

Technical guidance for the Electronic Exchange Platform (EEP) Call for Peer Reviews

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

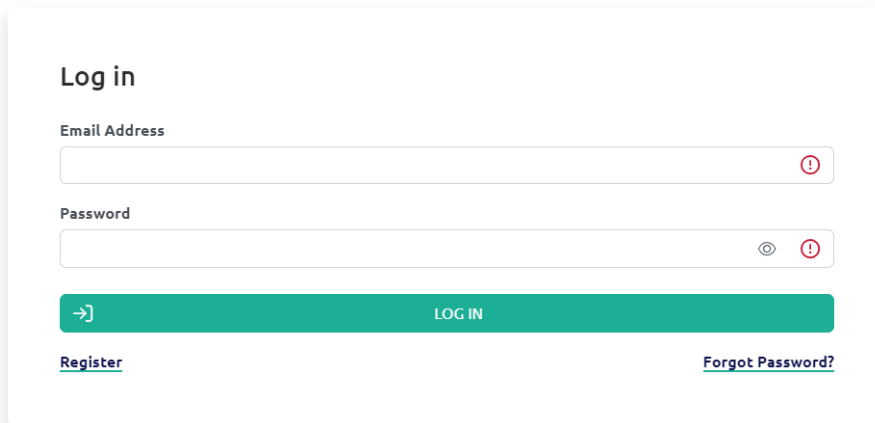
The EEP is a web application which can be accessed with recent versions of most common browsers (e.g. Google Chrome, Microsoft Edge, Mozilla Firefox). The functionality of the system follows the common standards of web applications for entering and submitting data.



1. ACCESS AND REGISTRATION

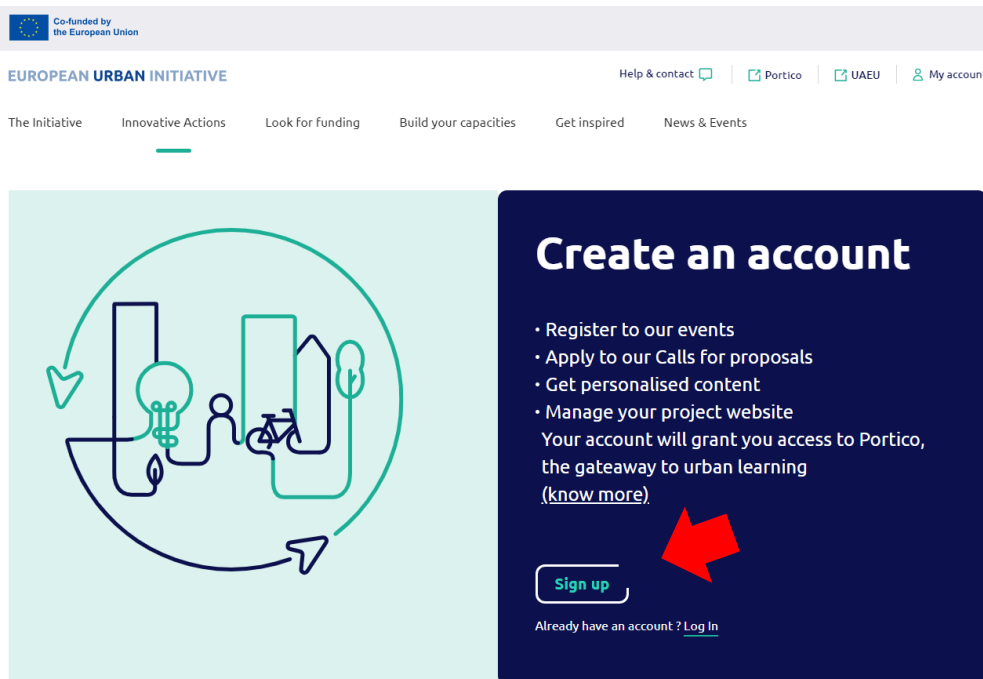
The EEP can be accessed at the following link: <https://connect.urban-initiative.eu>

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



The screenshot shows a login form titled "Log in". It contains two input fields: "Email Address" and "Password". The "Password" field has an eye icon and a red warning icon. Below the fields is a green button with a right arrow and the text "LOG IN". At the bottom left is a link "Register" and at the bottom right is a link "Forgot Password?".

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



The screenshot shows the homepage of the European Urban Initiative. At the top, there is a header with the European Union logo and the text "Co-funded by the European Union". Below this is the "EUROPEAN URBAN INITIATIVE" logo and a navigation menu with links: "Help & contact", "Portico", "UAEU", and "My account". A secondary navigation menu includes "The Initiative", "Innovative Actions", "Look for funding", "Build your capacities", "Get inspired", and "News & Events". The main content area features a large illustration of a city with a lightbulb, a person, and a bicycle, all connected by a circular arrow. To the right of this illustration is a dark blue box with the heading "Create an account". Below the heading is a list of benefits: "Register to our events", "Apply to our Calls for proposals", "Get personalised content", and "Manage your project website". A sub-heading states: "Your account will grant you access to Portico, the gateway to urban learning (know more)". A red arrow points to a "Sign up" button. Below the button is the text "Already have an account? Log In".



(see next page preview of the registration form)

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EUROPEAN URBAN INITIATIVE

Help & contact | Portico | UAEU | My account

The Initiative | Innovative Actions | Look for funding | Build your capacities | Get inspired | News & Events

← Home

Create an account

To attend our events, apply to our calls for proposals & get personalised content

- Personal information
- Job and organisation
- Interests
- Privacy policy & Data Protection

Personal information

About you

First name *

Last name *

Email *

Phone number

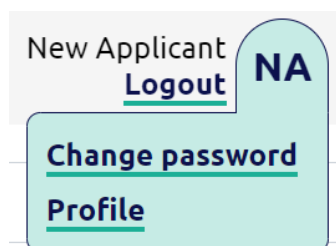
Password

Password *

Confirm password *

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.

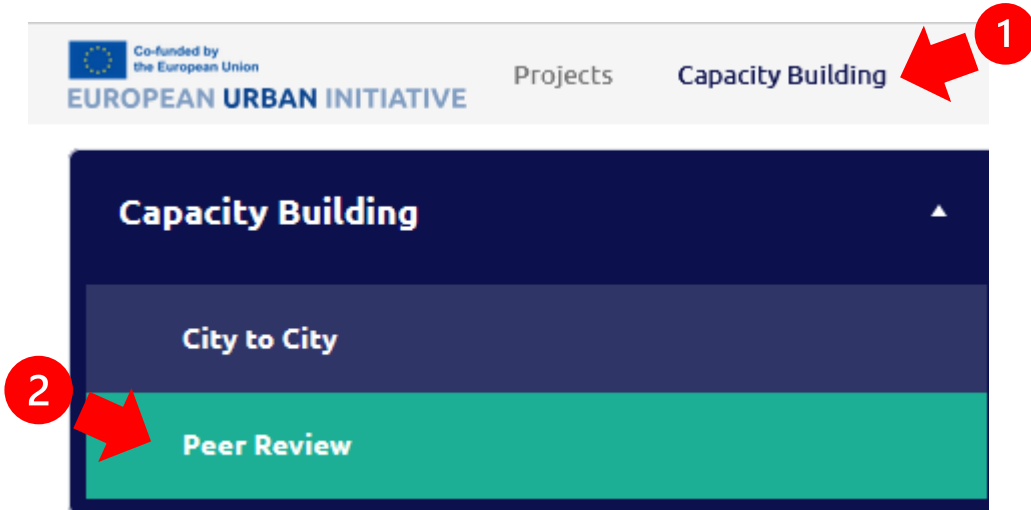
Any user can modify her/his password by clicking on her/his initials in the upper right corner of the screen and then on "Change password".



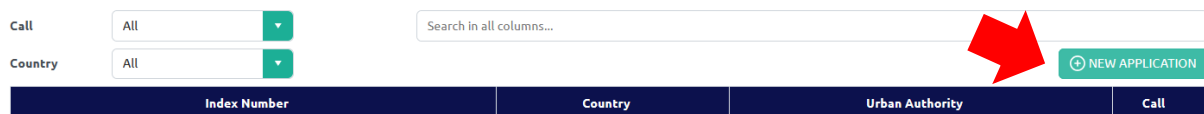
A password recovery function ("Forgot password?") is also available on the EEP homepage (see screenshot on page 2 of this document).

2. FILLING IN THE APPLICATION FORM

To create an Application Form (AF) for Peer Reviews, the user must first go in this section "Capacity Building", then in the subsection "Peer Review" of the dashboard.



The user must click on "+ New Application", in the top right corner of the page.



A new page will open. The user is then required to fill in at least the section "A.1 Call" and "A.10. For which role are you applying" of the part A – Applicant Information and click on the "Start your application" button to complete the creation of a new AF.

A screenshot of a web form titled "Part A - Applicant Information". The form has two main sections: "A.1. Call" and "A.10. For which role are you applying?". The "A.1. Call" section has a dropdown menu with "Call for Peer Reviews - autumn 2024" selected. The "A.10. For which role are you applying?" section has a heading "Please select (City under review, Peer reviewer or both)" and two checkboxes: "City under review" and "Peer reviewer", both of which are unchecked. Below the form is a blue banner with an illustration of a person at a computer and a button labeled "START YOUR APPLICATION".

- Point of attention 1: you may change the roles you selected at a later stage in the application.

- Point of attention 2: only when both questions have been completed does the button "Start your application" become active.

The menu of an AF looks as follows. All fields in all AF parts are **mandatory**.



→ The "error/warning" symbol is alerting the presence of inconsistent/missing information in a specific part of the AF.



→ When a section is correctly filled in, the "error/warning" symbol alerting the presence of inconsistent/missing information turns into a "green light".

The screenshot shows a dark blue sidebar menu for an 'Application form'. At the top is a 'Dashboard' dropdown. Below it, the 'Application form' section is expanded, showing several items with status indicators (checkmarks or X's) and expand/collapse arrows:

- ✔ A - Applicant Information
- ✘ B - Challenge and Motivation (with an expand arrow)
- ✔ Cities under Review (highlighted in a teal bar)
- ✔ Peer Reviewers (with a collapse arrow)
- ✘ C - Endorsement

Although automatic checks are foreseen in the EEP, **it is still the applicant's responsibility to verify that the AF is properly filled in.**

To move to a next section of the AF, users may:

- Click on the "Save and next" at the bottom of the page.




- Click on the title of the section they would like to go to.


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

- Guidance to fill in the AF is always indicated by info bubbles ⓘ.
- Being inactive for a long period may automatically end the user session for security reasons and unsaved data will be lost. A timer is available next to the user name – this



is reset to an hour each time a page is saved or the user moves to another part of the AF.

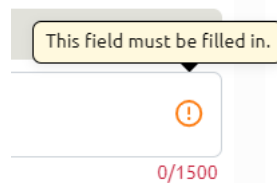


- Fields in the EEP have **character limitations**. Characters in excess will not be considered. The punctuation and spaces between words or paragraphs are considered as characters. Please note that as long as the character limitations are not respected in every field of a part of the AF, the following “error/warning” symbol  remains active in the left menu.

- **Data should be saved regularly** by clicking on  (at the top of the left menu) to avoid losing them in case of technical issues (e.g. interruptions of the internet connection). Do not use the “Enter” key of the 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!


- Warning symbols   are present throughout the AF to guide the applicant step by step – read carefully the associated supporting messages by passing your cursor on them.



- Users may apply to one or two roles in the current call for Peer Reviews. In part A – Applicant Information, an applicant must select the role. Based on this, the EEP will automatically indicate in relevant drop-down menus the associated sections.

Should the applicant decide to modify at a later stage the roles selected in part A – Applicant Information, the EEP will automatically adjust the dashboard of the AF.

All applicants must confirm endorsement from an authorised signatory, with their email address.

- By clicking on the function “Check for errors”  (at the top of the left menu), applicants can see if the fields present on the page checked are correctly filled in or not. The results of the check are displayed at the top of the page.

'Total number of inhabitants' must be greater than 0.


Part A - Applicant Information

3. PARTICULAR ISSUES IN PART B – CHALLENGE AND MOTIVATION

3.1. PART B.1 - CITIES UNDER REVIEW

Part B.1 – Cities under review is composed of 6 questions aiming at understanding the topics and challenges of the review.

In question B.1.3 “What are the three challenges you would like to address in the peer review?”, the user must first select three challenges.




B.1.3 What are the three challenges you would like to address in the peer review? ⓘ

| ⓘ

- Strategic dimension
- Territorial focus
- Governance
- Cross-sectoral integration
- Funding and finance
- Monitoring

9/1500

Then, a text box appears for each challenge, in which the user must describe the challenge.



B.1.3 What are the three challenges you would like to address in the peer review? ⓘ

Territorial focus ✕ Strategic dimension ✕ Governance ✕ ✕

Challenge 1 ⓘ ⓘ 0/800


Challenge 2 ⓘ ⓘ 0/800


Challenge 3 ⓘ ⓘ 0/800

In question B.1.5 “Who will take part in the peer review?”, the user must provide the institution, name, position and expected contribution to the exchange of **at least** one staff member of the urban authority involved in the design/implementation of the strategy.

Up to four participants can be added by clicking on the button '+ Add participant', at the bottom of question B.1.5.


B.1.5 Who will take part in the peer review? ⓘ

Institution type ⓘ	Full name ⓘ	Position ⓘ	Expected contribution to exchange ⓘ
Please select  ⓘ	<input type="text"/> ⓘ 0/200	<input type="text"/> ⓘ 0/200	<input type="text"/> ⓘ 0/800

 [+ ADD PARTICIPANT \(UP TO 4\)](#)

If the user only selected the role of 'City under review', the user can move to Part C – Endorsement. If the user selected the role of 'Peer reviewer', the "Save and Next" button will move them Part B.2 - Peer reviewers.

No Peer reviewers available.

[NEXT →](#)  [+ PEER REVIEWER](#) 

3.2. PART B.2 – PEER REVIEWERS

In Part B.2., the user may add up to four peer reviewers from the same urban authority. The user must click on the button '+ Add a peer reviewer', on the top right corner of the page.

No Peer reviewers available.

[NEXT →](#)  [+ PEER REVIEWER](#)

- Point of attention 1: if you click on the next button, the EEP will move to part C – Endorsement.

After completing the profile of Peer reviewer 1, the user has two options:

Option 1 : the user only wants to add the profile of one peer reviewer. The user click on the button "Save and next" at the bottom left of the page to go to part C - Endorsement.

[SAVE AND NEXT →](#)

Option 2: the user wants to add one to three more profiles of peer reviewers. The user click on the button "Save and add peer reviewer".

[SAVE AND ADD PEER REVIEWER](#)

- Point of attention 2: all peer reviewers add must be directly employed by the same urban authority as the one described in Part A – Applicant Information.

In questions B.2.1.4 and B.2.1.5, the user must first select three to five fields of expertise.

B.2.1.4 What are your operational fields of expertise in Sustainable Urban Development strategies? ⓘ

| ⓘ

- Strategic dimension
- Territorial focus
- Governance
- Cross-sectoral integration
- Funding and finance
- Monitoring
- Other

Then, a text box appears for each field of expertise, in which the user must describe their expertise.

Thematic field of expertise 1 ⓘ

0/800

Thematic field of expertise 2 ⓘ

0/800

Thematic field of expertise 3 ⓘ

0/800

Thematic field of expertise 4 ⓘ

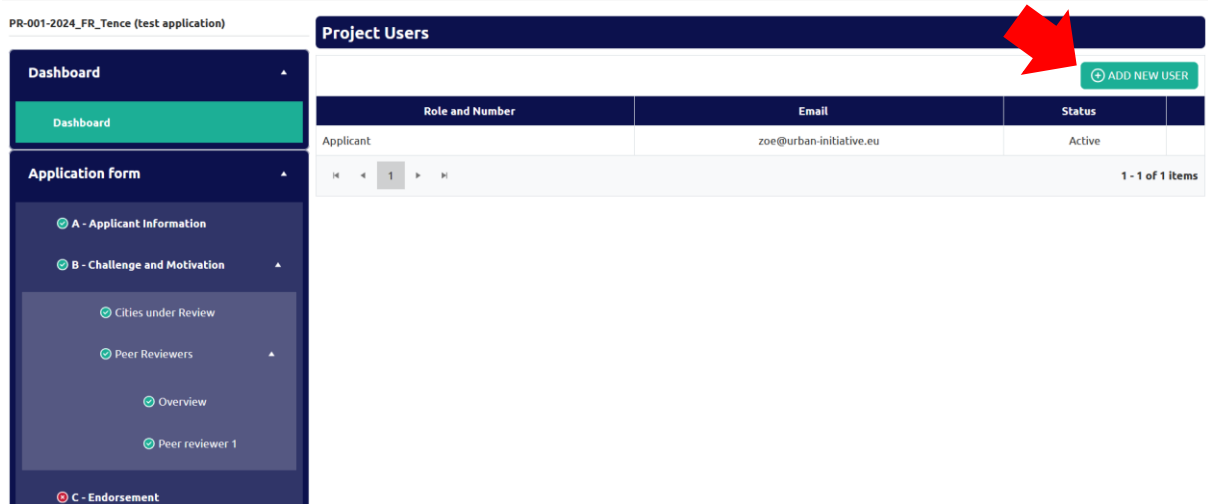
0/800

Thematic field of expertise 5 ⓘ

0/800

4. HOW TO ADD USERS TO YOUR PROJECT APPLICATION FORM

New users can be added to the AF as soon as the proposal is created in the EEP. To do so, the lead user should access the Dashboard section (left menu) and move to the table "Project Users".



PR-001-2024_FR_Tence (test application)

Project Users

+ ADD NEW USER

Role and Number	Email	Status
Applicant	zoe@urban-initiative.eu	Active

1 - 1 of 1 items

Dashboard

Application form

- A - Applicant Information
- B - Challenge and Motivation
 - Cities under Review
 - Peer Reviewers
 - Overview
 - Peer reviewer 1
- C - Endorsement

A new user can be added by using the button "+ Add New User" and then filling in all the requested fields.



Add New User

Partner

Please select...

Email

CANCEL SAVE

The new user will receive an automatic email to complete her/his account creation (see section 1 of this guidance). If the person has already an active account, s/he will receive a notification informing that s/he has been granted an access to the AF in question.

➤ Point of attention: AF submission

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


➤ Point of attention: risk of overwriting information

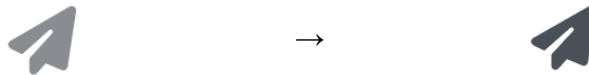
To a certain extent, it is possible for different users to work in parallel (at the same time) on the same AF. When working in parallel, users must make sure that they are not working simultaneously in the same section or sub-section, as they run the risk of overwriting information.

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.

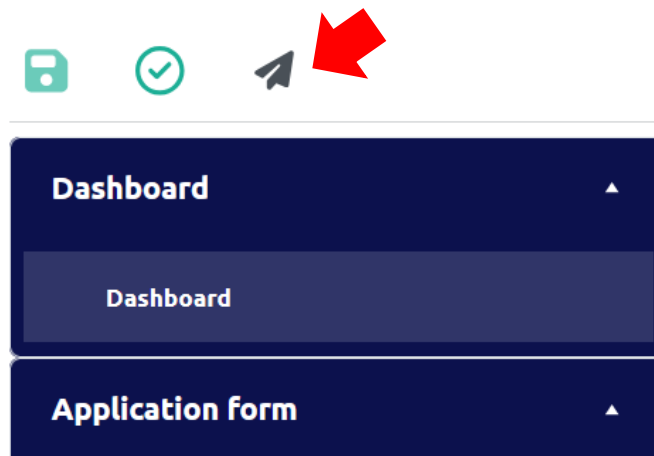
5. SUBMISSION OF THE APPLICATION FORM

Once all fields are properly completed, the user 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 part of the AF (in other words, when a “green light”  appears next to each part in the left menu). The button “Submit” becomes then active (i.e. from light to dark grey).



This specific function is present at the top of the left menu only in the part A – Applicant Information and in the part C – Endorsement.



- Point of attention 1: 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 the applicant to confirm the submission of the AF: please read it carefully and validate the submission by clicking on “Yes”.

- Point of attention 2: The user cannot modify their AF after submission, even if the call is still open.

After the submission of the AF, the applicant will receive an automatic confirmation email:

Peer Review Form PR-001-2024_FR_Tence (test application) Submitted



European Urban Initiative

To Zoé FOURNAND

If there are problems with how this message is displayed, click here to view it in a web browser.



Fri 18/10/2024 16:01

Dear Zoe Fourmand,

Your Application Form has been successfully submitted. Thank you for your interest in the EUI – Peer Review Call for Proposals.

The reference details are as follows:

- Application Form Identification number: PR-001-2024_FR_Tence (test application)
- Submission date and time: 18/10/2024 16:00

Please retain this message for your records.

This is an automated message, please do not reply.

Best regards,

The European Urban Initiative Team

- Point of attention: The confirmation email is sent out to the user having triggered the submission of the AF.

6. HELPDESK AND TECHNICAL SUPPORT

For any problems you might experience with the EEP, please contact the helpdesk at capacitybuilding@urban-initiative.eu.

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

- the application name
- the application 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



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