

IPA4SME

Your path towards IP valorisation

**Boosting the use of Intellectual Property with an
action specifically designed for Innovative
European SMEs – IPA4SME**

EMS Manual



Co-funded by the COSME programme
of the European Union

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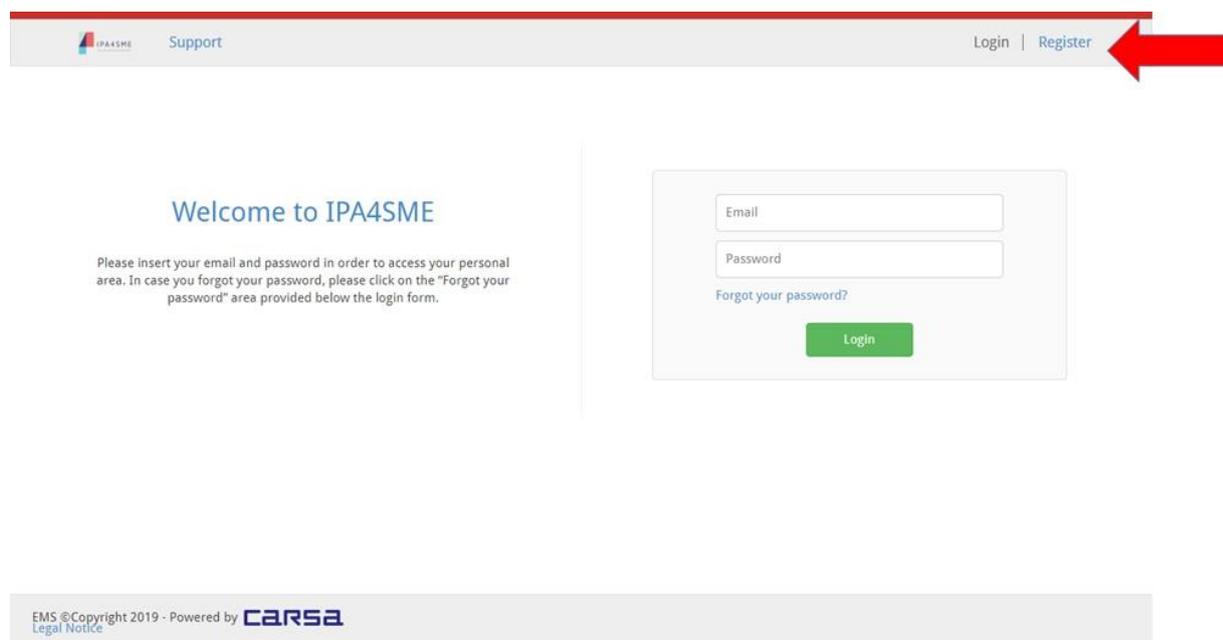
1 INTRODUCTION

This document represents a **visual guidance for applicants** on how to navigate through the Electronic Submission System (EMS) Platform when entering/registering into the system and preparing their applications to the IPA4SME Call. As we all know, EMS is IPA4SME's **main software tool operating in the cloud** which enables online interactions with the Coordination Centre.

2 REGISTRATION OF APPLICANTS

2.1 Step 1 – IPA4SME EMS accessing site and registration

Go to <https://ipa4sme.ems-carsa.com/> and click on "Register"



The screenshot shows the top navigation bar of the website. On the left, there is the IPA4SME logo and the word "Support". On the right, there are links for "Login" and "Register". A red arrow points to the "Register" link. Below the navigation bar, the main content area is divided into two columns. The left column contains the heading "Welcome to IPA4SME" and a paragraph: "Please insert your email and password in order to access your personal area. In case you forgot your password, please click on the 'Forgot your password' area provided below the login form." The right column contains a login form with two input fields: "Email" and "Password", a link for "Forgot your password?", and a green "Login" button. At the bottom of the page, there is a footer with the text "EMS ©Copyright 2019 - Powered by CARSA" and a link for "Legal Notice".

You will land on the following page. Then click on the green button "Register as an applicant"

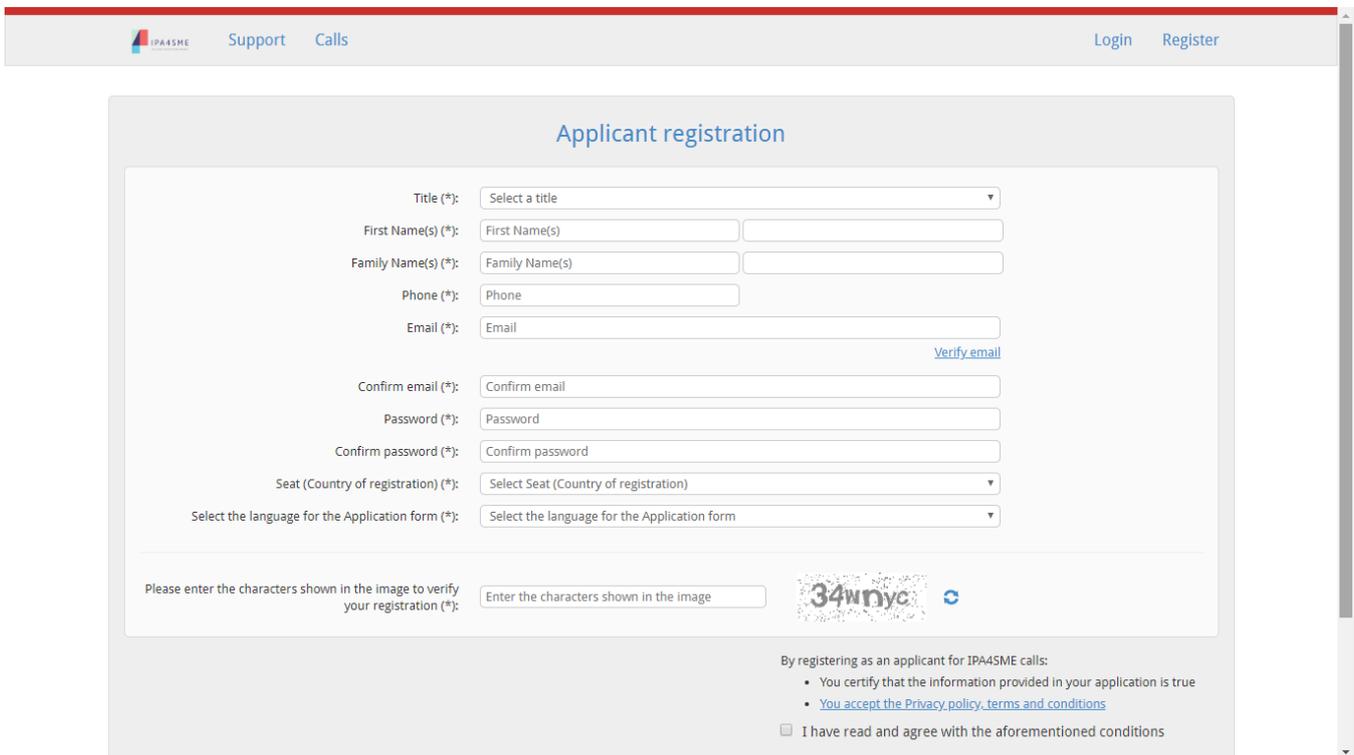
I would like to submit an application

Thank you for your interest in IPA4SME Open Calls. Please click on the box below in order to register as an applicant and be able to submit your application.

Register as an applicant



You will then be led to the registration form:



The screenshot shows the 'Applicant registration' form with the following fields and options:

- Title (*): Select a title (dropdown)
- First Name(s) (*): First Name(s) (text input)
- Family Name(s) (*): Family Name(s) (text input)
- Phone (*): Phone (text input)
- Email (*): Email (text input) with a [Verify email](#) link
- Confirm email (*): Confirm email (text input)
- Password (*): Password (text input)
- Confirm password (*): Confirm password (text input)
- Seat (Country of registration) (*): Select Seat (Country of registration) (dropdown)
- Select the language for the Application form (*): Select the language for the Application form (dropdown)

Below the form is a CAPTCHA section: "Please enter the characters shown in the image to verify your registration (*):" with an input field and a "34w1nyc" image.

At the bottom, there is a checkbox for "I have read and agree with the aforementioned conditions" and a list of terms:

- By registering as an applicant for IPA4SME calls:
 - You certify that the information provided in your application is true
 - [You accept the Privacy policy, terms and conditions](#)

2.2 Step 2 – Confirmation of your account

Once submitted your registration, the following message will appear in your browser:

"A confirmation email has been sent to the indicated email address. Please click on the link provided in the email in order to validate your registration."

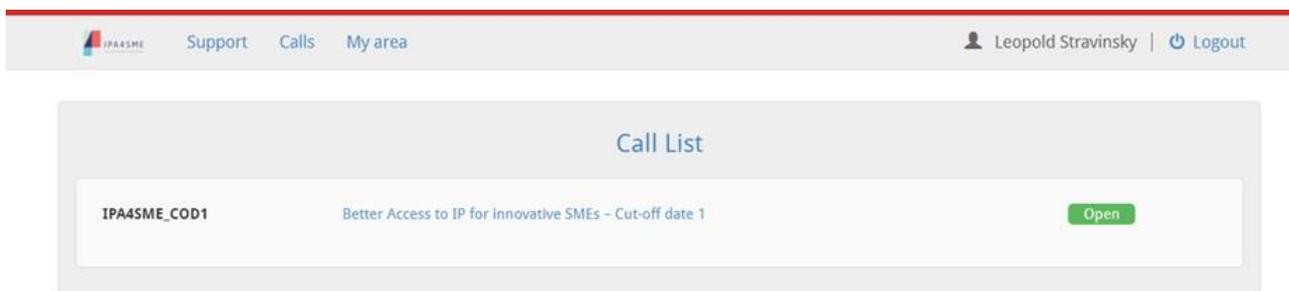
Then go to your email account and look for the email coming from IPA4SME as illustrated in the below picture:



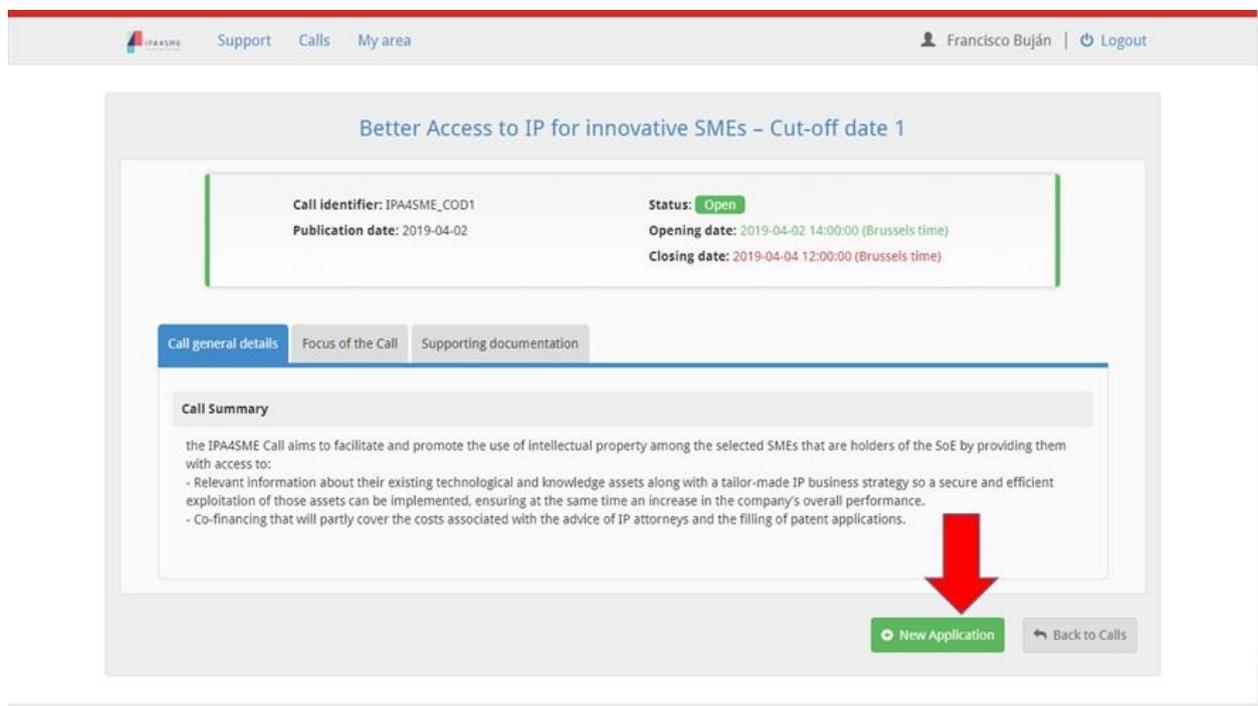
You will be asked to confirm your EMS account by clicking on the provided link (see above).

3 PREPARATION FOR SUBMISSION OF APPLICATIONS

Once successfully registered and logged in, you will be directed to the Call list. This is a list of the **past** and **currently open** (marked in green colour) **Cut-off dates** of IPA4SME Call.



By clicking on the Cut-off date that is open, you will be able to access the general information about the Call and also start the process of your application if you click on “New Application” as indicated in the following picture:



3.1 Step 1 – Filling in the Application Form

Applicants must fill in the information requested in the **Application Form (Step 1)**, **upload the documents required (Step 2)** and finally press the **submission button (Step 3)** to complete the process established in the IPA4SME EMS platform.

All three steps have their own page in the EMS Platform and are accessible at the left upper corner menu once a first draft or a completed Application Form has been saved in the system.

As far as the first Step is concerned, applicants will have the opportunity to read the required content of the application form before applying in order to verify the information that needs to be included. In the Guide for Applicants document, participating SMEs will find the template of the application form.

Applicants are kindly requested to read very carefully the fields provided in that template.

The following picture illustrates how the information is displayed in the EMS screen page when entering into the Application Form:

My area > My applications > New Application > Application form

Application form

Select the language for the Application form: English

Type of support action you want to apply for

- Service 1: IP Pre-diagnostic
- Service 2: Partial reimbursement of EPO fees
- Service 3: Partial reimbursement of IP attorney fees

Full name of the company: Full name of the company

Short name of the company: Short name of the company

VAT Number: VAT Number

Year of incorporation: Year of incorporation

City: City

Country: Spain

Number of employees: Number of employees

Annual turnover of the preceding year: Annual turnover of the preceding year

R&D intensity (sum total of in house and external R&D activities during last year) ⓘ: Total value in €

Innovation intensity (% of total turnover) ⓘ: % of total turnover

Export intensity (% of total turnover): % of total turnover

PIC number: PIC number

Participant Portal reference number assigned to the application submitted to the H2020 SME instrument that was awarded with the SoE: Participant Portal reference number

Points received (score) in the evaluation report (ESR) of your H2020 SME instrument application: Enter a number between 10.00 and 15.00

Date of SME Instrument call for which your Seal of Excellence was awarded: 2016-05-03 (Phase 1)

Where did you hear about this Call for EoIs?: Direct communication

I confirm that to this date, the applicant has not been supported by the H2020 SME Instrument Phase 2 programme

I confirm that the Seal of Excellence attached to this application was awarded during the last 3 years

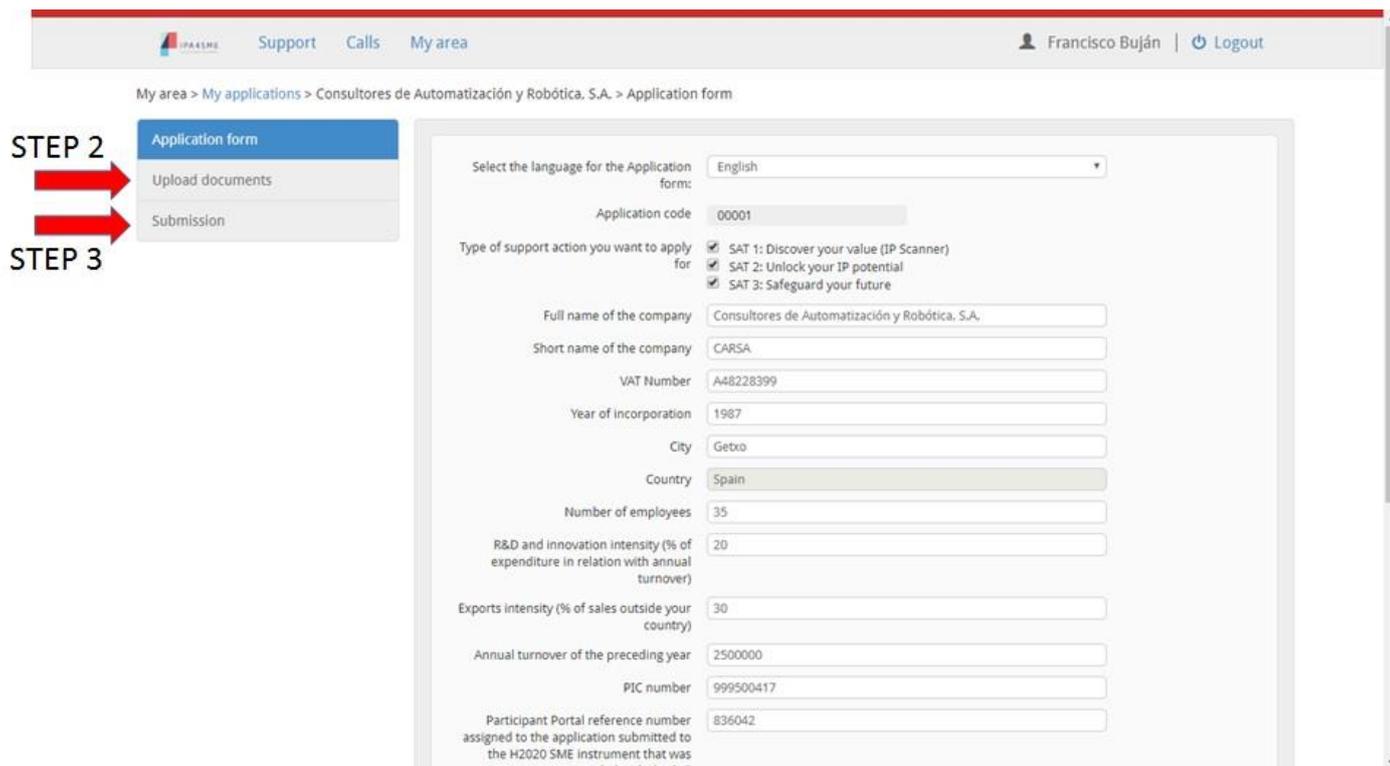
Save

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As can be seen, applicants may save the content of the Application Form as many times as they want. The EMS Platform allows users to always go back to the Form (even if logged out) and complete or correct the information that's been introduced.

Once its content has been saved the first time, at the left upper corner menu applicants will be able to access the other 2 pages:



3.2 Step 2 – Documents uploading

As it is described in the guide for applicants, the documents that are required to complete this second step are:

1. The Seal of Excellence (SoE) certificate (in .pdf format)
2. The Evaluation Summary Report (ESR) corresponding to the proposal awarded with the SoE (also in .pdf format)

In the picture below we can see the configuration of this page and the simple way its design will allow applicants to upload their documents:



My area > My applications > Consultores de Automatización y Robótica, S.A. > Upload documents

Application form

Upload documents

Submission

Select a language: English

Seal of Excellence certificate

Maximum: 5 MB
Type of document: PDF
Mandatory: Yes

Seleccionar archivo
Ningún archivo seleccionado

Upload

Evaluation Summary Report (ESR) corresponding to the proposal awarded with the SoE

Maximum: 5 MB
Type of document: PDF
Mandatory: Yes

Seleccionar archivo
Ningún archivo seleccionado

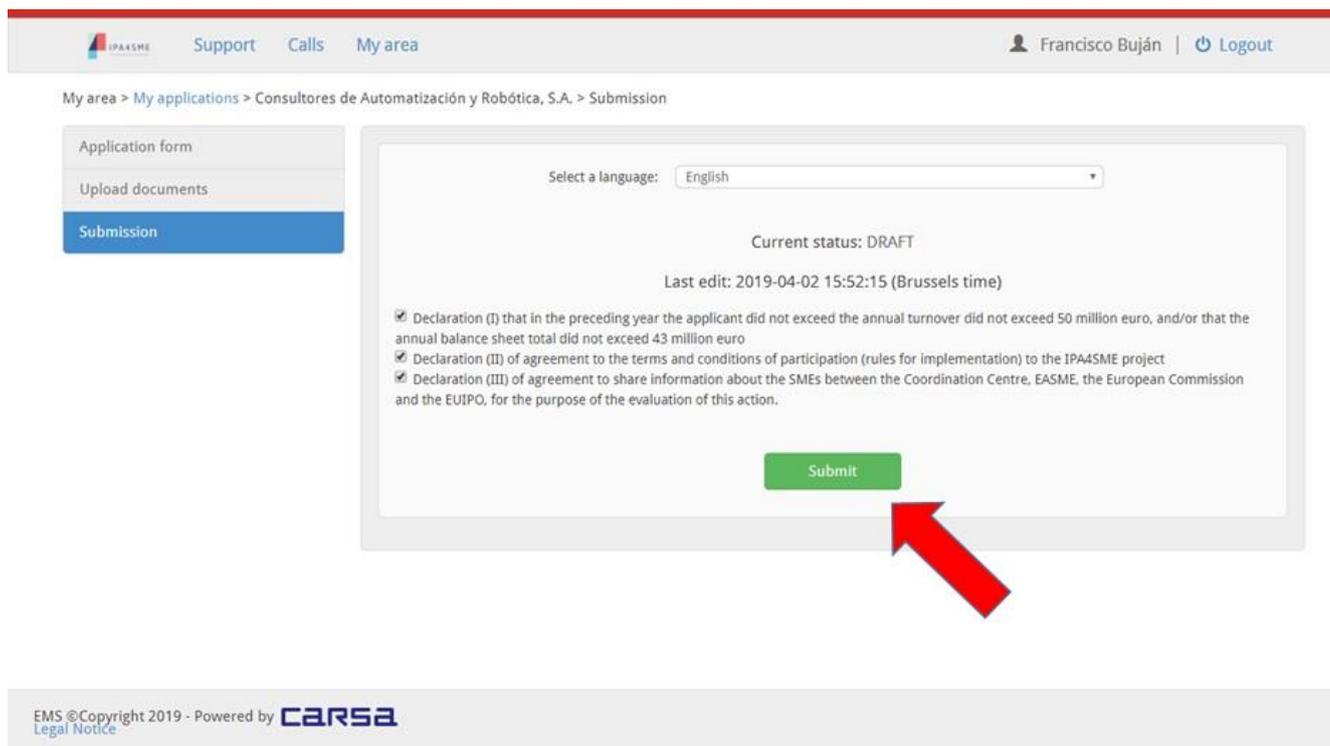
Upload

3.3 Step 3 – Submission of the Application

In Step 3 applicants will have to confirm they accept the following statements or declarations by clicking on the corresponding boxes:

- ✔ Declaration (I) that the applicant company employs fewer than 250 persons, that in the preceding year the annual turnover did not exceed 50 million euro, and/or that the annual balance sheet total did not exceed 43 million euro.
- ✔ Declaration (II) of agreement to the terms and conditions of participation (rules for implementation) to the IPA4SME project.
- ✔ Declaration (III) of agreement to share information about the SMEs between the Coordination Centre, EASME, the European Commission and the EUIPO, for the purpose of the evaluation of this action.

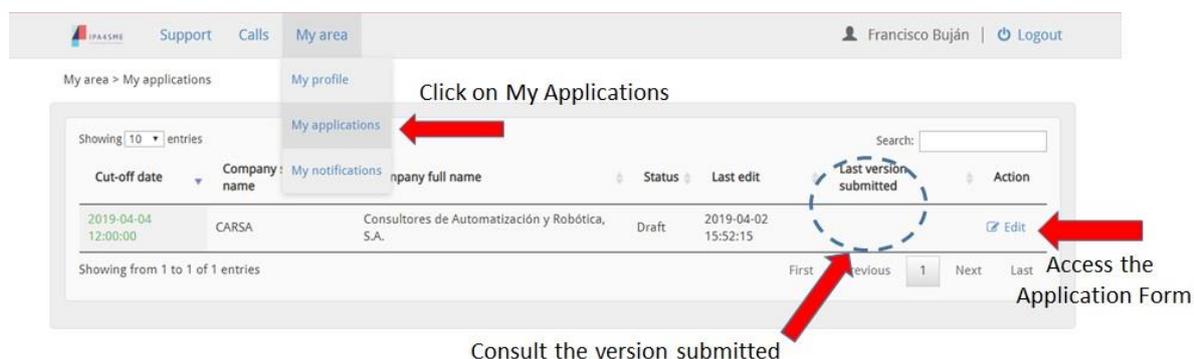
And then, applicants are requested to press on the green submission button to conclude this third Step and close the whole application process:



The EMS platform will not allow the submission of applications if any of the aforementioned data is missing or if any of the 3 Steps have not been completed.

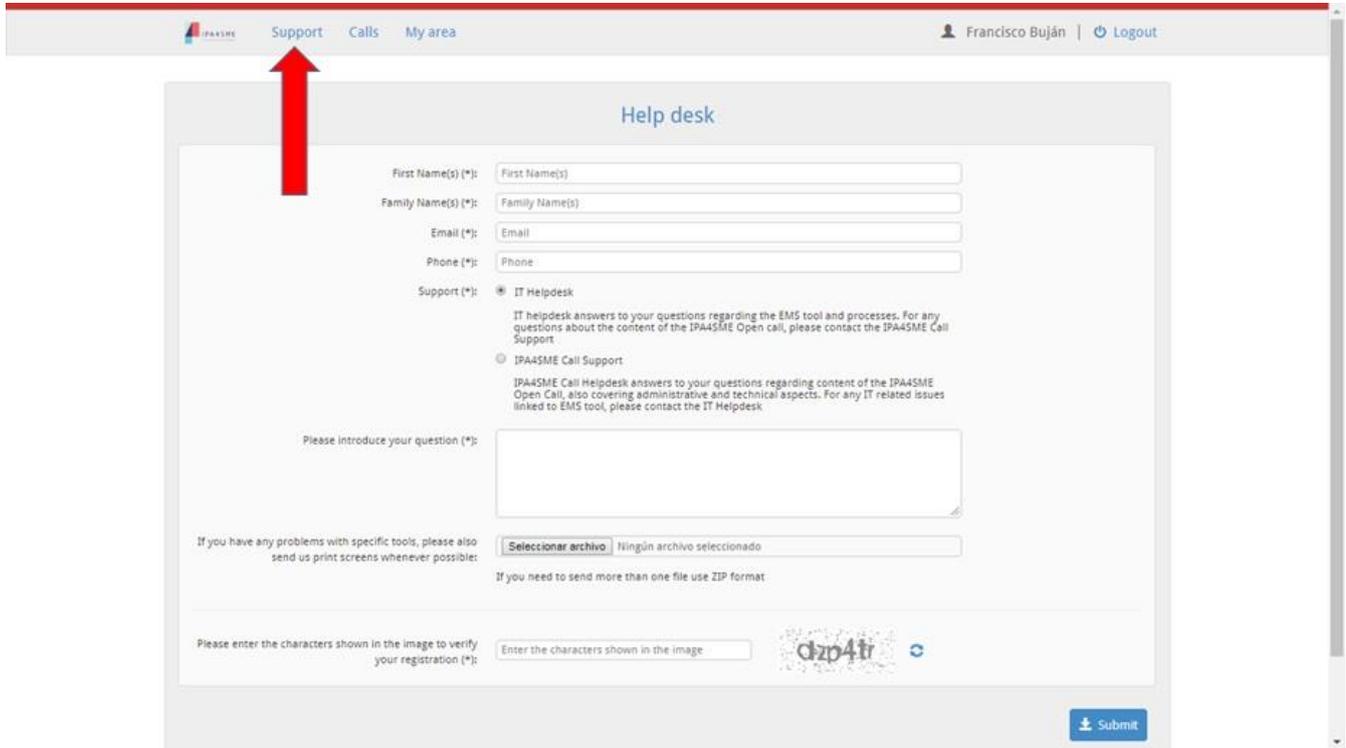
4 PRACTICAL INFORMATION

You may **access your application** by going to “My area>My applications” where you can find an overview of your applications and their status, as illustrated in the next picture:



As long as applications are on the “draft” status, they can be accessed by clicking on the “edit” button on the right. This button will be disabled once the application has been submitted.

To conclude, should you encounter any problems or difficulties with your registration or during the application submission process, please contact the IPA4SME support link (**Helpdesk**) as depicted in the figure below:



The screenshot shows the IPA4SME Helpdesk interface. At the top, there is a navigation bar with 'Support', 'Calls', and 'My area' links. A red arrow points to the 'Support' link. The main content area is titled 'Help desk' and contains a form with the following fields and options:

- First Name(s) (*):
- Family Name(s) (*):
- Email (*):
- Phone (*):
- Support (*):
 - IT Helpdesk

IT helpdesk answers to your questions regarding the EMS tool and processes. For any questions about the content of the IPA4SME Open call, please contact the IPA4SME Call Support
 - IPA4SME Call Support

IPA4SME Call Helpdesk answers to your questions regarding content of the IPA4SME Open Call, also covering administrative and technical aspects. For any IT related issues linked to EMS tool, please contact the IT Helpdesk
- Please introduce your question (*):
- If you have any problems with specific tools, please also send us print screens whenever possible:
- If you need to send more than one file use ZIP format:
- Please enter the characters shown in the image to verify your registration (*):

At the bottom right, there is a 'Submit' button.

Here, the EMS Platform enables two types of enquiries:

- IT Helpdesk: questions and problems regarding to the functioning of the EMS tool and its processes
- IPA4SME Call Support: covering questions regarding the technical and administrative requirements to complete an application (also accessible via the email address calls@ipa4sme.eu)

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