SEVENTH FRAMEWORK PROGRAMME

SESAM

User’s Guide for Project Participants

2011-01-20 Release 7

1. Introduction

Scope

This document applies to the Development and Maintenance project of the SESAM system. It is part of a maintenance delivery for the Specific Contract SC202, performed by ARηS Developments for DG RTD. The initial version of the document was produced under another contract by European Dynamics.

The FP6 and FP7 are the Sixth and Seventh European Community framework programmes for Research, Technological development and Demonstration.

The implementation of the framework programmes objectives is achieved through a number of RTD projects as well as various support activities carried out by the research DGs – RTD, INFSO, TREN, ENTR and MARE. The key business process spans from the publication of the call, then submission, evaluation, and funding of proposals, followed by project contracting, follow-up and reporting.

In context of the project follow-up, the Commission seeks an integrated service to support timely acquisition and analysis of the relevant information about project organisation, progress and continuous alignment to EC research key objectives. After aggregation, the statistics shall then feed a dashboard or used for reports generation.

The required business functions shall be supported by SESAM, an IT application made up of 2 dedicated modules, specialising in data acquisition (QUEST), and QUEST administration (QUEST-I).

The QUEST represents the main data input module in SESAM architecture, which provides users with means to fill-in various on-line forms. In general, the high-level functionality of SESAM - QUEST is to:

- Allow Internet users to fill-in Forms in a user-friendly way.
- Store in a central repository collected Forms, in the structured (XML) format, thus allowing their further processing and performing various kinds of statistical analysis.
- Generate printable version of collected Forms (PDF format) and store them to central repository.

The herein document provides the comprehensive description of the SESAM - QUEST functionality, from the GUI usage point of view. The following functionalities are described in details, using a step-by-step approach:

- Submit Questionnaire – allows filling-in and submitting Questionnaire for specified project.
- Save/Submit Report – allows filling-in, saving and submitting Report for specified project and Project Participant.
- Manage Reports – allows displaying existing Forms for specified project and Project Participant, as well as, additional manipulation of displayed Reports (e.g. accessing of PDF files and attachments).
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- Fill-In Form – allows filling-in Forms in a user-friendly way, including sub-functionalities like the management of publications, applications for patent, exploitable foregrounds or dissemination activities.
- Access User Document – allows accessing User Documents.

- Send Email to Helpdesk – allows sending emails to the helpdesk.
- Register as a New Participant – allows registering as a new Project Participant.
- FP6/FP7 layout – a different layout (logo and links) for the FP6/FP7 project selected.
- Manage Deliverables – allows accessing, uploading, updating and deleting Deliverables.
- Manage Publications – allows accessing, updating and deleting Publications.
- Manage Dissemination Activities – allows accessing, updating and deleting Dissemination Activities.
- Manage Applications for Patent – allows accessing, updating and deleting Applications for Patent.
- Manage Exploitable Foregrounds – allows accessing, updating and deleting Exploitable Foregrounds.
- Manage Partners – allows accessing, updating and deleting Partners list.
- Manage Fellows' data – allows accessing, updating and deleting Fellows' data.

Definitions, Acronyms, and Abbreviations

Term	**Definition**
EC	European Commission
FP6	Sixth EU Framework Programme for Research and Technological Development
FP7	Seventh EU Framework Programme for Research and Technological Development
ERA	European Research Area
RTD	Research, Technological Development and Demonstration
RTD Project	A project within FP6/FP7
SECUNDA	FP6/FP7 Security module hosting user competences
ECAS	European Commission Authentication Service
CPF	Contract Preparation Forms
CPM	Contract and Project Management module
FORCE	Form C Editing module
SESAM	SED, ESS, ARI, MCA requirements implementation project
MCA	SESAM user group – Marie Curie Actions
SED	SESAM user group – Socio-Economic Dimensions
GAP	Gender Action Plan
QUEST	SESAM module – Questionnaires Module
QUEST-I	SESAM module – Questionnaires Internal Module
Project ID (Contract ID)	Six-digit number, uniquely identifying a project (contract)
User	General term used to describe any type of user.
Actor	Concept used in the context of use cases. It describes a user who performs one or more actions.
Form	General term used to describe any kind of feedback or survey form that can be submitted through QUEST.

Questionnaire	Form created by anonymous user.
Report	Form created by authenticated user (username/password combination).
Vacancy	Job Vacancy managed in SESAM in order to be exported to EURAXESS finally.
Uncompleted Report/Vacancy	Report/Vacancy that is temporarily saved within the system, eventually to be completed and submitted (extracted in case of Vacancy).
Completed Report/Vacancy	Report/Vacancy that is completed and submitted by the Project Contractor (different than Project Coordinator), eventually to be checked and submitted (extracted in case of Vacancy) by the Project Coordinator.
Intermediate Report	Common term for Uncompleted and Completed Reports..
Submitted Report	Report that is completed and submitted within the system.
Exported Vacancy	Vacancy that is completed and submitted within the system being exported to EURAXESS.
Replicated Report	Kind of Submitted Report, which was completed and submitted within the system, but afterwards rejected by the Project Officer (using QUEST-I) in order to be corrected.
Project Contractor	Person representing one contractor (participant) on the project.
Project Coordinator	Project Contractor that coordinates the project on behalf of the contractors (participant index 1).
Project Reviewer	Person representing a reviewer of the project progress.
Project Rapporteur	Person representing a project reviewer that is responsible of creation and submission of the consolidated review report. This notion only concerns FP7 projects.
Project Participant	Person participating in a project by submitting reports through QUEST, i.e. common term for Project Contractors and Reviewers.
Link (Active Link)	Information linking particular QUEST Internet user to particular Project Participant, thus allowing him/her to create various QUEST Reports for the project. A link is represented by a combination of username (used by user to be authenticated in QUEST as a Project Participant), Project ID (identifying the project) and participant index (identifying the particular Project Participant).
Pending Link	Link not allowing particular QUEST Internet user to create various QUEST Reports for the project, but can be activated by the QUEST-I Administrator or Project Coordinator.
Review Session	Review session is a period during while the project reviewer is able to create, save and submit the review report. Session created by the Project Officer.

Table 1-1: Definitions

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2. User Manual

The SESAM - QUEST GUI implements the following functionality:

- filling-in and submitting Questionnaires
- filling-in, saving and submitting Reports
- deleting Intermediate Reports
- accessing PDF files of Intermediate Reports
- accessing PDF files of Submitted Reports
- accessing attachments of Submitted Reports
- accessing User Documents
- sending emails to helpdesk
- different layout for the FP7 project selected.
- managing of the Participant Registrations (Project Links) by Project Coordinator
- managing Project Publications
- managing Project Dissemination Activities
- managing Project Applications for Patent
- managing Project Exploitable Foregrounds
- managing Deliverables

Submit Questionnaire

This option allows submitting Questionnaire for specified project.

Note: if you access to the application through the Participant Portal, this functionality is not available.

In order to submit Questionnaire, the following steps should be considered:

1. Click the link QUESTIONNAIRES inside the menu of Home page. The QUESTIONNAIRE TYPE SELECTION PAGE is presented (Figure 2-1).

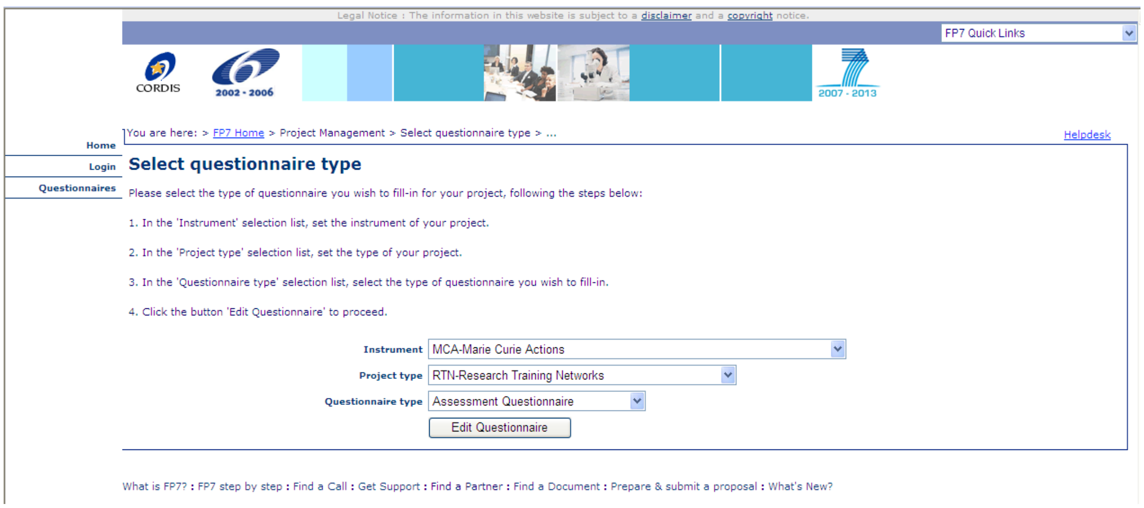

Figure 2-1: Questionnaire Type Selection Page (With Selected Questionnaire Type)

2. Specify Questionnaire type:
   a. Select instrument using the drop-down list INSTRUMENT.
   b. Select project type using the drop-down list PROJECT TYPE.
   c. Select Questionnaire type using the drop-down list QUESTIONNAIRE TYPE.
3. Click the button EDIT QUESTIONNAIRE. The PROJECT IDENTIFICATION PAGE is presented (Figure 2-2).

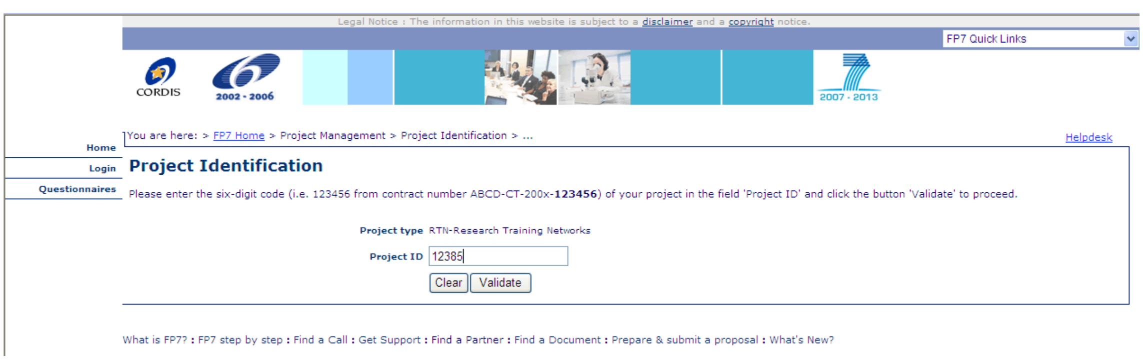

Figure 2-2: Project Identification Page (With Entered Project ID)

4. Enter Project ID in the field PROJECT ID.

5. Click the button VALIDATE. In case of successful project identification the FORM EDITING PAGE is presented (Figure 2-12); otherwise appropriate error message is presented.
6. Fill-in all Form fields (please refer to Fill-In Form).
7. Click the button SUBMIT.

- In case of successful submission (i.e. if all Form fields are properly filled-in) the QUESTIONNAIRE TYPE SELECTION PAGE is presented (Figure 2-1), accompanied with the COMPLETION MESSAGE BOX (Figure 2-3).

Figure 2-3: Completion Message Box

- In case of unsuccessful submission (i.e. if some Form fields are not properly filled-in) the refreshed FORM EDITING PAGE is displayed, clearly presenting the invalid fields (please refer to Fill-In Form). Please proceed with Step 6.

Save/Submit Report

This option allows saving/submitting Report for specified project and Project Participant.

If you access the application through the Participant Portal, you can directly jump to the step 4. Steps 1 to 3 are not accessible. The project selection must be done using the Participant Portal.

In order to save/submit Report, the following steps should be considered:

1. After the successful user authentication (see Login) the SELECT PROJECT PAGE is presented (Figure 2-4).

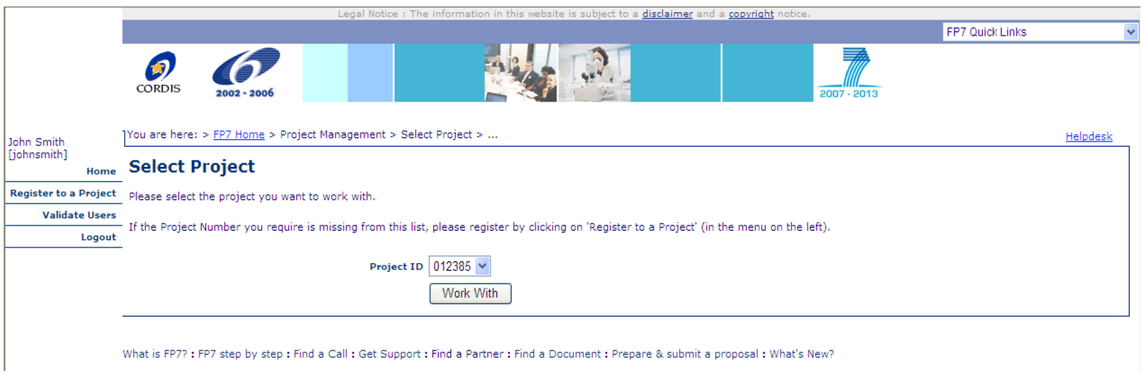

Figure 2-4: Select Project Page

2. Select the project Id from drop-down list PROJECT ID.
3. Click the button WORK WITH. The WORK WITH A PROJECT PAGE is presented (Figure 2-5).

Figure 2-5: Work with a Project Page

4. Click on one of the following available links in the menu: REPORTS, REVIEW REPORTS, ASSESSMENT REPORTS, DOCUMENTS, AMENDMENT REQUESTS OR NOTIFICATIONS. The REPORT SELECTION PAGE for specified project and particular Project Participant is presented (Figure 2-6 or Figure 2-7).
5. Specify Report:
   a. Select form type using the drop-down list REPORT / REVIEW REPORT / DOCUMENT / AMENDMENT / NOTIFICATION TYPE.
   b. If applicable, select participant using the drop-down list PARTICIPANT.
   c. If applicable, select the review session using the drop-down list REVIEW SESSION.

d. If applicable, select the project reviewer using the drop-down list PROJECT REVIEWER.

e. If applicable, select REPORTING PERIOD for which the report will be submitted

6. Open Report for editing

   a. Create new report:

      i. Click the button CREATE NEW REPORT / REVIEW REPORT / DOCUMENT / AMENDMENT REQUEST / NOTIFICATION.

         - In case that data may be imported from some previously submitted Report (e.g. the Report to be created is periodic one and there are Reports submitted for previous reporting periods), the DATA IMPORT WINDOW is presented (Figure 2-8 or Figure 2-9). To proceed without data import, click the button NO; the FORM EDITING PAGE is presented (Figure 2-12), displaying the Report without imported data. Otherwise, specify the Report from which to import the data, by selecting the participant index (the drop-down list PARTICIPANT INDEX) and reporting period (the drop-down list REPORTING PERIOD), and click the button YES. The FORM EDITING PAGE is presented (Figure 2-12), displaying the Report with imported data.

Project Coordinator [epc]

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You are here: > FP7 Home > Project Management > Select report > ...

Helpdesk

Select Report

Please choose one of the following:

1. Create a new report by clicking the button 'Create New Report'.
2. Continue editing an existing report by clicking the link in the column 'Form name' of the table 'Intermediate Reports' for target Report.
3. Delete an existing report by clicking the link in the column 'Delete' of the table 'Intermediate Reports' for target Report.

Instrument CP - Collaborative project

Project Information 217480

Username epc

Report type Periodic Report

Participant All

Intermediate Reports

Username	Participant Index	Form name	Period	Date created	Date last updated	Status	Delete	Print
epc	All	Periodic Report	4	09/11/2010 18:00:24 CET	09/11/2010 18:00:25 CET	Uncompleted	delete	print draft
epc	All	Periodic Report	3	12/08/2010 13:36:27 CET	09/11/2010 17:18:04 CET	Uncompleted	delete	print draft
epcs	All	Periodic Report	5	11/08/2010 17:37:04 CET	11/08/2010 17:37:04 CET	Uncompleted	delete	print draft
ebu	All	Periodic Report	1	11/08/2010 11:28:13 CET	11/08/2010 11:28:14 CET	Uncompleted	delete	print draft
ebu2	All	Periodic Report	6	14/07/2010 18:10:10 CET	15/07/2010 16:44:56 CET	Uncompleted	delete	print draft

Reporting Period 7

Create New Report

Submitted Reports

Report status Submitted and Rejected

Username	Participant Index	Form name	Attachments	Period	Date submitted	Date rejected	Status	Comment	ARES Reg. N.	Acknowledgement
epcs2	All	Periodic Report	download	8	12/08/2010 14:56:24 CET		Submitted		-	-
epcs	All	Periodic Report	download	5	11/08/2010 14:05:18 CET	11/08/2010 17:37:04 CET	Rejected		Ares(2010)1281528368206	Ares(2010)1281528368409
epcs	All	Periodic Report	download	5	11/08/2010 13:45:50 CET	11/08/2010 13:47:18 CET	Rejected		Ares(2010)1281527163935	Ares(2010)1281527166075
epcs	All	Periodic Report	download	5	11/08/2010 13:33:53 CET	11/08/2010 13:35:21 CET	Rejected		Ares(2010)1281526454859	Ares(2010)1281526455162
epc	All	Periodic Report	download	5	09/12/2009 19:26:29 CET	11/08/2010 11:50:18 CET	Rejected		-	-
epcs2	All	Periodic Report	download	7	15/07/2010 10:51:41 CET	11/08/2010 11:31:17 CET	Rejected		-	-
epc	All	Periodic Report	download	3	08/09/2009 04:22:24 CET	15/07/2010 16:04:12 CET	Rejected		-	-
epc	All	Periodic Report	download	1	10/12/2009 07:39:31 CET	14/07/2010 18:28:54 CET	Rejected		-	-
epc	All	Periodic Report	download	6	28/01/2010 15:54:06 CET	14/07/2010 18:27:53 CET	Rejected		-	-
epc	All	Periodic Report	download	7	26/04/2010 09:35:19 CET	21/06/2010 18:03:23 CET	Rejected		-	-
epc	All	Periodic Report	download	8	29/04/2010 08:25:51 CET	21/06/2010 18:03:02 CET	Rejected		-	-
epc	All	Periodic Report	download	4	29/04/2010 15:10:26 CET	29/04/2010 15:33:24 CET	Rejected		-	-
epc	All	Periodic Report		4	22/09/2009 03:21:19 CET	29/04/2010 11:51:48 CET	Rejected		-	-
epc	All	Periodic Report	download	7	26/04/2010 09:30:37 CET	26/04/2010 09:52:33 CET	Rejected		-	-
epc	All	Periodic Report	download	7	26/04/2010 09:28:13 CET	26/04/2010 09:47:41 CET	Rejected		-	-
epc	All	Periodic Report	download	7	26/04/2010 08:48:42 CET	26/04/2010 09:44:37 CET	Rejected		-	-
epc	All	Periodic Report	download	6	10/12/2009 20:19:25 CET	28/01/2010 16:10:01 CET	Rejected		-	-
epc	All	Periodic Report	download	1	09/12/2009 10:50:21 CET	10/12/2009 07:54:08 CET	Rejected			
epc	All	Periodic Report	download	1	07/09/2009 10:23:32 CET	21/09/2009 13:51:55 CET	Rejected			
epc	All	Periodic Report	download	1	07/09/2009 08:52:13 CET	07/09/2009 15:20:37 CET	Rejected			
epc	All	Periodic Report	download	2	07/09/2009 08:57:02 CET	07/09/2009 15:20:32 CET	Rejected			
epc	All	Periodic Report	download	2	07/09/2009 10:19:14 CET		Submitted			

View Request Comments

Test final rejection

OK

What is FP7? : FP7 step by step : Find a Call : Get Support : Find a Partner : Find a Document : Prepare & submit a proposal : What's New?

QUEST version 7.8.0 in TEST environmen

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Figure 2-6: Report Selection Page

Figure 2-7: Review Report Selection Page

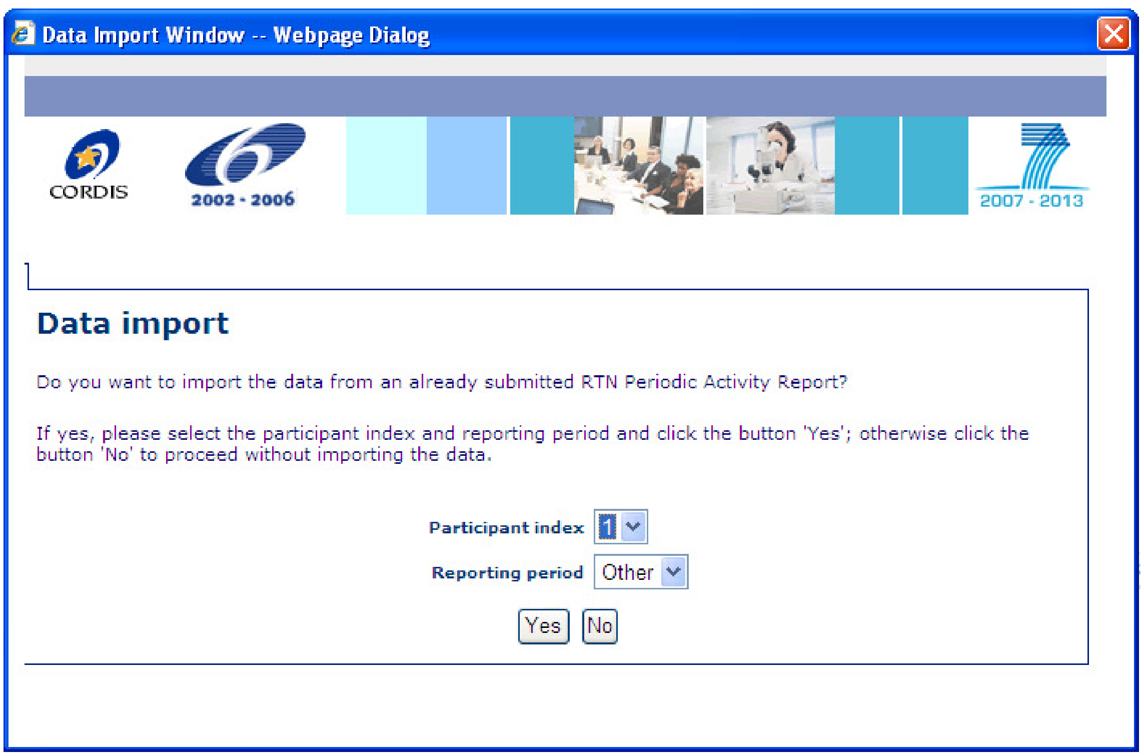


Figure 2-8: Data Import Window

Figure 2-9: Data Import Window

- In case that data cannot be imported from some previously submitted Report (e.g. the Report to be created is not periodic one or there are no Reports submitted for previous reporting periods), the Form Editing Page is presented (Figure 2-12).
- In case that the Project Participant is a Project Coordinator, s/he should not be able to create new Reports for other Project Contractors, if not explicitly linked through QUEST-I to the particular Project Contractor.
- In case the Project Participant is a Project Reviewer, s/he should not be able to create new Review Reports for other Project Reviewers.

b. Open previously saved Report:

i. Click the hyperlink in the column Form name of the Intermediate Reports table for target Report. The Form Editing Page is presented (Figure 2-12), displaying the selected Report.

- Project Contractors different than Project Coordinator should not be able to edit Reports with status Completed.
- Project Reviewers should not be able to edit Review Reports of other Project Reviewers.

7. Fill-in Form (please refer to Fill-In Form).

8. Save/Submit Report

a. Save Report

i. Click the save button. The Report Selection Page from which complete action was initiated is presented (Figure 2-6).

b. Submit Report:

i. Click the submit button.

- In case of successful submission (i.e. if all Form fields are properly filled-in) the REPORT SELECTION PAGE from which complete action was initiated is presented (Figure 2-6 or Figure 2-7).
    - If you are the Project Coordinator, a Project Reviewer or a Project Rapporteur, the report/review report/consolidated review report is moved in the SUBMITTED REPORTS table and become read-only. Depending on the Sub-funding Scheme and Unit of the project, you might receive an Acknowledgement of Receipt by email.
    - If you are not the Project Contractor, the Report is stored as a Completed Report and displayed in the INTERMEDIATE REPORTS table with status COMPLETED. Afterwards, the Report may be further edited and submitted finally by the Project Coordinator.
- In case of unsuccessful submission (i.e. if some Form fields are not properly filled-in) the refreshed FORM EDITING PAGE is displayed, clearly presenting the invalid fields (please refer to Fill-In Form). Please proceed with Step 10.b.

Manage Reports

This option allows displaying existing Forms for specified project and Project Participant, as well as, additional manipulation of displayed Reports (e.g. accessing of PDF files and attachments).

In order to manage Reports, the following steps should be considered:

1. Reach the REPORT SELECTION PAGE (Figure 2-6 or Figure 2-7). Please refer to 0 Save/Submit Report.
2. **Select Report Type or Review Report Type:** A type of Reports to be managed may be modified by using the drop-down list REPORT TYPE or REVIEW REPORT TYPE. The REPORT SELECTION PAGE is refreshed, displaying in the tables INTERMEDIATE REPORTS and SUBMITTED REPORTS existing Reports of selected type.
3. **Select Review Session**: Drop-down list REVIEW SESSION contains all the review sessions available for the Project Participant (open and/or closed). After selection, the REPORT SELECTION PAGE is refreshed, displaying in the tables INTERMEDIATE REPORTS and SUBMITTED REPORTS existing Reports of selected Project Participant.
4. **Select Project Reviewer**: The Project Reviewer may be modified by using the drop-down list PROJECT REVIEWER. The REPORT SELECTION PAGE is refreshed, displaying in the tables INTERMEDIATE REPORTS and SUBMITTED REPORTS existing Reports of selected Project Reviewer.
   a. For Project Reviewer, the drop-down list Project Reviewer contains the different Project Reviewers related to the selected Review Session, as well as, entry All representing all Project Reviewers.
   b. For Project Rapporteur, the drop-down list Project Reviewer contains entry All representing the unique Project Rapporteur.
5. **Select Project Participant:** A Project Participant, for which to manage Reports, may be modified by using the drop-down list Participant. The Report Selection Page is refreshed, displaying in the tables Intermediate Reports and Submitted Reports existing Reports of selected Project Participant.
   a. For Project Coordinators the drop-down list Participant contains all Project Participants, as well as, entry All representing all Project Participants. In this way, Project Coordinators may access Completed Reports of other Project Contractors, in order to check and submit them finally.
6. **Select Reporting Period:** Drop-down list Reporting Period contains the remaining values of period(s) for which new report can be created. Selected value is the period that contains the day of creating new report. If report has been already fulfilled for that period, the first available period will be pre-selected. If the Final report or Document or Amendment Request or Notification is selected, the Reporting Period select box is not displayed. If the Periodic report is selected and the report has been fulfilled for all the reporting periods by the selected participant, the Reporting Period select box is displayed but disabled.
7. **Select Report Status:** A status of Submitted Reports to be managed may be modified by using the drop-down list Report Status. The Report Selection Page is refreshed, displaying in the table Submitted Reports existing Reports of selected statuses.
8. **Edit Intermediate Report:** A previously saved Report may be edited by clicking the hyperlink in the column Form name of the Intermediate Reports table. The Form Editing Page (Figure 2-12) is presented, displaying the selected Report.
   a. Not for Review Report, Project Contractors different than Project Coordinator are not able to edit Completed Reports (Reports with status COMPLETED).
9. **Delete Intermediate Report:** A previously saved Report may be deleted by clicking the hyperlink delete in the column Delete of the Intermediate Reports table. The Report Selection Page is refreshed, reflecting the modified information about Intermediate Reports.
   a. Not for Review Report, Project Contractors different than Project Coordinator are not able to delete Completed Reports (Reports with status COMPLETED).

10. **Access Intermediate Report PDF:** The PDF file of a previously saved Report may be accessed by clicking the hyperlink print draft in the column Print of the Intermediate Reports table. The PDF file, clearly marked as draft one, is created and the File Download Window is displayed (Figure 2-10).

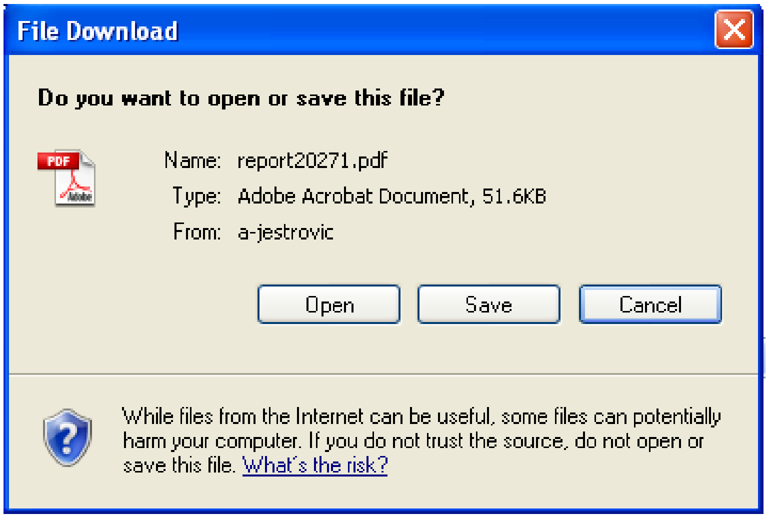


Figure 2-10: File Download Window

11. **Access Submitted Report PDF:** The PDF file of a Submitted Report may be accessed by clicking the hyperlink in the column Form name of the Submitted Reports table. If the PDF file exists for selected Report, the File Download Window is displayed (Figure 2-10); otherwise, if PDF file does not exist (still not created), appropriate error message is displayed (Figure 2-11).

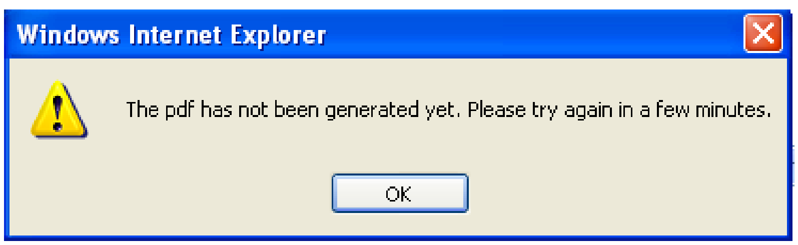


Figure 2-11: PDF Creation Error Message

12. **Access Submitted Report Attachments:** The attachments of a Submitted Report (as a ZIP archive) may be accessed by clicking the hyperlink in the column Attachments of the Submitted Reports table. The File Download Window is displayed (Figure 2-10).

13. **View Submitted/Rejected Report Comment:** When a comment is available on a Submitted or Rejected Report, an icon is displayed in the Comment column. Click this icon to view the comment, as shown in Figure 2-6.

14. **Download ARES Documents:** The ARES registration number appears in the ARES column. Click this hyperlink in order to download the report, its XML version and its attachments as they are stored in ARES as a ZIP archive. The File Download Window is displayed (Figure 2-10).

15. **Download the Acknowledgement of Receipt:** The Acknowledgement of Receipt (AoR) registration number appears in the Acknowledgement column. Click this hyperlink in order to download it. The File Download Window is displayed (Figure 2-10).

Fill-In Form

This option allows filling-in various Forms in a user-friendly way, using the FORM EDITING PAGE (Figure 2-12). The Forms have been designed in such a way that the possibility of errors during their completion is minimised:

- Radio buttons and selection lists are used for filling-in questions with limited number of answers.
- Date fields are filled-in through dedicated functionality (0 Fill-In Date Field), using the DATE WINDOW (Figure 2-14).
- Country fields are filled-in through dedicated functionality (0 Fill-In Country Form Field), using the COUNTRY WINDOW (Figure 2-15).

Filling-in tables with variable number of rows is supported as well (0 Fill-In Table with Variable Number of Rows). It is also possible to attach annexes (0 Manage Report Attachments) to Reports (not Questionnaires) to be submitted.

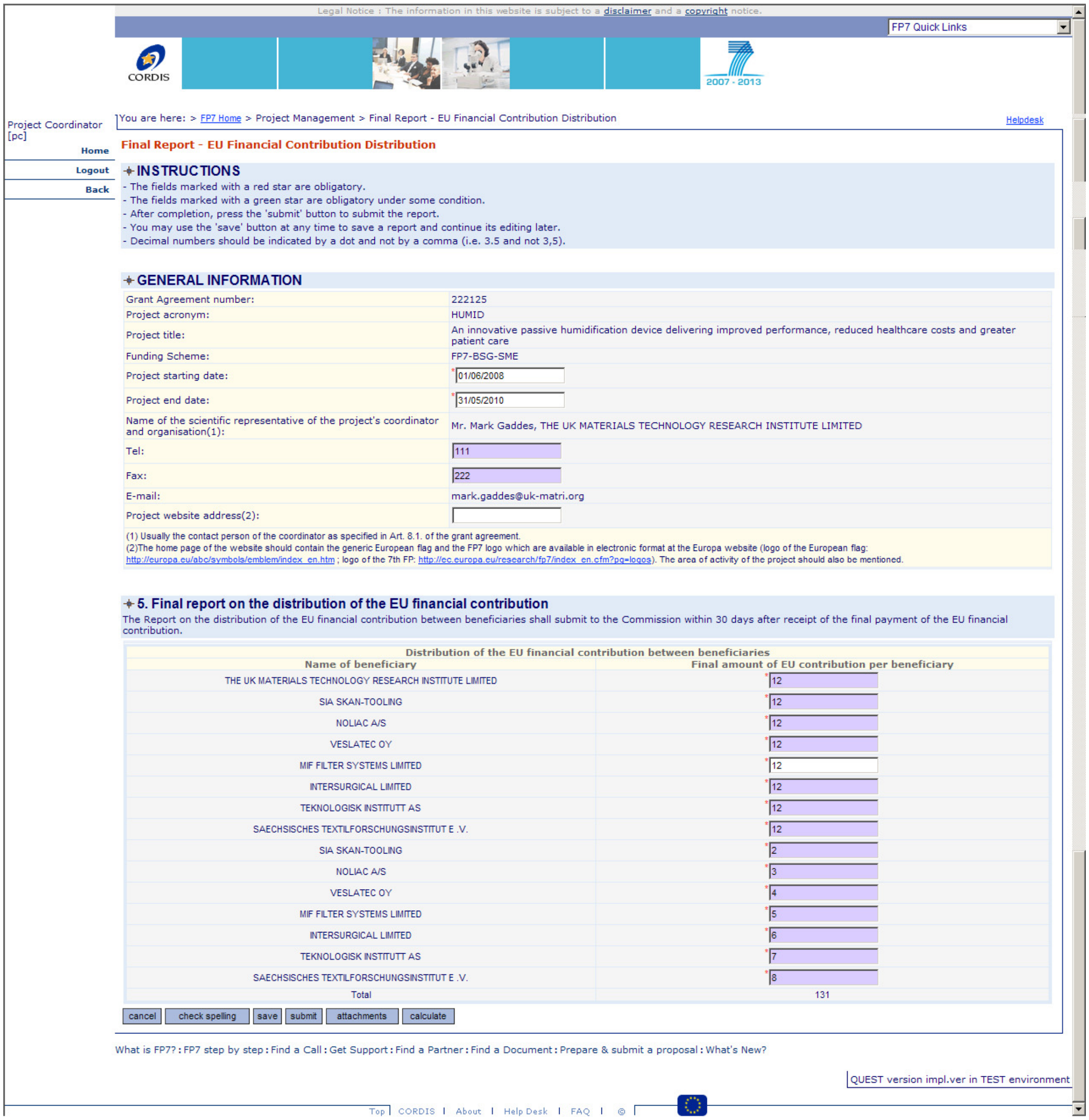
Submission of Forms involves filling-in all obligatory (mandatory) fields, which are indicated by a red asterisk next to them. Furthermore, some fields may be conditionally obligatory (mandatory), i.e. obligatory under some conditions, for example depending on the answer to some previous question. Such fields are indicated by a green asterisk next to them.

Process of Form submission includes the validation of filled-in Form. In case of unsuccessful submission (i.e. if some Form fields are not properly filled-in) the refreshed FORM EDITING PAGE is displayed, clearly presenting the invalid fields (Figure 2-13). In general, 2 kinds of validation are performed:

- **Validation of obligatory fields:** It is validated if obligatory field (or conditionally obligatory field, if related condition is fulfilled) is filled-in with any value.
- **Validation of type:** It is validated if the field is filled-in with a value of appropriate type. The following types are supported:
  - String: Any text (no type validation).
  - Integer: Number (e.g. 1)
  - Double: Decimal number (e.g. 1.5). It should be noted that "." (character dot) is used as decimal character and not "," (character comma).
  - Amount: Decimal number (e.g. 1.5) between -99 999 999.99 and 99 999 999.99 with 2 decimals. The formatting is applied automatically so that 2 decimals are always shown (e.g. 1 → 1.00; 1.5 → 1.50). If more than 2 decimals are inserted, the value will be rounded to the nearest second decimal (e.g. 1.234 → 1.23; 1.235 → 1.24).

The most common validation errors are the following:

- Obligatory field (or conditionally obligatory field, if related condition is fulfilled) is not filled-in.
- Integer field is filled-in with a decimal number (e.g. 1.5 instead of 1).
- Double field is filled-in with a decimal number using "," as decimal character (e.g. 1,5 instead of 1.5).



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FP7 Quick Links

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Final Report - EU Financial Contribution Distribution

INSTRUCTIONS

- The fields marked with a red star are obligatory.
- The fields marked with a green star are obligatory under some condition.
- After completion, press the 'submit' button to submit the report.
- You may use the 'save' button at any time to save a report and continue its editing later.
- Decimal numbers should be indicated by a dot and not by a comma (i.e. 3.5 and not 3,5).

GENERAL INFORMATION

Grant Agreement number:	222125
Project acronym:	HUMID
Project title:	An innovative passive humidification device delivering improved performance, reduced healthcare costs and greater patient care
Funding Scheme:	FP7-BSG-SME
Project starting date:	01/06/2008
Project end date:	31/05/2010
Name of the scientific representative of the project's coordinator and organisation(1):	Mr. Mark Gaddes, THE UK MATERIALS TECHNOLOGY RESEARCH INSTITUTE LIMITED
Tel:	111
Fax:	222
E-mail:	mark.gaddes@uk-matri.org
Project website address(2):	

(1) Usually the contact person of the coordinator as specified in Art. 8.1. of the grant agreement.
(2)The home page of the website should contain the generic European flag and the FP7 logo which are available in electronic format at the Europa website (logo of the European flag: http://europa.eu/abc/symbols/emblem/index_en.htm ; logo of the 7th FP: http://ec.europa.eu/research/fp7/index_en.cfm?pg=logos). The area of activity of the project should also be mentioned.

5. Final report on the distribution of the EU financial contribution

The Report on the distribution of the EU financial contribution between beneficiaries shall submit to the Commission within 30 days after receipt of the final payment of the EU financial contribution.

Distribution of the EU financial contribution between beneficiaries	
Name of beneficiary	Final amount of EU contribution per beneficiary
THE UK MATERIALS TECHNOLOGY RESEARCH INSTITUTE LIMITED	12
SIA SKAN-TOOLING	12
NOLIAC A/S	12
VESLATEC OY	12
MIF FILTER SYSTEMS LIMITED	12
INTERSURGICAL LIMITED	12
TEKNOLOGISK INSTITUTT AS	12
SAECHSISCHES TEXTILFORSCHUNGSINSTITUT E .V.	12
SIA SKAN-TOOLING	2
NOLIAC A/S	3
VESLATEC OY	4
MIF FILTER SYSTEMS LIMITED	5
INTERSURGICAL LIMITED	6
TEKNOLOGISK INSTITUTT AS	7
SAECHSISCHES TEXTILFORSCHUNGSINSTITUT E .V.	8
Total	131

cancel | check spelling | save | submit | attachments | calculate

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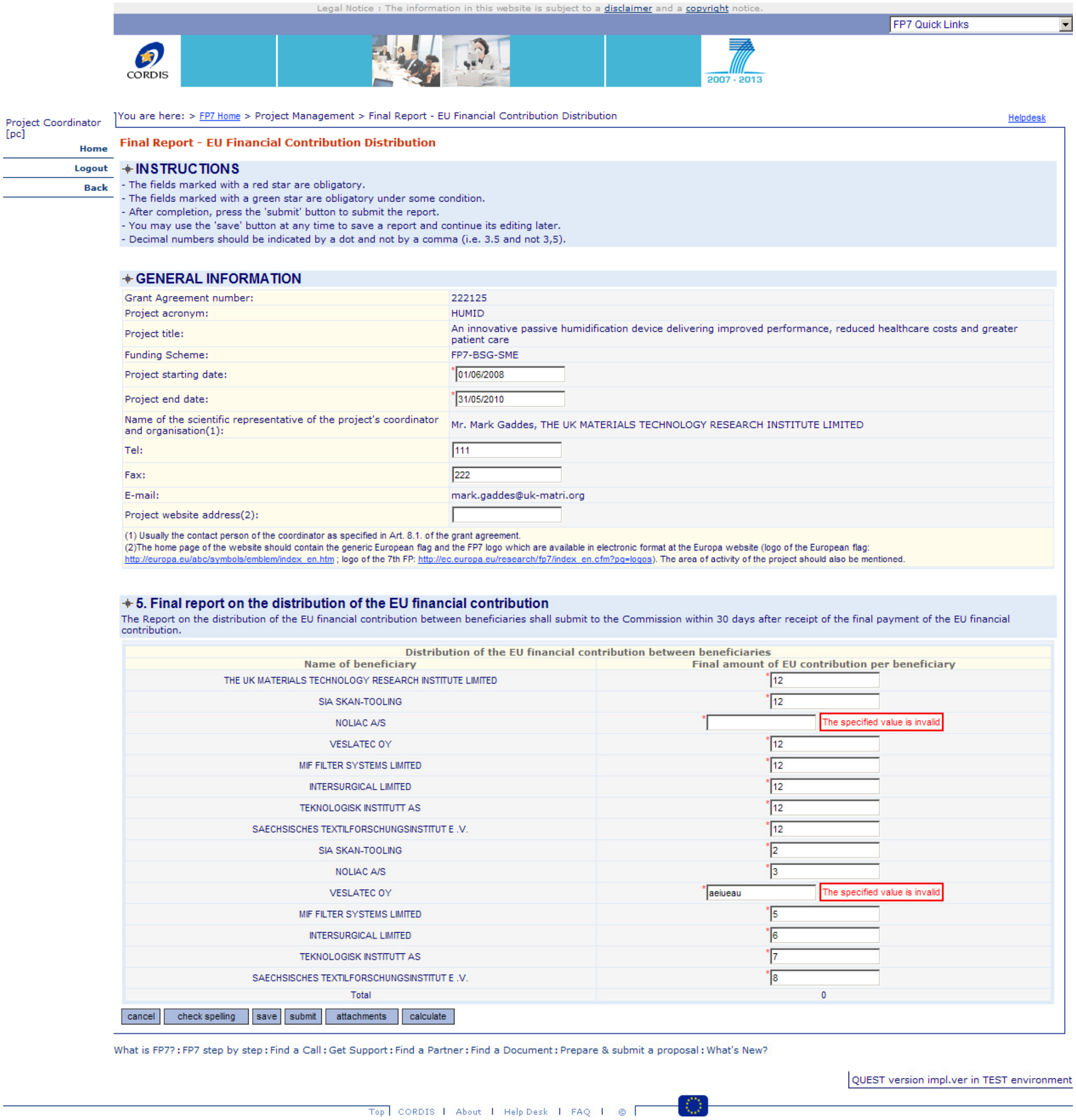
Figure 2-12: Form Editing Page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Helpdesk

Final Report - EU Financial Contribution Distribution

INSTRUCTIONS

- The fields marked with a red star are obligatory.
- The fields marked with a green star are obligatory under some condition.
- After completion, press the 'submit' button to submit the report.
- You may use the 'save' button at any time to save a report and continue its editing later.
- Decimal numbers should be indicated by a dot and not by a comma (i.e. 3.5 and not 3,5).

GENERAL INFORMATION

Grant Agreement number:	222125
Project acronym:	HUMID
Project title:	An innovative passive humidification device delivering improved performance, reduced healthcare costs and greater patient care
Funding Scheme:	FP7-BSG-SME
Project starting date:	01/06/2008
Project end date:	31/05/2010
Name of the scientific representative of the project's coordinator and organisation(1):	Mr. Mark Gaddes, THE UK MATERIALS TECHNOLOGY RESEARCH INSTITUTE LIMITED
Tel:	111
Fax:	222
E-mail:	mark.gaddes@uk-matri.org
Project website address(2):	

(1) Usually the contact person of the coordinator as specified in Art. 8.1. of the grant agreement.
(2)The home page of the website should contain the generic European flag and the FP7 logo which are available in electronic format at the Europa website (logo of the European flag: http://europa.eu/abc/symbols/emblem/index_en.htm ; logo of the 7th FP: http://ec.europa.eu/research/fp7/index_en.cfm?pg=logos). The area of activity of the project should also be mentioned.

5. Final report on the distribution of the EU financial contribution

The Report on the distribution of the EU financial contribution between beneficiaries shall submit to the Commission within 30 days after receipt of the final payment of the EU financial contribution.

Distribution of the EU financial contribution between beneficiaries	
Name of beneficiary	Final amount of EU contribution per beneficiary
THE UK MATERIALS TECHNOLOGY RESEARCH INSTITUTE LIMITED	12
SIA SKAN-TOOLING	12
NOLIAC A/S	The specified value is invalid
VESLATEC OY	12
MIF FILTER SYSTEMS LIMITED	12
INTERSURGICAL LIMITED	12
TEKNOLOGISK INSTITUTT AS	12
SAECHSISCHES TEXTILFORSCHUNGSINSTITUT E .V.	12
SIA SKAN-TOOLING	2
NOLIAC A/S	3
VESLATEC OY	aeiueau The specified value is invalid
MIF FILTER SYSTEMS LIMITED	5
INTERSURGICAL LIMITED	6
TEKNOLOGISK INSTITUTT AS	7
SAECHSISCHES TEXTILFORSCHUNGSINSTITUT E .V.	8
Total	0

cancel | check spelling | save | submit | attachments | calculate

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Figure 2-13: Form Editing Page (With Displayed Invalid Fields)

Fill-In Date Field

This option allows filling-in date form fields in a user-friendly way.

In order to fill-in date form field, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12) displaying the Form with at least one date field.
2. Click inside the date field. The DATE WINDOW is displayed (Figure 2-14).

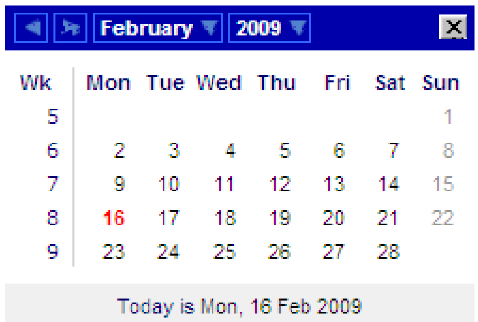


Figure 2-14: Date Window

3. Browse for a date and click on a date. The DATE WINDOW is closed and the selected date is displayed in the edited field on the FORM EDITING PAGE from which complete action was initiated.

Fill-In Country Form Field

This option allows filling-in country form fields in a user-friendly way.

In order to fill-in country form field, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12) displaying the Form with at least one country field.
2. Click inside the country field. The COUNTRY WINDOW is displayed (Figure 2-15).

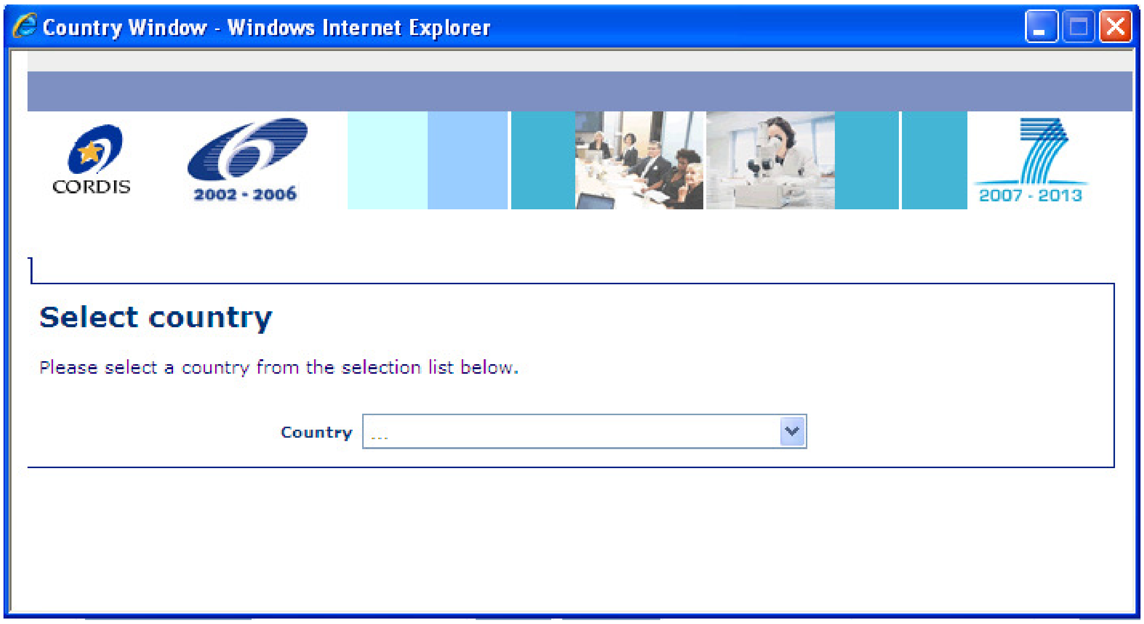


Figure 2-15: Country Window

3. Select a country from the drop-down list COUNTRY. The COUNTRY WINDOW is closed and the selected country is displayed in the edited field on the FORM EDITING PAGE from which complete action was initiated.

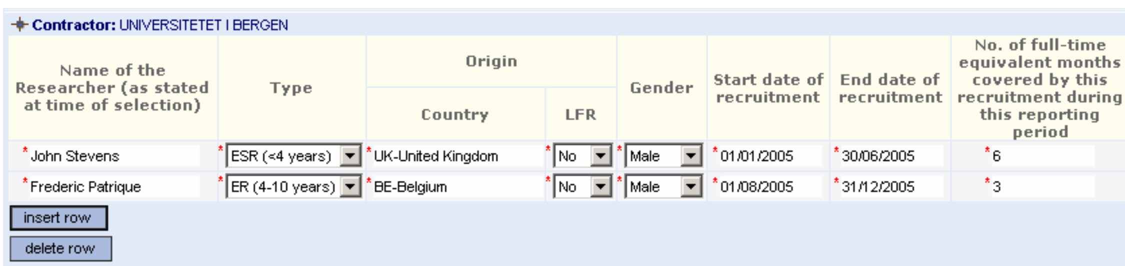
Fill-In Table with Variable Number of Rows

This option allows filling-in tables with variable number of rows.

In order to fill-in table with variable number of rows, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12) displaying the Form with at least one table with variable number of rows.
2. **Insert Row:** Click the button INSERT ROW (Figure 2-16). The FORM EDITING PAGE is refreshed, displaying the table with inserted row at the table bottom.
3. **Delete Row:** Click the button DELETE ROW (Figure 2-16). The FORM EDITING PAGE is refreshed, displaying the table with the last row deleted.

It should be noted that completely empty rows (without any filled-in field) do not have to be deleted manually, even if they contain obligatory fields; the completely empty rows will be automatically removed by the system on the Form submission.



Contractor: UNIVERSITETET I BERGEN

Name of the Researcher (as stated at time of selection)	Type	Origin		Gender	Start date of recruitment	End date of recruitment	No. of full-time equivalent months covered by this recruitment during this reporting period
		Country	LFR				
* John Stevens	* ESR (<4 years)	* UK-United Kingdom	* No	* Male	* 01/01/2005	* 30/06/2005	* 6
* Frederic Patrique	* ER (4-10 years)	* BE-Belgium	* No	* Male	* 01/08/2005	* 31/12/2005	* 3

insert row

delete row

Figure 2-16: Table with Variable Number of Rows (Form Editing Page)

Check Spelling

It is possible to check the spelling of all the text areas of a report by following these steps:

1. Reach the FORM EDITING PAGE (Figure 2-12) displaying the Form with at least one table with variable number of rows.
2. Click the check spelling button at the bottom on the form.
3. Wait for the Spell Checker to load (Figure 2-17).

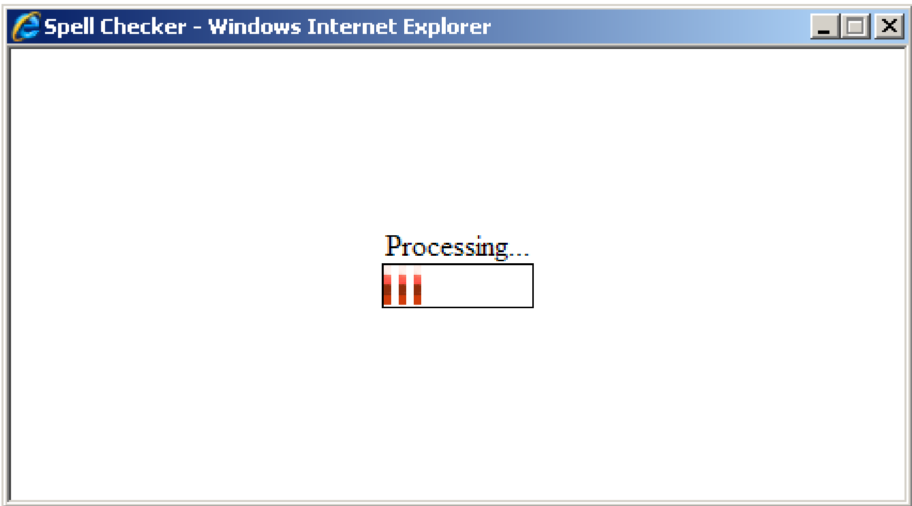


Figure 2-17: Spell Checker Loading

4. Once loaded, the Spell Checker will process each text area as shown in Figure 2-18. In the Spell Checker, the following options are available:
   a. **The upper left text area** shows a part of the text, with an unrecognized word indicated in red.
   b. **Ignore Once:** ignore a single occurrence of the unrecognized word
   c. **Ignore all in this field:** ignore all occurrences of the unrecognized word within the current text area
   d. **Suggestions:** shows a list of known words that are similar to the unrecognized one. Click on a word to select it, and then click on CHANGE for replacing the current word with the selected one, or CHANGE ALL for replacing all occurrences of the current word with the selected one (within the current text area).
   e. **Next Field:** click this button to skip the processing of the rest of the current text area, and continue with the next (non-empty) one. If the current one is the last one, this button is changed to “DONE” and clicking it will close the Spell Checker.
   f. **Manual Edit:** click in the upper left text area (with the unrecognized word) in order to switch en Edit Mode (Figure 2-19). In this mode you can modify the text area and then click CHANGE for applying your modifications. To cancel your modifications and switch back to the normal mode, click on UNDO EDIT.

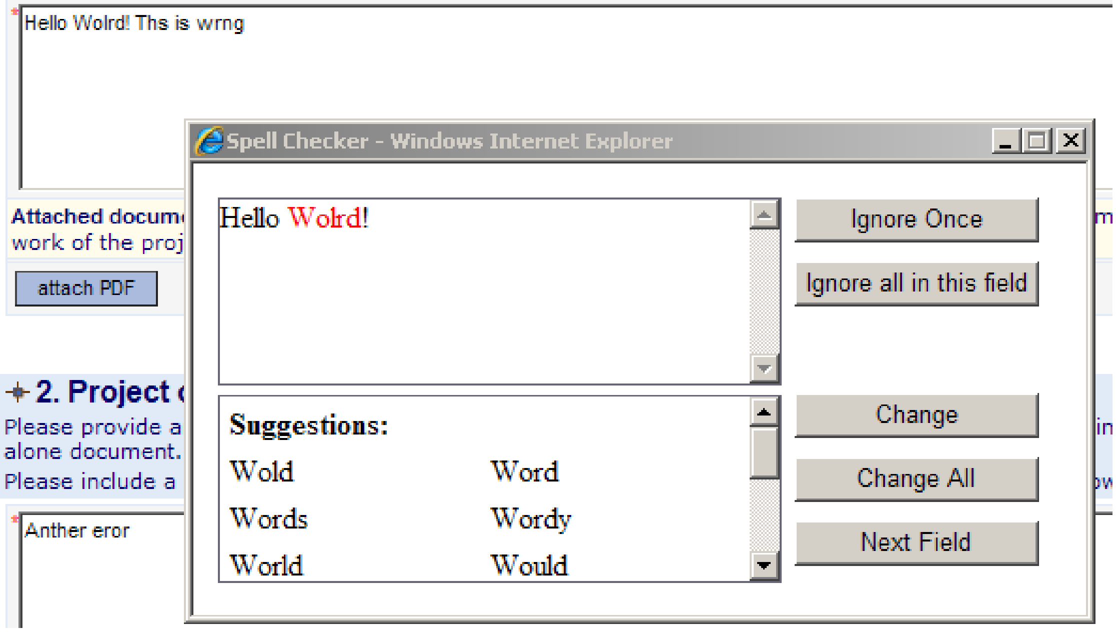


Figure 2-18: Spell Checker processing a text area

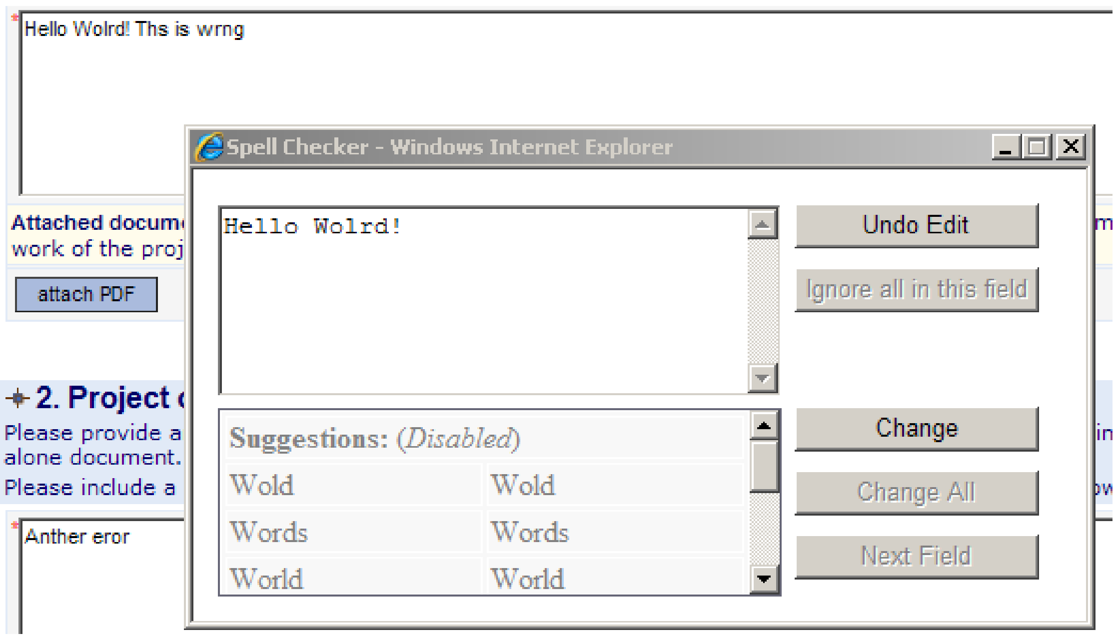


Figure 2-19: Spell Checker in Edit Mode

Manage Report Attachments

This option allows attaching annexes to the Reports to be submitted.

In order to attach annexes, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12) by opening a previously saved Report. Please refer to 0 Manage Reports Step 8. If you are currently creating a new report, please save it first.
2. Click the button ATTACHMENTS at the bottom of the FORM EDITING PAGE or the button or attach PDF, Attach Document or attach Access database at the bottom of its sections (the button exists only for Reports that supports attaching annexes). The ATTACHMENTS WINDOW is displayed (Figure 2-20). If you clicked the button at the bottom of a section, the corresponding ATTACHMENT TYPE will be selected automatically.

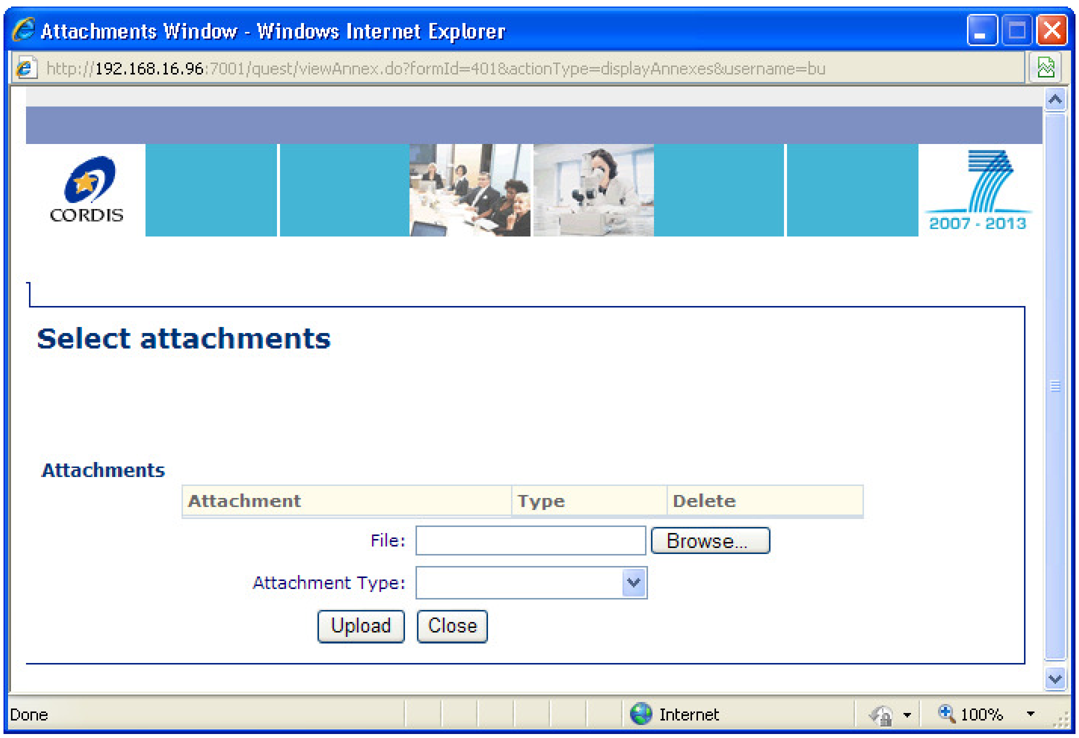


Figure 2-20: Attachments Window

3. Click the button BROWSE and browse for the attachment. If you accessed the Attachments Window using "attach PDF" from the Form Editing Page, you must select a PDF file. If you accessed the Attachments Window using "attach Access database" from the Form Editing Page, you must select a MDB file. If you accessed that window from the attachments button at the bottom of the Form Editing Page, the expected file format will depend on the Attachment Type you select at step 4. For Attachment Types different than "Other", please refer to the corresponding section of the Form Editing Page in order to know the expected file format (PDF or any). The path of the selected file is displayed inside the field in front of the button BROWSE. The maximum file size is 250mb.
4. Select the ATTACHMENT TYPE from the drop-down list, if not already selected.
5. Click the button UPLOAD. The button UPLOAD becomes disabled and the uploading of the selected file as a Report attachment is initiated. After the file upload is finished, the button UPLOAD becomes enabled and refreshed ATTACHMENTS WINDOW is displayed, reflecting the modified information about the Report attachments.

6. **Access Attachment:** An attachment may be accessed by clicking the hyperlink in the column ATTACHMENT of the ATTACHMENTS table. The FILE DOWNLOAD WINDOW is displayed.
7. **Delete Attachment:** An attachment may be deleted by clicking the hyperlink in the column DELETE of the ATTACHMENTS table. The ATTACHMENTS WINDOW is refreshed, reflecting the modified information about the Report attachments.

Manage deliverables list

This option allows managing the deliverables list to the Reports to be submitted (on the reports where the deliverables available, e.g. “CP-CSA-NoE Periodic Report”).

In order to manage the deliverables list, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of deliverables as presented in Figure 2-21.

TABLE 1. Deliverables (4)

Del. no.	Deliverable name	Version	WP no.	Lead beneficiary	Nature	Dissemination level (5)	Delivery date from Annex I (proj month)	Actual / Forecast delivery date	Status	Comments
1	File Accepted - 2	1.0	1	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Submitted	
10	File Pending	1.0	1	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Not Submitted	
11	File Accepted	1.0	1	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Submitted	
1	File Reminded	1.0	2	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Not Submitted	
2	File Accepted - 3	1.0	2	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Submitted	
3	File Accepted - 3	1.0	2	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Submitted	
0	File Rejected	1.0	5	Lead Beneficiary	Nature	Dissemination	30	* 30/09/2010	* Not Submitted	

Add or modify deliverables

Figure 2-21: Table of deliverables (Form Editing Page)

2. This table is automatically loaded with the deliverables associated to the current project. Having said that, if the list must be updated, click the ADD OR MODIFY DELIVERABLES button, to access the Deliverables Management Page (please refer to section 0).

Manage Report Publications

This option allows attaching publications to the Reports to be submitted (on the reports where the publications available, e.g. “IAPP-ITN Final Report”).

In order to attach publications, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12), displaying the Form with at list one upload field (Figure 2-22), by opening a previously saved Report. Please refer to 0 Manage Reports Step 8.

LIST OF SCIENTIFIC (PEER REVIEWED) PUBLICATIONS, STARTING WITH THE MOST IMPORTANT ONES

No.	Title	Upload	Download	Main author	Title of the periodical or the series	Number, date or frequency	Publisher	Place of publication	Year of publicatio
1	User Manual	Publica	download	John Smith	Manage Report Publicatior	2	John SMith	Athens	2004
2	http://cordis.europa.eu/fp7		download						

insert row

delete row

Figure 2-22: Table with the Upload Field (Form Editing Page)

2. Click inside the upload field. The UPLOAD PUBLICATION WINDOW is displayed (Figure 2-23).

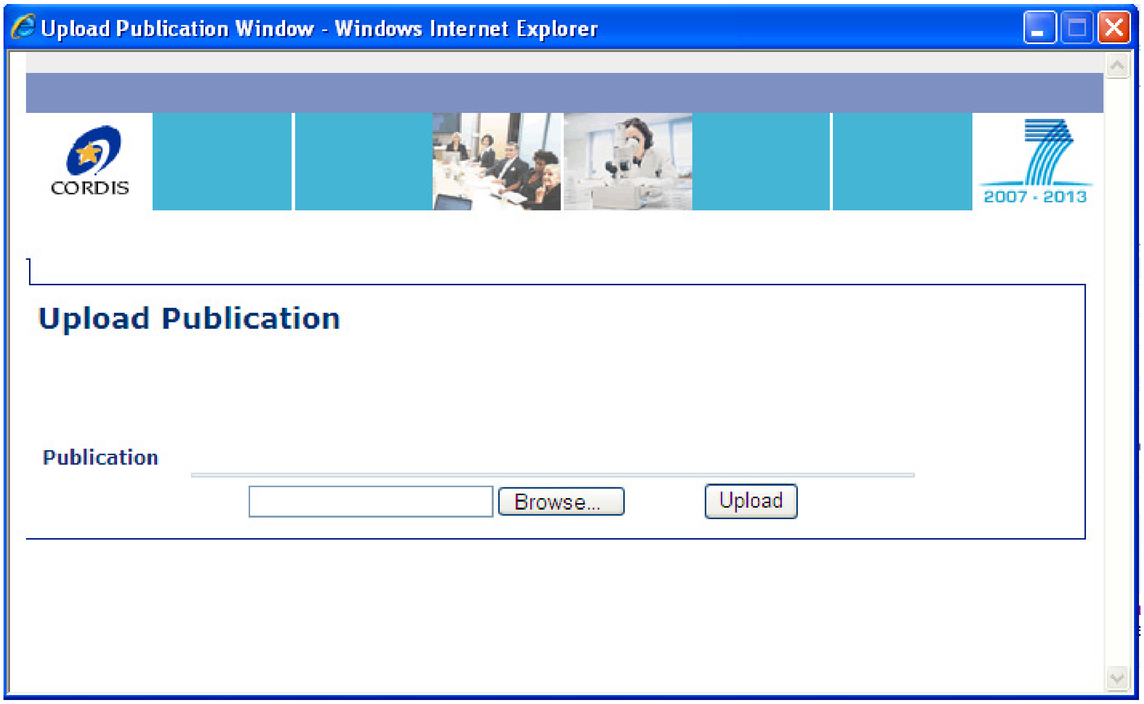


Figure 2-23: Upload Publication Window

3. Click the button BROWSE and browse for the attachment. The path of the selected file is displayed inside the field in front of the button BROWSE.
4. Click the button UPLOAD. The button UPLOAD becomes disabled and the uploading of the selected file is initiated. After the file upload is finished, publication file name is displayed in Title and Upload fields. The title name of uploaded publication can be changed.
5. **Access Publication:** Click the button DOWNLOAD. The FILE DOWNLOAD WINDOW is displayed.
6. **Delete Publication:** The publication file is deleted automatically by deleting row where the publication file is uploaded.

Manage publications list

This option allows managing the publications lists to the Reports to be submitted (on the reports where the publications available, e.g. “CP-CSA-NoE Final Report”).

In order to manage the publications list, the following steps should be considered:

3. Reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of publications as presented in Figure 2-24.

TEMPLATE A1 - LIST OF SCIENTIFIC (PEER REVIEWED) PUBLICATIONS, STARTING WITH THE MOST IMPORTANT ONES										
No.	Title	Main author	Title of the periodical or the series	Number, date or frequency	Publisher	Place of publication	Date of publication	Relevant pages	Permanent identifiers (3) (if applicable)	Is open access(4) provided to this publication?
1	my publication	auiebape	àuei	i.yi.bép	oeyx.	pboeyx.	31/08/2009	époépàe		Yes
3	ne	baunietsn	bstnuisaet	nstbaépofrs	tnlts	béfsrt	31/01/2009	uefirsté	épontaupo	Yes
5	puiè,yioè,	yio,io	ie,yiex,	iye,x	xye,ie,	x,e	17/09/2009	yuépoep	yàpueyep	Yes
6	Badboy Publication	badboy	some periodical	42	badboy software	internet	26/09/2009	42		No
7	Publication Title	Publication Author	Periodic Title	Periodic Number	Publisher Name	Publication Place	15/10/1990	42-64		Yes
8	anuitseé€æ	anuitseé€æ	anuitseé€æ	anuitseé€æ	anuitseé€æ	anuitseé€æ	14/10/2009	anuitseé€æ	anuitseé€æ	No
9	fes	fe	ef	fe	fe	zzae	03/08/2010	zeaze	zeaze	Yes
10	Test	Test	Test	Test	Test	Test	03/08/2010	7		Yes
11	test zerrez	te	azer	azet	azer	azer	24/08/2010	1		Yes
12	fdg	fdfdg	fdgf	dffd	fdf	fgfd	30/09/2010	34	rere	Yes

Add or modify publications

Figure 2-24: Table of publications (Form Editing Page)

4. This table is automatically loaded with the publications associated to the current project. Having said that, if the list must be updated, click the ADD OR MODIFY PUBLICATIONS button, to access the Publications' List Page (please refer to section 0).

Manage dissemination activities list

This option allows managing the dissemination activities list to the Reports to be submitted (on the reports where the dissemination activities are available, e.g. "CP-CSA-NoE Final Report").

In order to manage the dissemination activities list, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of dissemination activities as presented in Figure 2-25.

TEMPLATE A2 - LIST OF DISSEMINATION ACTIVITIES								
No.	Type of activities	Main leader	Title	Date	Place	Type of audience	Size of audience	Countries addressed
1	Publication	UNIVERSITEIT UTRECHT	fezfezf	23/09/2010	dsfdsf	Scientific community (higher education, Research) - Civil society	4345	Belgium
2	Press releases	UNIVERSITY OF LEEDS	Dkfjkjfskjsfd	03/09/2009	Brussels	Scientific community (higher education, Research) - Industry - Civil society - Policy makers - Medias	2	Belgium

Add or modify dissemination activities

Figure 2-25: Table of dissemination activities (Form Editing Page)

2. This table is automatically loaded with the dissemination activities associated to the current project. In case the list must be updated, click the ADD OR MODIFY DISSEMINATION ACTIVITIES button, to access the Dissemination Activities' List Page (please refer to section 0).

Manage applications for patent list

This option allows managing the applications for patent lists to the Reports to be submitted (on the reports where the application for patents available, e.g. "CP-CSA-NoE Final Report").

In order to manage the applications for patent list, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of application for patents as presented in Figure 2-26.

TEMPLATE B1: LIST OF APPLICATIONS FOR PATENTS, TRADEMARKS, REGISTERED DESIGNS,UTILITY MODELS, ETC.					
Type of IP Rights	Confidential	Foreseen embargo date dd/m/yyyy	Application reference(s) (e.g. EP123456)	Subject or title of application	Applicant(s) (as on the application)
Patent	Yes	09/09/2010	EP000001	Invention of the wheel	Mesopotamians

Add or modify applications

Figure 2-26: Table of applications for patent (Form Editing Page)

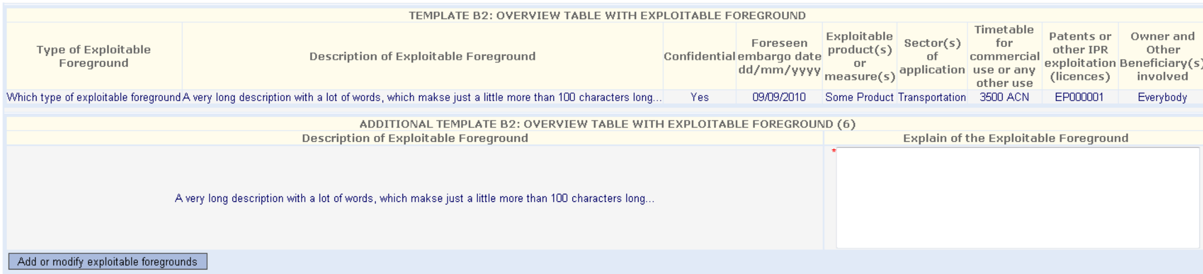
2. This table is automatically loaded with the application associated to the current project. Having said that, if the list must be updated, click the ADD OR MODIFY APPLICATIONS button, to access the Applications' List Page (please refer to section 0).

Manage exploitable foregrounds list

This option allows managing the exploitable foregrounds lists to the Reports to be submitted (on the reports where the exploitable foregrounds available, e.g. "CP-CSA-NoE Final Report").

In order to manage the exploitable foregrounds list, the following steps should be considered:

1. Reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of exploitable foregrounds as presented in Figure 2-27.



TEMPLATE B2: OVERVIEW TABLE WITH EXPLOITABLE FOREGROUND

Type of Exploitable Foreground	Description of Exploitable Foreground	Confidential	Foreseen embargo date dd/mm/yyyy	Exploitable product(s) or measure(s)	Sector(s) of application	Timetable for commercial use or any other use	Patents or other IPR exploitation (licences)	Owner and Other Beneficiary(s) involved
Which type of exploitable foreground	A very long description with a lot of words, which makse just a little more than 100 characters long...	Yes	09/09/2010	Some Product	Transportation	3500 ACN	EP000001	Everybody

ADDITIONAL TEMPLATE B2: OVERVIEW TABLE WITH EXPLOITABLE FOREGROUND (6)

Description of Exploitable Foreground	Explain of the Exploitable Foreground
A very long description with a lot of words, which makse just a little more than 100 characters long...	*

Add or modify exploitable foregrounds

Figure 2-27: Table of exploitable foregrounds (Form Editing Page)

2. This table is automatically loaded with the exploitable foregrounds associated to the current project. Having said that, if the list must be updated, click the ADD OR MODIFY EXPLOITABLE FOREGROUNDS button, to access the Exploitable foregrounds' List Page (Please refer to section 0).

Manage partners' list

This option allows managing the partners' lists to the Reports to be submitted (on the reports where the partners are available, e.g. "IRSES Periodic Report").

In order to manage the partners' list, the following steps should be considered:

1. Click the PARTNERS link from the WORK WITH A PROJECT PAGE (Figure 2-5) or reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of partners as presented in Figure 2-28.

Partner: NORWEGIAN INSTITUTE FOR AIR RESEARCH

WP No.	Name of the Researcher	Type	Gender	Seconded to Partner	Start date of secondment	End date of secondment	No. of full-time equivalent months covered by this secondment during this reporting period
*		*		*	*	*	*
	Total						0.0

insert row

delete row

Add or modify partners

Figure 2-28: Table of partners (Form Editing Page)

2. One table is automatically created for each partner associated to the current project. Having said that, if the list must be updated, click the ADD OR MODIFY PARTNERS button, to access the Partners' List Page (please refer to section 0).

Manage fellows' data

This option allows managing the fellows' data lists to the Reports to be submitted (on the reports where the fellows' data available, e.g. "COFUND Final Report").

Fellows' data are related to a specific instance of report. Before being able to manage these data, you must create and save the report for which the data will be used.

In order to manage the fellows' data list, the following steps should be considered:

1. Click the FELLOWS' DATA link from the WORK WITH A PROJECT PAGE (Figure 2-5) or reach the FORM EDITING PAGE (Figure 2-12), displaying the Form containing the List of fellows' data as presented in Figure 2-29.

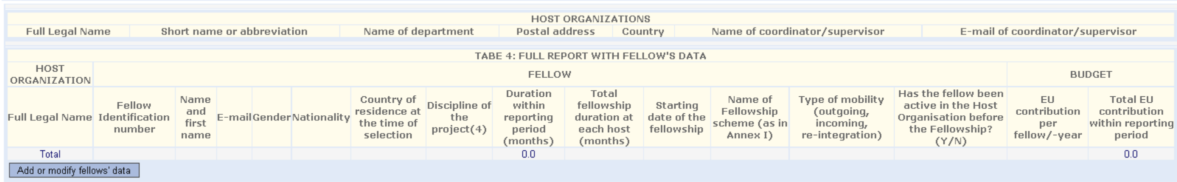


Figure 2-29: Table of fellows' data (Form Editing Page)

2. This table is automatically loaded with the fellows' data associated to the current project. Having said that, if the list must be updated, click the ADD OR MODIFY FELLOWS' DATA button, to access the Fellows' data' List Page (please refer to 0).

Access User Document

This option allows accessing User Documents. In order to access User Document, the following steps should be considered:

1. Click the link HOME inside the menu of any SESAM - QUEST page. The HOME PAGE is presented (Figure 2-30).
2. Click the hyperlink in the column TITLE of the table DOCUMENTS for the target User Document. The FILE DOWNLOAD WINDOW is displayed.

Figure 2-30: Home Page

Send Email to Helpdesk

This option allows sending emails to the helpdesk.

In order to send email to the helpdesk, the following steps should be considered:

1. Click the hyperlink HELPDESK inside the header of any SESAM - QUEST page. The CREATE EMAIL WINDOW of the default email client application on the user computer is presented, with the following email parameters pre-populated:
   - Recipient – Helpdesk email address
   - Subject – QUEST USER SUPPORT (all pages except the ERROR PAGE) or QUEST ERROR MESSAGE (ERROR PAGE)
   - Body (ERROR PAGE only) – Error message displayed on the ERROR PAGE

Login and Register User

On the HOME PAGE (Figure 2-30) follow LOGIN link from the menu. It opens ECAS Login Page where user provides the username and password to be authenticated and sent back to QUEST application. Also, on the ECAS Login page the register link is present for the new users that need to register themselves first.

Register as a New Participant

This option allows creating new Project Participant account, assuming you are able to provide correct data identifying yourself as valid Project Participant.

In order to register as new Project Participant, the following steps should be considered:

1. Click the hyperlink REGISTER TO A PROJECT on the SELECT PROJECT PAGE (Figure 2-4). The NEW PARTICIPANT REGISTRATION PAGE is presented (Figure 2-31).

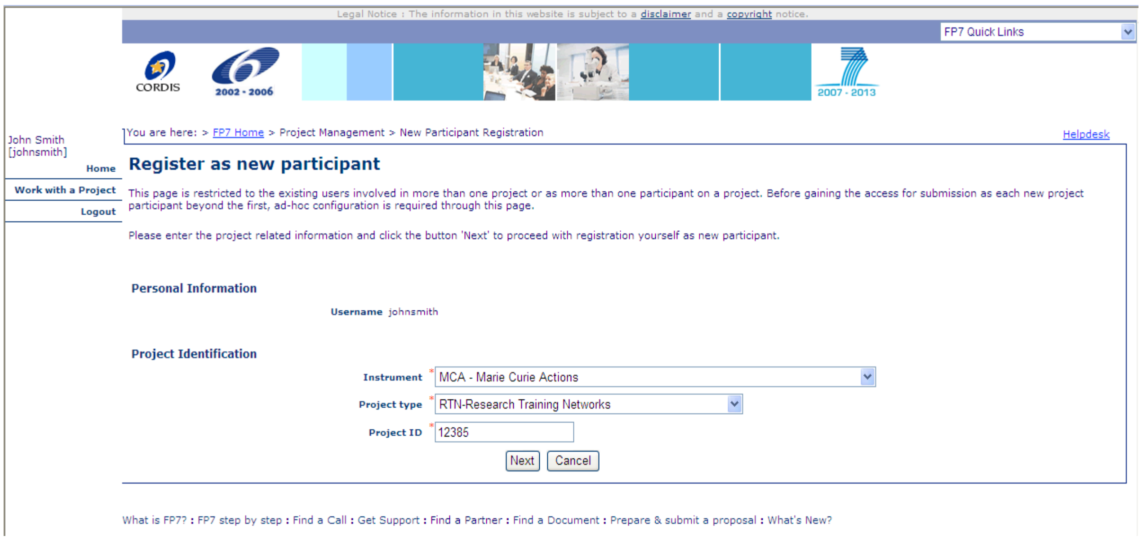


Figure 2-31: New Participant Registration Page

2. Provide project identification information:
   a. Select instrument using the drop-down list INSTRUMENT.
   b. Select project type using the drop-down list PROJECT TYPE.
   c. Enter Project ID in the field PROJECT ID.
3. Click button NEXT. The NEW PARTICIPANT REGISTRATION PAGE is presented (Figure 2-32).
4. Provide Project Contractor or Project Reviewer identification information:
   a. Provide Project Coordinator identification information:
      i. Select PROJECT COORDINATOR from the drop-down list PROJECT PARTICIPANT TYPE.
   b. Provide Project Contractor identification information:
      i. Select PROJECT CONTRACTOR from the drop-down list PROJECT PARTICIPANT TYPE.
      ii. Select PARTICIPANT NAME from the drop-down list PARTICIPANT.

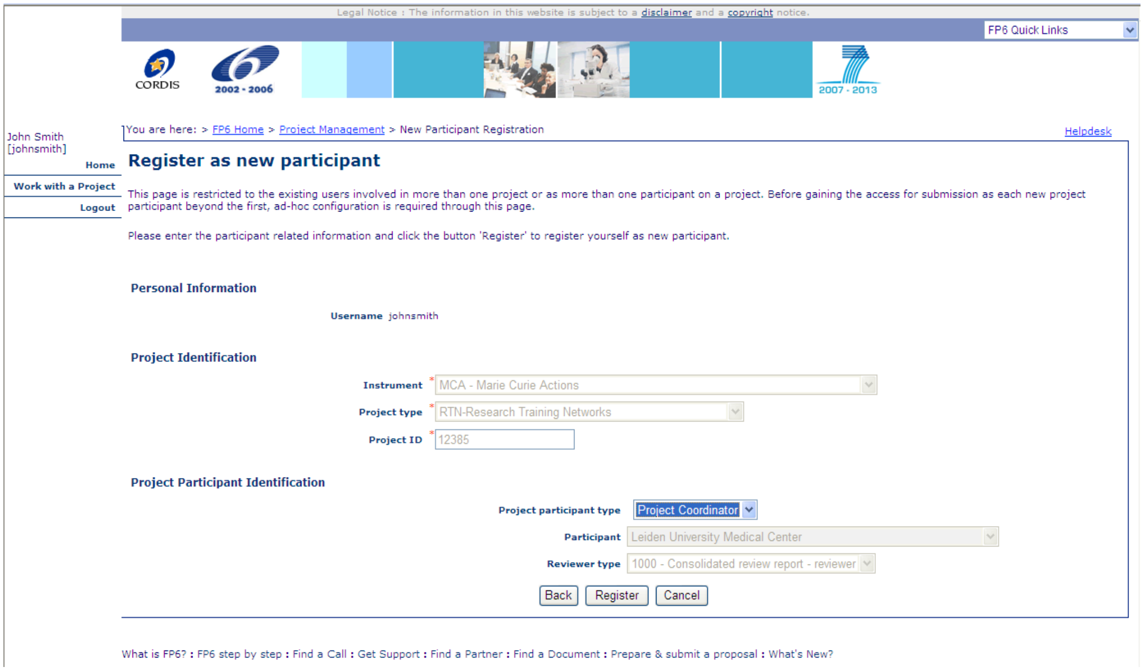


Figure 2-32: New Participant Registration Page (with Project Participant Identification)

c. Provide Project Reviewer identification information:
   i. Select PROJECT REVIEWER from the drop-down list PROJECT PARTICIPANT TYPE.
   ii. Select REVIEWER TYPE using the drop-down list REVIEWER TYPE.

5. Click the button REGISTER. The CONFIRMATION MESSAGE BOX is presented (Figure 2-33).

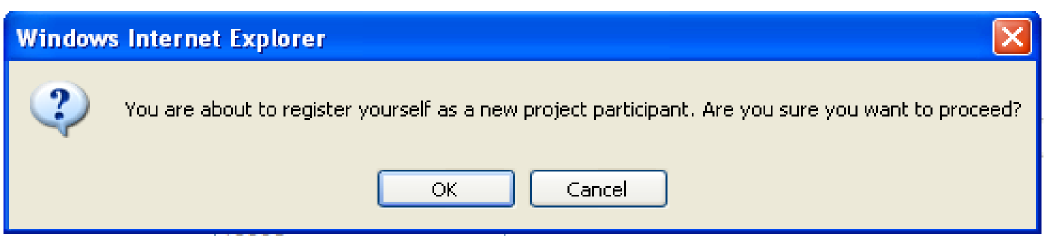


Figure 2-33: Confirmation Message Box

6. Click the button OK to proceed (or CANCEL otherwise). The SELECT PROJECT PAGE is presented, accompanied with the COMPLETION MESSAGE BOX (Figure 2-34).

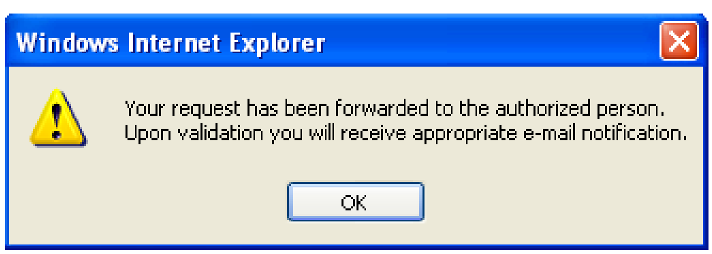


Figure 2-34: Completion Message Box

`FP6/FP7 Layout – Different Layout for The FP6/FP7 Project Selected`

This option allows displaying a different layout for specified FP6/FP7 project.

In order to display FP7 layout, on the PROJECT IDENTIFICATION PAGE (Figure 2-2) or SELECT PROJECT PAGE (Figure 2-4) specify the identifier of FP7 project. In case of the report selected, the layout of the appropriate Report Selection Page is the following:

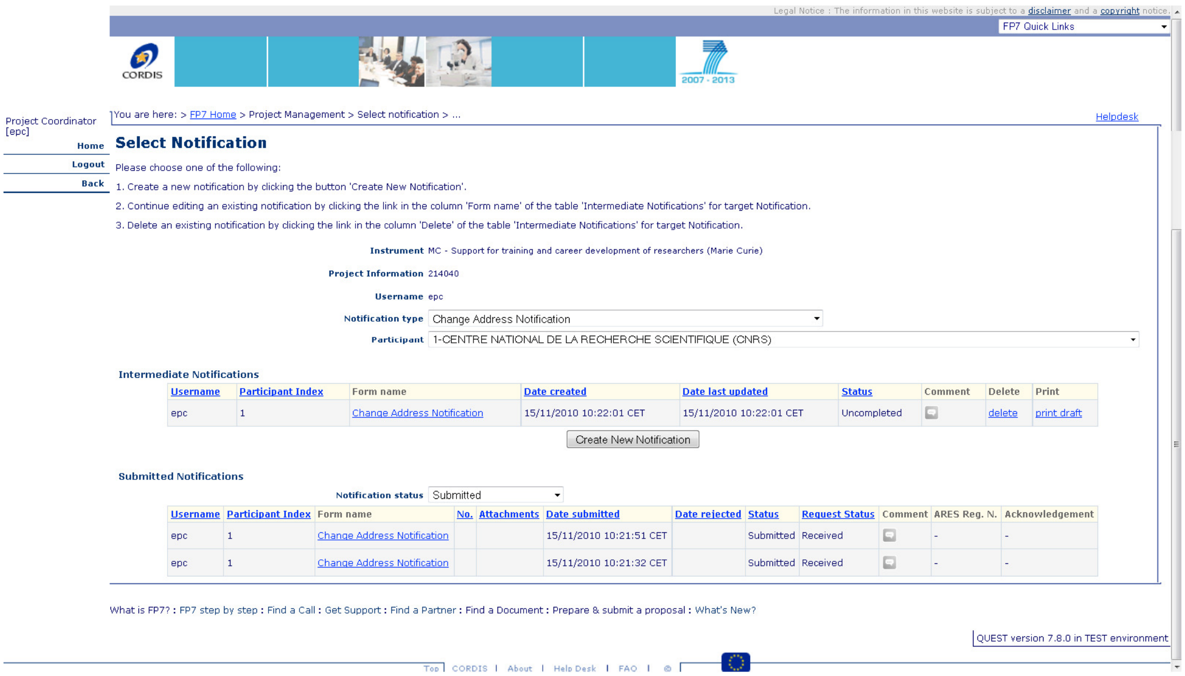


Figure 2-35: Report Selection Page (FP7 layout)

The FP7 layout is also applied as a default one (on the pages without project being selected or for the projects without framework programme specified in CPM).

In order to display FP6 layout, the same steps should be done but for the FP6 project. The resulting layout is:

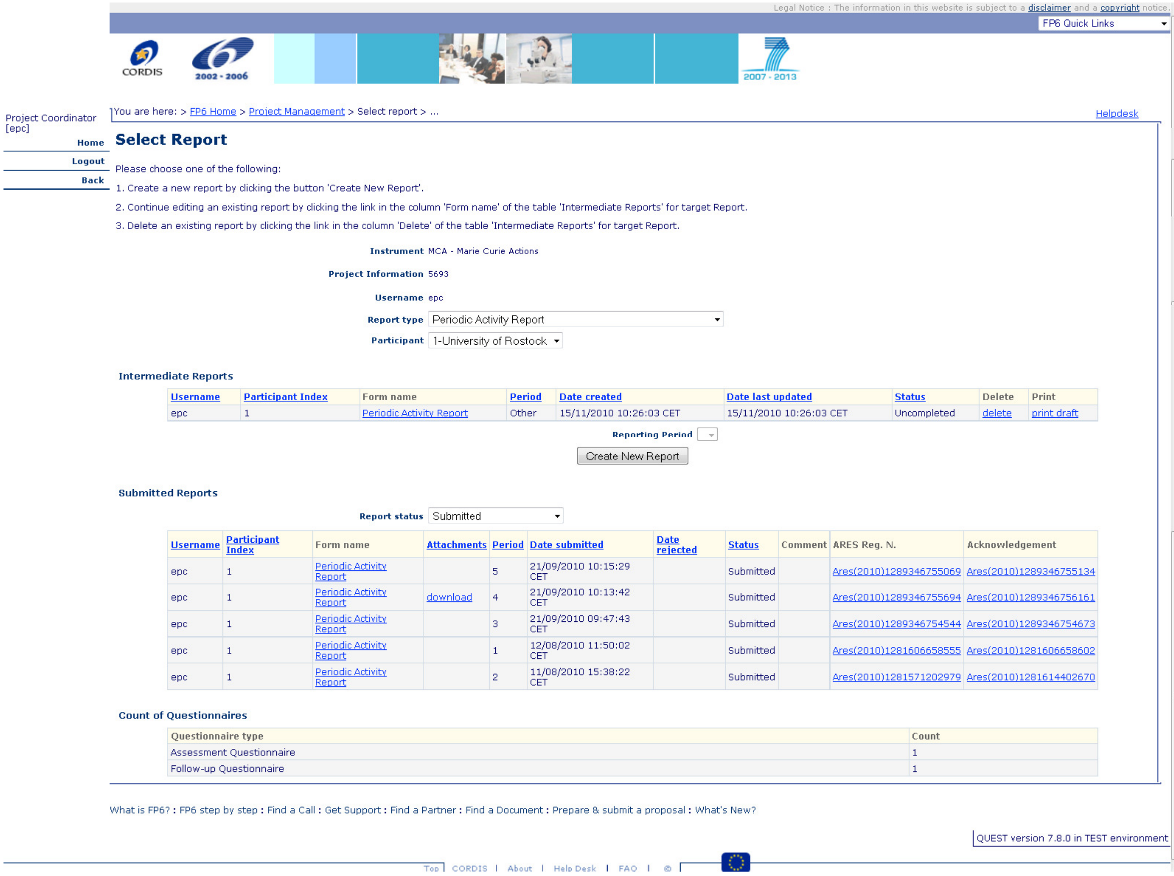


Figure 2-36: Report Selection Page (FP6 layout)

Manage User-Project links

The user can display overview of active users that have pending or active links on the projects on which the actor is Coordinator, using a number of filtering criteria:

1. Click the link VALIDATE USERS inside the menu on SELECT PROJECT PAGE. The USERS VALIDATION SEARCH PAGE is presented (Figure 2-37).

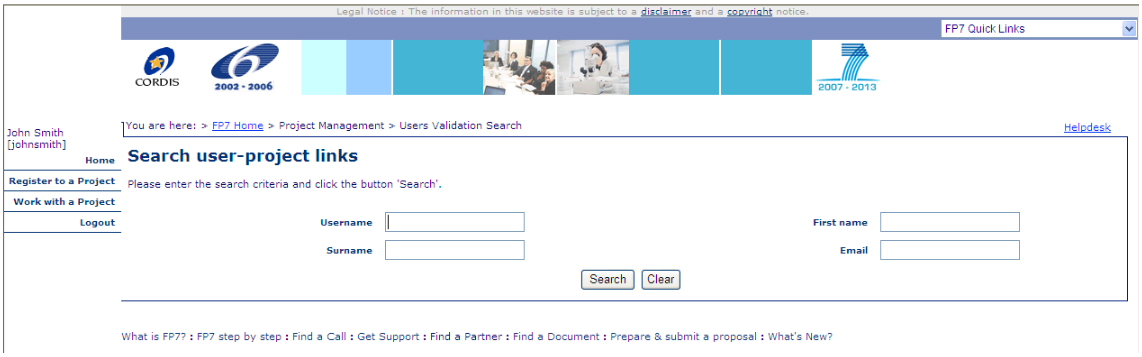


Figure 2-37: Users Validation Search Page

2. Specify filtering criteria:
   a. Enter username in the field USERNAME.
   b. Enter first name in the field FIRST NAME.
   c. Enter surname in the field SURNAME.
   d. Enter email in the field EMAIL.

   USERNAME filtering criterion supports the convention for wild characters:

   - % – Any character
   - * – Any characters

   FIRST NAME, SURNAME and EMAIL support:

   - * – Any characters
3. Click the button SEARCH. The USERS VALIDATION RESULTS PAGE is presented (Figure 2-38). The results are structured in the following columns:
   - USERNAME
   - FIRST NAME
   - SURNAME
   - EMAIL
   - ACTIVE LINKS – Space separated list of hyperlinks for deleting Active Links (format Project ID:Participant index)
   - PENDING LINKS – Space separated list of hyperlinks for activating Pending Links (format Project ID:Participant index)

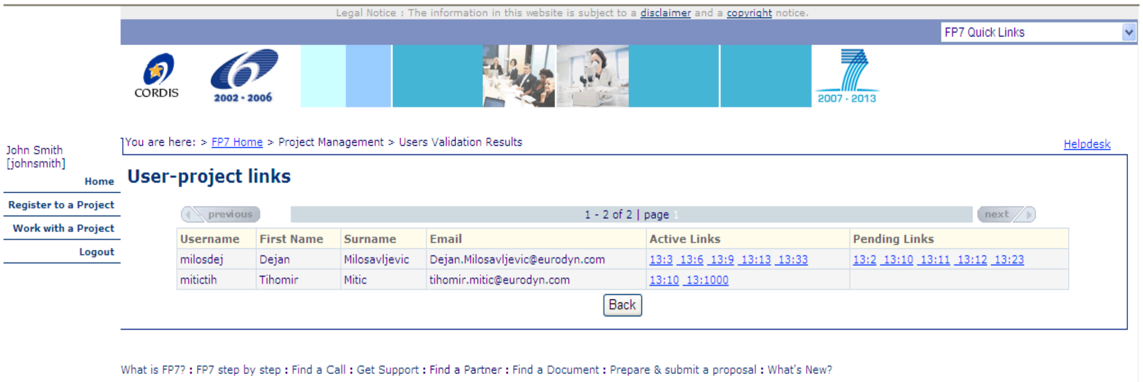


Figure 2-38: Users Validation Results Page

4. Navigate through users using links to particular pages, as well as, buttons PREVIOUS and NEXT.
5. **Activate Link:** A Pending Link may be activated by considering the following steps:
   a. Click a hyperlink in the column PENDING LINKS for target Link. The CONFIRMATION MESSAGE BOX is presented (Figure 2-39).

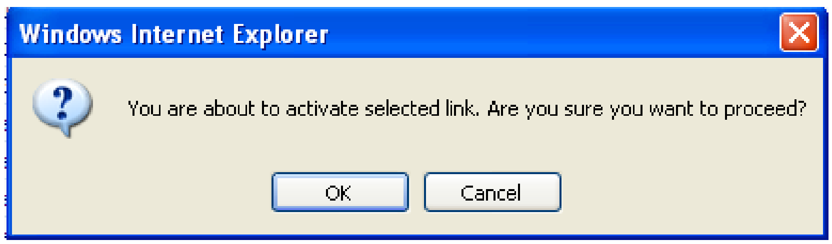


Figure 2-39: Confirmation message box

   b. Click the button OK to proceed (or CANCEL otherwise). The Link is activated and refreshed USERS VALIDATION RESULTS PAGE is displayed, reflecting the new status (the Link should appear in the column ACTIVE LINKS instead of PENDING LINKS).
6. **Delete Link:** An Active Link may be deleted by considering the following steps:
   a. Click a hyperlink in the column ACTIVE LINKS for target Link. The CONFIRMATION MESSAGE BOX is presented (Figure 2-40).

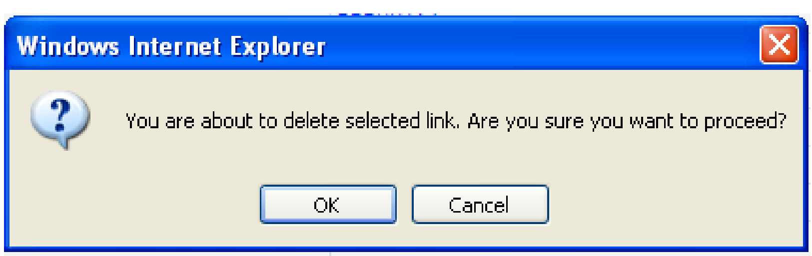


Figure 2-40: Confirmation message box

   b. Click the button OK to proceed (or CANCEL otherwise). The Link is deleted and refreshed USERS VALIDATION RESULTS PAGE is displayed, reflecting the new status (the Link should disappear from the column ACTIVE LINKS).

Manage Deliverables

This option allows accessing Deliverables. In order to access Deliverables, the following steps should be considered:

1. Click the DELIVERABLES link from the WORK WITH A PROJECT PAGE (Figure 2-5)
2. Click the hyperlink in the TITLE column of either “Submitted deliverables” or “Deliverables in progress” table where a hyperlink is activated, as presented in Figure 2-41.
3. The DOWNLOAD WINDOW pops-up.

Figure 2-41: Deliverables management page

Upload deliverable: In the “Deliverables in progress” table, click on the hyperlink UPLOAD of one row of the Deliverables list where the deliverable is expected. The UPLOAD DELIVERABLE PAGE is displayed (Figure 2-42). Browse for the file to upload by clicking the BROWSE button. If the selected deliverable is an expected one[1] then, the other fields are prefilled and displayed for information. So it is mandatory to select a file to upload. Otherwise, if the deliverable is not expected, it is not mandatory to select a file to upload because a non-expected deliverable can be added without a version. Also, is the case of a non-expected deliverable the following fields are editable and should be filled or not according to some validation rules:

- Work package no is mandatory; it should be an integer.
- Title is mandatory; it is a free text.
- flag Related to a reporting period is not mandatory.

[1] An expected deliverable is a deliverable already defined in CPM. It is expected contractually speaking.

- Reporting period is mandatory if the flag Related to a reporting period is checked.
- Lead beneficiary is not mandatory; it is chosen among a predefined list.
- Person months is not mandatory; it should be a real number with maximum 2 decimal digits.
- Nature is not mandatory; it is chosen among a predefined list.
- Dissemination level is not mandatory; it is chosen among a predefined list.
- Delivery date from Annex I is mandatory; it should represent a number of months.
- Document type is not mandatory; it is chosen among a predefined list.

Validate deliverable: For the project coordinator only! In the “Deliverables in progress” table, click the hyperlink VALIDATE of one row of the Deliverables list where the deliverable status is PENDING. The status is updated to READY TO SUBMIT.

Add new deliverable: click on the UPLOAD OTHER button to add a non expected deliverable (also called “non contractual” deliverable). The UPLOAD DELIVERABLE PAGE is displayed (Figure 2-42). Enter the following fields, at least the mandatory ones:

- Work package no is mandatory; it should be an integer.
- Title is mandatory; it is a free text.
- flag Related to a reporting period is not mandatory.
- Reporting period is mandatory if the flag Related to a reporting period is checked.
- Lead beneficiary is not mandatory; it is chosen among a predefined list.
- Person months is not mandatory; it should be a real number with maximum 2 decimal digits.
- Nature is not mandatory; it is chosen among a predefined list.
- Dissemination level is not mandatory; it is chosen among a predefined list.
- Delivery date from Annex I is mandatory; it should represent a number of months.
- Document type is not mandatory; it is chosen among a predefined list.

And then, browse for the file to upload by clicking the BROWSE button. The file name is displayed in the field FILE UPLOAD. It is not mandatory to select a file to upload because a non-expected deliverable can be added without a version. Click the UPLOAD button. The file is uploaded in the QUEST database and the DELIVERABLES MANAGEMENT PAGE is displayed, presenting the changes.

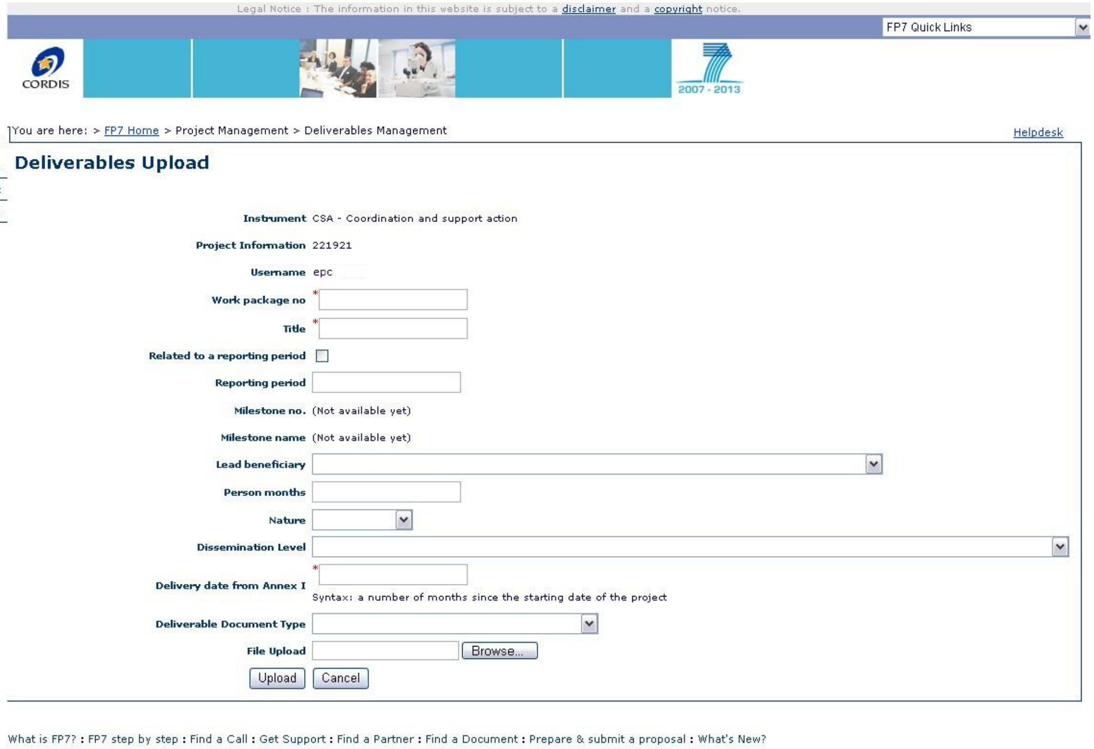


Figure 2-42: Upload deliverable page

Delete deliverable: Click the hyperlink DELETE (or the REJECT link for Pending deliverables visible to Project Coordinator) of one row of the Deliverables list where a version of the deliverable exists. The deliverable is deleted and the DELIVERABLES MANAGEMENT PAGE is displayed, presenting the changes.

Submit deliverable: For the project coordinator only! In the “Deliverables in progress” table, click the hyperlink ADD (NON-EXPECTED DELIEVRABLE WITHOUT ATTACHMENT) or SUBMIT (OTHER CASES) of one row of the Deliverables list where the deliverable status is READY TO SUBMIT. The status is updated to SUBMISSION TO BACKEND SYSTEM ONGOING, which is an automatic background task. Once the submission is successful, you might receive an Acknowledgement of Receipt by email, depending on the Unit and Sub-funding Scheme of the project. The deliverable will then be moved in the “Submitted deliverables” table and it will be visible in the reports. Furthermore, an email will be sent to the project officer informing him that a new deliverable has been submitted.

If a recoverable error occurs, the status will be updated to SUBMISSION TO BACKEND SYSTEM IN PROGRESS and the system will retry the submission later. If the deliverable is not submitted yet after one day, or if the status becomes SUBMISSION TO BACKEND SYSTEM FAILED, please contact the Help Desk.

Manage Publications

This option allows accessing directly to Publications.

1. Click the Publications link from the WORK WITH A PROJECT page (Figure 2-5). The MANAGE PUBLICATIONS PAGE is displayed (Figure 2-43).

Figure 2-43: Manage publications page

2. Enter:

    a. TITLE: mandatory, maximum 512 characters,

    b. MAIN AUTHOR: mandatory, maximum 512 characters,

    c. TITLE OF THE PERIODICAL OR SERIES: mandatory, maximum 100 characters,

    d. NUMBER DATE OR FREQUENCY: mandatory, maximum 100 characters,

    e. PUBLISHER: mandatory, maximum 512 characters,

    f. PLACE OF PUBLICATION: mandatory, maximum 512 characters,

    g. YEAR OF PUBLICATION: mandatory, date format,

    h. RELEVANT PAGES: mandatory, maximum 100 characters,

    i. PERMANENT IDENTIFIERS (if applicable) fields: maximum 100 characters

    j. OPEN ACCESS field.

3. Click the ADD PUBLICATION button. The publication is added and the publications list is refreshed to display the changes.

4. **Update Publication**: Click the link UPDATE of a row from the publications list. The field values are displayed on top of the page. Modify these values and click the UPDATE PUBLICATION button to save the changes, as presented in Figure 2-44**Error! Reference source not found.**. Click on Cancel Edition if you want to cancel the edition of the publication.

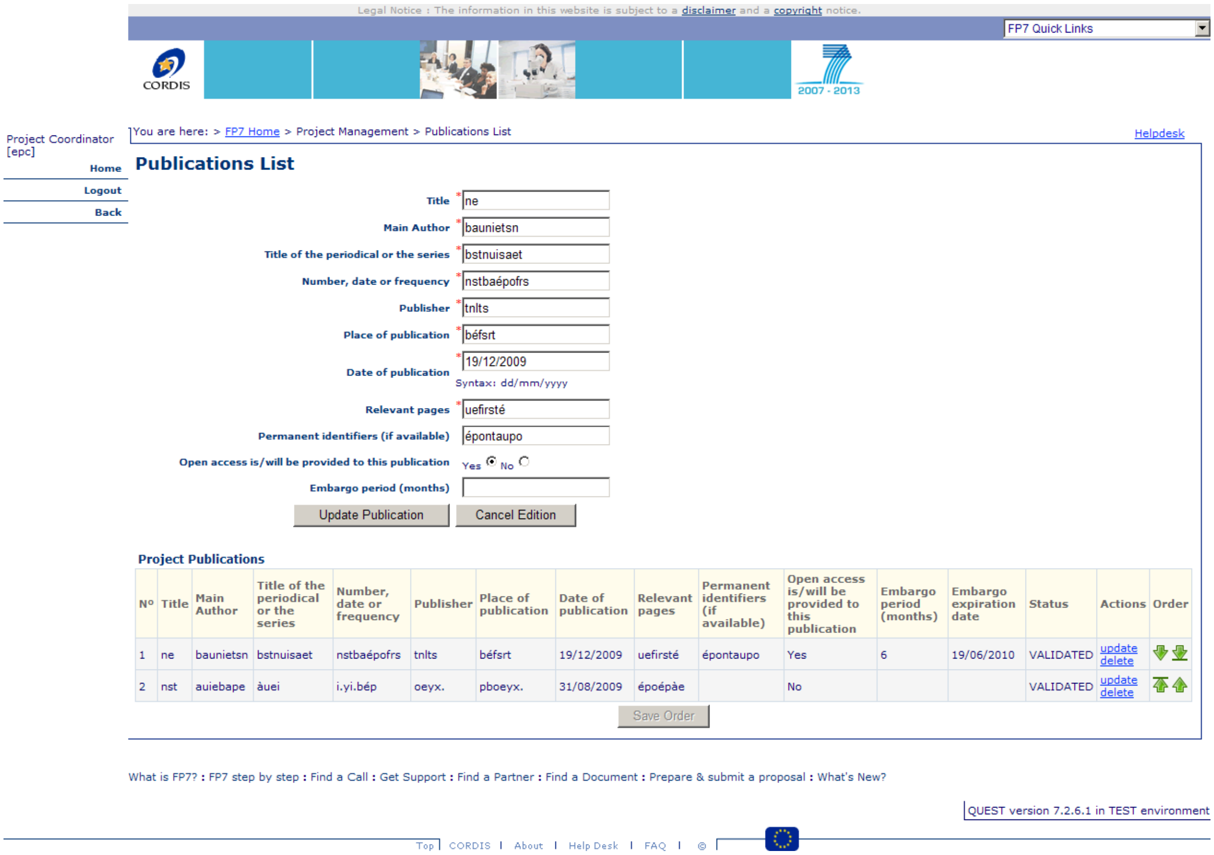


Figure 2-44: Update publication

5. **Delete publication**: Click the DELETE link (or the REJECT link for Pending publications visible to Project Coordinator). The publication row is removed from the system and the publications list is refreshed accordingly.

6. **Validate publication**: For project coordinator only, click the VALIDATE button of one row having status PENDING. The status is updated to VALIDATED and the publication becomes therefore visible in the reports.

7. **Change publication order**: Click the arrows of the publications list as presented in Figure 2-45**Error! Reference source not found.**. The corresponding publication moves to the top, up, down or to the end, respectively from left to right. Click the CHANGE ORDER button to save the publications order.

Figure 2-45: change publication order

Manage Dissemination Activities

This option allows accessing directly to Dissemination Activities.

1. Click the Dissemination Activities link from the WORK WITH A PROJECT page (Figure 2-5). The MANAGE DISSEMINATION ACTIVITIES PAGE is displayed (Figure 2-46).

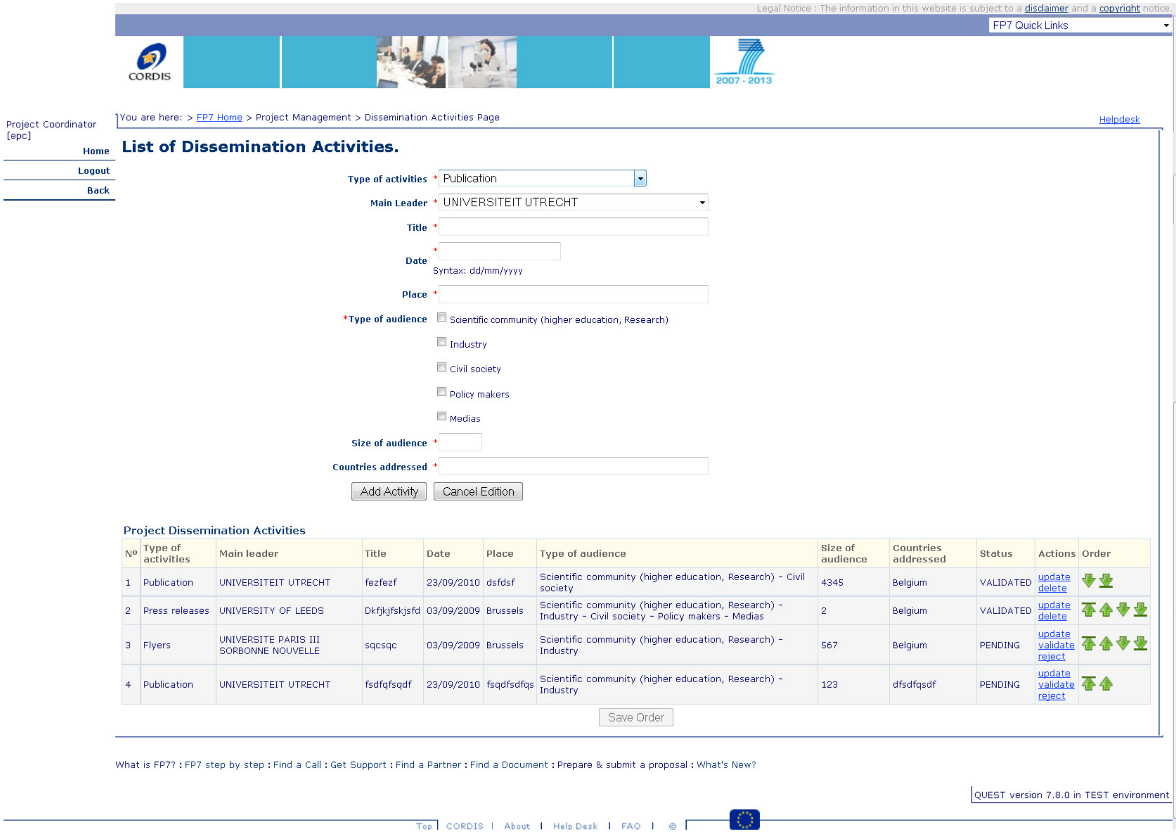


Figure 2-46: Manage dissemination activities page

3. Select :
   a. TYPE OF ACTIVITIES,
   b. MAIN LEADER,
   c. TITLE: mandatory, maximum 100 characters,
   d. DATE: mandatory, date format,
   e. PLACE: mandatory, maximum 50 characters,
   f. TYPE OF AUDIENCE fields (at least one must be selected),
   g. SIZE OF AUDIENCE: mandatory, between 0 and 9999,
   h. COUNTRIES ADDRESSED fields.
4. Click the ADD ACTIVITY button. The dissemination activity is added and the dissemination activities list is refreshed to display the changes.

5. **Update Dissemination Activities**: Click the link UPDATE of a row from the dissemination activities list. The field values are displayed on top of the page. Modify these values and click the UPDATE ACTIVITY button to save the changes, as presented in Figure 2-47. Click on Cancel Edition if you want to cancel the edition of the dissemination activity.

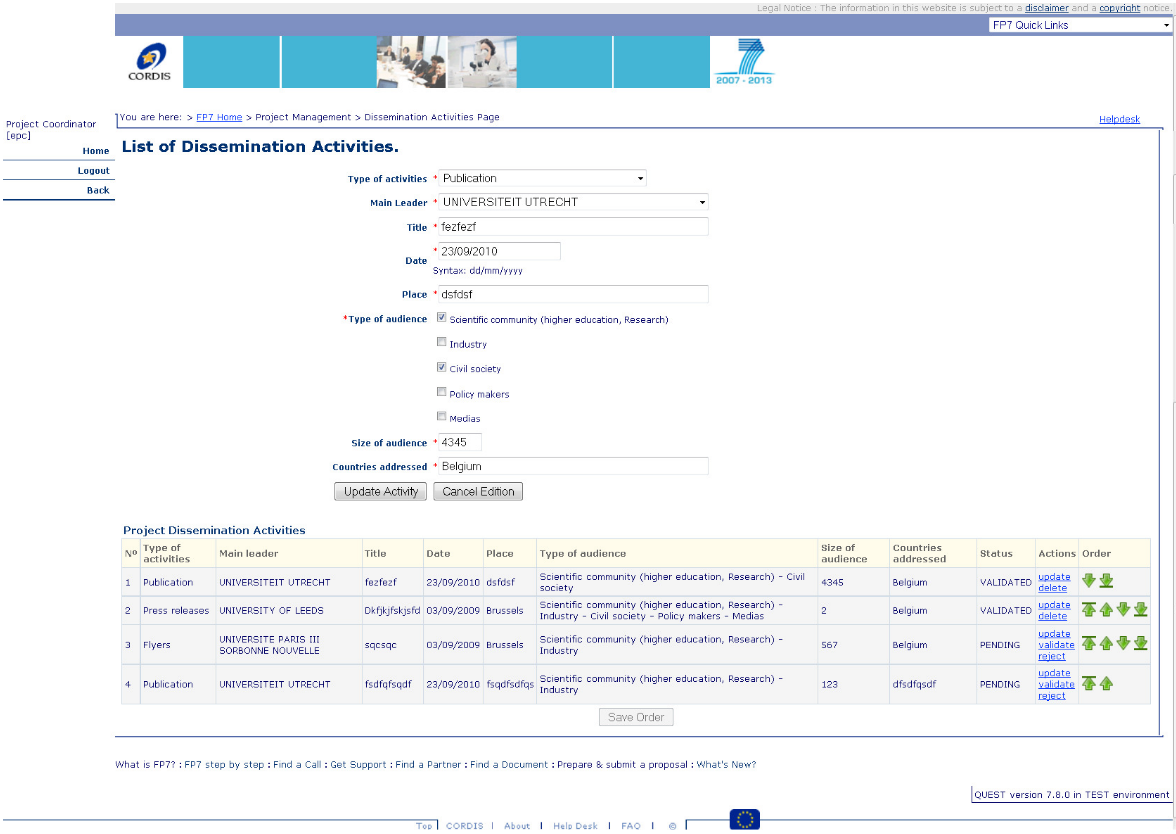


Figure 2-47: Update dissemination activity

6. **Delete dissemination activity**: Click the DELETE link (or the REJECT link for Pending dissemination activities visible to Project Coordinator). The dissemination activity row is removed from the system and the dissemination activities list is refreshed accordingly.
7. **Validate dissemination activity**: For project coordinator only, click the VALIDATE button of one row having status PENDING. The status is updated to VALIDATED and the dissemination activity becomes therefore visible in the reports.
8. **Change dissemination activities order**: Click the arrows of the dissemination activities list as presented in Figure 2-48. The corresponding dissemination activity moves to the top, up, down or to the end, respectively from left to right. Click the CHANGE ORDER button to save the dissemination activities order.

Figure 2-48: change dissemination activities order

Manage Applications for Patent

This option allows accessing directly to Applications for Patents.

1. Click the Patents link from the WORK WITH A PROJECT page (Figure 2-5). The MANAGE PATENTS PAGE is displayed (Figure 2-49).

Figure 2-49: Manage applications for patent page

3. Enter:
    a. TYPE OF IP RIGHTS : mandatory, maximum 50 characters,
    b. APPLICATION REFERENCE : mandatory, maximum 100 characters,
    c. SUBJECT OR TITLE OF APPLICATION : mandatory, maximum 512 characters,
    d. FORESEEN EMBARGO DATE : mandatory, date format,
    e. APPLICANT(S) : mandatory, maximum 512 characters,
    f. URL OF APPLICATION fields : maximum 256 characters,
    g. CONFIDENTIAL field.
4. Click the ADD PATENT button. The application for patent is added and the applications list is refreshed to display the changes.

5. **Update Application**: Click the link UPDATE of a row from the applications list. The field values are displayed on top of the page. Modify these values and click the UPDATE APPLICATION FOR PATENT button to save the changes, as presented in Figure 2-50**Error! Reference source not found.**. Click on Cancel Edition if you want to cancel the edition of the publication.

Figure 2-50: Update application for patent

6. **Delete application for patent**: Click the DELETE link (or the REJECT link for Pending applications for patent visible to Project Coordinator). The application for patent row is removed from the system and the applications list is refreshed accordingly.
7. **Validate application for patent**: For project coordinator only, click the VALIDATE button of one row having status PENDING. The status is updated to VALIDATED and the application for patent becomes therefore visible in the reports.

Manage Exploitable Foregrounds

This option allows accessing directly to Exploitable Foregrounds.

1. Click the Exploitable Foregrounds link from the WORK WITH A PROJECT page (Figure 2-5). The MANAGE EXPLOITABLE FOREGROUNDS PAGE is displayed (Figure 2-51).

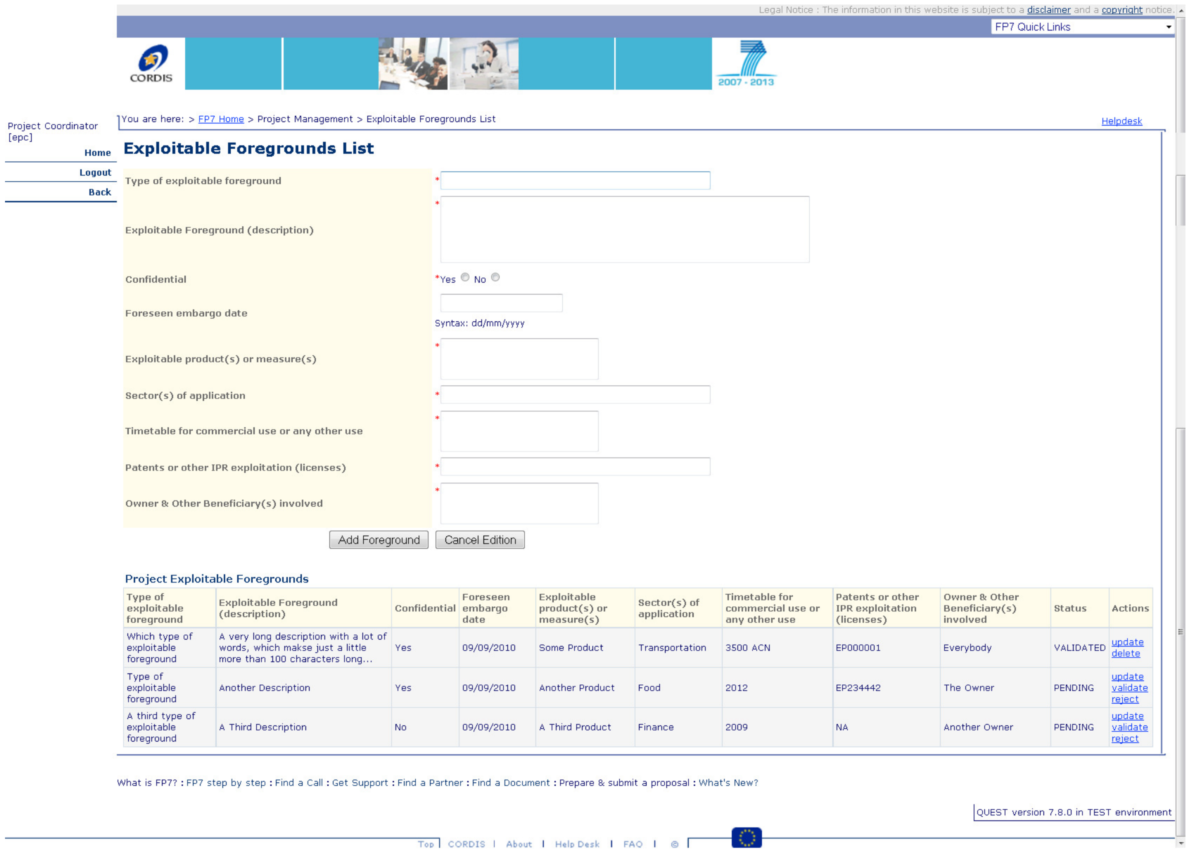


Figure 2-51: Manage exploitable foregrounds page

3. Enter:
   a. TYPE OF EXPLOITABLE FOREGROUND : mandatory, maximum 100 characters,
   b. EXPLOITABLE FOREGROUND (DESCRIPTION) : mandatory, maximum 4000 characters,
   c. FORESEEN EMBARGO DATE: mandatory, date format,
   d. EXPLOITABLE PRODUCT(S) OR MEASURE(S) : mandatory, maximum 512 characters,
   e. SECTOR(S) OF APPLICATION : mandatory, maximum 100 characters,
   f. TIMETABLE COMMERCIAL USE : mandatory, maximum 512 characters,
   g. PATENTS OR OTHER IPR EXPLOITATION : mandatory, maximum 100 characters,
   h. OWNER & OTHER BENEFICIARIES INVOLVED fields : mandatory, maximum 512 characters,
   i. CONFIDENTIAL field.
4. Click the ADD EXPLOITABLE FOREGROUND button. The exploitable foreground is added and the exploitable foregrounds list is refreshed to display the changes.

5. **Update Exploitable Foreground**: Click the link UPDATE of a row from the exploitable foregrounds list. The field values are displayed on top of the page. Modify these values and click the UPDATE EXPLOITABLE FOREGROUND button to save the changes, as presented in Figure 2-52**Error! Reference source not found.**. Click on Cancel Edition if you want to cancel the edition of the publication.

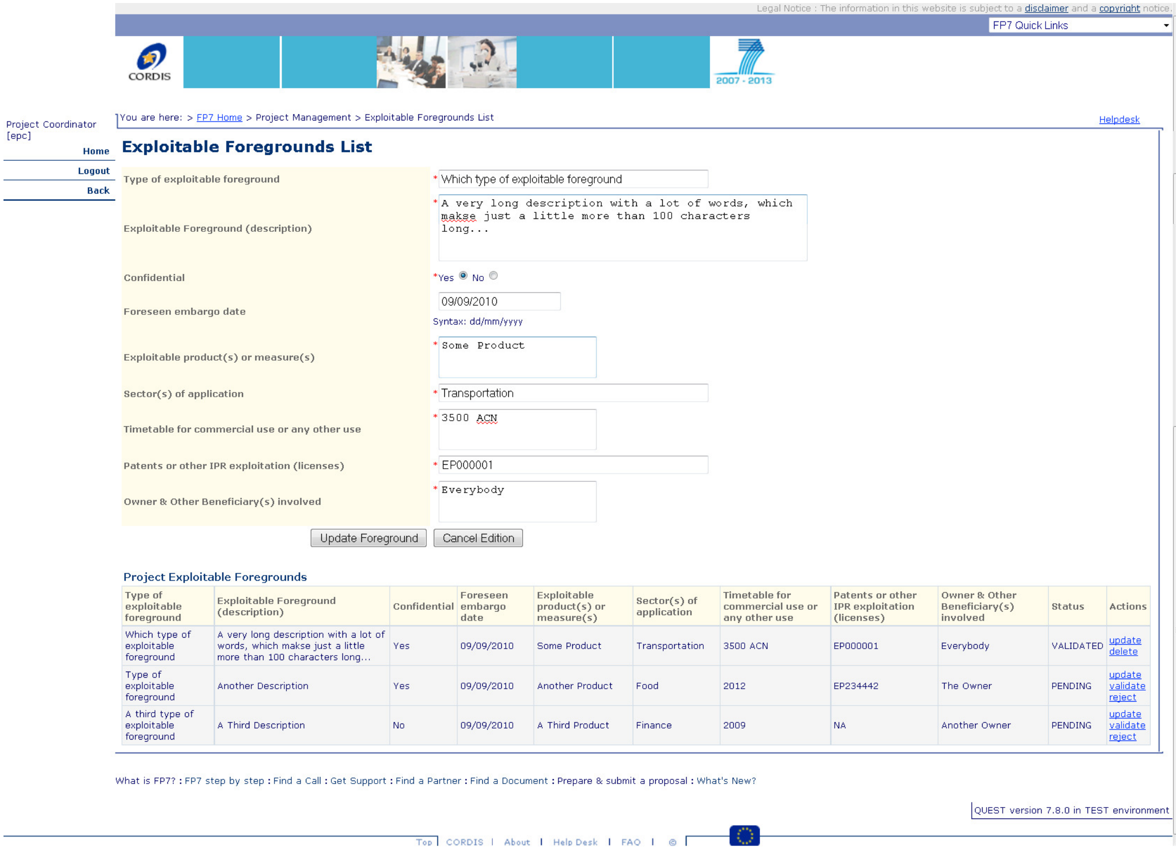


Figure 2-52: Update exploitable foreground

6. **Delete exploitable foreground**: Click the DELETE link (or the REJECT link for Pending exploitable foregrounds visible to Project Coordinator). The exploitable foreground row is removed from the system and the exploitable foregrounds list is refreshed accordingly.
7. **Validate exploitable foreground**: For project coordinator only, click the VALIDATE button of one row having status PENDING. The status is updated to VALIDATED and the exploitable foreground becomes therefore visible in the reports.

Manage Partners

This option allows accessing directly to Partners list.

1. Click the Partners link from the WORK WITH A PROJECT page (Figure 2-5). The MANAGE PARTNERS PAGE is displayed (Figure 2-53).

Figure 2-53: Manage partners page

3. Enter :

   a. SHORT NAME : mandatory, maximum 100 characters,

   b. LEGAL NAME : mandatory, maximum 100 characters,

   c. PIC : mandatory, maximum 100 characters,

   d. START DATE : mandatory, date format,

   e. END DATE: mandatory, date format.

4. Click the ADD PARTNER button. The partner is added and the publications list is refreshed to display the changes.

5. **Update Partner**: Click the link UPDATE of a row from the partners list. The field values are displayed on top of the page. Modify these values and click the UPDATE PARTNER button to save the changes, as presented in Figure 2-54**Error! Reference source not found.**. Click on Cancel Edition if you want to cancel the edition of the partner.

Figure 2-54: Update partner

6. **Delete partner**: Click the DELETE link (or the REJECT link for Pending partners visible to Project Coordinator). The partner row is removed from the system and the partners list is refreshed accordingly.
7. **Validate partner**: For project coordinator only, click the VALIDATE button of one row having status PENDING. The status is updated to VALIDATED and the partner becomes therefore visible in the reports.

Manage Fellows' data

This option allows accessing directly to Fellows'data.

1. Click the Fellows' data link from the WORK WITH A PROJECT page (Figure 2-5). The MANAGE FELLOWS' DATA PAGE is displayed (Figure 2-55).

Figure 2-55: Manage fellows' data page (first pane: Host Organisations)

2. In the pane HOST ORGANIZATIONS, the list of host organizations can be managed:

- Enter :

  a. FULL LEGAL NAME : mandatory, maximum 100 characters,

  b. SHORT NAME : mandatory, maximum 100 characters,

  c. NAME OF DEPARTMENT : mandatory, maximum 100 characters,

  d. POSTAL ADDRESS : mandatory, maximum 100 characters,

  e. COUNTRY,

  f. NAME OF COORDINATOR/SUPERVISOR : mandatory, maximum 100 characters,

  g. E-MAIL OF COORDINATOR/SUPERVISOR fields.

- Click the ADD HOST ORGANIZATION button. The fellows' data is added and the host organizations list is refreshed to display the changes.

- **Update Host Organization**: Click the link UPDATE of a row from the host organization list. The field values are displayed on top of the page. Modify these values and click the UPDATE HOST ORGANIZATION button to save the changes, as presented in Figure 2-56. Click on Cancel Edition if you want to cancel the edition of the host organization.

Figure 2-56: Update host organization

- **Delete host organization**: Click the DELETE link. If no fellow is associated to the selected host organization, the host organization row is removed from the system and the host organization list is refreshed accordingly. Otherwise, the system displays an error message.

3. In the pane FELLOWS' DATA, the list of Fellows' data can be managed:

- Chose an Host Organization, enter the NAME AND FIRST NAME, E-MAIL, GENDER, NATIONALITY, COUNTRY OF RESIDENCE, DISCIPLINE OF THE PROJECT, DURATION WITHIN REPORTING PERIOD (IN MONTHS), FELLOWSHIP DURATION AT EACH HOST (IN MONTHS), STARTING DATE OF THE FELLOWSHIP, NAME OF THE FELLOWSHIP SCHEME (AS IN ANNEX I), TYPE OF MOBILITY, EU CONTRIBUTION PER FELLOW/-YEAR AND CHECK WHETHER THE FELLOW HAS BEEN ACTIVE IN THE HOST ORGANISATION BEFORE TRE FELLOWSHIP. The TOTAL EU CONTRIBUTION WITHIN REPORTING PERIOD will be computed automatically from the DURATION WITHIN REPORTING PERIOD and the EU CONTRIBUTION PER FELLOW/-YEAR.
- Click the ADD FELLOWS' DATA button. The fellows' data is added and the fellows' data list is refreshed to display the changes.
- **Update Fellows' data**: Click the link UPDATE of a row from the fellows' data list. The field values are displayed on top of the page. Modify these values and click the UPDATE FELLOWS' DATA button to save the changes, as presented in Figure 2-57**Error! Reference source not found.**. Click on Cancel Edition if you want to cancel the edition of the fellows' data.

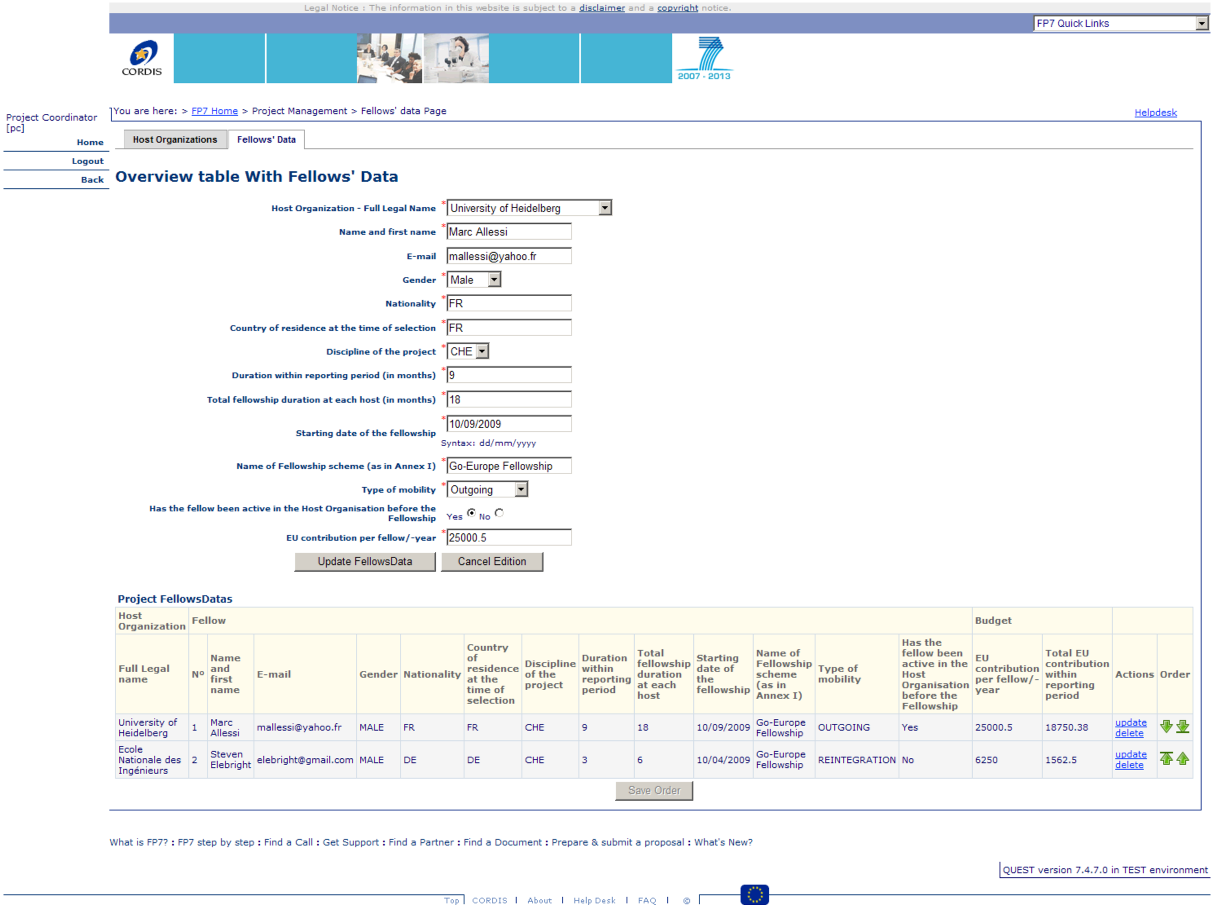


Figure 2-57: Update fellows' data

- **Delete fellows' data**: Click the DELETE link. The fellows' data row is removed from the system and the fellows' data list is refreshed accordingly.
- **Change fellows' data order**: Click the arrows of the fellows' data list as presented in Figure 2-58**Error! Reference source not found.**. The corresponding fellows' data moves to the top, up, down or to the end, respectively from left to right. Click the SAVE ORDER button to save the fellows' data order.

Figure 2-58: change fellows' data order

END OF DOCUMENT