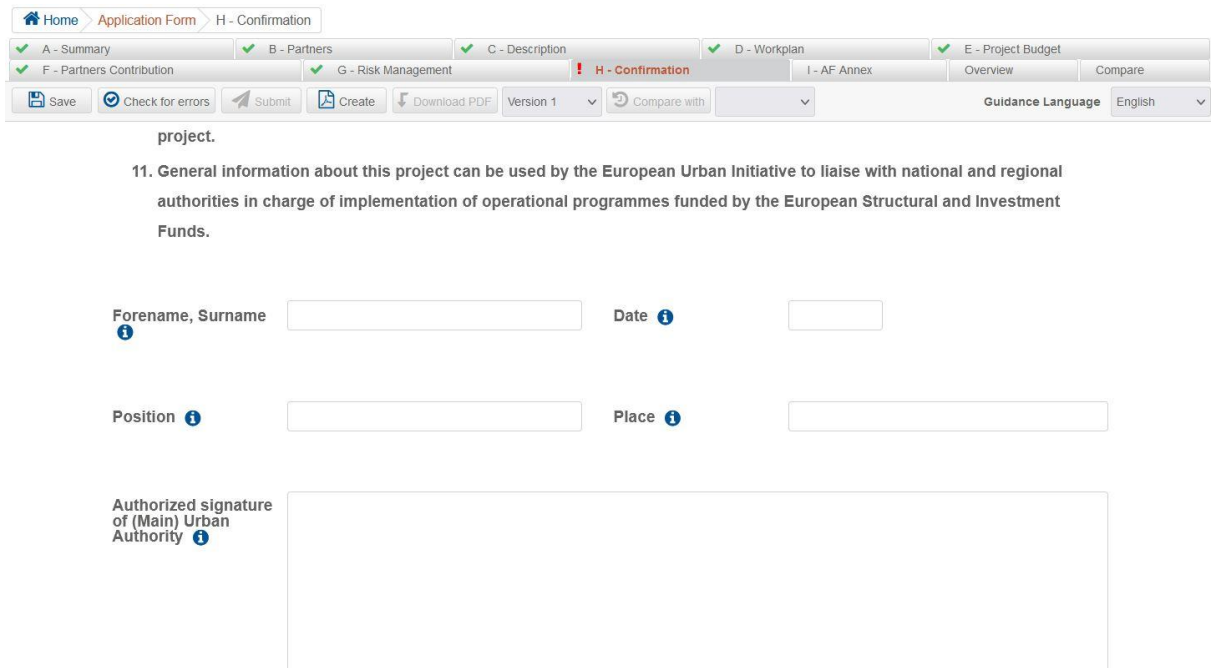
To submit a project proposal, the Confirmation Sheet (CS) must beforehand be downloaded (see below button "AF confirmation sheet"), printed, signed, scanned in PDF format and then uploaded in the AF.

The CS is accessible at any time during the application process under the section "H - Confirmation" of the AF.

The applicant has the possibility to add information on the person in charge of the signature of the CS by filling in the following fields in the section "H – Confirmation":

When downloading the CS, the existing information on the fields above is automatically generated on the PDF.

➢ How to **upload** the Confirmation Sheet?

The user selects the scanned document (in PDF format) to be uploaded by clicking on "Select" (step 1 – see next screenshot). When this is done, the user uploads it in the EEP by clicking on "Upload" (step 2).

The document appears right after under the table "Manage Uploaded Documents" (step 3). If this is not the case, the upload was not successful and the steps 1 and 2 should be repeated.

➢ Point of attention: e-signature allowed

All applicants must upload a signed Confirmation Sheet. The use of electronic signature is accepted.

6. HOW TO UPLOAD AN ANNEX (OPTIONAL)

One additional document can be uploaded to the AF as annex - the maximum size of the file is 5 MB (preferably as PDF). Applicants can upload this annex in section I – AF Annex.
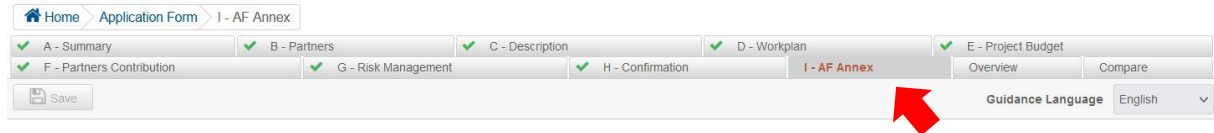
▷   How to **upload** an annex?

The user selects the scanned document (in PDF format) to be uploaded by clicking on "Select" (step 1 – see next screenshot). When this is done, the user uploads it in the EEP by clicking on "Upload" (step 2).

The document appears right after under the table "Manage Uploaded Documents" (step 3). If this is not the case, the upload was not successful and the steps 1 and 2 should be repeated.
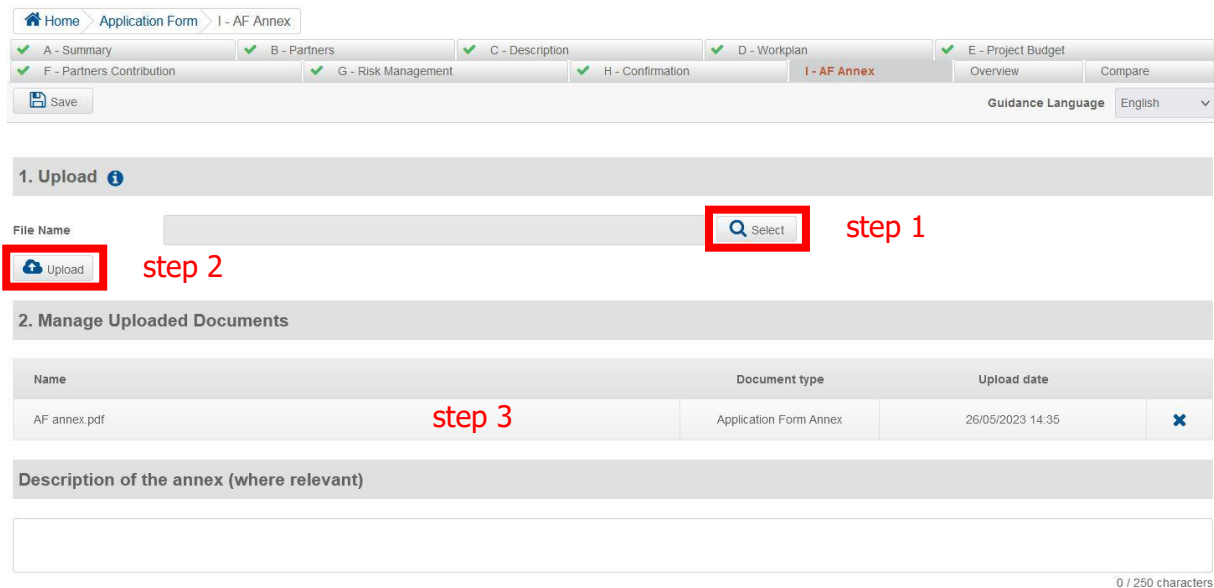
7. SUBMISSION OF THE APPLICATION FORM

Once the Confirmation Sheet is duly signed and uploaded in the section "H - Confirmation" (see previous section), the applicant is in the position of submitting the AF.

The AF can be officially submitted only when all automatic checks are successfully passed and no errors are detected in each section (in other words, when a "green light" ✔ appears next to each section in the AF menu). The button "Submit" is then active.
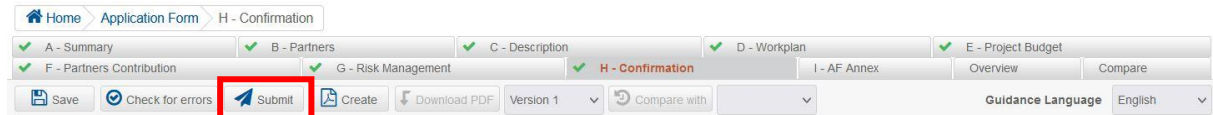
> ▷ Point of attention: Completeness and consistency checks are run by the system, **but** the EEP does not check the quality of information provided. Therefore, it remains the applicants' responsibility to read carefully information included in the EUI guidance, go through their AF and verify that all necessary fields are properly filled in.

After clicking on "Submit", a pop-up window appears asking you to confirm the submission of your AF: please read it carefully and validate your submission by clicking on "Yes".

After the submission, the applicant will receive an automatic confirmation email.

Application Form EUI02-002 Submitted

Dear   ,

Your Application Form has been successfully submitted. We thank you for your confidence in the EUI Initiative.
The reference details are as follows:

• Application Form Reference number: EUI02-002
• Acronym:
• Submission date/time: 26/05/2023 17:28

Please retain this message for your records.

Please note that you can edit and resubmit your form for as long as the call for Application Forms is open. If your form is not resubmitted after modification, it will not be taken into consideration.
Please refer to the Technical guidance for the Electronic Exchange Platform for details.

This is an automated message, please do not reply.

All the best

The European Urban Initiative team

At any time, applicants can generate a PDF version of the AF by clicking on "Download PDF" in the AF menu.
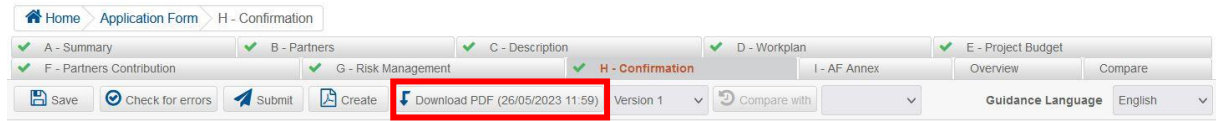
8. MODIFICATIONS AFTER SUBMISSION

Applicants are allowed to modify their application until the closure of the call for proposals. In order to do modifications after submission, the applicant can revert the AF by clicking on "Revert".
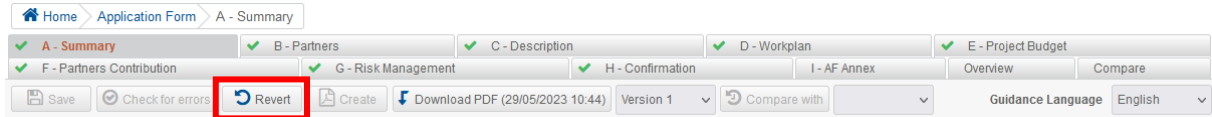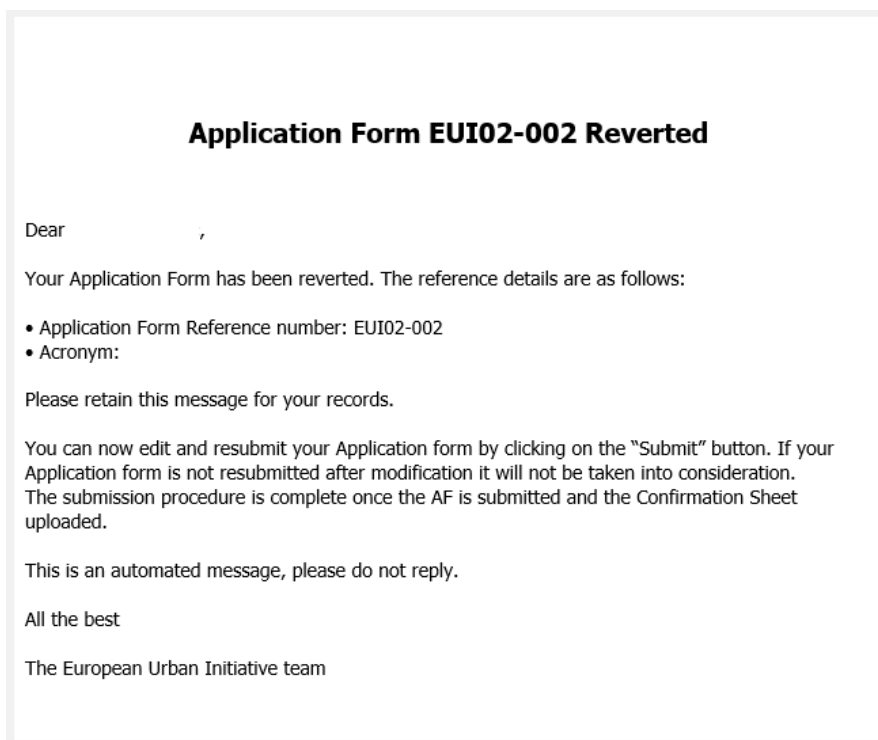

After reverting your application, a notification will be sent to the applicant.

Application Form EUI02-002 Reverted

Dear   ,

Your Application Form has been reverted. The reference details are as follows:

• Application Form Reference number: EUI02-002
• Acronym:

Please retain this message for your records.

You can now edit and resubmit your Application form by clicking on the "Submit" button. If your Application form is not resubmitted after modification it will not be taken into consideration. The submission procedure is complete once the AF is submitted and the Confirmation Sheet uploaded.

This is an automated message, please do not reply.

All the best

The European Urban Initiative team

Please note that a reverted AF needs to be **resubmitted** in order to make it valid for evaluation. The submission has to be done before the closing time of the call for proposals.

9. HELPDESK AND TECHNICAL SUPPORT

For any problems you might experience with the EEP, please contact the helpdesk at innovativeactions@urban-initiative.eu or you can also call us on +33 (0)3 61 76 59 34.

To facilitate the handling of your requests, we invite you to communicate us the following elements (when relevant):

- the project name
- the project ID
- the user account facing a problem (i.e. the email address used during the registration phase)
- a screenshot and/or the alert message appearing on your screen