Operating Grants 2007 - 2013

*e*Form User Guide
How to complete & submit the eForm

Applications and Deadlines:

Applications for Operating Grant Agreement	Deadline for submission
Culture (2007-2013)	10/10/2012 12:00 midday Brussels time
Youth in Action (2007-2013)	15/10/2012 12:00 midday Brussels time
Europe for Citizens (2007-2013)	15/10/2012 12:00 midday Brussels time
Jean Monnet – Key Activity 3 – Structural support	15/11/2012 12:00 midday Brussels time

EACEA Technical Helpdesk:

Contact Details	Availability
Tel: +32 229 90705 **Email**: eacea-helpdesk@ec.europa.eu	08:30 to 17:30, Monday to Thursday 08:30 to 17:00, Fridays Excluding public holidays All times are Brussels time

Version 2   24 August 2012
Deadline for Strand 2 extended from 18/09/2012 to 10/10/2012

Table of Contents

1 Introduction

Applications for operating grant agreements for the 2013 budgetary year **must be made using the eForm**.

The purpose of this document is to provide guidance on the **technical** aspects of completing and submitting the eForm. For all guidance on the content of the application form / application package, the application procedure and the rules that must be respected, please consult the relevant *Programme Guide* or *Call for Proposals* for the programme you are applying for. These documents can be found on the Agency's website.

Please note that the terms 'eForm', 'form', 'application form' and 'online application form' are used interchangeably throughout this guide.

> You are strongly advised not to leave the preparation and submission of your application form until the last days before the deadline for applications

> **Please read all of this User Guide *before* beginning your application**

2 Technical Requirements & Considerations

The eForm is an interactive PDF form that requires Adobe Reader software to be installed on your computer for you to be able to complete and submit it.

The retrieval and submission of the form are 'online' activities but completion of the form and its validation are 'offline' activities. This is explained in more detail in the process overview below.

Adobe Reader
The **minimum** version i.e. lowest version of Adobe Reader that you must have installed on your computer is version 8.1.5. You may also use a higher version than this e.g. 8.2, 9.0, 9.1, X etc. If you have a **lower** version than 8.1.5, you will not be able to complete and submit the eForm.

Follow the link below to be directed to Adobe's website to download the software free of charge or to upgrade your existing copy of the software. If you do not have administrator rights on your computer this activity may require the intervention of your IT department. You will need to specify your operating system before the download can commence.

> http://get.adobe.com/reader/otherversions/

If you are using Adobe Acrobat (Standard) or Adobe Acrobat Professional, the version must likewise be 8.1.5 or higher.

The screenshots in this User Guide are based on version 8.1.6 of Adobe Reader.

You can check the system requirements for Adobe Reader – i.e. the minimum required specification of your computer – through the following link:

http://www.adobe.com/uk/products/reader/systemreqs/

Internet Connection & Browser software
You will require an internet connection and standard browser software to retrieve and submit the online application form.

Security settings in some versions of Adobe Reader and Adobe Acrobat
If you are using a version of Adobe Reader or Adobe Acrobat that incorporates **Enhanced Security**, it is possible that the enhanced security settings will block the submission of your eForm. The involved versions of Adobe Reader and Adobe Acrobat are:

- 8.2 or any *higher* version 8 than this (including any sub-versions e.g. 8.2.1, 8.2.2 etc);

- 9.3 or any *higher* version 9 than this (and including any sub-versions e.g. 9.3.1, 9.4.2 etc;

- any version X (including any sub-versions e.g. 10.0.1)

The disabling of the Enhanced Security is performed from the following Adobe Reader menu path:

Edit > Preferences > Security (Enhanced)

Uncheck the box *Enable Enhanced Security* and click *OK*. Once the submission has been performed you can re-enable the Enhanced Security. For more detailed instructions (including screenshots), please refer to the relevant 'Known Issue' on the following webpage:

http://eacea.ec.europa.eu/eforms/index_en.php#issues

Here you will also find instructions on how to leave Enhanced Security **enabled** but identify your eForm as a trusted item so that its submission is not blocked.

Test eForm
A test eForm is available on the EACEA eForm home page:

http://eacea.ec.europa.eu/eforms/index_en.php

The form contains a small number of questions and functions. It has been designed to help applicants understand how the main fields in the eForm work and also to ensure that their own software and internet connection allow an application form to be submitted. It is NOT mandatory to use this form; it is provided as a help tool for applicants who are using electronic submission for the first time.

Advice for Macintosh Users
The eForm can only be opened and completed using Adobe Reader or one of the Adobe Acrobat products. It is not possible to open and work with the eForm using the Mac Preview viewer.

Please therefore ensure that if your default viewer is set as Mac Preview, you nonetheless open the eForm with one of the Adobe products mentioned above. This advice applies to both the download of the form – if you try to open it before downloading – and to the opening of the form for its general completion and submission. For more detailed advice, please visit the 'Known Issues' section of the EACEA eForm home page:

http://eacea.ec.europa.eu/eforms/index_en.php#issues

3   The Online Application Process – Overview

(i)   You download the eForm from the agency website, saving it to your own computer or local network drive. **Do not try to fill in the form directly on the agency's website**. The form can only be filled in once you have saved it to your local computing environment.

(ii)   You complete the eForm on your own computer (as an 'offline' document). You do not need to be connected to the internet for this and no connection to the EACEA website or any Commission server is required. Completion of the form includes the attachment of the annexes.

(iii) You validate the form (on your own computer) to ensure that it is ready for submission.

(iv)   You connect to the internet and press the submit button to submit your form. You do not need to be connected to the EACEA website or to any particular webpage – this connection to the Agency server happens automatically. (The submission process includes a mandatory save both before and after the submission. These save operations are instigated by the form itself. This is explained in detail in section 8.)

(v)   If the submission is successful, a submission number will be automatically generated and added to your form.

(vi)   You print your form.

(vii) An email acknowledging receipt of your form is automatically sent to the email address that you entered for the contact person of the Applicant Organisation (Part A.2).

4   Working with the eForm

4.1   Download the eForm from EACEA

A link to a read-only copy of the form can be found on the EACEA eForm home page:

http://eacea.ec.europa.eu/eforms/index_en.php

Save the form to your local computer respecting the following filename convention:

programme_ applicant ISO country code_AppForm.pdf

e.g Culture_BE_MyCompany_AppForm.pdf

You can now open, save, close, print etc the file in the same way you would any other document you had saved or created on your own computer.

4.2   Adobe Acrobat Reader – a brief introduction to some key features of the pdf form
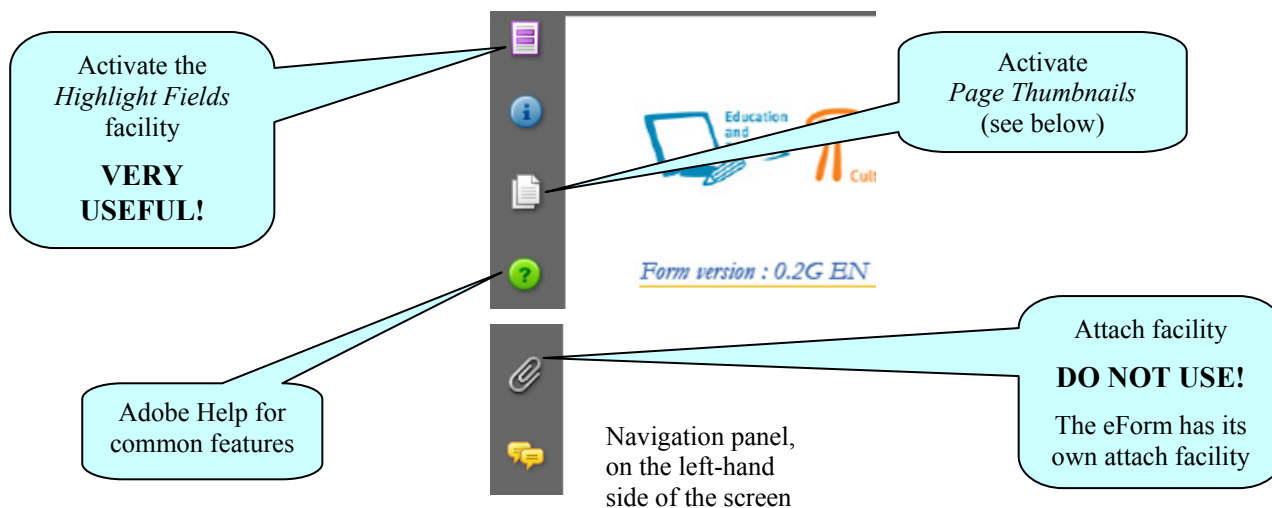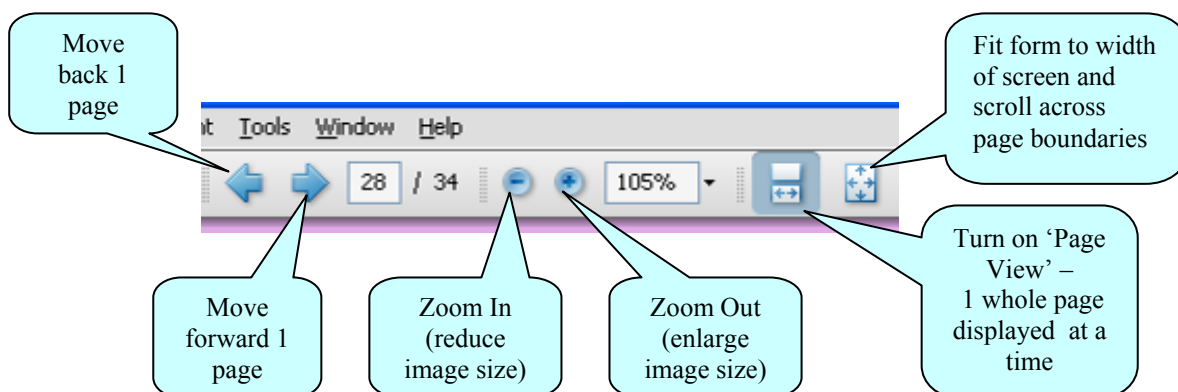
<u>Toolbar</u>

From the *Tools* menu you can customise your toolbar e.g. you can add the *Save* button if it is not already displayed. There are also various display and navigation options that you can add.
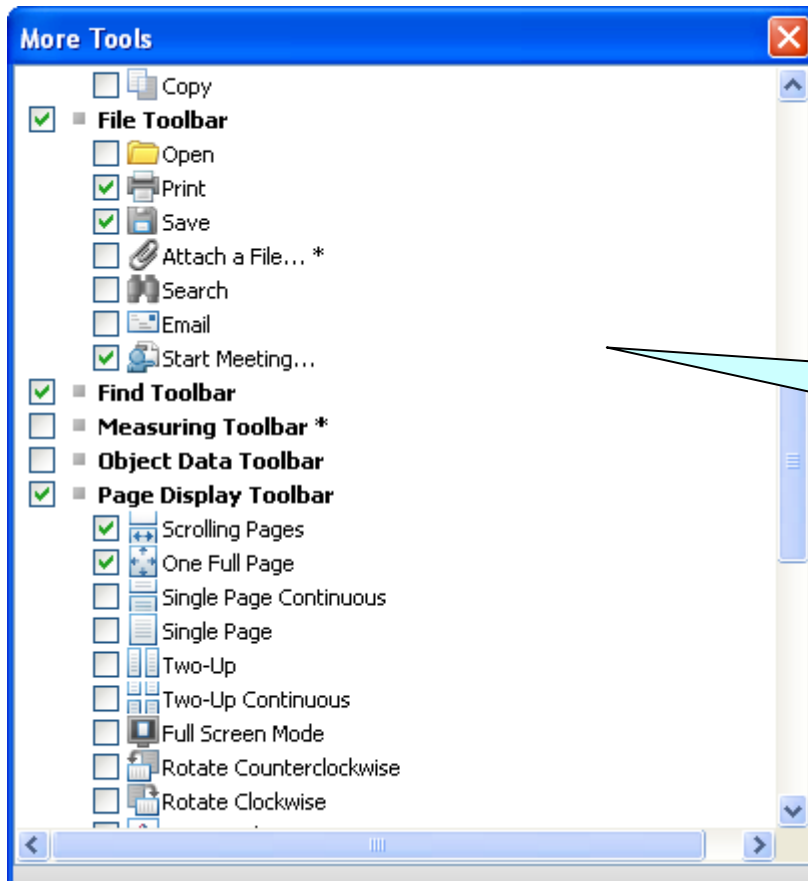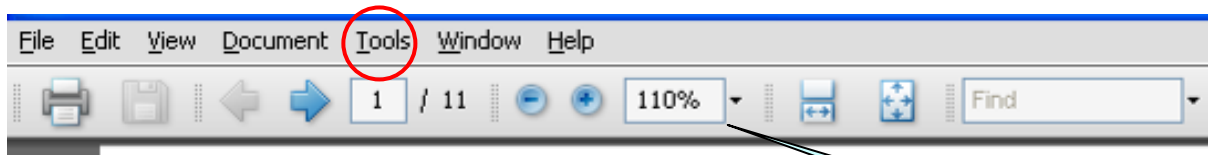

Toolbar

Customise toolbar selection menu (partial view)

Explained here are some of the commonly used display and navigation options:

Move back 1 page

Fit form to width of screen and scroll across page boundaries

Move forward 1 page

Zoom In (reduce image size)

Zoom Out (enlarge image size)

Turn on 'Page View' – 1 whole page displayed at a time

Page Thumbnails

If you activate the *Page Thumbnails* option, a new panel is opened up on the left-hand side of the screen. It contains miniature previews ('thumbnails') of each page:
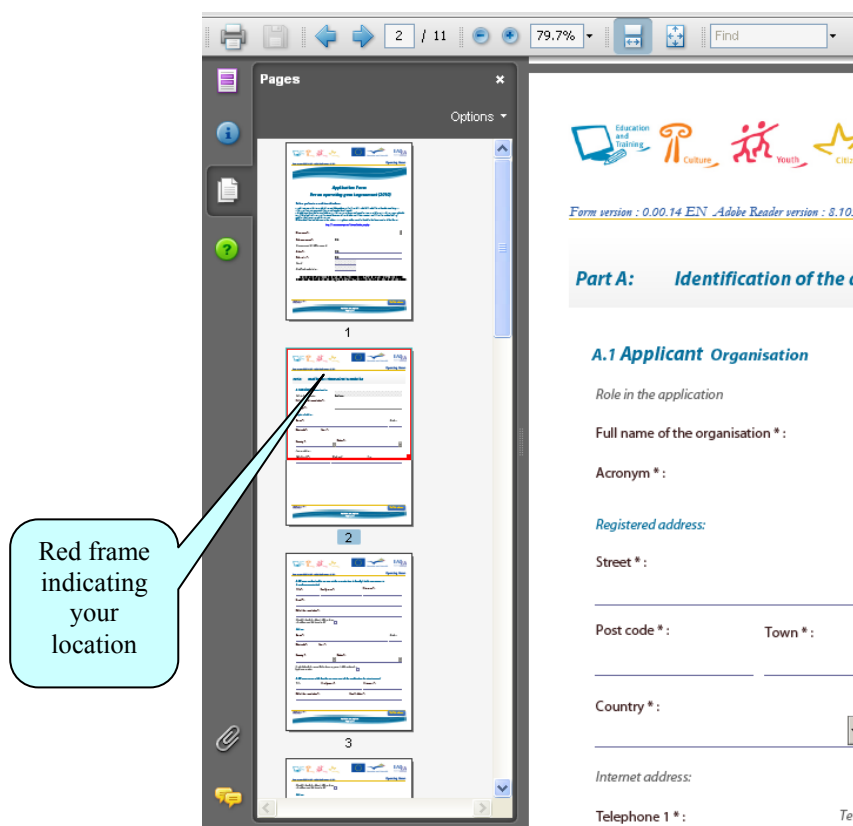
* Use the thumbnails to jump to different areas of the form.

* A frame outlined in red indicates where you are in the document.

* Right click on the panel to access options to enlarge or reduce the thumbnails.

Zoom in / Zoom out

To rapidly zoom in or out, press CTRL on your keyboard and move the scroll wheel on your mouse:

Scroll **up**	to zoom **out**, increasing the size of the image
Scroll **down**	to zoom **in**, decreasing the size of the image

4.3   eForm completion

The eForm is an interactive PDF form that contains form fields that are either selected from a restricted list or filled in using free text:

Click inside a text field to enter data.
Click to select options from e.g. dropdown lists, checkboxes, pop-up calendars and radio buttons.
Press Tab to move forward one field or Shift+Tab to move backward one field.
Point and click with the mouse to select a specific field.

4.4   Mandatory, optional and calculated fields

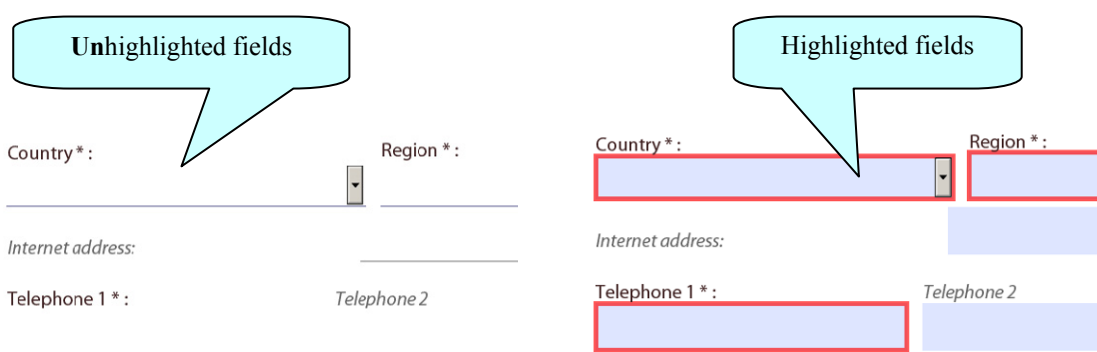| Field Type	Characteristics	Examples
Mandatory	Field label is accompanied by an asterisk *	Telephone 1 * : Number of participants*
Optional	Field label has no asterisk	Telephone 2: Activity
Calculated automatically	Field contains diagonal grey lines.	Activity number Act-1 0,00 €

How to highlight mandatory fields

Click on the purple button [icon] in the navigation panel and this will activate the *Document message bar* which incorporates the *Highlight Fields* feature.
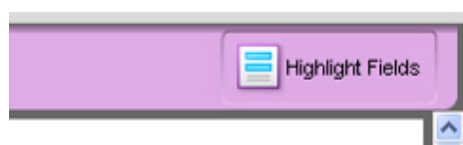
Highlight Fields

Click on the *Highlight Fields* button and all mandatory and optional fields will gain highlighting that makes them easier to identify (and easier to differentiate from one another).

Mandatory fields – red border and a light blue background
Optional fields – light blue background (and a black border when you hover the cursor over them).

Unhighlighted fields

Highlighted fields

Country * :   Region * :

Internet address:

Telephone 1 * :   Telephone 2

Country * :   Region * :

Internet address:

Telephone 1 * :   Telephone 2

Please note: if any mandatory field remains incomplete the eForm will not validate successfully and it will not be possible to submit your form. Where a numerical field is mandatory but you have no value to enter e.g. in Part D, please make sure you enter a zero to indicate your null value.

Once you have activated the highlighting you can click the purple [icon] button again to remove the *Document message bar* (and maximise the display of your form).

4.5 Saving your form

To save your form, click on the *Save* button on the toolbar or select *Save* from the *File* menu or press *CTRL* and *S*.

Please ensure that you **save your form on a regular basis**. If you encounter a problem in your local computing environment and your form or your computer crashes, the Adobe Reader auto-recovery function will only restore your form to the point of the **most recent save**.

4.6 Entering Dates and Numbers

Please respect the following rules when entering dates and numbers on the form:

	Rule	**Example**
Dates	All date fields are in the format dd/mm/yyyy.	01/10/2009
Telephone numbers	No rules - this is a free text field but please provide the country code.	-

4.7 Using the Add and Delete buttons (eForm tables)

Some fields or groups / blocks of fields are required to be completed more than once allowing you to build up a 'table' of information e.g. the list of applications requested in Part B.5. Whenever you need to insert a new 'blank' field or add rows to a table, you will do this by using the *Add* buttons.

These buttons are coloured green. Click on them to add the desired new field or table row.
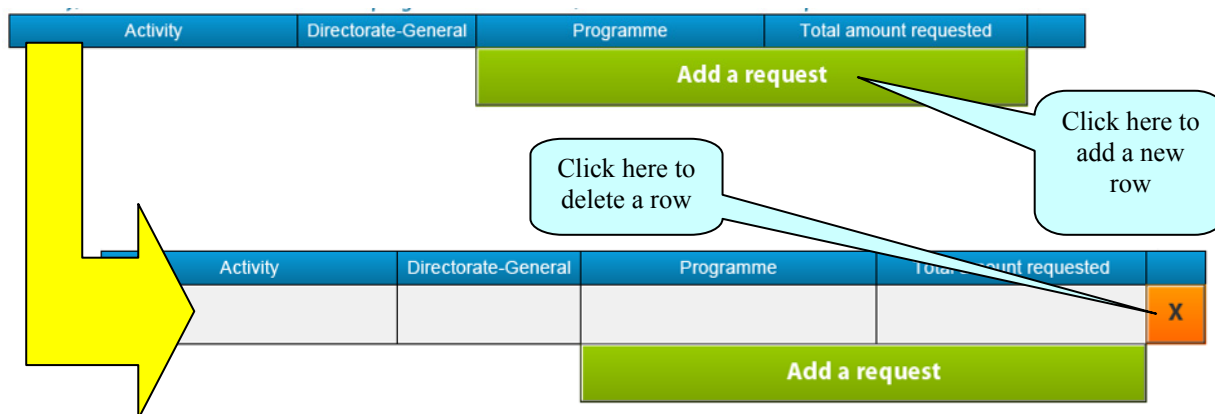
Once you have added a field or row, the delete facility – an orange-coloured button containing an 'x' – appears so that you can delete the field, block of fields or table row concerned (and its contents!).

4.8 Formatting

If you enter formatted content into the form e.g. through copy-and-paste from other document sources, the eForm will remove the formatting and plain text only will be pasted into the form.

Please do **not** copy bullet points into your form. The formatting of some bullets can trigger the requirement to download add-ons to your Adobe Reader software (so that it can handle those bullets).

4.9 Character Limits

The free text fields in the eForm have character limits that restrict the amount of text you can enter. These limits include both characters AND spaces. If you try to enter more characters than the limit allows the form will simply restrict the text to the predefined limit. Many word processing packages have a 'count' tool that may help you respect the limits.

For the major fields, the limits are displayed in the headings and sub-headings of the eForm. For other fields, please consult the following table:

Part	Field	Character Limit
A	Full name of the organisation	62
	Acronym	62
	Street	57
	Street Number	5
	Postcode	12
	Town	60
	Internet address	60
	Telephone 1 and Telephone 2	60
	Fax	60
	Title	25
	Family name	62
	First name	62
	E-mail address	100
	Role in the organisation	32
B.1	Registered office	60
B.4	Organisations/Members/Active partners	300
	Works and artists envisaged	300
	Activities envisaged	300
	Full and active member Association Members of the European Association from at least 6 Member States…	300
	Please indicate here all other members…	300
B.5	Activity	200
	Directorate-General	200
	Programme	200
C.2 B (**NOT** Youth in Action)	Venue of Activity	100
	Target group	300
	Type of the activity	300
	Field or subject	300
	Members taking part	300
	Objectives / results expected	500

Part	Field	Character Limit
C.2 A Youth in Action only	Venue of Activity	100
	Target group	300
	Type of the activity	300
	Members taking part	300
	Objectives / results expected	500
C.2 B and C Youth in Action only	Venue of Activity	100
	Type of the activity	100
	Objectives	500
C.5 Culture only	Target audience	100

5   Guidance for specific Parts of the form

5.1   Cover Page

Important!

Please ensure that you complete all the fields of the Cover Page (page 1) ***before*** going on to complete the rest of the form!

This is because the selections that you make, dictate how the rest of the form behaves e.g the headings and options that appear in Part C, *Description of the activities* are dependent upon the programme and, where applicable, the action and sub-action that you selected.

5.2   Parts A and B – Applicant Organisation

Regardless of the language you have chosen to complete the form, the field 'Full name of the organisation' in Part A.1 should be recorded in English.

The registered address details that you enter in Part A.1 are automatically copied to the address fields in Parts A.2 and A.3. If you wish to record a **different** address in Part A.2 or Part A.3, click the relevant checkbox to clear the address field concerned.

The person details that you enter in Part A.2 are automatically copied to the person details in Part A.3. If you wish to record **different** person details in Part A.3 – because the legal representative is a different person from the contact person – click the relevant checkbox to clear the A.3 person detail fields.

The field 'Internet address' in Part A.1 relates to the organisation's website address.

5.3   Part D – Budget

If you are using the budget-based grant system, please ensure that all budgetary rules are respected. If a budgetary rule has been broken, you will see red font in your table. All fields in the budget tables are mandatory. If you have no value to enter, do not leave the field blank but enter a zero.

6   Attaching Documents to your eForm

The following mandatory annexes, which are a formal part of your grant application, must be attached to your eForm:

- Declaration of Honour;
- Budget / Flat-rate Calculator.

Please employ one of the following formats for your attachments:

Annex	Required Format
Declaration of Honour	.pdf, .jpg or .jpeg
Budget / Flat-rate Calculator	.xls or .xlsx

Attachment size limitation
There is a limit to the **total** (combined) size of your attachments. This is **5MB**. If you receive a message advising you that the total size of documents exceeds the maximum allowed, please reduce the size of the image-based documents e.g. by reducing their resolution.

To carry out the attach function, click on the relevant *Attach a document* button and a window will pop up enabling you to browse, locate and select the file you wish to attach:
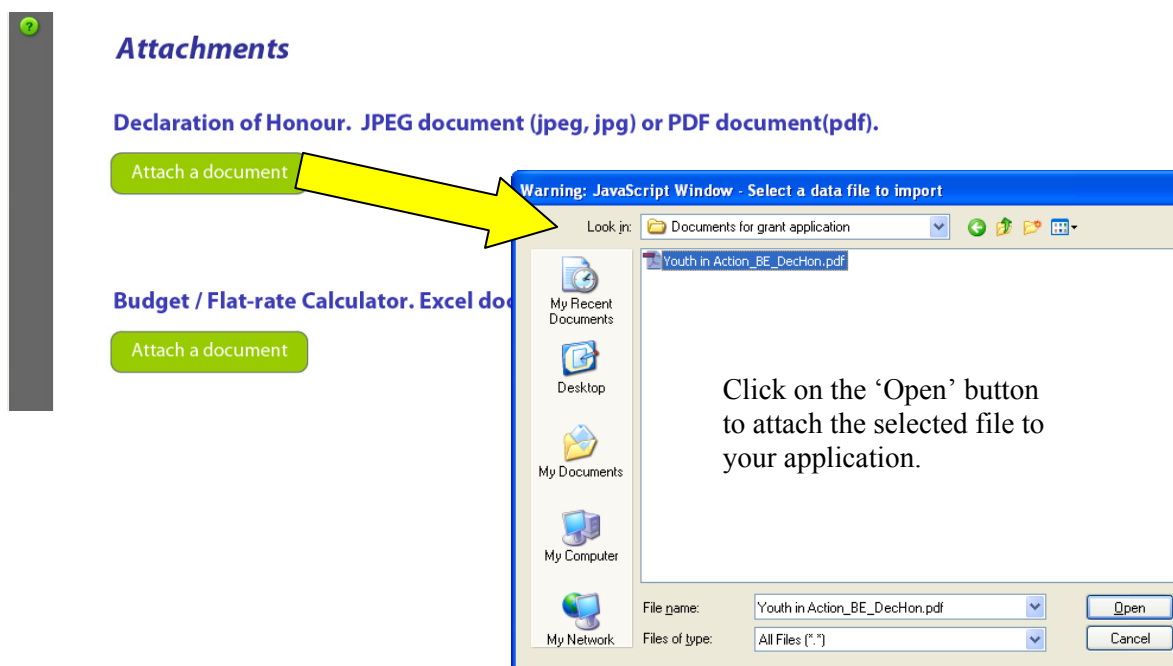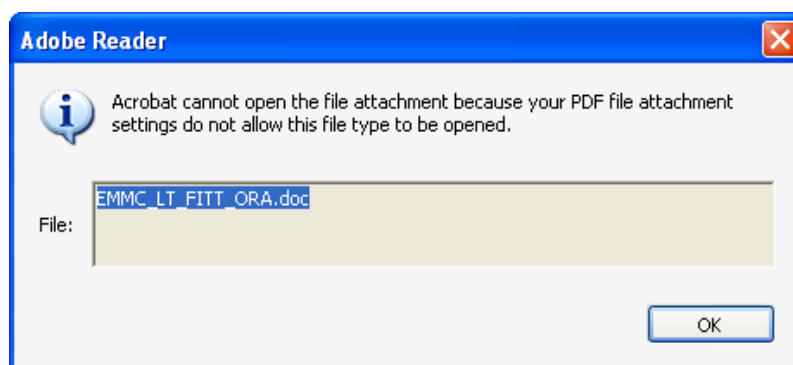

Once a file has been successfully attached, the filename is displayed and the *Attach a document* button is replaced by a *Delete this document* button and a *View this document* button:
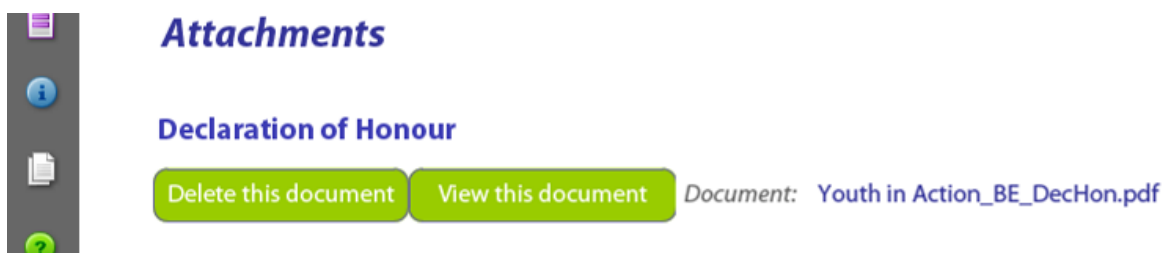
<u>Viewing attached documents</u>

You may encounter the following information message when trying to view non-PDF documents that you have attached:

If so, you can change your settings – to allow such documents to be opened – via the following Adobe Reader menu path:

Edit > Preferences > Trust Manager

Check the box *Allow opening of non-PDF file attachments with external applications* and then click *OK* to confirm the setting change:
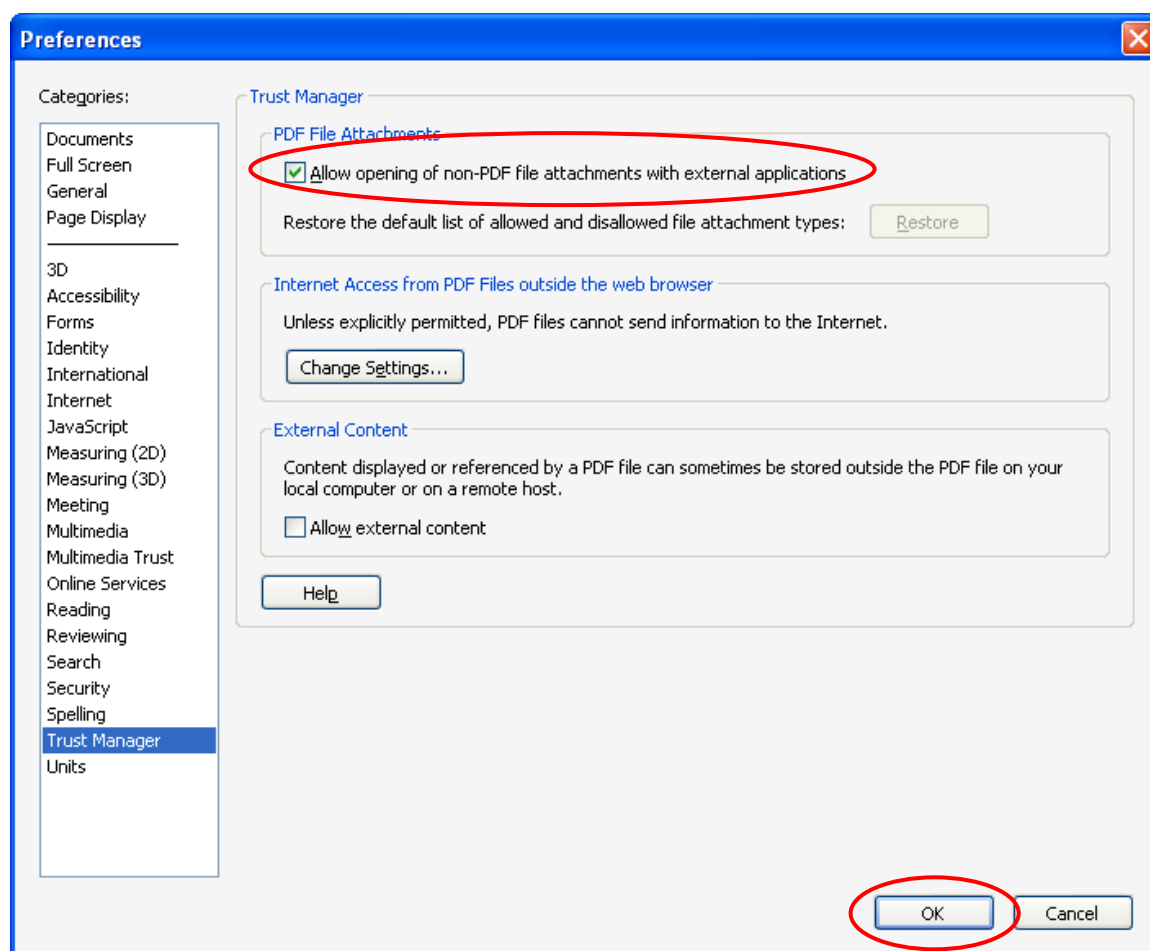
7 Validation of your eForm

The *Validate Form* button appears at the bottom right of every page of the form.

It is recommended that you do not validate your form until you have finished completing it as validation slightly alters the look of the form.

When you are ready, click on the button and various checks will be automatically performed to ascertain whether your form is ready for submission. For example, the validation will verify that all mandatory fields have been completed, that all budget table rules have been respected and that all the mandatory attachments are present.

If there are any errors present, the total number of them will be listed on the last page of your form. If there are any budget or attachment errors these will be itemised separately in the same list:

The errors themselves will be highlighted in pink. In the example that follows the mandatory field *Aims and activities of the organisation* has not been completed:

When you validate, an additional button – the *Go to next error* button – appears next to the *Validate form* button.

Use this button to jump from error to error in your form The function starts with the error nearest the top of the form i.e. nearest to Page 1 and, as you click the button, it descends the form moving to the next error with each click.

Please note the following:

- When you fix the errors that are highlighted, the *Errors list* is **not** dynamically updated. It is only updated i.e. refreshed when you perform **another** validation.

- The *Go to next error* function works best when you fix errors one by one, following the top-to-bottom sequence used by the *Go to next error* button. If you fix errors out of sequence e.g. fix an error further down the form, the *Go to next error* function will still follow the **original** sequence of errors reported by the validation.

- If you have fixed errors out of sequence, you are recommended to perform a **fresh** validation so that the errors you have fixed are removed from the sequence (and you would then start again from the error nearest the top of the form).

- If you prefer, you can simply do a visual search for the pink errors in your form. If you do this, it is recommended that you first turn **off** the highlighting for mandatory fields (see Section 4.4). You may find the thumbnail view a useful aid to quickly detecting the pink highlighted fields (see Section 4.2).

Whichever method you use, fix the errors that are present and validate your form again. If all errors have been resolved you will see the following pop-up message:
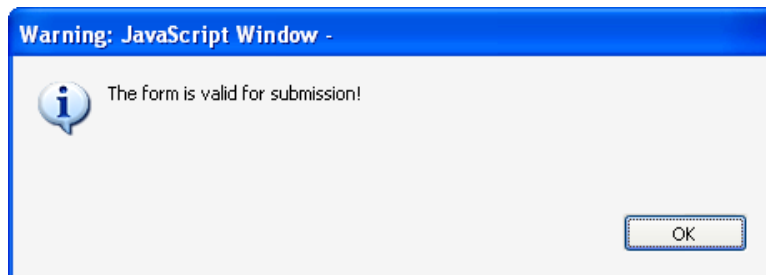
Until your form validates successfully the *Submit* button is disabled and it will not be possible to submit your form. The *Submit* button turns from grey to green when validation has been carried out successfully.
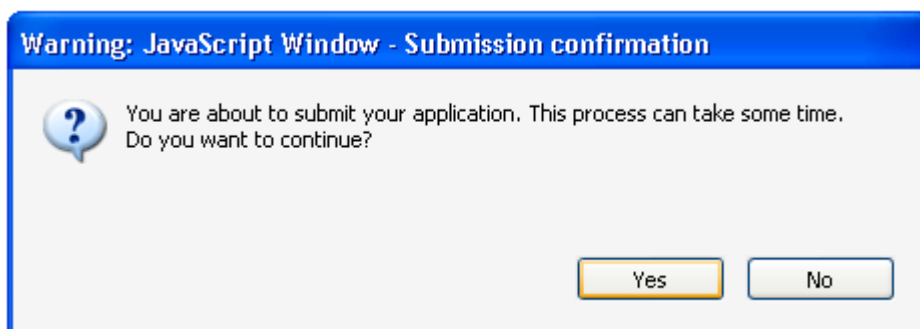
8   Submission of your eForm

On the final page of the form is the *Submit this form* button. Once your form has been successfully validated the button is enabled (as confirmed by its green colour). Click on this button to launch the submission.
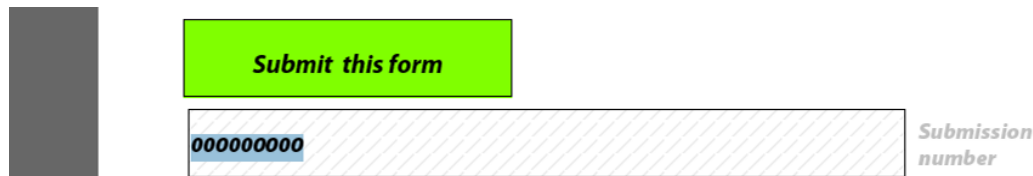

The following message will appear:

If for any reason you do not want to continue, you may click *No* and carry out the submission at a later time. The submission process will end. **Once you click *Yes* your form will be locked and it will no longer be possible to modify its content or change the attachments.**

8.1   *The mandatory save BEFORE submission*

If you click *Yes,* the next step of the submission process is a **mandatory save**. The following message appears:
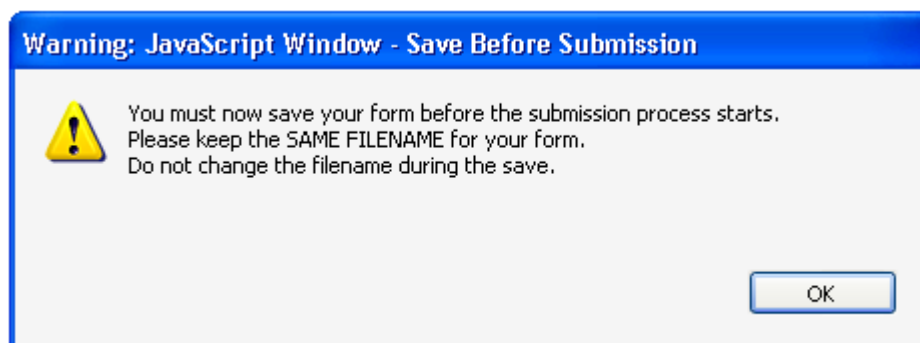
When you click *OK*, the form triggers a *Save As* operation. You will see the classic *Save As* window as appears in the screenshot which follows.

(Please note: this screenshot is simply an **example** of the *Save As* window. The window that **you** see, will reflect the filename and directory name that you have been using.)
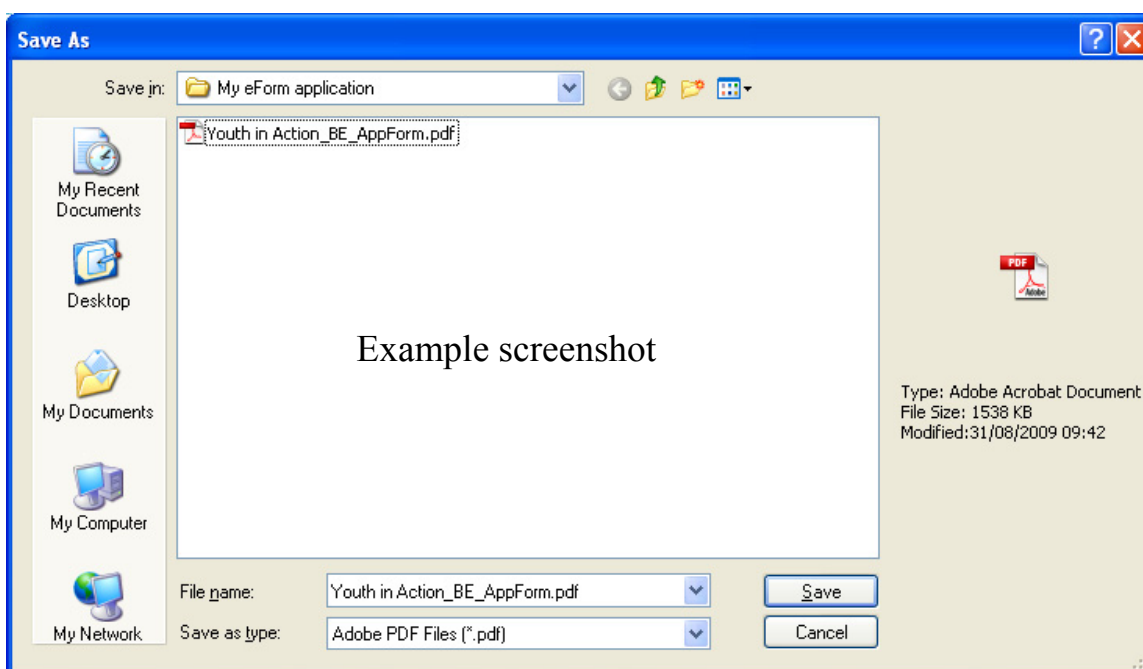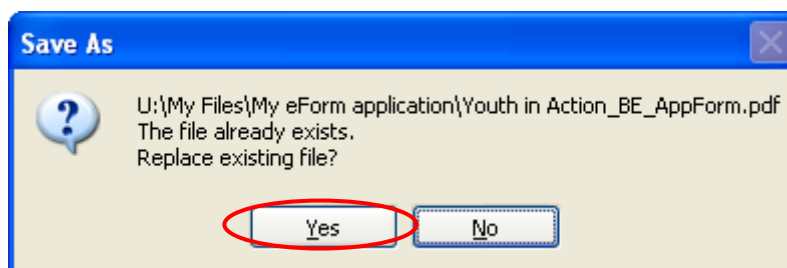
You must now perform the *Save As* by clicking on the *Save* button.

Very Important!

You must **NOT** change the filename of your eForm.
You must keep the same filename that the file had when you began the submission operation!

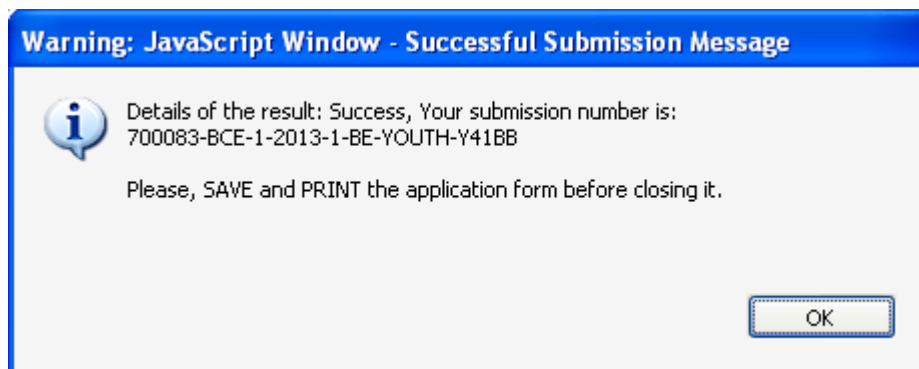Click *Yes* when you are asked if you want to replace the existing file:

8.2 Submission

Depending upon your security settings, the following pop-up window may now appear:

If the window appears, click on the *Allow* button in order to proceed with the submission.

When the submission is complete you will see a pop-up message similar to the one that follows:
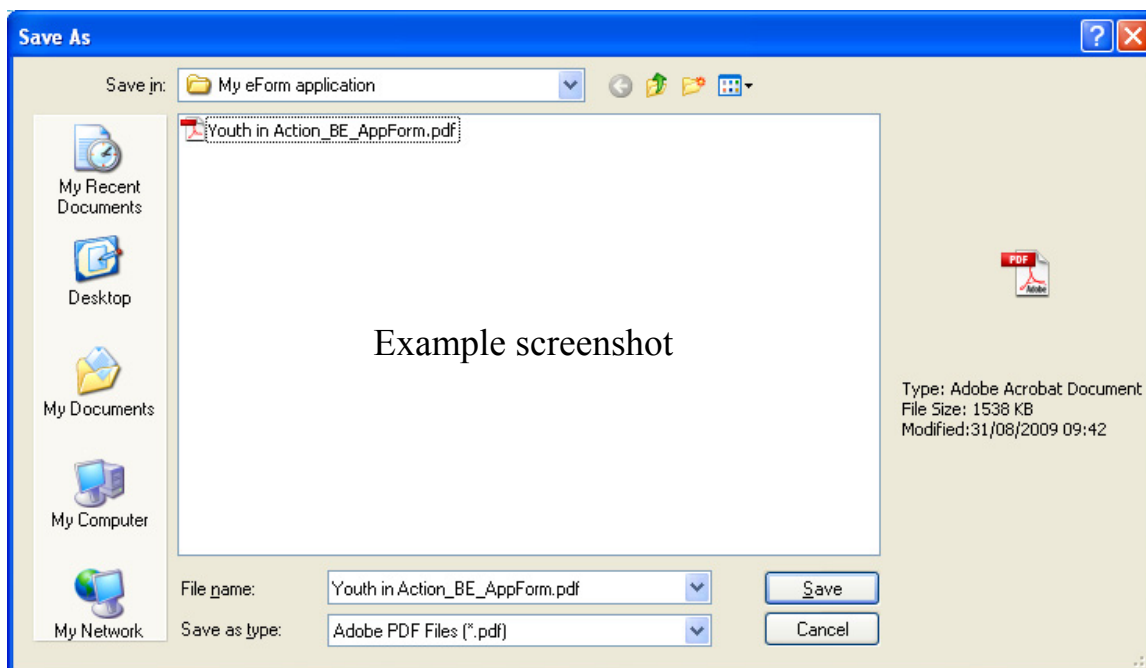

Click 'OK'.

8.3   The mandatory save AFTER submission

When you click *OK*, the form triggers another *Save As* operation. This is so that you cannot mistakenly close the form without saving (and so lose the submission number).

Once again you will see the classic *Save As* window appear:
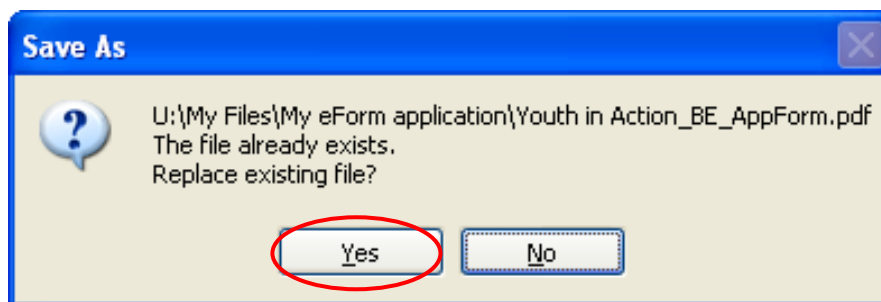

You must now perform the *Save As* by clicking on the *Save* button.

Very Important!

You must **NOT** change the filename of your eForm.
You must keep the same filename that the file had when you began the submission operation!

Click *Yes* when you are asked if you want to replace the existing file:

When you click 'Yes', the submission number is automatically added to the 'Submission number' box:

It is also inserted into the footer of your form.

The form has also been saved and this save included the submission number

Your submitted form is now 'locked'. That is to say, it has been converted to a read-only document: changes cannot be made to it and it cannot be re-submitted.

As part of the submission process, an email message acknowledging receipt of your eForm is automatically sent to the email address you entered for the contact person of the Applicant Organisation (Part A.2).

As indicated by the earlier pop-up message, you may now print the form before closing it.

9   Printing your eForm

The eForm can be printed using Adobe Reader's standard menu-driven print function. The *Print* button is found on the tool bar, or the *Print* menu can be selected from the *File* menu.
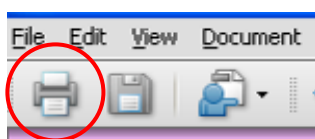
10 How to obtain technical assistance – EACEA Technical HelpDesk

If this User Guide does not provide answers to all of the **technical** questions or problems you encounter in completing the application form, a telephone and email HelpDesk service is available to assist you further:

EACEA Technical HelpDesk: +32 229 90705
eacea-helpdesk@ec.europa.eu
Monday to Thursday 08:30 to 17:30
Fridays 08:30 to 17:00
Excluding public holidays
All times are Brussels time

Should you experience what you believe to be a significant technical issue with the eForm it will be worth checking the website of the programme you are applying for since, in the event of a general technical problem, an update bulletin would be posted.

You may also visit the Agency's dedicated eForm webpage which contains the latest versions of all published forms along with a Test eForm and other items of information:

http://eacea.ec.europa.eu/eforms/index_en.php

Non-technical assistance

If you require assistance with a query or problem that is **not technical** in nature, please do **not** contact the EACEA Technical Helpdesk. This Helpdesk team are only authorised and trained to help applicants who are encountering technical problems.

Please refer instead to the **funding opportunities webpage** of the programme/action that you are applying for.

Generally speaking, the funding opportunities webpage will include the mailbox address of the programme team that is responsible for the programme/action that you are applying for. The page will also contain documentation that may already provide an answer to your non-technical question e.g. a *Call for Proposals*, *Programme Guide* or *Instructions for Applicants* document or a link to an in-country Helpdesk which can help you. If you cannot find the answer to your question, please contact the mailbox of the programme team cited on the funding opportunities webpage.

The following table provides some examples of technical and non-technical questions

Technical Questions (handled by the EACEA Technical)	Non-technical Questions (handled by the programme team)
I can't download the form.	What is required to be entered for the field *Other Community Grants*?
A dropdown list isn't working.	Why isn't country A in the dropdown list?
I can't attach my budget form (or other annexe/attachment).	I need help with completing my budget form.
How does the synchronisation of fields work?	Why is this field mandatory?
I can't delete a table row that I have entered.	Our project has more than one coordinator. What should I do? What is the minimum / maximum number of partners that is allowed?
My form freezes/crashes.	What documents need to be sent by post and where do I send them?
My form is working slowly.	I need more characters for my answer!
My form won't validate.	What do you mean by the term 'acronym'?
My form won't submit.	Where are the templates for the attachments and additional documents?
I think there is a bug in the form.	What should I enter in the form for my project start and end dates?