TECHNICAL GUIDANCE FOR THE EUI.CONNECT PLATFORM
EUI-IA CALL 4

This Guidance contains key technical information on the operation and use of the EUI.Connect platform (EUI.Connect) of the European Urban Initiative (EUI). Applicants are requested to complete and submit their Application Form (AF) via this platform. Therefore, it is highly recommended to read this document carefully before using EUI.Connect. This Technical Guidance complements the EUI-IA Call 4 Guidance which is also available on the EUI website.

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TECHNICAL INFORMATION AND SYSTEM REQUIREMENTS

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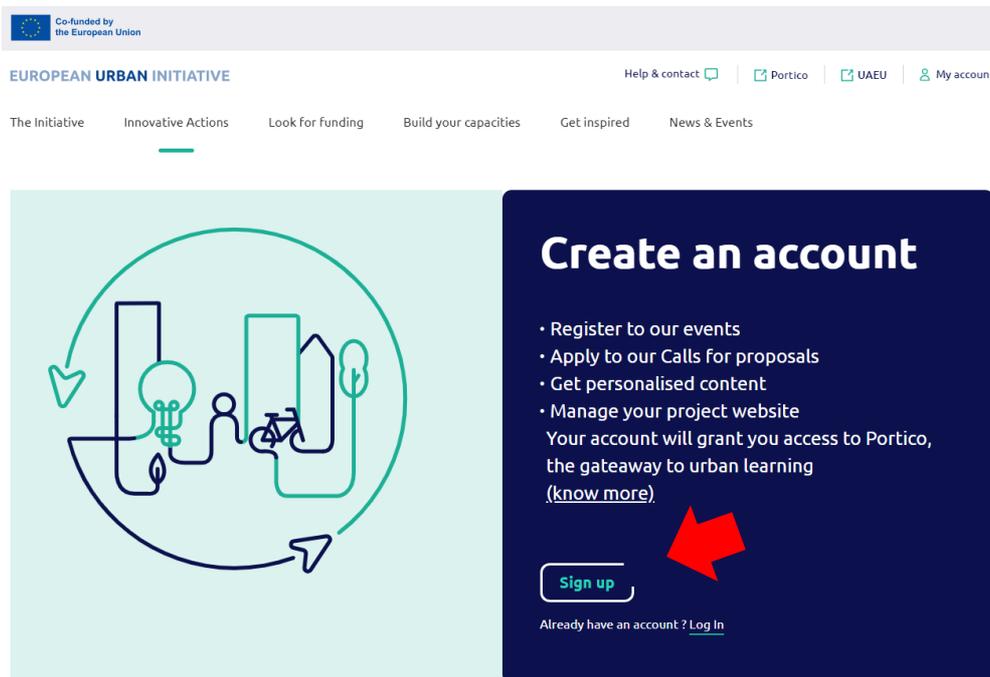
1. ACCESS AND REGISTRATION

EUI.Connect can be accessed at the following link: https://connect.urban-initiative.eu

To use this platform, each applicant (or user) must first create a personal account by clicking on "Register" on the homepage.
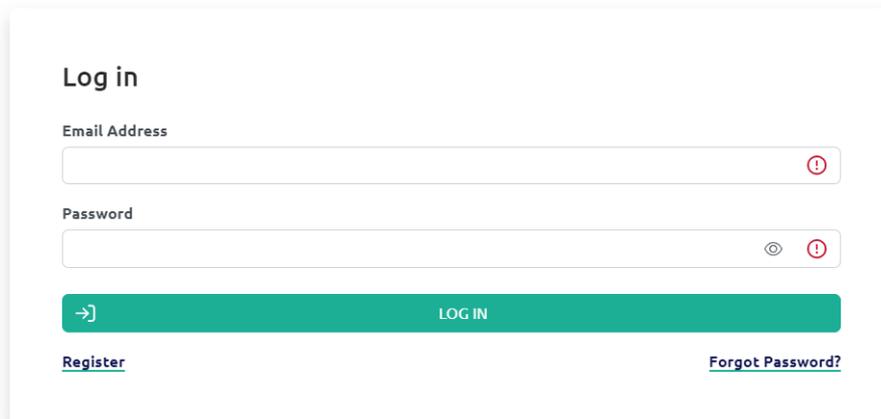
The user will be automatically redirected to the EUI website, where the account creation will take place.

↓

(see next page preview of the registration form)

After having filled in and submitted the registration form, a confirmation email is automatically sent to the email address provided in the form. To activate the account, the applicant must click on the link included in the email.

Any user can modify her/his password by clicking on her/his initials in the upper right corner of the screen and then on "Change password".
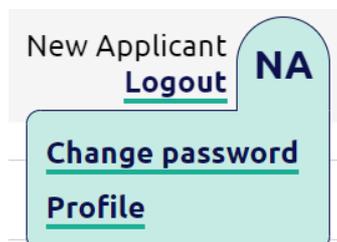
A password recovery function ("Forgot password?") is also available on the EUI.Connect homepage (see screenshot on page 2 of this document).

2. FILLING IN THE APPLICATION FORM

To create an Application Form (AF), the user must first click on "+ New Project" under the section "Projects" of the dashboard.

A new page will open. The user is then required to fill in at least the section "A.1 Project Identification" of the part A – Project summary and click on the "Save" button (on the top left corner) to complete the creation of a new AF.
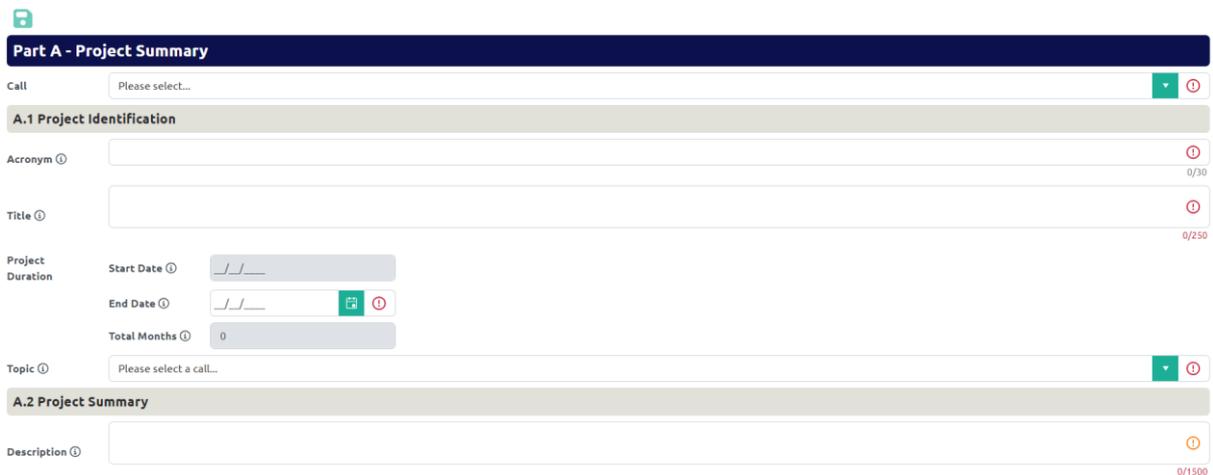
⯈ Point of attention 1: at this very first stage, the section "A.2 Project Summary" is not compulsory. However, it will be mandatory to complete this field before submitting the AF.

⯈ Point of attention 2: only when the call and all the fields in section 'A.1 Project identification' have been completed does the "Save" button become active (i.e. from light to dark green; function present at the top of the left menu).

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

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

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

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

Application form ▲

- ⊗ A - Summary
- ⊗ B - Partners ▼
- ⊗ C - Description ▼
- ⊗ D - Workplan ▼
- ⊘ E - Project Budget
- ⊘ F - Partners Contribution
- ⊗ G - Risk Management
- ⊗ H - Confirmation
- ⊘ I - AF Annex
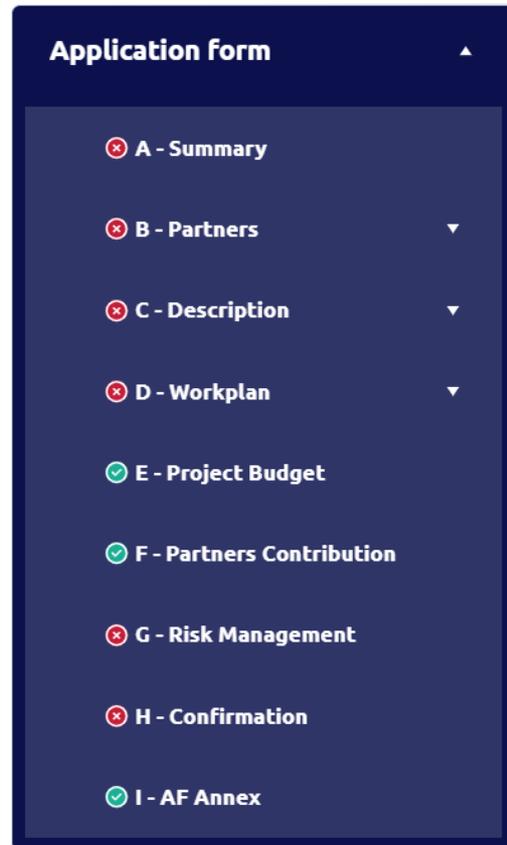
The following important aspects must be remembered when filling in the AF:

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

To select the language of your choice, a language menu is available anytime by clicking on the flag at the top of each page, next to the user name:

   →
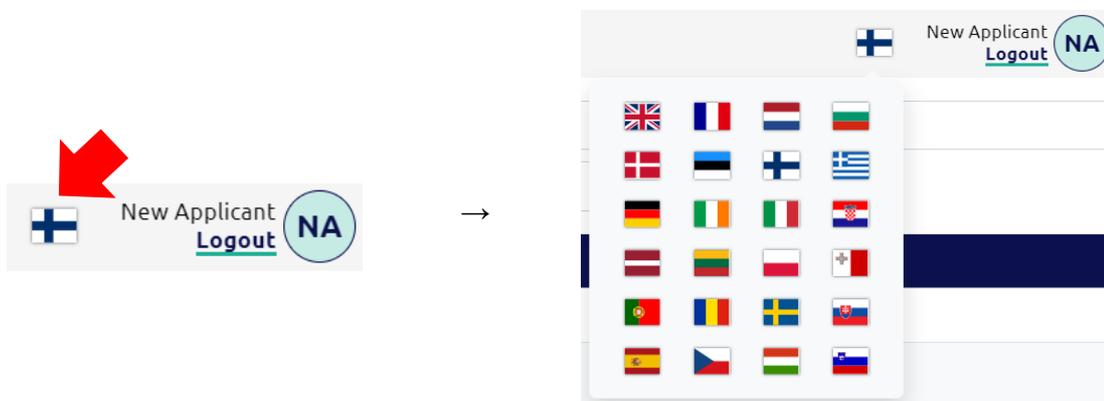
▷ Being inactive for a long period may automatically end the user session for security reasons and unsaved data will be lost. A timer is available next to the user name – this is reset to an hour each time a page is saved or the user moves to another part of the AF.

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

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

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

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

▷ The sequential order of the Work Packages and activities follows the order in which they were added by the applicant in EUI.Connect.

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

Should the applicant decide to modify at a later stage the topic selected in part A - Summary, the result and output indicators will have to be adjusted accordingly. It remains the responsibility of the applicant to carefully revise and countercheck all the information present in the sections addressing result and output indicators (e.g. description, baseline, target value, etc.).

▷ All applicants must upload a signed Confirmation Sheet (part H). The use of electronic signature is accepted.

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

'Risks at project strategy level' must not be empty.   ✕

Part G - Risk Management ⓘ

G.1 Risks at project strategy level ⓘ

ⓘ

0/1500
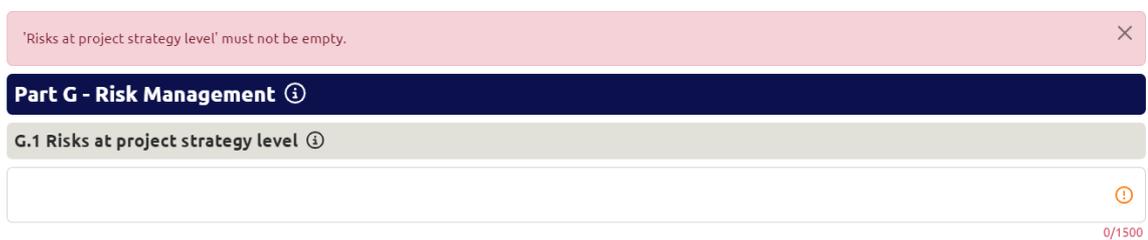
▷ A PDF of the AF can be generated at any moment in part A – Summary, by clicking on "Create Application Form PDF" at the top of the left menu. The creation of a PDF may take several minutes.

Once ready, the PDF can be downloaded via the function "Download PDF" ⬇ appearing automatically at the end of the process.

A new version of the PDF can be generated at any time with the function "Update Application Form PDF" (the latter automatically replaces "Create Application Form PDF" right after the

creation of the first PDF). The creation of a new PDF may also take several minutes and at the end of the generation process, it can be downloaded via the same function "Download PDF".

By passing your cursor on the function "Download PDF", the user can read the date and hour of the latest PDF generated and available for download.

30.04.2024 15:25

Please note that EUI.Connect does not store all the PDF versions generated, but only the latest one.

3. PARTICULAR ISSUES IN PART D – WORKPLAN

3.1. CREATION OF WORK PACKAGES

To create a Work Package (WP), the user should use the following button available in the page Overview in part D – Workplan > D.2 Work Packages - Overview.
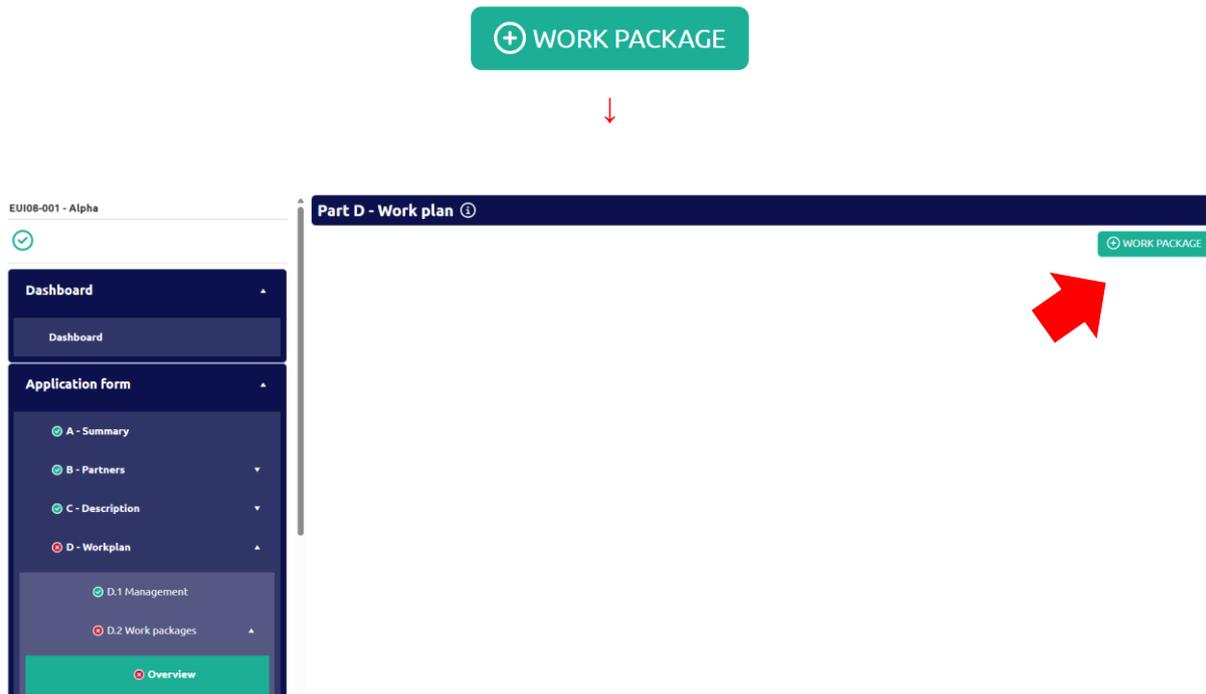
3.2. WORK PACKAGES AND INVESTMENTS

A WP can include one or several "investment" items.

Applicants are allowed to include investments within relevant WPs if needed and properly justified. As a rule, investments shall be foreseen in the EUI-IA projects only to the extent that they are necessary for the achievement of the project's outputs and results. Find more information on Investments in the EUI Guidance (2.2.3 Investments in the Work Plan).

To add an "investment" item under a WP, the applicant must follow these two steps:

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

↓

(see next page view of the compulsory field after having created the work package)

Work Plan Per Work Packages - Work Package 1 Thematic ⓘ

Title ⓘ		⊘
		0/200

Start Date ⓘ   __/__/____

End Date ⓘ   __/__/____

2. The button "Add Investment" becomes then active on the same page. By clicking on it, a new dedicated page appears. All the fields of this page are editable. To validate the creation of an "investment" item, the applicant must fill in all the required elements and click on Save (also available here at the top of the left menu).

Investments ⓘ

ADD INVESTMENT

↓

Investment 1

Title ⓘ	⊘
	0/200

Investment Description (including indicative budget of the main cost items)   ⊘   0/1500

Delivery date ⓘ   __/__/____ 📅 ⊘

Investment aspects	Questions	Project answers
	Explain why this investment is needed.	⊘ 0/1000
	Clearly describe the thematic relevance of the investment.	⊘ 0/1000
Justification of the investment	Describe who is benefiting (e.g., Partners, city, target groups, etc.) from this investment, and in what way.	⊘ 0/1000
	Please clarify which problem it tackles, which findings you expect from it, how it can be replicated, and how the experience coming from it will be used for the benefit of the programme area.	⊘ 0/1000
	Describe the location of the physical investment;	⊘

Once the new "investment" item is saved, the user can see a summary table of the investment(s) back in the WP page. An investment can be modified at any time by clicking on the related item in the table.

The total budget assigned to the investment(s) should then be reflected by the applicant in the part D – Workplan > D.3 Budget (the budget indicated in the investment fiche(s) is not automatically transferred in this page).

3.3. BUDGET

The structure of the partner budget tables under part D – Workplan > D.3 Budget is directly linked to the "Project Partner Cost Option" selected for each partner under the part B – Partners. Therefore, the structure of the partner budget tables might differ between them, i.e. some cost categories can be editable or not due to the flat rate in place for the selected cost option (see below view for the three different cost options).

Option 1
Standard hourly rate per Member State for Staff costs, flat rate for Office and Administration, Travel and Accommodation; real cost for the rest of cost categories

Option 2
Standard hourly rate per Member State for Staff costs and 40% flat rate of Staff costs for other cost categories

Project Partner 3 - Gamma

Budget Line	Allocated Budget Description	Percentage of Staff Cost (%)	Allocated Budget Amount
Staff (€) ⓘ	 0/500 ⓘ		0.00
Office and Administration (€) ⓘ	N/A 3/500	15.00	0.00
Travel and Accommodation (€) ⓘ	N/A 3/500	5.00	0.00
External Expertise and Services (€) ⓘ	N/A 3/500	20.00	0.00
Equipment (€) ⓘ	N/A 3/500	0.00	0.00
Infrastructure and Works (€) ⓘ	N/A 3/500	0.00	0.00
Total (€)			0.00

Option 3
20% flat rate for Staff costs, flat rate for Office and Administration, Travel and Accommodation; real cost for the rest of cost categories

Project Partner 4 - Delta

Budget Line	Allocated Budget Description	Allocated Budget Amount
Staff (€) ⓘ	N/A 3/500	0.00
Office and Administration (€) ⓘ	N/A 3/500	0.00
Travel and Accommodation (€) ⓘ	N/A 3/500	0.00
External Expertise and Services (€) ⓘ	 0/500	0.00
Equipment (€) ⓘ	 0/500	0.00
Infrastructure and Works (€) ⓘ	 0/500	0.00
Total (€)		0.00

▷ Should the "Project Partner Cost Option" of any partner change after having started to fill in the related partner budget table under part D, the existing budget information of this partner will be automatically reset.

▷ It should not be omitted to reflect in the relevant partner budget table(s) the indicative budget foreseen for the project investment(s).

Please note that the MUA has extra columns in its partner budget tables, i.e. the ones referring to the lump sums "Preparation", "Initiation Phase" and "Closure" (an example below with a MUA using option 3).

Budget Line	Preparation Lump Sum	Initiation Phase Lump Sum	Allocated Budget Description	Allocated Budget Amount	Closure Lump Sum	Total
Staff (€) ⓘ	0.00	0.00	N/A 3/500	0.00	0.00	0.00
Office and Administration (€) ⓘ	0.00	0.00	N/A 3/500	0.00	0.00	0.00
Travel and Accommodation (€) ⓘ	0.00	0.00	N/A 3/500	0.00	0.00	0.00
External Expertise and Services (€) ⓘ	10,000.00	30,000.00	0/500	0.00	7,500.00	47,500.00
Equipment (€) ⓘ	0.00	0.00	0/500	0.00	0.00	0.00
Infrastructure and Works (€) ⓘ	0.00	0.00	0/500	0.00	0.00	0.00
Total (€)	10,000.00	30,000.00		0.00	7,500.00	47,500.00

▷ At the bottom of the part D – Workplan > D.3 Budget, indicative budget breakdowns per year and per work package have to be informed once the partner budget tables are filled in.

▷ The part E – Project Budget will be automatically filled in. The latter compiles at project level all the budgetary information inserted at partner level in part D.

4. HOW TO ADD USERS TO YOUR PROJECT APPLICATION FORM

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

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

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

⊳   Point of attention: AF submission

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

▷ Point of attention: risk of overwriting information

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

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

5. HOW TO UPLOAD THE CONFIRMATION SHEET

To submit a project proposal, the Confirmation Sheet must beforehand be downloaded (see below button "Download Confirmation template"), printed, signed, scanned in PDF format and then uploaded in the part H – Confirmation.

The Confirmation Sheet is accessible at any time during the application process in the part H – Confirmation. The applicant has the possibility to add information on the person in charge of the signature of the Confirmation Sheet by filling in the following fields marked with ⓘ. When downloading the Confirmation Sheet, the existing information on these fields is automatically generated in the PDF.

➢ How to **upload** the Confirmation Sheet in EUI.Connect?

The upload should be done in part H – Confirmation, in the section "Upload" (right below the button "Download Confirmation template").

The applicant selects the scanned document (in PDF format) to be uploaded by clicking on "Select files" (step 1). Once done, the user uploads it by clicking on "Upload" (step 2). The document appears right after under the table "Manage Uploaded Documents" (step 3). If this is not the case, the upload was not successful and the steps 1 and 2 should be repeated.

2. Upload ⓘ				
File step 1	Select files...	Drop files here to select	UPLOAD step 2	

3. Manage Uploaded Documents

3.1 Confirmation documents

Title	Type	Upload date	
Confirmation Sheet signed.pdf step 3	Confirmation Sheet	02/05/2024 12:36	🗑

➢ <u>Point of attention</u>: e-signature allowed

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

6. HOW TO UPLOAD AN ANNEX (OPTIONAL)

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

> ➢ How to **upload** an annex in EUI.Connect?

The applicant selects the document to be uploaded by clicking on "Select files" (step 1). Once done, the user uploads it by clicking on "Upload" (step 2).

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

Part I - Annex			
1. Upload ⓘ			
File step 1 Select files...	Drop files here to select	UPLOAD step 2	
2. Manage Uploaded Documents			
2.1 Annex document			

Title	Type	Upload date	
AF Annex.pdf step 3	Application Form Annex	02/05/2024 13:42	🗑 ▲▼

Description of the annex (where relevant)
0/250

7.   SUBMISSION OF THE APPLICATION FORM

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

The AF can be officially submitted only when all automatic checks are successfully passed and no errors are detected in each part of the AF (in other words, when a "green light" ✅ appears next to each part in the left menu). The button "Submit" becomes then active (i.e. from light to dark grey).
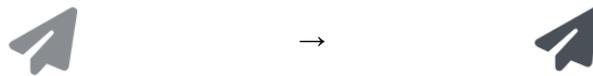
This specific function is present at the top of the left menu <u>only</u> in the part A – Summary and in the part H – Confirmation.
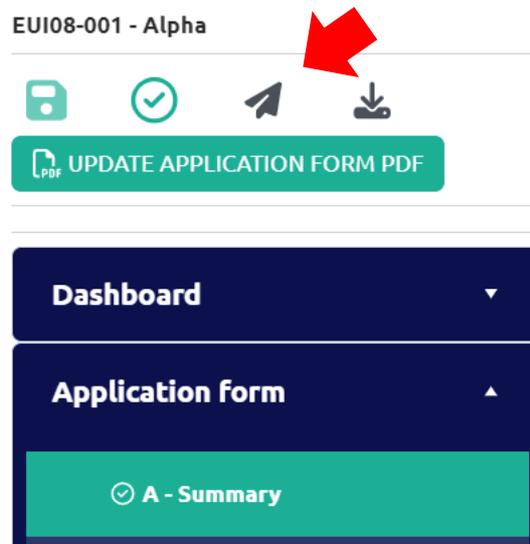
 ➢   <u>Point of attention</u>: Completeness and consistency checks are run by the system, **but** the EUI.Connect platform does not check the quality of information provided. Therefore, it remains the applicants' responsibility to read carefully information included in the EUI guidance, go through their AF and verify that all necessary fields are properly filled in.

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

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

Application Form EUI08-001 Submitted

Dear   ,

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

The reference details are as follows:

- Application Form Reference number: EUI08-001
- Acronym: Alpha
- Submission date and time: 02/05/2024 14:33

Please retain this message for your records.

Please note that you can edit and resubmit your Application Form as long as the Call for Proposals is open. Please ensure to resubmit the Application Form after modification and before the Call deadline. Please refer to the Technical guidance for the Electronic Exchange Platform for details.

This is an automated message, please do not reply.

Best regards,

The European Urban Initiative Team

➢ Point of attention: The confirmation email is sent out to the user having triggered the submission of the AF, the contact person of the MUA (part B – Partners) as well as the other MUA users added to the project AF (see section 4 of this guidance).

After the submission, the applicant can generate at any time a PDF version of the AF by clicking on the function "Download PDF" ⬇ in part A – Summary.

8.   MODIFICATIONS AFTER SUBMISSION

Applicants are allowed to modify their AF until the closure of the call for proposals. In order to do modifications after submission, the applicant can revert the AF by clicking on the function "Revert" ↺
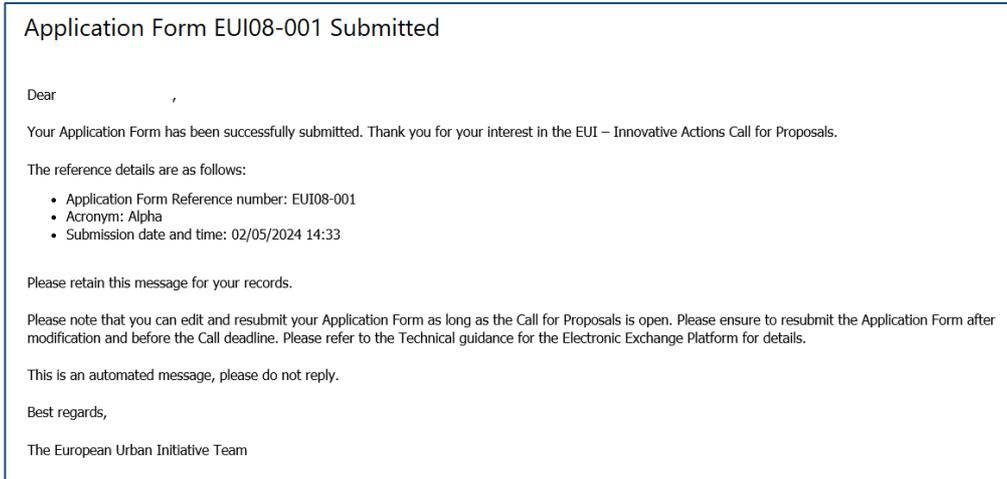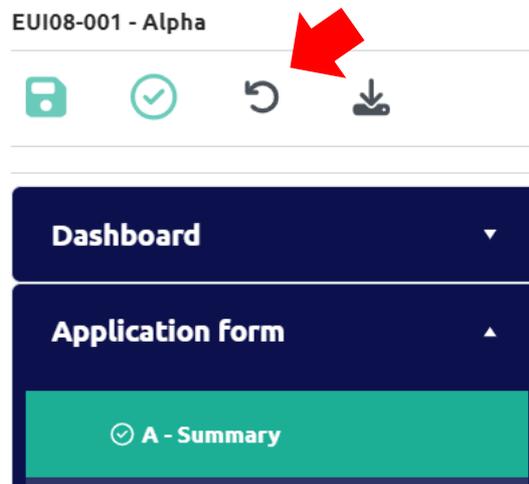
This specific function is present at the top of the left menu only in the part A – Summary and in the part H – Confirmation.

After reverting the AF, a notification is sent to the applicant:

Application Form EUI08-001 reverted

Dear   ,

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

- Application Form Reference number: EUI08-001
- Acronym: Alpha

Please retain this message for your records.

You can now edit and resubmit your Application Form by clicking on the "Submit" button. If your Application Form is not resubmitted after modification, it will not be taken into consideration. Please refer to the Technical guidance for the Electronic Exchange Platform for further details.

This is an automated message, please do not reply.

All the best

The EUI Permanent Secretariat team

➢   Point of attention: The above confirmation email is sent out to the user having triggered the revert of the AF, the contact person of the MUA (part B – Partners) as well as the other MUA users added to the project AF (see section 4 of this guidance).
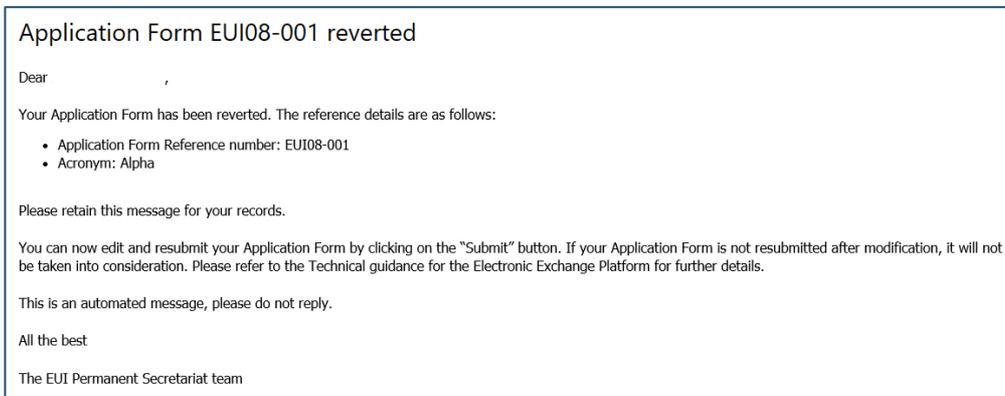
Please note that a reverted AF needs to be **resubmitted** in order to make it valid for evaluation. The submission must be done before the end of the call.

9. HELPDESK AND TECHNICAL SUPPORT

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

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

- the project name

- the project ID

- the user account facing a problem (i.e. the email address used during the registration phase)

- a screenshot and/or the alert message appearing on your screen