



# Electronic Exchange Platform

## Technical Guidance Online Application

(version 23 December 2016)



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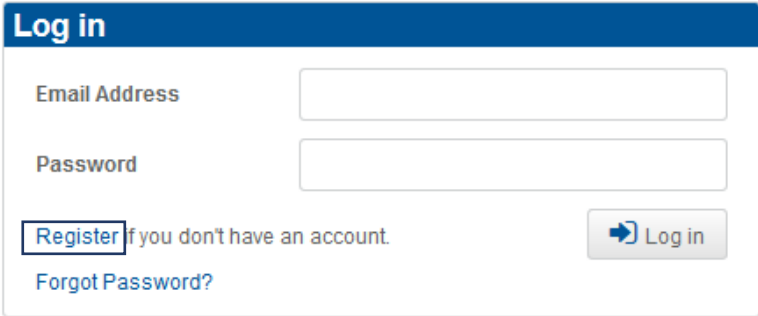
This guidance contains key technical information on the operation and use of the Electronic Exchange Platform (EEP) of the Urban Innovative Actions Initiative (UIA). Applicants are requested to complete and submit their application form (AF) via the EEP. Therefore it is highly recommended to read this 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). It should be noted that Firefox has proven to be the most reliable browser so far. 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>



- B. To use the EEP, each applicant (or user) must first register by clicking on [Register](#). The login/password of applicants who registered during Call 1 are still valid
- C. In the registration form, the following fields need to be filled in:



- 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:



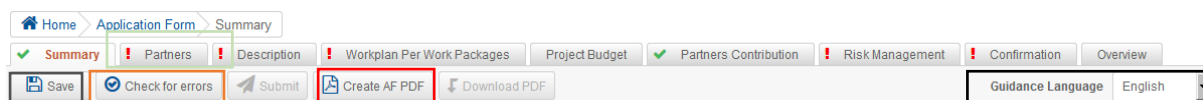
- F. Any user can modify her/his password by clicking on her/his name in the upper right corner of the screen. Beware this function is available only once a project proposal has been created.





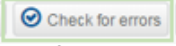



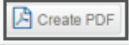
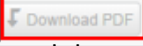
- G. EEP users are reminded that there is a “forgot password” function on the EEP access page

### 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 should also be noted that when an Application Form is submitted a PDF is automatically generated
- 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. 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.

- 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 
- 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

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

## B. WP Investment

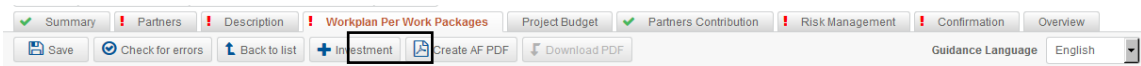
The WP Investment has a slightly different logic than the other WPs. the budget can be filled in only once all the individual investments have been added. Besides filling in all the necessary fields, the following steps are compulsory:

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

- Select all participating partners in the WP

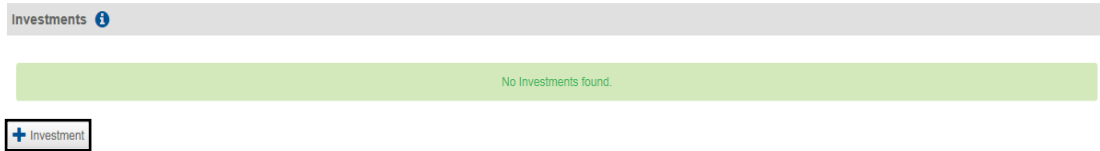
- Create the individual investment(s) by clicking on “+ investment” which is available at:

### Top of the section



### Work Plan Per Work Packages - WorkPackage 4 (Investment Work Package) ⓘ

### Bottom of the section

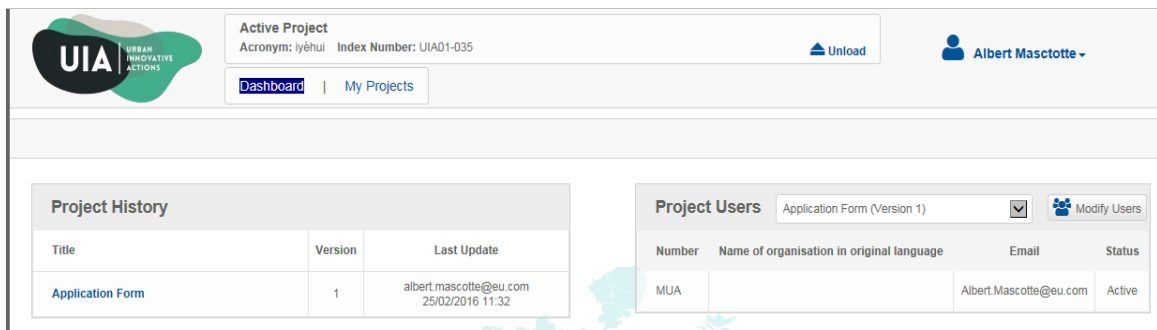


4. Select all participating partners in each investment
5. You can now fill in the budget in the WP Investment

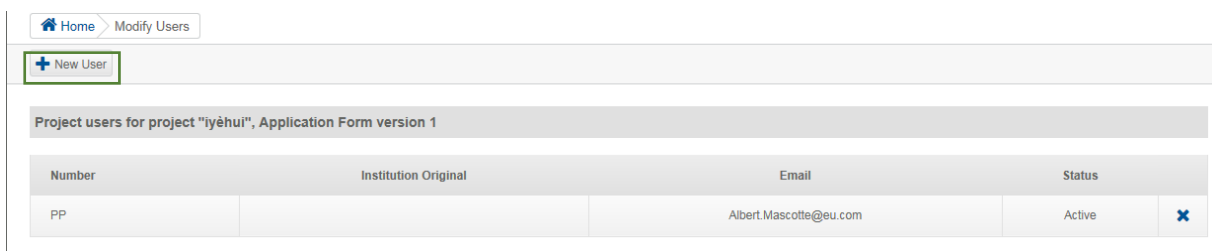
## V. How to add users

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:

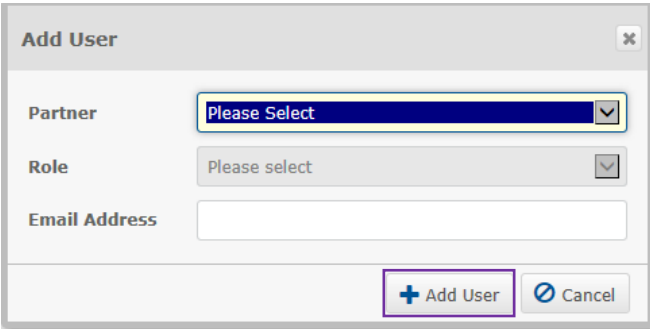


B. By clicking on **Modify Users** an overview of all users related to the project is displayed:



C. A new user can be added with a click on **+ New User**

- D. Once the requested information is filled in, a click on  is necessary.



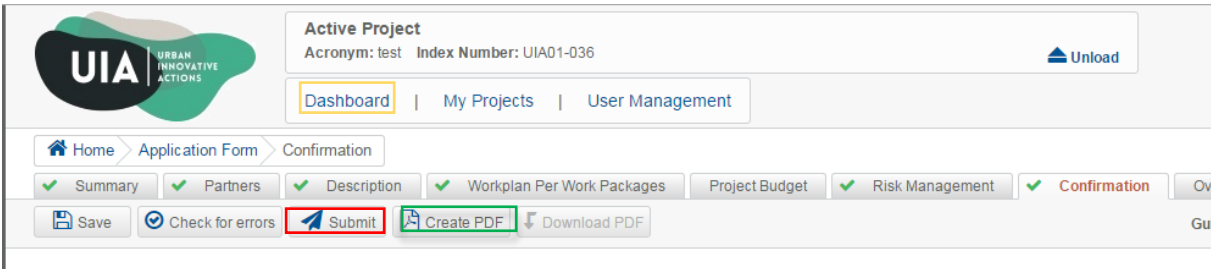
The 'Add User' dialog box contains the following fields:

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


At the bottom right, 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



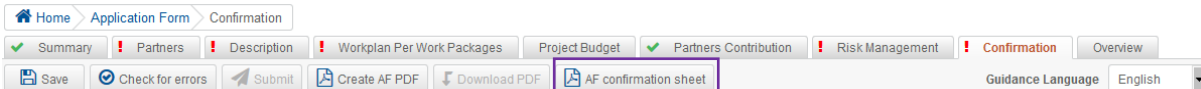
The screenshot shows the 'Confirmation' step of the Application Form submission process. The top navigation bar includes 'Dashboard', 'My Projects', and 'User Management'. The main area displays a progress bar with several steps: Summary, Partners, Description, Workplan Per Work Packages, Project Budget, Risk Management, and Confirmation (which is currently active and highlighted in red). Below the progress bar, there are buttons for 'Save', 'Check for errors', 'Submit', 'Create PDF', and 'Download PDF'. The 'Submit' button is highlighted with a red box.

- A. When submitting the AF, the final version of the Application Form is automatically saved
- 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 and the Annex

To complete the submission of the project proposal, the Confirmation Sheet must be printed, signed, scanned (PDF) and uploaded. One Annex can also be uploaded; its maximum size is 2MB and the format must be PDF. The Confirmation Sheet is accessible before or after the submission.

*Before the submission of the Application Form, the Confirmation Sheet can be downloaded*



This screenshot is similar to the previous one, but the 'Confirmation' step in the progress bar is now marked with a red exclamation mark, indicating an error or a required action. The 'AF confirmation sheet' button in the bottom toolbar is highlighted with a purple box.



After the submission of the Application Form, the Confirmation Sheet can be downloaded as well by clicking on [Dashboard](#) and then on [AF confirmation sheet](#)

The screenshot shows a web interface with a top navigation bar containing 'Dashboard', 'My Projects', and 'User Management'. Below this is a breadcrumb trail: 'Home > Application Form > AF confirmation sheet'. The main content area is divided into three sections:

- 2. Upload**: Includes a 'Document Type' dropdown menu (set to 'Please select'), a 'File Name' input field with a 'Select' button, and an 'Upload' button.
- 3. Manage Uploaded Documents**: A table with columns for 'Name', 'Document type', 'Upload date', and a delete icon (X).
- Description of the annex (where relevant)**: A text input field with a character count '0 / 250 characters'.

Name	Document type	Upload date	
AF confirmation sheet - [redacted] Copy.pdf	Confirmation Sheet	22/12/2016 11:14	X
[redacted].pdf	Application Form Annex	22/12/2016 11:15	X

In order to upload the Confirmation Sheet or the Annex:

- The user selects the scanned document (PDF) to be uploaded by clicking on [Select](#)
- The user uploads the document by clicking on [Upload](#)
- A description of the Annex can be added

## 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) or you can also call us on +33 (0)3 61 76 59 34.