

# Technical guidance for the Electronic Exchange Platform (EEP)

This guidance contains key technical information on the operation and use of the Electronic Exchange Platform (EEP) of the European Urban Initiative (EUI). Applicants are requested to complete and submit their application form (AF) via the EEP. Therefore, it is highly recommended to read this document carefully before using the EEP. This technical guidance complements the EUI Guidance which is also available on the EUI website.



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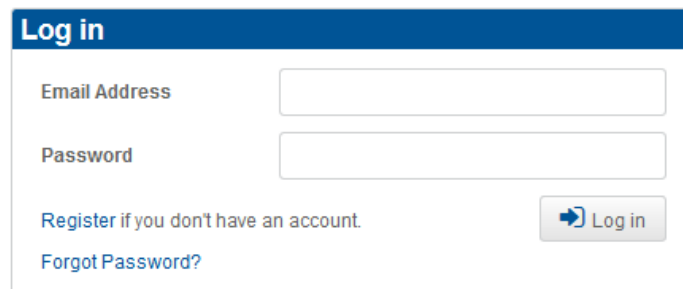
## TECHNICAL INFORMATION AND SYSTEM REQUIREMENTS

The EEP 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

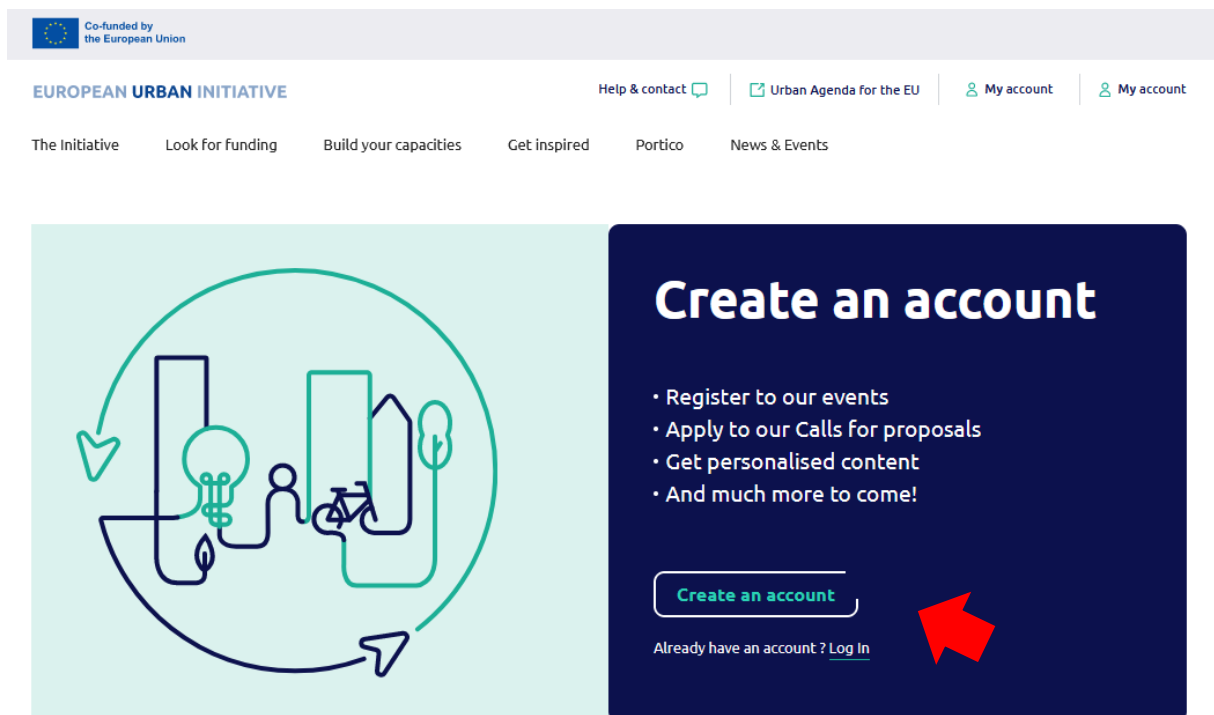
The EEP can be accessed at the following link: <https://eep.urban-initiative.eu>

To use the EEP, each applicant (or user) must first create a personal account by clicking on "Register" on the EEP homepage.



A login form titled "Log in" with a blue header. It contains two input fields: "Email Address" and "Password". Below the "Email Address" field, there is a link "Register if you don't have an account." and a link "Forgot Password?". To the right of the "Password" field is a "Log in" button with a right-pointing arrow icon.

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)

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EUROPEAN URBAN INITIATIVE

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The Initiative | Look for funding | Build your capacities | Get Inspired | Portico | News & Events

← Home

## Create an account

To attend our events, apply to our calls for proposals & get personalised content

- 1 Personal information
- 2 Job and organisation
- 3 Interests
- 4 Privacy policy & Data Protection

### Personnal information

#### About you

First name \*  
Your first name

Last name \*  
Your last name

Your email \*  
Your email

Phone number  
FR ▼

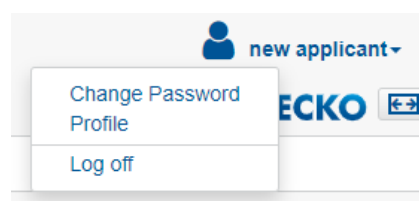
#### Password

Password \*  
Password

Confirm password \*  
Password

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 name in the upper right corner of the screen.



A password recovery function ("Forgot password?") is also available on the EEP homepage.

### Log in

Email Address

Password

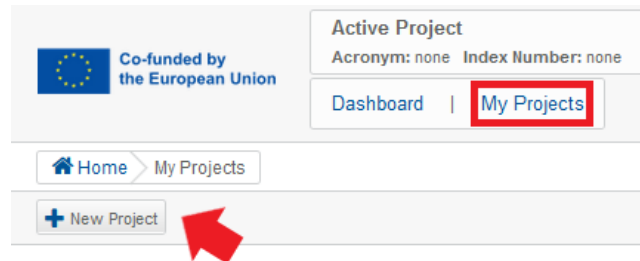
[Register](#) if you don't have an account.

[Forgot Password?](#)

[Log in](#)

## 2. FILLING IN THE APPLICATION FORM


To create your Application Form (AF) click on "+ New Project" under the section "My Projects" of your dashboard.



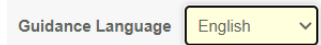
The menu of an AF looks as follows:

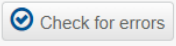




The following important aspects must be remembered when filling in the AF:

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


To select the language of your choice, a drop-down menu is available on the top right side of the AF menu:



- All fields in all AF tabs are **mandatory**. After clicking on  applicants can check if the fields are correctly filled in.


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

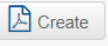

Although automatic checks are foreseen in the EEP, **it is still the applicant's responsibility to verify that the AF is properly filled in.**

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

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

- Being inactive for a long period may automatically end your session for security reasons and unsaved data will be lost.
- Fields in the EEP have **character limitations**. Characters in excess will not be considered. Please note that the punctuation and spaces between words or paragraphs are considered as characters.
- The sequential order of the predefined Work Packages and activities follows the order in which they were added in the EEP AF template. This order cannot be changed by the applicant.
- The current call for proposals has different topics. In part A – Summary, an applicant has to select first one topic. Based on this, the EEP 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 should be adjusted accordingly. The "error/warning" symbol  is alerting the presence of inconsistent/missing information in parts C and D. 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.).

- The tab 'Compare' (menu) is not active during the application phase; the latter is not meant to compare different drafted versions of a proposal.
- A PDF of the AF can be created at any moment by clicking on  and then downloaded via  .

The creation of a PDF may take several minutes.

## 3. PARTICULAR ISSUES IN PART D – WORKPLAN

### 3.1. WORK PACKAGE PROJECT PREPARATION AND INITIATION PHASE

The Work Package (WP) Project Preparation and Initiation Phase is predefined by the system. The only involved and responsible partner on this WP is the Main Urban Authority (Project Partner 1). The end date of this WP is the last day before the start of the project implementation phase.


### 3.2. THEMATIC WORK PACKAGES AND INVESTMENTS

A Thematic Work Package (WP) has a slightly different logic than the others, as the latter can include one or several “investment” items.

Applicants are allowed to include investments within relevant Thematic 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 on the EUI Guidance (2.2.6 Thematic Work Packages).

To add an “investment” item under a Thematic WP, please follow these steps:

- a. Create first a Thematic WP and save it (the only compulsory field required for creating such WP is the field “Title”).



The screenshot shows a form titled "Work Plan Per Work Packages - Work Package 5 Thematic". It contains several input fields: "Title" (with a character count of 0 / 200), "Start Date", "End Date", and "Budget" (with a value of 0.00). Each field has an information icon (i) to its left.

- b. The button “+ Investment” becomes then active on the same page. By clicking on it, a new dedicated tab appears. All the fields in this tab are editable. To validate the creation of an “investment” item, fill in all the required fields and click on Save.



The screenshot shows a tab titled "Investments". Below the title bar, there is a green message box that says "No Investments found." At the bottom left, there is a button labeled "+ investment" with a red arrow pointing to it.

(see next page view of the above-mentioned tab)

Investment 1

Title

0 / 200 characters

Investment Description

0 / 1,500 characters

Delivery date

Budget
0.00

Investment aspects	Questions	Project answers
Justification of the investment	Explain why this investment is needed.	<div> 0 / 1,000 characters </div>
	Clearly describe the thematic relevance of the investment.	<div> 0 / 1,000 characters </div>
	Describe who is benefiting (e.g., Partners, city, region, target groups, etc.) from this investment, and in what way.	<div> 0 / 1,000 characters </div>
	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.	<div> 0 / 1,000 characters </div>
Location of the investment	Describe the location of the physical investment; if possible, a specific address where the investment will be located.	<div> 0 / 1,000 characters </div>

Once the new “investment” item is saved, you can see a summary table of the investment(s) back in the Thematic WP page. You can modify an investment at any time by clicking on the related item in the table.

Investments						
Number	Title	Description	Budget	Delivery date		
I 5.1	Investment1 11 / 200 characters	<div> <div> 1,131 / 1,500 characters </div> </div>	100,000.00	01/03/2026	✓	✕

Please note that the budget assigned for the investment will be added automatically in the “Indicative budget breakdown per activities and investments” at the end of the Thematic WP page.

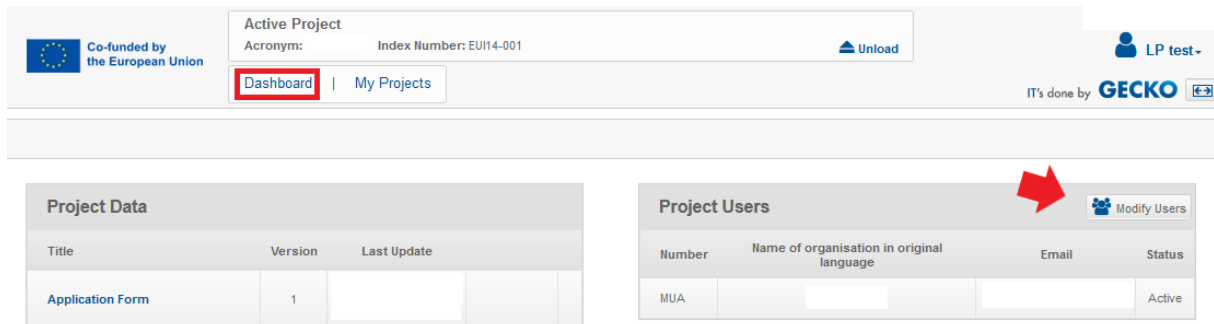
### 3.3. CLOSURE WORK PACKAGE

The Work Package (WP) Closure is predefined by the system. The only involved and responsible partner on this WP is the Main Urban Authority (Project Partner 1). The end date of this WP is the last day of the third month after the end of the project implementation phase.



## 4. HOW TO ADD USERS TO YOUR PROJECT APPLICATION FORM

New users can be added to the project AF as soon as the proposal is created in the system. To do so, the lead applicant should access the Dashboard and click on the button “Modify users” in the table “Partner Users”.



The screenshot shows the top navigation bar with the European Union logo, project details (Active Project, Acronym, Index Number: EU114-001), and a user profile (LP test). Below the navigation bar, there are two main sections: 'Project Data' and 'Project Users'. In the 'Project Data' section, the 'Application Form' is listed with version 1. In the 'Project Users' section, a table lists users with columns for Number, Name of organisation in original language, Email, and Status. The 'Modify Users' button is highlighted with a red arrow.

Title	Version	Last Update
Application Form	1	

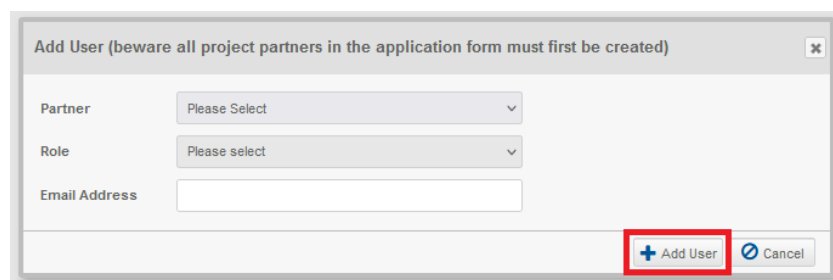
Number	Name of organisation in original language	Email	Status
MUA			Active

An overview of all users related to the project is then displayed. A new user can be added by using the button “+ New User” and then filling in all the requested fields.



The screenshot shows the 'Modify Users' page. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there is a breadcrumb trail: Home > Modify Users. The '+ New User' button is highlighted in red. Below the button, there is a table titled 'Project users for project , Application Form version 1'. The table has columns for Number, Institution Original, Email, and Status. The first row shows 'PP 1 (MUA)' with a status of 'Active' and a delete icon (X).

Number	Institution Original	Email	Status
PP 1 (MUA)			Active



The screenshot shows the 'Add User' modal form. The title is 'Add User (beware all project partners in the application form must first be created)'. The form has three fields: 'Partner' (a dropdown menu with 'Please Select' selected), 'Role' (a dropdown menu with 'Please select' selected), and 'Email Address' (a text input field). At the bottom right, there are two buttons: '+ Add User' (highlighted in red) and 'Cancel'.

The new user will receive an automatic email to complete her/his account creation (see section 1 of this document).

➤ Point of attention: AF submission

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

➤ Point of attention: risk of overwriting information

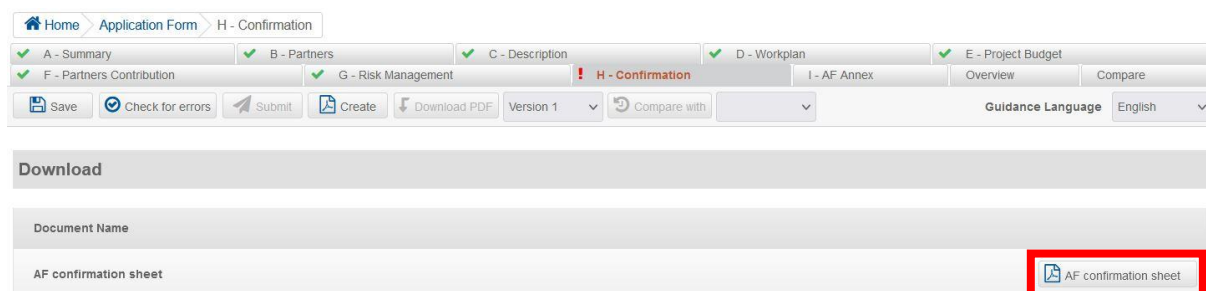
To a certain extent, it is possible for different users to work in parallel (at the same time) on the same AF. When working in parallel, users have to make sure though that they are not working simultaneously in the same section or sub-section as there is the risk to overwrite information.

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 EEP during the application phase.

## 5. HOW TO UPLOAD THE CONFIRMATION SHEET

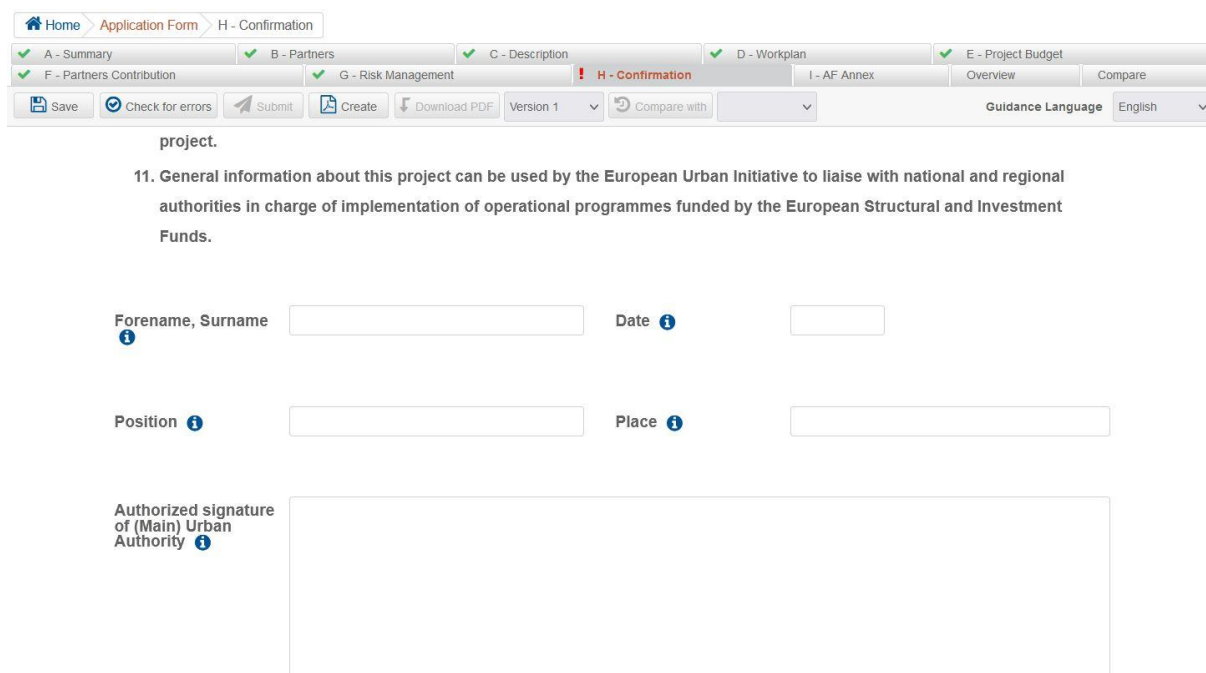
To submit a project proposal, the Confirmation Sheet (CS) must beforehand be downloaded (see below button "AF confirmation sheet"), printed, signed, scanned in PDF format and then uploaded in the AF.

The CS is accessible at any time during the application process under the section "H - Confirmation" of the AF.



The screenshot shows the AF application form interface. The top navigation bar includes links for Home, Application Form, and H - Confirmation. Below this, a series of tabs represent different sections of the form: A - Summary, B - Partners, C - Description, D - Workplan, E - Project Budget, F - Partners Contribution, G - Risk Management, H - Confirmation (highlighted with a red exclamation mark), I - AF Annex, Overview, and Compare. A toolbar below the tabs contains buttons for Save, Check for errors, Submit, Create, Download PDF, Version 1, and Compare with. The Guidance Language is set to English. The main content area is titled 'Download' and contains a table with one row. The table has two columns: 'Document Name' and a button labeled 'AF confirmation sheet' (highlighted with a red box).

The applicant has the possibility to add information on the person in charge of the signature of the CS by filling in the following fields in the section "H – Confirmation":



The screenshot shows the AF application form interface, specifically the 'H - Confirmation' section. The top navigation bar and tabs are the same as in the previous screenshot. The main content area is titled 'project.' and contains a paragraph of text: "11. General information about this project can be used by the European Urban Initiative to liaise with national and regional authorities in charge of implementation of operational programmes funded by the European Structural and Investment Funds." Below this text, there are four input fields: 'Forename, Surname' (with an information icon), 'Date' (with an information icon), 'Position' (with an information icon), and 'Place' (with an information icon). At the bottom, there is a large text area labeled 'Authorized signature of (Main) Urban Authority' (with an information icon).

When downloading the CS, the existing information on the fields above is automatically generated on the PDF.

➤ How to **upload** the Confirmation Sheet?

The user selects the scanned document (in PDF format) to be uploaded by clicking on "Select" (step 1 – see next screenshot). When this is done, the user uploads it in the EEP 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.

The screenshot displays the 'H - Confirmation' section of an application form. The top navigation bar includes tabs for A - Summary, B - Partners, C - Description, D - Workplan, E - Project Budget, F - Partners Contribution, G - Risk Management, H - Confirmation (active), I - AF Annex, Overview, and Compare. Below the navigation bar are buttons for Save, Check for errors, Submit, Create, Download PDF, and a Version 1 dropdown. A 'Compare with' dropdown and a 'Guidance Language' dropdown (set to English) are also visible.

The 'Download' section shows a 'Document Name' field with 'AF confirmation sheet' and a corresponding download icon.

The 'Upload' section features a 'File Name' input field, a 'Select' button (highlighted with a red box and labeled 'step 1'), and an 'Upload' button (highlighted with a red box and labeled 'step 2').

The 'Manage Uploaded Documents' section contains a table with the following data:

Name	Document type	Upload date	
AF confirmation sheet pdf	Confirmation Sheet	26/05/2023 11:34	✕

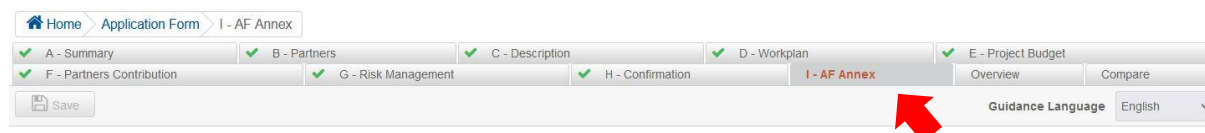
The row in the table is labeled 'step 3'.

➤ Point of attention: 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 section I – AF Annex.



Home > Application Form > I - AF Annex

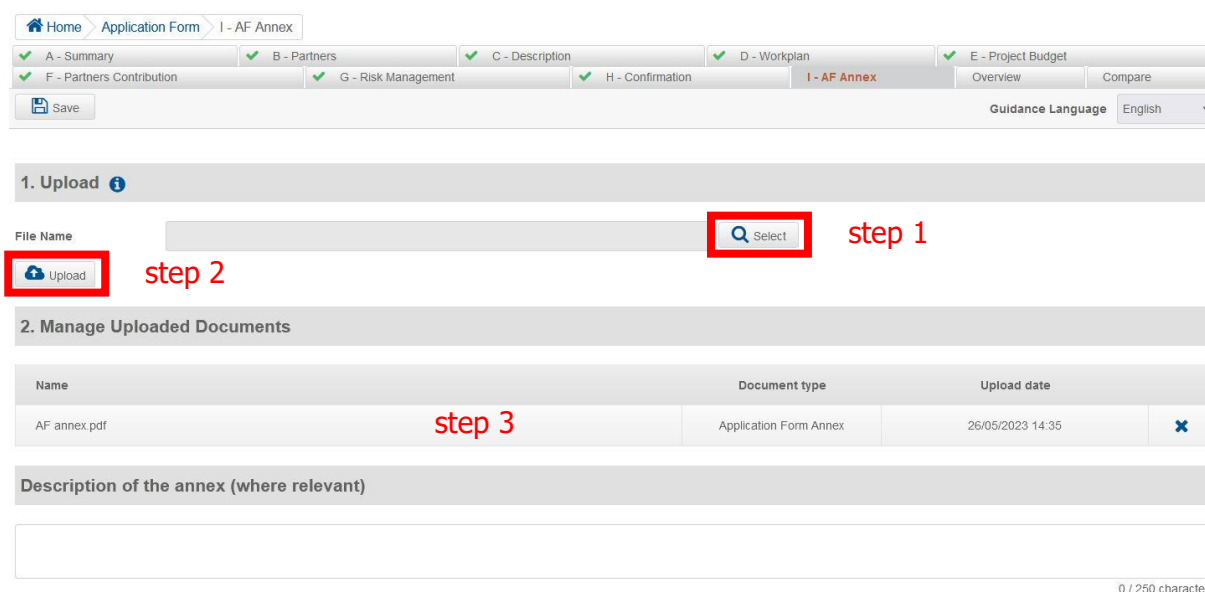
A - Summary B - Partners C - Description D - Workplan E - Project Budget  
F - Partners Contribution G - Risk Management H - Confirmation I - AF Annex Overview Compare

Save Guidance Language English

### ➤ How to **upload** an annex?

The user selects the scanned document (in PDF format) to be uploaded by clicking on “Select” (step 1 – see next screenshot). When this is done, the user uploads it in the EEP 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.



Home > Application Form > I - AF Annex

A - Summary B - Partners C - Description D - Workplan E - Project Budget  
F - Partners Contribution G - Risk Management H - Confirmation I - AF Annex Overview Compare

Save Guidance Language English

### 1. Upload

File Name  Select **step 1**

Upload **step 2**

### 2. Manage Uploaded Documents


Name	Document type	Upload date	
AF annex pdf	Application Form Annex	26/05/2023 14:35	<b>step 3</b> <span>✕</span>

Description of the annex (where relevant)

0 / 250 characters

## 7. SUBMISSION OF THE APPLICATION FORM

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

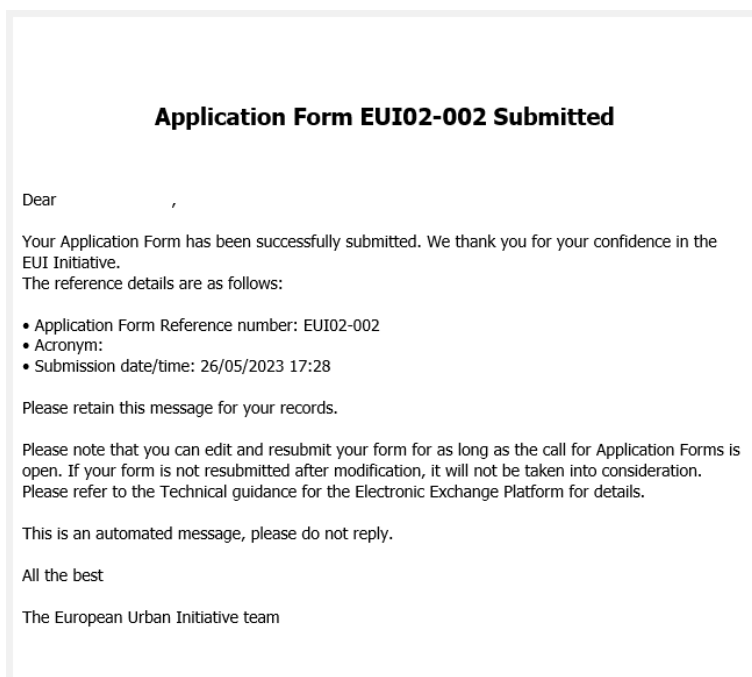
The AF can be officially submitted only when all automatic checks are successfully passed and no errors are detected in each section (in other words, when a “green light”  appears next to each section in the AF menu). The button “Submit” is then active.



- Point of attention: Completeness and consistency checks are run by the system, **but** the EEP 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 you to confirm the submission of your AF: please read it carefully and validate your submission by clicking on “Yes”.

After the submission, the applicant will receive an automatic confirmation email.

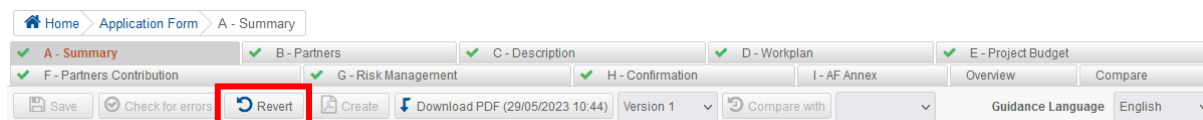


At any time, applicants can generate a PDF version of the AF by clicking on “Download PDF” in the AF menu.

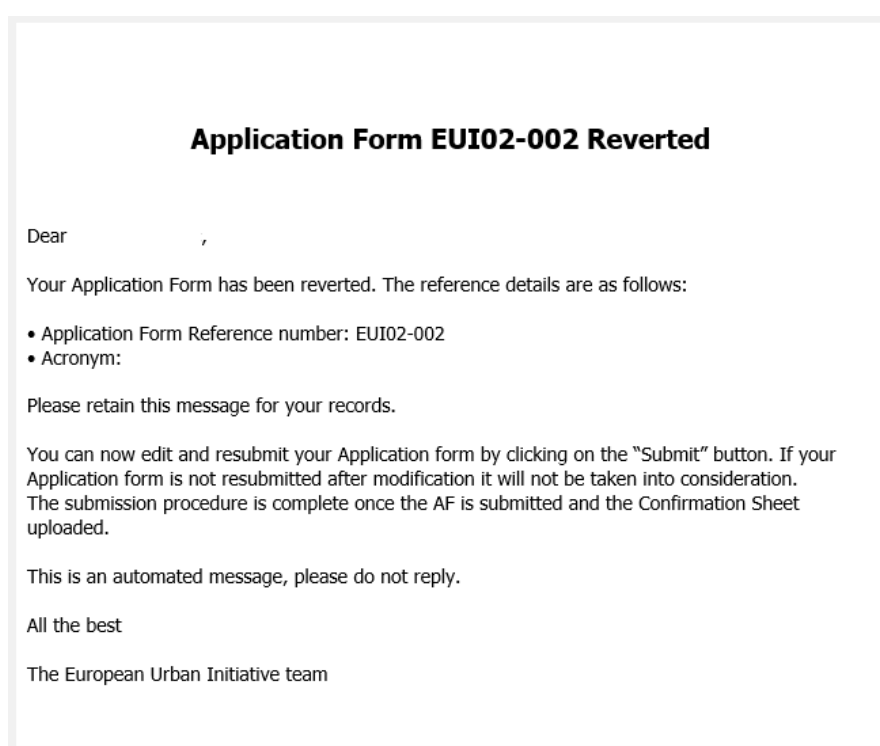


## 8. MODIFICATIONS AFTER SUBMISSION

Applicants are allowed to modify their application until the closure of the call for proposals. In order to do modifications after submission, the applicant can revert the AF by clicking on "Revert".



After reverting your application, a notification will be sent to the applicant.



Please note that a reverted AF needs to be **resubmitted** in order to make it valid for evaluation. The submission has to be done before the closing time of the call for proposals.



## 9. HELPDESK AND TECHNICAL SUPPORT

For any problems you might experience with the EEP, please contact the helpdesk at [innovativeactions@urban-initiative.eu](mailto: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



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