Co-funded by the European Union

Electronic submission system -users' guide

EIT Manufacturing

Paris | 2021

eitmanufacturing.eu

Contents

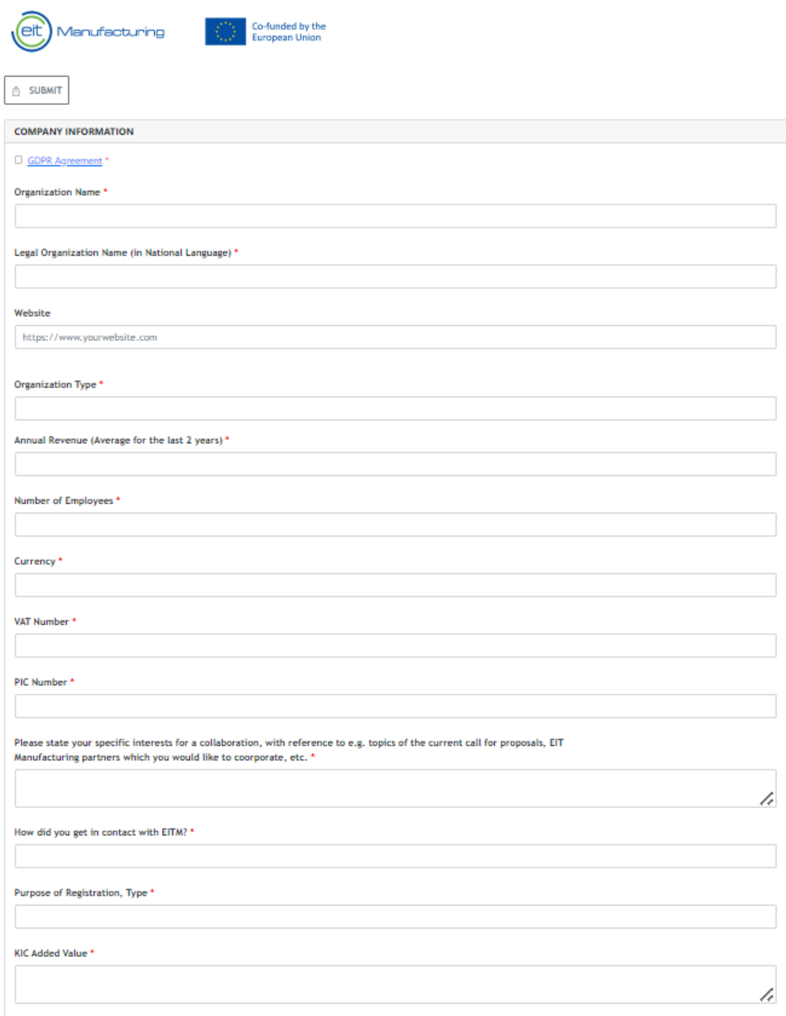
Registration

We have 2 types of registrations to get access to NetSuite.

1. **New Organization registration** – Organizations that do not exist in our current system (Who do not have access to Plaza as well) must fill in the **New Org** form to start their registration process. Once the organization is registered, they can register additional users using the Contact form mentioned below.
2. **Existing organizations registration**– Organizations that were already registered in our previous ERP (Plaza) are migrated to NetSuite. However, users of the organizations must fill in the Contact Form to register users in NetSuite. This enables the addition of co-editors to your proposals, ensuring collaborative engagement.

New Organization Registration

New Organizations that are not currently registered in our system and are interested in applying for Call for Proposal can initiate the registration process by filling out the online form: https://7967462.extforms.netsuite.com/app/site/hosting/scriptlet.nl?script=2533&deploy=1&compid=7967462&h=d122eeeac74aca589364



eit Manufacturing

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SUBMIT

COMPANY INFORMATION

GDPR Agreement *

Organization Name *

Legal Organization Name (in National Language) *

Website

https://www.yourwebsite.com

Organization Type *

Annual Revenue (Average for the last 2 years) *

Number of Employees *

Currency *

VAT Number *

PIC Number *

Please state your specific interests for a collaboration, with reference to e.g. topics of the current call for proposals, EIT Manufacturing partners which you would like to coorporate, etc. *

How did you get in contact with EITM? *

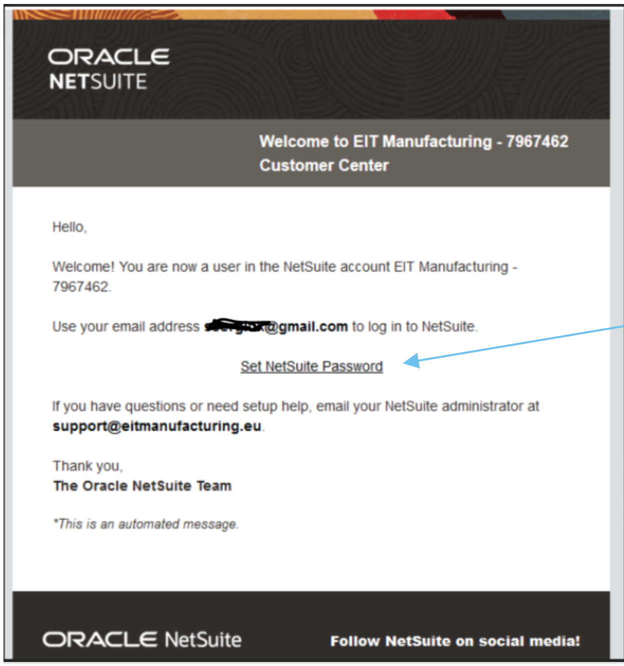
Purpose of Registration, Type *

KIC Added Value *

Fill in every mandatory field in the form and click submit button.

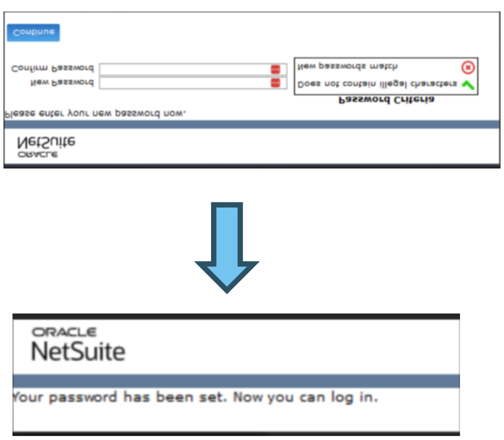
In the 'Purpose of Registration' field, selecting the value 'Call for Proposal' ensures that the organization's intention is clearly communicated, facilitating the registration review process.

After submission, the application undergoes verification by EIT Manufacturing’s team to ensure authenticity. Once verified, an email will be sent to the organization contact to finalize the registration process with a link to set the password. This email works as a security measure to ensure that only authorized individuals can access the account.



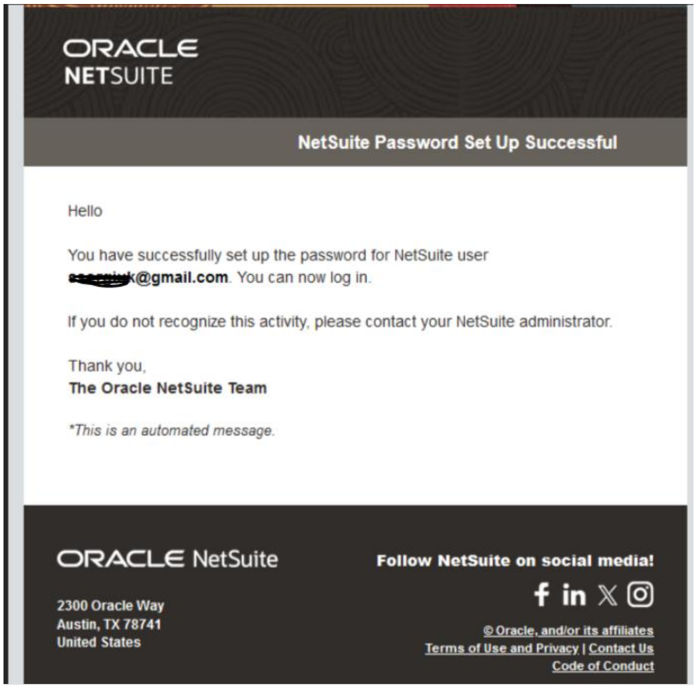
Click on the link to proceed and set your new NetSuite password.

Users should click on the link in the email to be redirected to the password setting page. Here, they can securely set a password of their choice, enhancing account security.



Insert your new password and click continue. Make sure that the criteria on the right are respected.

After successfully setting the password, a confirmation email will be sent to the user, indicating that the registration process is complete, and they can now access the Partner Area.

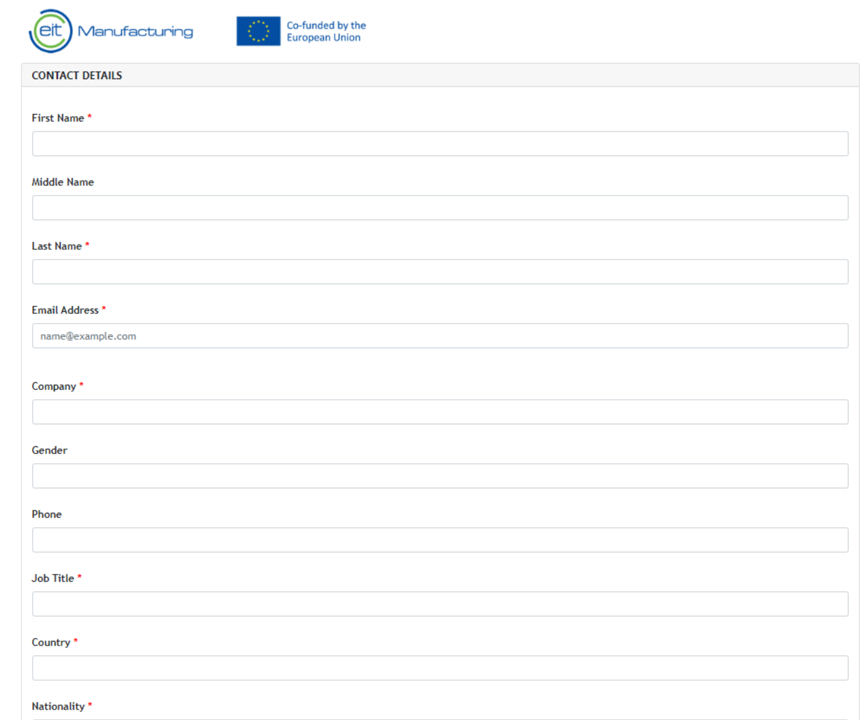


After your organization has been successfully registered, you can register a user by following the steps mentioned below for Existing Organizations.

Existing organizations

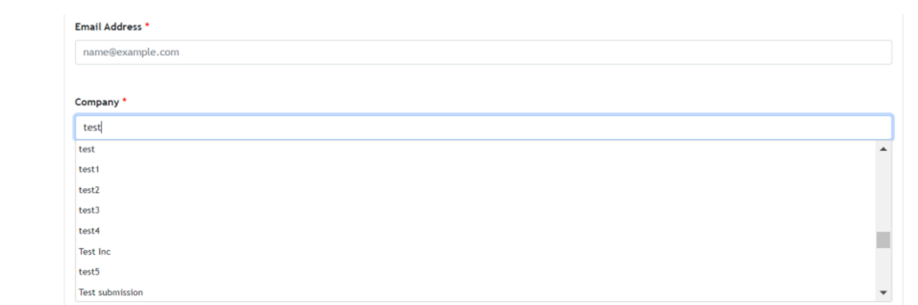
Organizations that were registered in our previous ERP (Plaza) can fill out the below online form to register users. If you want to have co-editors for your Proposal, fill out the below form to register them as a contact:

https://7967462.extforms.netsuite.com/app/site/hosting/scriptlet.nl?script=2528&deploy=1&compid=7967462&h=2506f2b89f106e074770



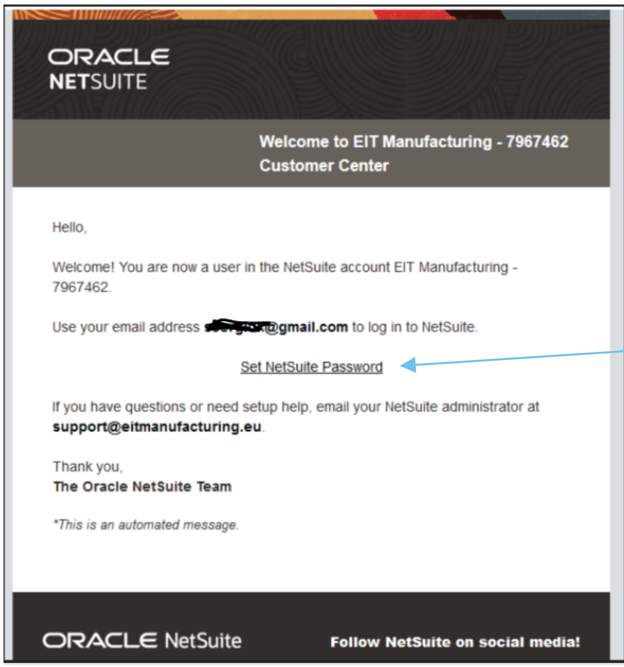
Fill in every mandatory field in the form and click submit button.

In the field 'Company', please start by typing 3 characters to initiate the dropdown prompt, then find your company name and click on the name to select.



Once the form is submitted, the application will be checked internally by the EITM Team.

Once verified, an email will be sent to the registered user to finalize the registration process with a link to set the password. This email serves as a security measure to ensure that only authorized individuals can access the account.


ORACLE NETSUITE

Welcome to EIT Manufacturing - 7967462 Customer Center

Hello,

Welcome! You are now a user in the NetSuite account EIT Manufacturing - 7967462.

Use your email address [redacted]**@gmail.com** to log in to NetSuite.

Set NetSuite Password

If you have questions or need setup help, email your NetSuite administrator at **support@eitmanufacturing.eu**.

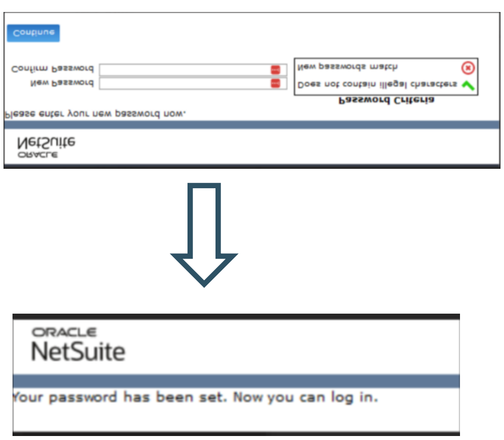
Thank you,
The Oracle NetSuite Team

**This is an automated message.*

ORACLE NetSuite **Follow NetSuite on social media!**

Click on the link to proceed and set your new NetSuite password

Users should click on the link in the email to be redirected to the password setting page. Here, they can securely set a password of their choice, enhancing account security.



Insert your new password and click continue. Make sure that the criteria on the right are respected

After successfully setting the password, a confirmation email will be sent to the user, indicating that the registration process is complete, and they can now access the Partner Area.

ORACLE
NETSUITE

NetSuite Password Set Up Successful

Hello

You have successfully set up the password for NetSuite user **[redacted]@gmail.com**. You can now log in.

If you do not recognize this activity, please contact your NetSuite administrator.

Thank you,
The Oracle NetSuite Team

**This is an automated message.*

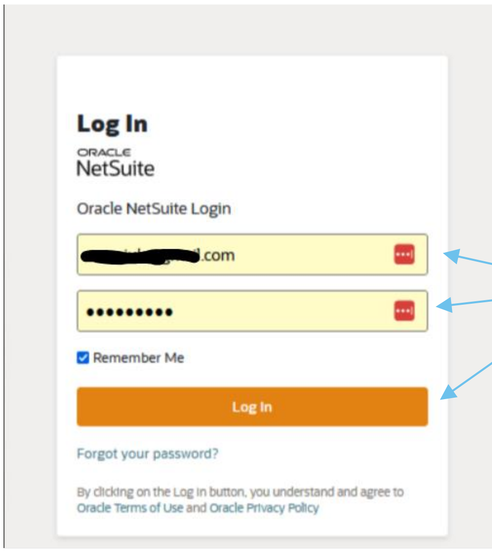
ORACLE NetSuite

Follow NetSuite on social media!

2300 Oracle Way
Austin, TX 78741
United States

Log in to Partner Area

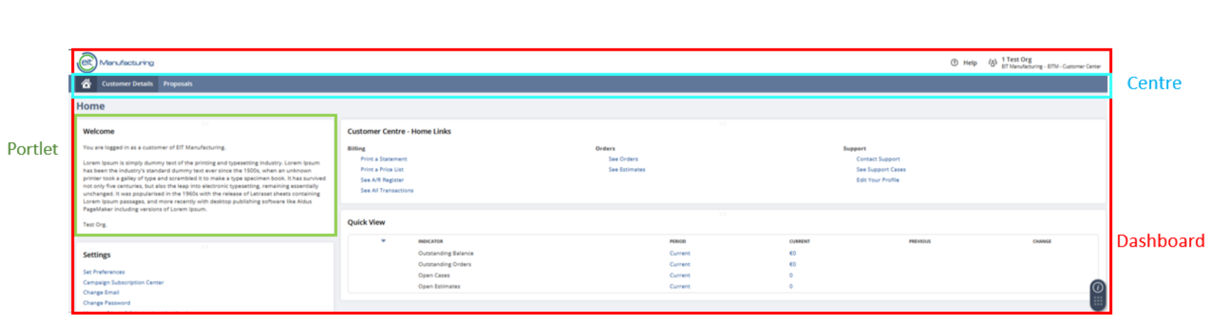
After having registered, you can log in by accessing this link: https://7967462.app.netsuite.com/



Insert your login (email), password and click on login.

Once you click login you will be redirected to the main page of your organization.

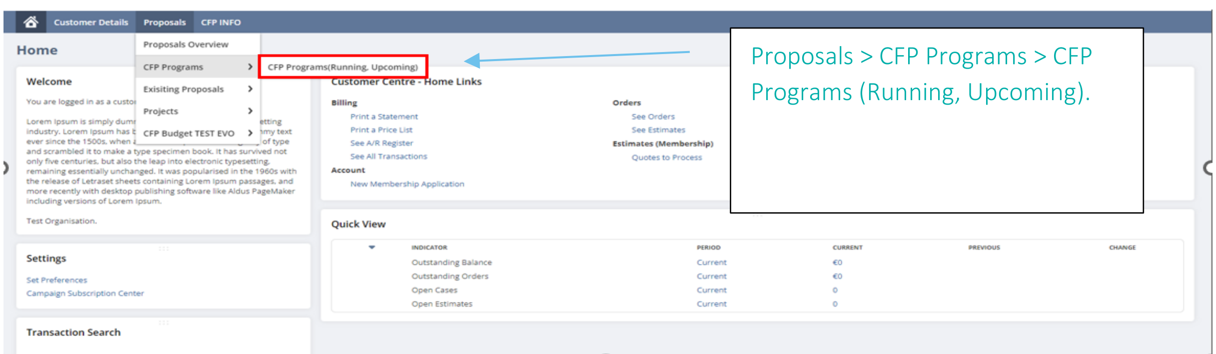
Partner Area Home Page



Navigation to the CFP Program

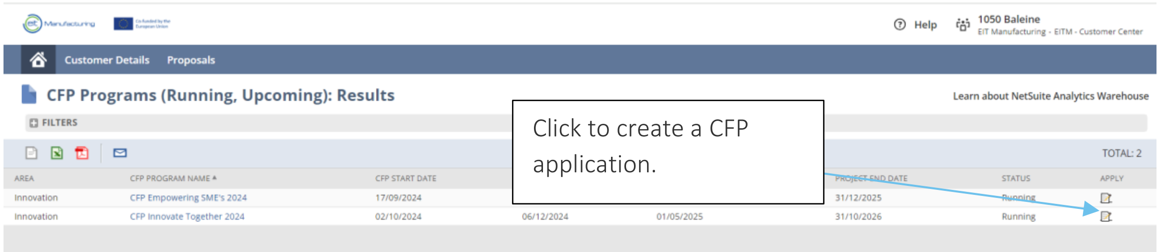
Within the Home Dashboard, partners can easily navigate to the CFP Programs section by selecting the appropriate menu options:

Proposals > CFP Programs > CFP Programs (Running, Upcoming).



CFP Program

The Program oversees partners' ability to create or submit proposals, ensuring alignment with program objectives and timelines.



Applying for a CFP is a straightforward process, with users simply needing to click on the Apply button within the designated program interface.

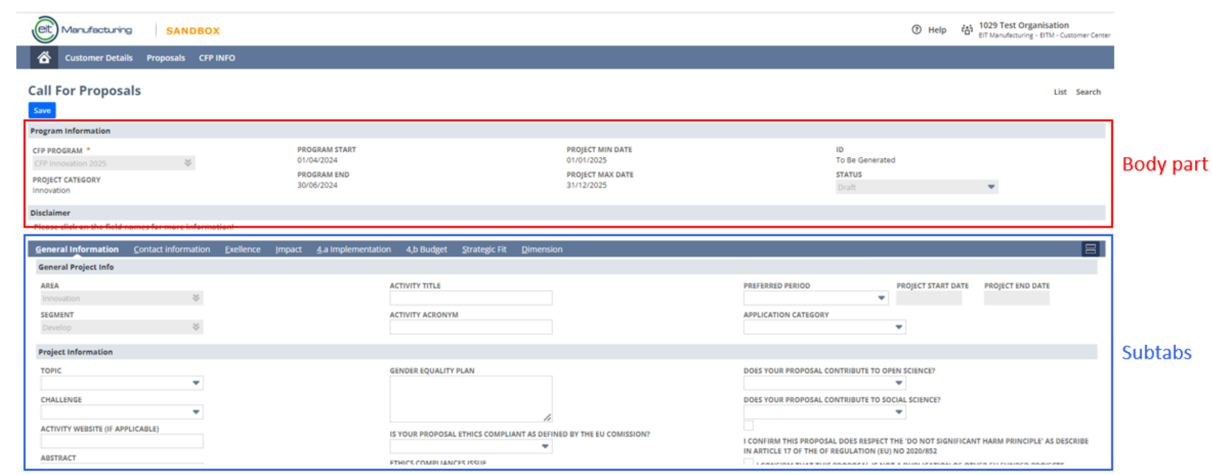
Users should cross check the CFP Program name and Area and click the Apply button for their respective Program they are interested in.

Call for Proposals Form

The CFP form is composed of 2 main parts:

Body part (Highlighted in Red): Always visible on the form, it contains general information about the Program (CFP) and essential details about the proposal (such as ID and the status).

Subtabs (Highlighted in Blue): Also known as criteria, these contain all the fields required for the CFP. Users can navigate through them by clicking on specific subtab titles



The applicant can fill in the information on the form, save the progress, and come back to edit and continue the application anytime. Ensure that you click the Save button before leaving the page so that the information filled in is not lost.

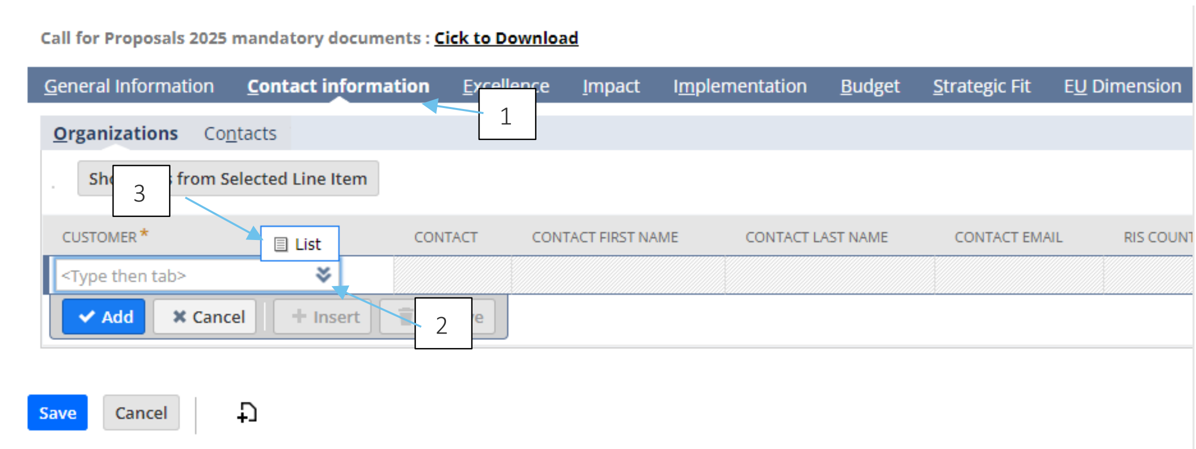
To know more about the fields, click on the field name to open the help text.

How to add an Organization

Step 1: Click on the Contact Information tab

Step 2: Locate the table with the column name “Organizations” and click on the down arrow

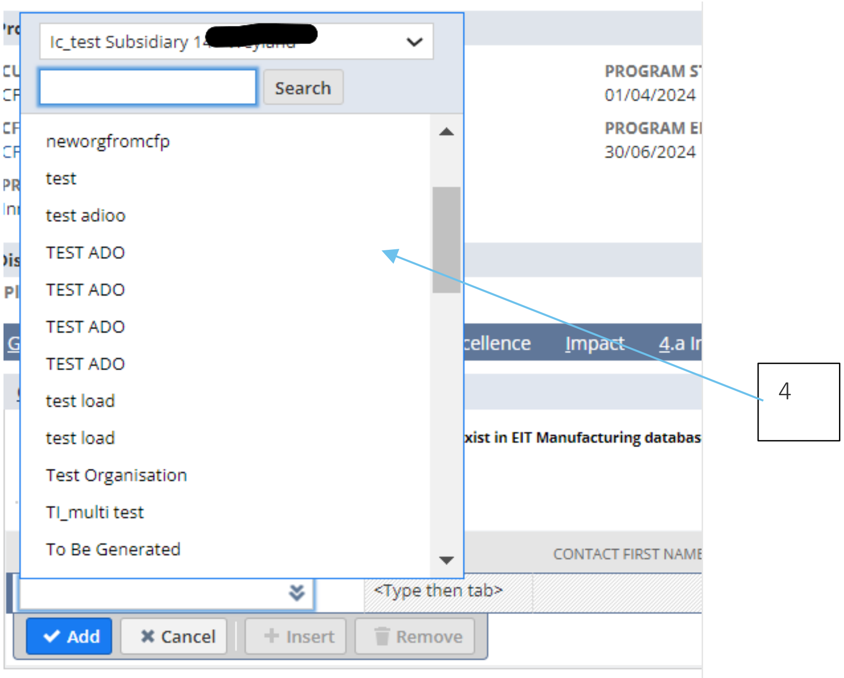
Step 3: Click on List button



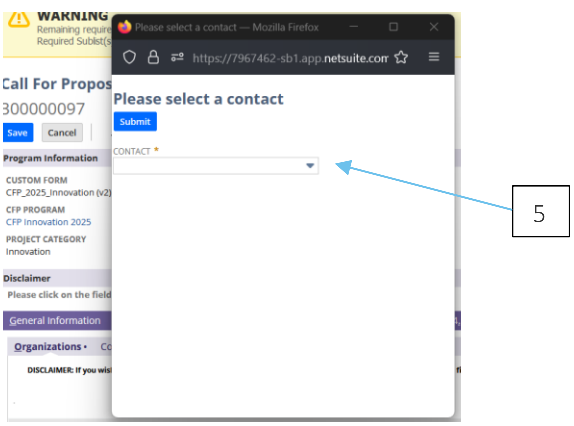
Step 4: Find your organization in the list or use the search option and select it.

Note that only the organizations that are already registered will be displayed here. To add a new organization that is not on this list, kindly use the below link to register the organization.

https://7967462.extforms.netsuite.com/app/site/hosting/scriptlet.nl?script=2533&deploy=1&compid=7967462&h=d122eeeac74aca589364

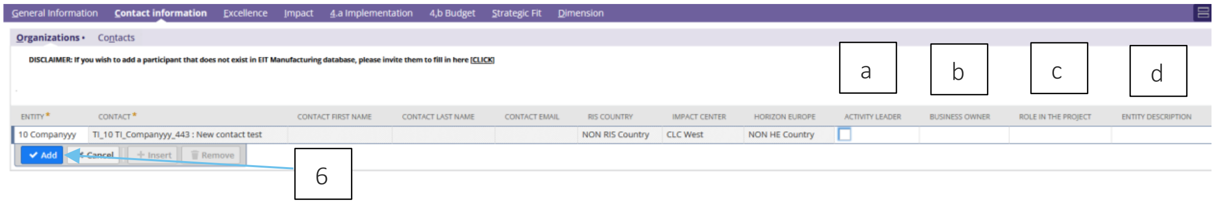


Step 5: A new window will appear – in the list of contacts please select the main contact person for this organization and click submit.



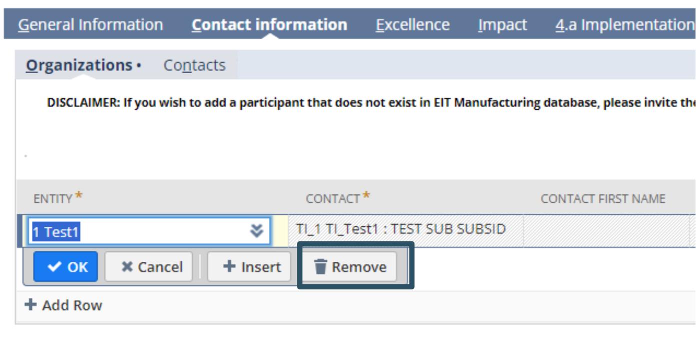
Step 6: Once the organization and contact are selected you will see it in the table. You are also able to indicate if the organization you selected is the Activity Leader(a), or a Business Owner(b), add the Role of the organization(c) in the project and the organization's description(d). When the information is completed click add to submit your organization.

- It is possible to add multiple organizations to the consortia.
- No duplicates are allowed in this table meaning that you will be able to add your organization only once.
- Only one Activity Leader is allowed per proposal.



How to remove added Organization:

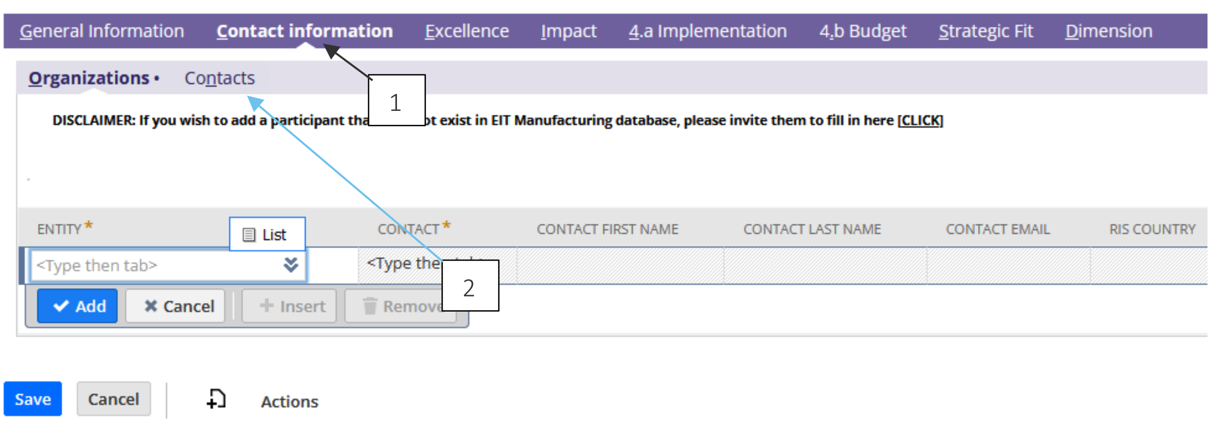
In case you wish to remove the selected organization, click on the name of the organization and click Remove button. The line will be deleted.



How to add co-editors (contact)

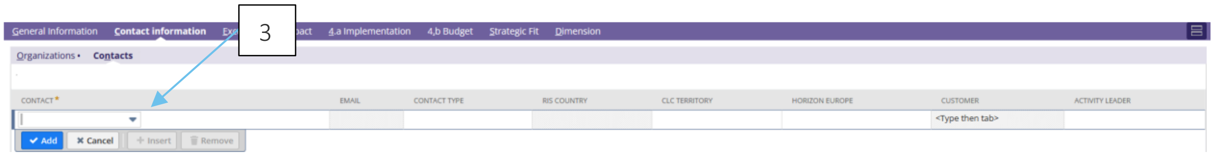
Step 1: Click on Contact Information tab

Step 2: Locate Contact List

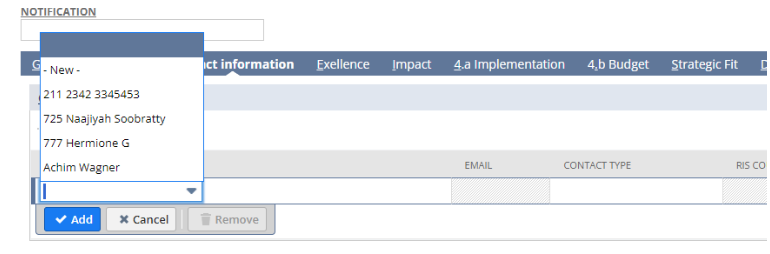


Step 3: Locate the table with the column name “Contact”

Step 3: Under Contact, click on the dropdown list to open the list of contacts.



Step 4: Select a contact from the list and you will see that other fields such as Email are filled in.



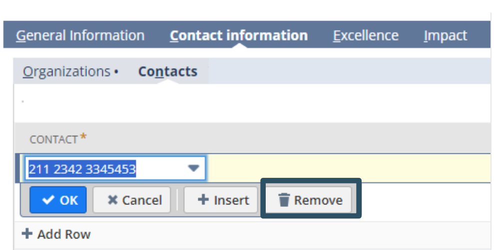
Step 5: Click Add

If you wish to add a contact for an organization, but this contact is not registered yet: it should do by using this form to register a user:

https://7967462.extforms.netsuite.com/app/site/hosting/scriptlet.nl?script=2528&deploy=1&compid=7967462&h=2506f2b89f106e074770

How to remove added Contact:

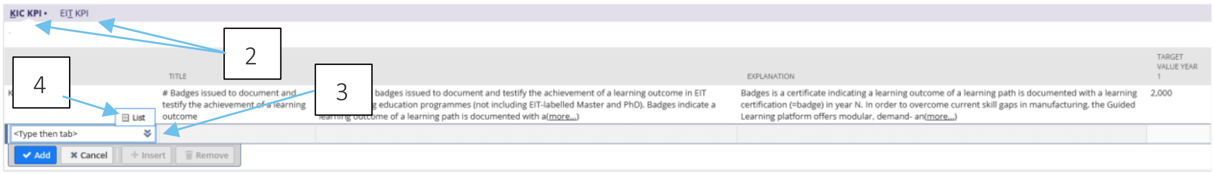
If the applicant wishes to delete the selected contact, they can do so by clicking on the name of the selected contact, then click the 'Remove' button.



How to add KPIs

Step 1: Locate the KPIs table in the Impact subtab.

Step 2: Locate the table with the column name "Code" and click on the down arrow

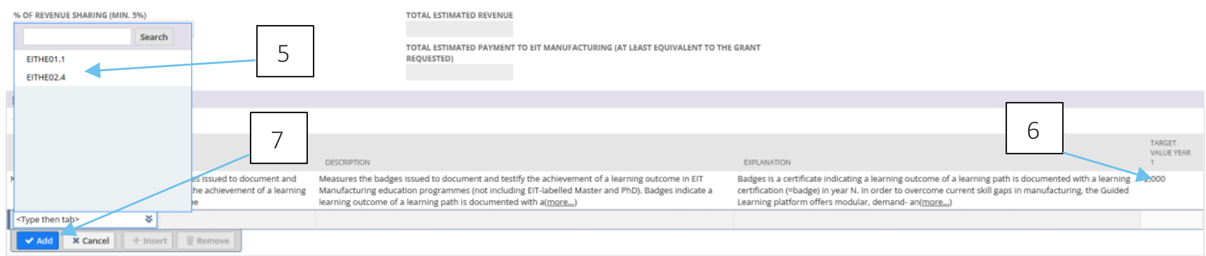


Step 4: Click on the List button.

Step 5: Select an available KPI from the list.

Step 6: Add value to the column "2025",2026

Step 7: Click the add button



The information about the title, description and explanation are automatically added, you can go through it to better understand the KPI.

How to remove a KPI from selection:

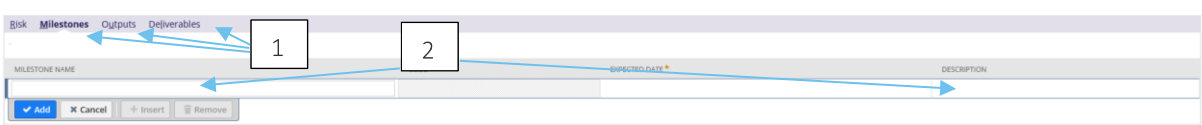
Click on the name of the KPI to select the line. Then click on the 'Remove' button to delete.

How to add deliverables

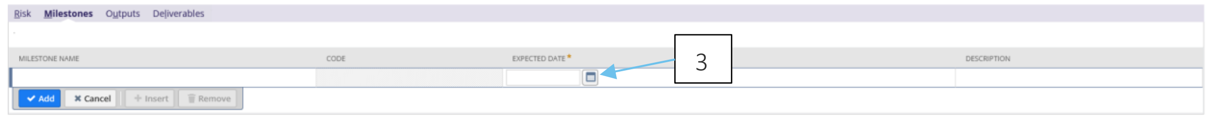
In the call for proposals, deliverables

Step 1: Navigate to Implementation tab. Locate the Deliverables.

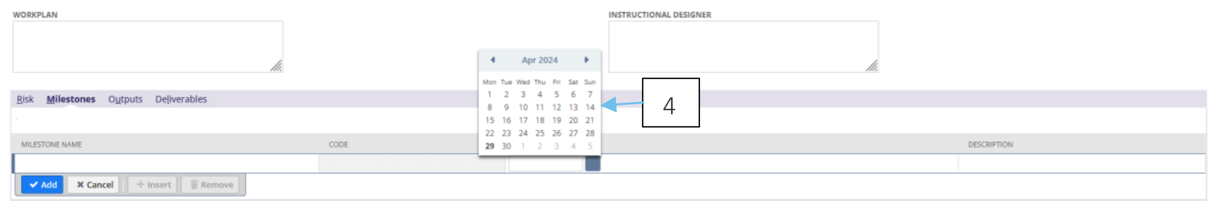
Step 2: Add the Title and the Description by clicking on the fields.



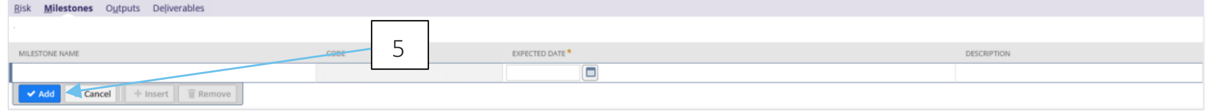
Step 3: To add the expected date, hover your mouse over the field and a small calendar will be displayed, by clicking on it a calendar will popup



Step 4 select the date in the calendar.



Step 5 click add button

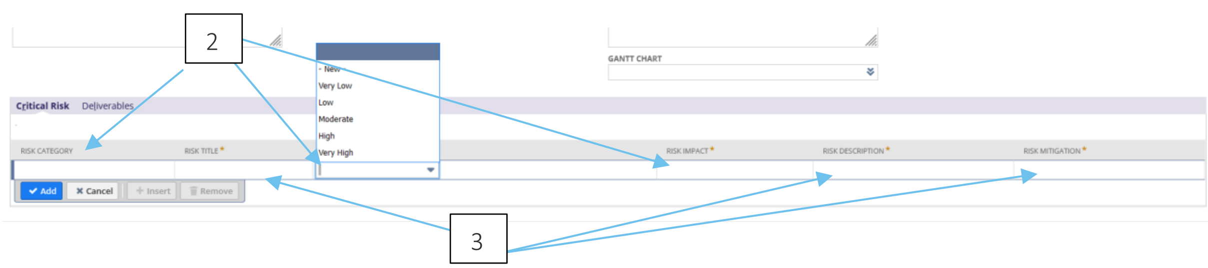


How to add Critical Risk

Step 1: Locate the Critical Risk table.

Step 2: Fill in the list fields – to fill in the list fields click on the field and a small list will be displayed. Click on the Item to be added.

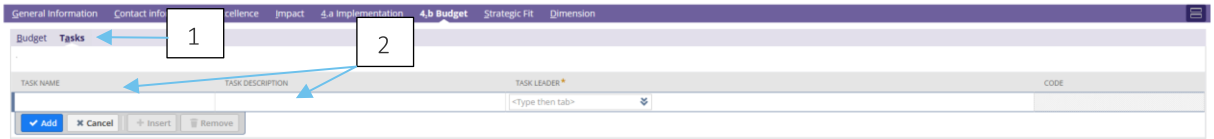
Step 3: Fill in Text fields – to fill in the text fields click on the field and input text.



How to add Task

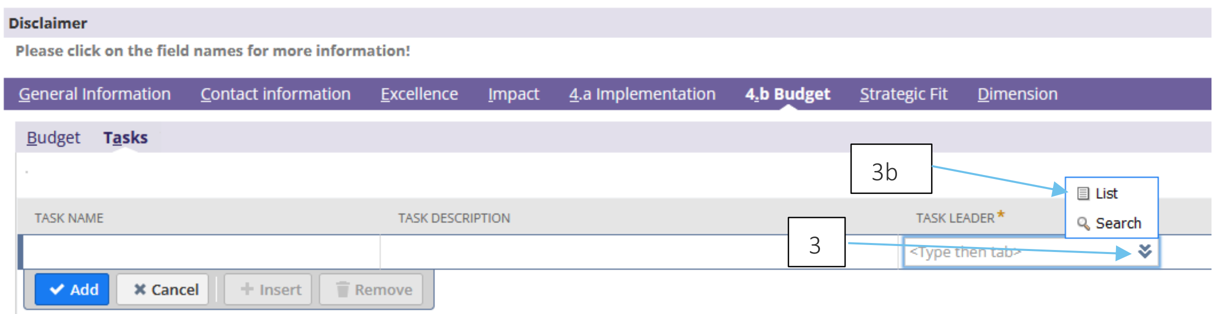
Step 1: Locate the Task table.

Step 2: Fill in Text fields – to fill in the text fields click on the field and input text.



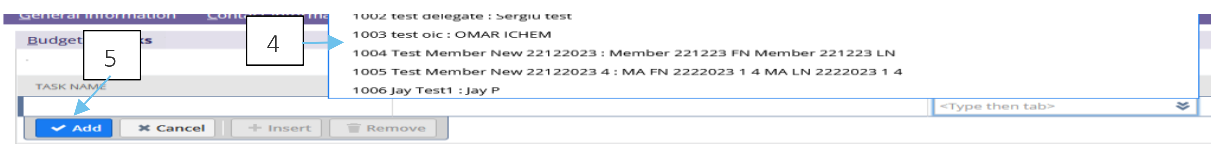
Step 3: To add a task Leader, Locate the column with the column name "Task Leader" and click on the down arrow

Step 3b: Click on the List button.



Step 4: Select the contact from the list (It should be a contact selected in the Contact Information subtab)

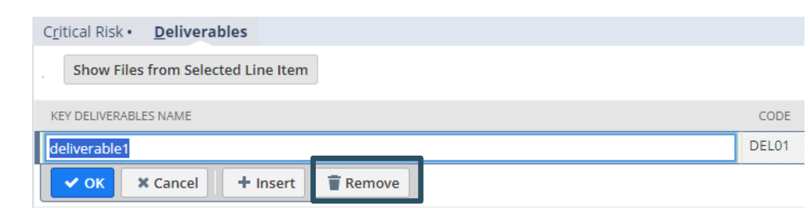
Step 5 Click the add button.



How to remove Deliverables/Risks

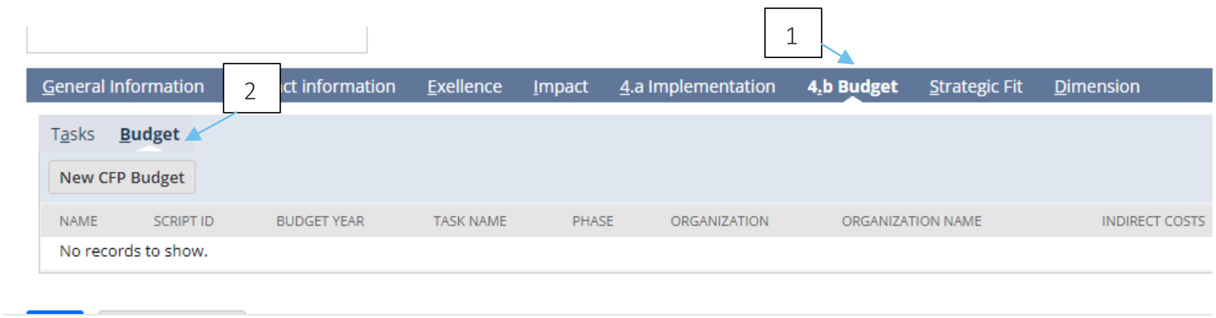
The process of deleting milestones, deliverables, tasks, output or risks is the same.

Locate the tab and click on the name of the line you wish to delete. The row is highlighted. You can click on the 'Remove' button.

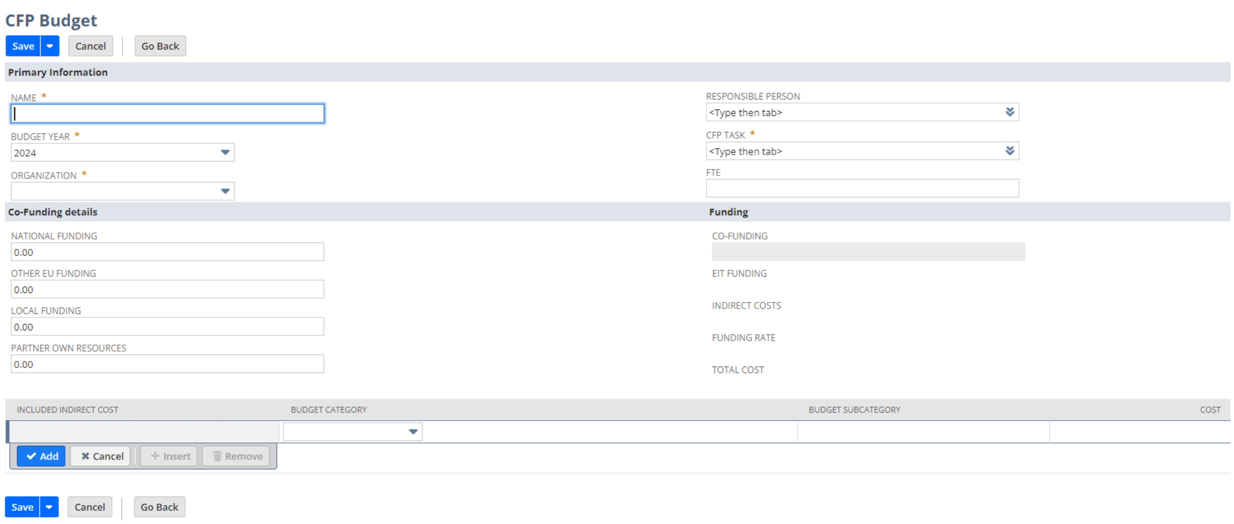


How to add Budget

Step 1: Navigate to the Budget Subtab and click on Budget (Next to Tasks)



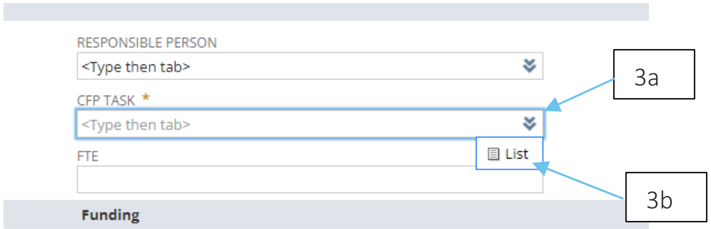
Step 2: Click on New CFP Budget button.



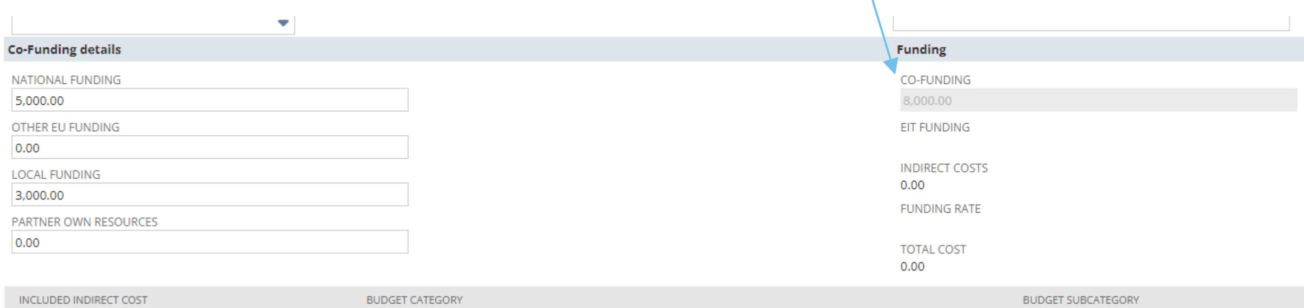
Step 3: Fill in the details in the fields.

Organization – Select the organization from the dropdown.

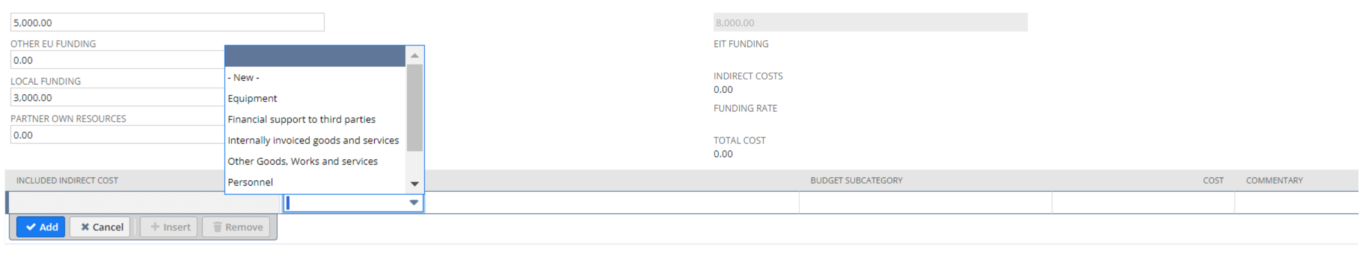
CFP Task – Click on the down arrow and click on the List to open the list of tasks created in the previous steps



In the co-funding details, the user can enter value for National Funding, Other EU Funding, Local Funding, Partner Own Resources. Based on this input, the value of the field co-funding (in the right column under Funding heading) will be auto-calculated and filled.



At the bottom of the page you will find the table for adding Budget Category



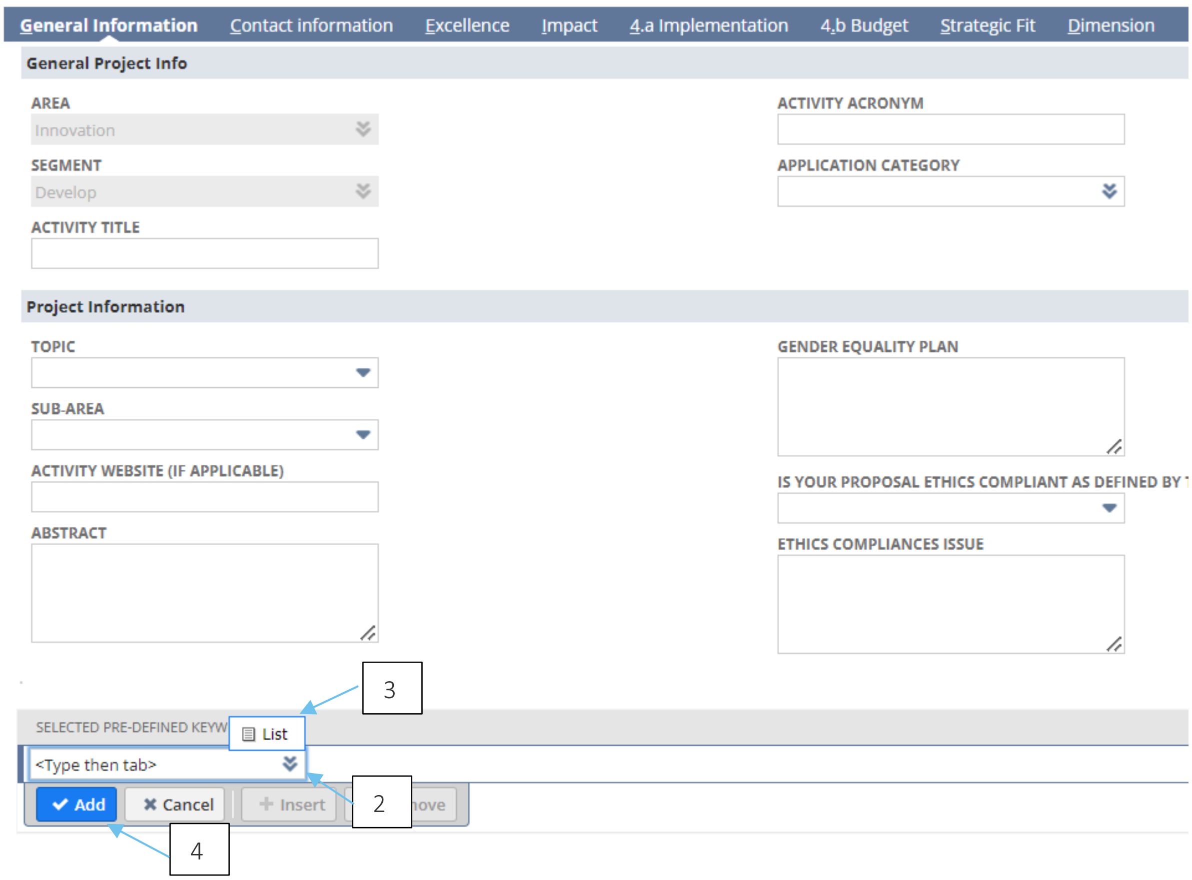
The applicant can select a budget category, add cost, and a comment. Once the information is completed for the line, click the Add button.

Step 4: Click Save

How to add Keywords

Step 1: Navigate to the General Information subtab.

1



Step 2 : Locate the Pre-defined keywords. Click on the Arrow icon.

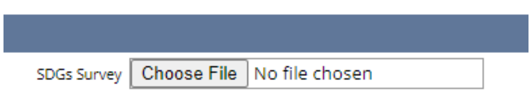
Step 3: Click on List to open the list of pre-defined keywords.

Step 4: Click the Add button to add the keyword once you have selected the keyword.

How to upload documents

For all file upload fields,

1. To add a document, Click on Choose file button. It will open a pop-window to select a file from your computer.



2. To change the document that is selected and to upload a new one, click the 'Choose File' button to open the pop-up window to select a different file.

Submission

Partners can input information, save progress, and resume later while creating a proposal, fostering flexibility and convenience in the proposal development process. The "Submit" button becomes active once all required fields are fully completed and saved, signaling readiness for proposal submission. Upon submission, the proposal is locked and marked for evaluation. All designated contacts added in the CFP application receive an email notification confirming the successful submission of the form, providing transparency and acknowledgment of the submission status.

Support

In the event of any issues or inquiries during the application process, partners can use the provided form to submit queries and seek assistance from EIT Manufacturing’s IT support team.

https://share-eu1.hsforms.com/1hxfoMSwVRtKUtGuk_o1IjQfigq6


eit Manufacturing

Co-funded by the European Union

NetSuite Support

First name *

Last name *

Company name *

Email *

Please indicate your email it will be used for exchanges with EIT Manufacturing support team

Subject *

Detailed Information *

Please indicate as much details as you can this will allow a rapid process of your request.

File upload

Choose File No file chosen

Disclaimer :

Please check your Spam-Box if you did not recieve any notification after the submission of the ticket.

Submit