Date of release: 13/10/2009
Version: 2.5

EPSS

Frequently Asked Questions (FAQ)

For support please contact:

EPSS Helpdesk
- workdays from 08:00 to 20:00 -

Phone: +32 2 23 33 760
E-mail: support@epss-fp7.org

A. General Questions:

N.B.: For PIC-related questions please also see the relevant section on CORDIS (http://cordis.europa.eu/fp7/pp-pic_en.html) or its FAQ (http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=faq).

B. Coordinators:

C. Other participants:

Questions and Answers

A. General Questions:

1. What are my options for preparing and submitting a proposal?

You can prepare and submit an application online using the EPSS system or, in exceptional cases and if allowed by the call on paper. You are strongly recommended to use the online EPSS system for preparation and submission of your proposal.

2. What are the Minimum Requirements for using the EPSS application?

Proposers will access EPSS through Web Browsers.
The Minimum Requirements are:

- An SVGA screen, i.e. a screen with a resolution of 1024x768 pixels, small fonts. Users should not use the font scaling option that is available with some browsers to enlarge the font size in the A forms, as this may lead to unpredictable results while visualizing the forms
- A connection to the Internet
- Internet Explorer 6.0 and above or
- Netscape Navigator 7.0 and above or
- Opera 6.0 and above or
- Mozilla Firefox 1.0 and above or
- Mac OS X Mozilla Firefox browser for Apple Macintosh users (Mac OS 9 is not supported and Safari - Google Chrome neither)
- JavaScript or ActiveX controls enabled (depending on browser)
- Cookies enabled browser

3. With respect to using the EPSS, what is the difference between a Coordinator and other participants'?

- Coordinators register for a specific call, define the participants of the proposal, edit electronic forms, send usernames and passwords to other participants, upload Part B files/annexes and, finally, they submit the proposal.

- Other participants use usernames and passwords for a specific call (that they receive from the coordinator), edit their own forms and send their annexes to the coordinator. Other participants can not submit the proposal.

4. Do I need to register to use the EPSS system?

Only coordinators should register. Other participants obtain the information to access the system from their coordinators.

5. I registered for an EPSS account (I pressed on register and at the end I saw that an email was sent) but I haven't received any email so far. What can I do?

When you register in EPSS, an email with the coordinator and partner account is sent automatically from noreply@epss-fp7.org. If still after a couple of hours you don't receive it, you should check your SPAM box in the case it ends up there. If it's not in the SPAM box, you should then contact the EPSS helpdesk providing some of the data you filled during the registration (e.g. the email address, or the acronym or name of the coordinator). The EPSS Helpdesk will then manually send the EPSS account to the e-mail addresses that you will indicate. It is advised that prior to the registration you should check that the EPSS domain (epss-fp7.org) is accepted by the email server of your organization.

6. What is the PIC or Participant Identification Code of my organisation?

The PIC or Participant Identification Code is a 9 digits identifier that uniquely identifies a legal entity. Participants will not have to submit their legal and financial information (and supporting documents) each time they have to submit a proposal or negotiate a grant agreement, but just their unique code - the PIC.

7. How can I check whether my organisation already has a PIC?

All organisations that have an FP7 grant agreement have received a unique code (the PIC – Participant Identification Code), to be used for identifying the participant in any future proposal in the programmes managed by the "Research Directorates-General". The PIC is being communicated to all contact points for FP7 contracts known to the Commission. You will need to find out within your organisation who the contact points for FP7 contracts are; they will be able to tell you what your PIC is. If you cannot find any contact point within your organisation, then you should complete the "request form" from the participant portal : contact our service desk (http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=contactus).
Please note that in order to avoid identity theft, neither the URF help desk nor the EPSS Helpdesk will be able to provide you with the PIC.

Here you can find a search PIC module of the participant portal:
(http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=searchorganisations#).

8. How can I get a PIC?

If it is the first participation then the participant should register into the URF and submit the legal data. A PIC is provided at the end of the registration process and can be used for proposal submission after 48 hours. During registration, URF does not check for duplicate registrations; this will be done if your proposal is retained for negotiation

9. How can I use the PIC in EPSS?

- If you registered your organisation, make sure that registration took place at least 48 hours before; otherwise the URF data will not be visible to EPSS (check the call deadline!)
- In EPSS, type your PIC when asked; EPSS will show you part of the legal data associated to that PIC for you to check that the PIC you are using is the right one
- If you think there are errors in the data shown that might affect the eligibility of your proposal (such as SME status) you can always remove the PIC and fill in the data as usual

10. Can I use the PIC for all calls?

Normally – after the transition period in May 2008 - the PIC can be used for all calls published on CORDIS.

11. Do I need to have a PIC to submit a proposal in EPSS?

The use of a PIC is not compulsory for proposal submission but it is strongly recommended.

12. I have registered in URF, I got a PIC, but when using it in EPSS it tells me I have a wrong PIC.

Although the legal data is directly saved in the participant database, there will be a delay of 48 Hours before that the PIC can be used and thus the data be shown in EPSS.

13. Why can't I modify the data directly in EPSS when I use a PIC?

The data shown in EPSS when entering a PIC can only be changed in URF by the LEAR of the organisation.

For technical reasons, there is no dynamic synchronization between the EPSS and the URF registry of legal entities. The data related to a PIC are transferred to the EPSS only at the moment when the PIC is inserted in EPSS. If between the introduction of a PIC in the EPSS and the submission of the proposal the data of the legal entity are changed in URF, a synchronization with the data displayed in EPSS can only be forced by a removal of the respective PIC of the partner (with loss of PIC data for this partner in the partner-specific proposal forms) and a new introduction of this partner PIC in the proposal setup. This procedure should only be applied for changes having an effect on the eligibility of the proposal (e.g. SME status in calls requiring a minimum number of SMEs or country of establishment in calls requiring a minimum number of participants from specific country groups). Minor data inconsistencies can be ignored.

14. The data displayed when using my PIC is not accurate, what should I do?

If you think that there are errors that put in danger the eligibility of your proposal (such as the legal status of your organisation (SME, profit/non-profit, etc.) or its country of establishment), you should submit your proposal without entering the PIC by manually re-entering all the legal and financial data.

15. Why am I asked to verify and confirm the PIC associated data?

When the coordinator adds a participant in the consortium with using their PIC number, (s)he needs to make sure that the organization associated with PIC is indeed the correct one of his/her intention. For that purpose EPSS will show the principal information associated with the PIC number (i.e. the name and address of the organization), so that the coordinator can verify the selection. On the other hand, the individual participants need to verify the details of the data associated with the PIC number and decide whether they will go ahead and use it. (cfr. Questions 12 & 13 above).

16. How can I stop using the PIC in EPSS?

Only the coordinator can remove a PIC associated with a partner. In that case the person responsible for filling the forms has to supply all the PIC-related data requested in the forms.

17. I have lost my password, what should I do?

You have to click on the "Forgot your password?" link in order to reset it to the original one. Note that only coordinators can request new passwords. If you are a participant and forgot your password, you should contact your coordinator.

18. How can I print a form on my printer?

It is not possible to print a form directly from the EPSS. You need to download the desired form first as a PDF file. To download a specific form, tick the corresponding "DOWNLOAD (PDF)" box next to the form. Then click the download button and follow the onscreen instructions. Once the form is downloaded, you will be able to print it provided you have the **Adobe Acrobat Reader** installed on your machine**.**

19. What do evaluators see?

All proposals are printed in black and white at a resolution of 300dpi (dots per inch) before evaluation. You should download your proposal and check particularly the legibility of pictures and diagrams under these conditions.

20. Can I access EPSS directly (not via CORDIS)?

Yes it is possible to bypass the CORDIS call selection page once you have obtained a username and password. The URL to connect is: https://www.epss-fp7.org

21. How does EPSS support 2 stage calls?

User name and passwords will remain identical for the first and for the second stage -for projects that are retained for the second stage of the call.

22. I am in an EPSS form NOT idle filling the fields and the system ejected me saying that I was idle for more than 30 minutes. I lost all the data I have filled in! Is that normal?

If the “Save” or “Validate” buttons are not pressed, the system considers the user idle because there is interaction with the system only when those buttons are pressed. Make sure that you save the form you are filling OFTEN.

23. I am trying to fill the forms and the online help-hints obscure the field that I need to write in. What can I do?

You have probably moved from one field to another using the Tab key and not the mouse. The hints appear/disappear based on the mouse movements NOT based on the field selection. Move your mouse on the screen and the help-hint that obscures the field will go away.

24. I try to open a form in PDF format and I get an error like “…Error opening document. File not found….” What can I do?

It has been observed that certain PC configurations may lead to the inability to open online the form in PDF format. The exact reason is not yet clear, but it is probably related to the PC security policies combined with the cache settings for HTTPS sessions. A work around solution is to save the form locally on the PC in PDF format and then open it.

25. I am preparing several proposals concurrently, I am using different IE7 Tabs for the different sessions and all my sessions are mixed up! Is that normal?

Due to the way that several browsers handle the cookies that are used by JAVA applications to identify user sessions, it may happen to have interference between sessions which are initiated on different tabs. Typical examples of applications that suffer from interferences are the ones that use login credentials to identify different sessions (EPSS is such an application). The browser cannot handle the different login sessions if they are opened on different Tabs; it can only differentiate them when they are opened on different browser windows. IF YOU HAVE TO PREPARE MULTIPLE PROPOSALS, YOU MUST USE DIFFERENT BROWSER WINDOWS, NOT TABS.

26. Why does a column "Training" appear in the summary budget table A3.2, while no such column is provided in the A3.1 budget tables to be completed for each partner?
This is a technical artefact that will be rectified in the next software update of the EPSS. Training activities, if eligible under the chosen funding scheme, should be budgeted in the column "Other" of the budget tables in A3.1

27. <u>I have validation errors in the forms, how shall I fix them?</u>
At the bottom of each form the validation errors are listed and these validation errors are highlighted with a red colour within the form. Make sure that ALL fields have values, as all of them are mandatory. If you need to introduce a value in a field that has no meaning, use the "-" or "0" values (if the field is character or number respectively). Especially in the A3, only integer numbers are accepted, without spaces, "," or ".".

B. Coordinators:

1. How should I proceed as a coordinator? (Roadmap)
Coordinator steps:
1. Register on the CORDIS website for a specific call.
2. Login to access the online EPSS.
3. Change the passwords for the coordinator and the other participants.
4. Send the usernames and passwords to the other participants.
5. Set up the proposal by entering the number of participants, their participant id, name and email addresses.
6. Edit Part A forms.
7. Edit and upload the Part B file.
8. Upload other annexes, if required.
9. Validate proposal to ensure basic checks are satisfied.
10. Submit the proposal.
11. Logout.

2. I have just registered and the system asks me to change my password. Is that normal?
Yes, the first time you login, the system asks you to change the coordinator's and partner's passwords for security reasons.

3. I uploaded a wrong Part B, is it possible to delete it?
You cannot delete a Part B file but you can overwrite it. If you upload another Part B file the previous one will be overwritten. Please remember that you must re-submit (press the SUBMIT button) after you have uploaded the new part B.

It is your responsibility to ensure that the submitted proposal contains the right files with the right content.

4. I uploaded a wrong Annex file, is it possible to delete it?

Yes it is possible to delete Annex files. Please note that Annex files are only permitted where they are specifically requested in the call text. All others will be ignored.

5. Is there any limitation on the size of the uploaded files?

In order to have a fast upload process and avoid possible timeout errors, it is recommended not to upload very big files. To keep sizes down, make sure that your Part B file is in PDF, avoid colour and unnecessary high resolution pictures and graphs. The average size of a research proposal is 2MB (less for mobility actions). You should aim to restrict your proposal to under 3MB, and under no circumstances try to upload a file larger than 10 MB.

6. When should I submit?

You may submit your proposal at any time before call closure. As soon as you have a consolidated version you should submit it! You may continue to improve the proposal and re-submit the improved version as often as you wish up to the call closure. The submission takes place by clicking on the "Submit" button (and all buttons that follow in the subsequent pages), simply uploading or saving data is not sufficient! Do not tempt fate by waiting until the last moment!

7. During submission the proposal validation check has failed. Can I still submit the proposal?

It depends on the reasons for the failure. The proposal validation check could have warnings (e.g. non mandatory fields left blank) or errors (e.g. missing Part B, missing A forms, blank mandatory fields left blank). In the former case you can continue the proposal submission and also provide some comments regarding the warnings. In the latter case the submission is not possible.

8. What happens with the filled in forms when I edit other participants in the list?

- *Deleting a Participant*: The Participant Numbers and the Participant Types remain unchanged and the order of participants is adapted.
  Note: when deleting a Participant, all associated Part A forms are deleted as well. For example, when deleting Partner 5, the A2 and A3.1 form for Participant 5 will also be deleted.
- *Adding a Participant*: A new Participant is added at the end of the list of participants, a new A2 and A3.1 is added automatically by the system.

9. Which file format may I use for Part B?

For the proposal content (part B) you must use exclusively PDF (portable document format, compatible with Adobe Acrobat Reader version 5 or higher, with embedded fonts). Other file formats will not be accepted by the system. Both commercial and free tools to convert files to PDF format are widely available on the Internet. Zipped (or otherwise compressed) archives will not be accepted (PDF is self-compressing, there is no gain in zipping). Most calls allow only one PDF file comprising the complete technical annex (part B) to be uploaded. You should check the call text and guide for proposers before uploading any annex. (Please note that un-requested information such as company brochures, etc. will be ignored.) Any annexes uploaded must also use exclusively PDF.

The PDF Part B must **not be encrypted** and the parameter that prevents printing **must not be selected**

10. Should I ZIP the Part B?

NO! PDF files are already compressed. Send the Part B only in PDF format.

11. Are there any restrictions on file names?

Use only alpha-numeric characters and the "_" character. **Do not use spaces** and **do not use any special characters** such as /, \, *, punctuation characters etc? Your part B filenames must not exceed 100 characters.

12. May I annex other files?

Do not annex any other files unless they are specifically requested in the call text.

13. How can I check my submitted proposal?

After you have submitted, you are advised to download the proposal and print it in black and white at 300 dpi resolution – Check the result: this is how your proposal will be seen by the evaluators.

14. I am stuck at a specific page of EPSS. What can I do?

Clean the Internet browser temporary files (cache) and cookies. Close your browser. Restart your session in a new Internet browser window. If the problem persists contact the EPSS Helpdesk without delay.

15. I have been ejected from the EPSS system. Is that normal?

The EPSS system automatically disconnects users that have been inactive for more than 30 minutes. Being active means clicking on "buttons" (performing a validation, save or submit operation, adding or deleting participants); entering data into the electronic forms is not accounted for. You are advised to save the form early and often. If this does not explain the reason for being ejected from the system, contact the EPSS Helpdesk without delay.

16. Can I add multiple e-mail addresses for a participant?

Adding multiple e-mail addresses is possible in EPSS; they have to be separated by a ";".

17. Are there any restriction to define the acronym of my proposal?

The acronym will be used to identify your proposal efficiently in the call.
It should be of no more than 20 characters (use standard **Latin alphabet and numbers only**; no spaces, symbols or special characters please).
The same acronym should appear on each page of part B of your proposal.

C. Other participants:

1. How should I proceed as another participant? (Roadmap)

Participant steps:

1. Receive username and password from the coordinator.
2. Login for accessing the EPSS.
3. Edit your Part A2 form.
4. Validate your Part A2 to ensure basic checks are satisfied.
5. Logout.

2. Why can I not edit the A1 / A3 / A4 (if applicable) forms?

Individual Participants can only edit forms that apply to themselves such as A2. Only the proposal coordinator can edit all the other forms.

3. How do I find my Part A form?

After logging in, navigate to the Part A tab and edit the form that indicates your name as provided by the coordinator or go to Proposal setup and see the forms that are associated with each Participant. Only A2 forms can be edited by the Participants, the respective A3.1 forms are edited by the coordinator.

At the bottom of each form the validation errors are listed and these validation errors are highlighted with a red colour within the form. Make sure that ALL fields have values, as all of them are mandatory. If you need to introduce a value in a field that has no meaning, use the "-" or "0" values (if the field is character or number respectively).

4. **I cannot upload the Part B file.**
   Only the coordinator has the permission to upload Part B files. The other participants can only download the files.

5. **Can I change my password?**
   No, only the coordinator can change passwords.

6. **I am trying to login but the system does not accept my password.**
   Contact the proposal coordinator to check if he/she has changed the other participant's password.