

EUROPEAN COMMISSION



Humanitarian Aid

humanitarian aid & civil protection

User Manual

APPEL & offline eTools

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Welcome

APPEL is a tool for a two-way electronic exchange of information between DG ECHO and its Partners.

APPEL gives the opportunity to organisations that are not yet recognised as DG ECHO Partners, to become known to DG ECHO by applying for the Framework Partnership Agreement (FPA) in order to become a partner of DG ECHO.

To connect to APPEL, the candidate Partner first has to create an ECAS (European Commission Authentication System) account by registering in ECAS starting from the APPEL authentication screen. An ECAS account consists of a single personal identifier (user id or email address, password) making it possible to establish a protected connection with a wide range of Commission information systems using this same mode of authentication instead of having to create a specific identifier for each application.

To consult or modify the APPEL data, the user should activate his account and his user rights starting from the APPEL home screen.

APPEL is used by existing ECHO partners to update their administrative data and manage their humanitarian projects.

To manage humanitarian projects, the application is composed of:

- ◆ eRequest: used to create or consult a request.
- ◆ Agreement: used to consult Grant Agreements, to create or consult eModification requests, eInterim and eFinal reports.
- ◆ Downloads: used to download the Offline eTools application.

This eDocumentation groups the how to's and the online trainings of the APPEL application of DG ECHO. To learn how to work with the APPEL application you follow the online trainings modules and read the Step by Step explanation in this eDocumentation on how to perform any functionality of the online application.

This eDocumentation groups the how to's and the trainings of the Offline eTools application of DG ECHO.

- ◆ Learn the Offline eTools application with the online **training modules**.
- ◆ Follow the Step by Step explanation on how to perform any functionality of the application in the section '**Offline eTools application**'.

The Offline eTools application provides you with the possibility to prepare and follow up on a humanitarian action without the need of an internet connection.

Once you have created a humanitarian action with the aid of the offline application, all modifications, different requests and reports are bundled within one file on your computer. Each time you want to upload a request or report you make use of this unique file.

In order to work with the Offline eTools application you have to install the application on your computer.

This application is provided to you by CD or by the download module of the OSOR website. Once installed, you can start the 'Offline eTools application' and create an account.

The different steps to create and follow up on a new humanitarian action are:

- ◆ Create the new action.
- ◆ Create the Initial eRequest.
- ◆ Upload it to APPEL online.

This eDocumentation is also available online at <https://webgate.ec.europa.eu/appe/>

About

About APPEL

APPEL gives the opportunity to organisations that are not already recognised as ECHO partners, to become known to ECHO by applying for the Framework Partnership Agreement (FPA) in order to become an ECHO partner.

Organisations which are already ECHO partners can access their organisation data if the account and the user rights are validated by a contact person of the organisation. The organisations have to request the activation of the users account before doing any update.

As soon as the user account is activated, APPEL can be used by existing ECHO partners to update their administrative data. It allows partners to update operational and financial information which can then be used by ECHO for the periodic assessment of partners foreseen under the FPA.

APPEL Modules

E-request

Here you can:

- ◆ Search for eRequests of your organization.
- ◆ Modify eRequests of your organization.

Agreement

Here you can:

- ◆ Search for Grant Agreements of your organization.
- ◆ Modify Grant Agreements of your organization.

Downloads

Here you can:

- ◆ Download the Offline eTools application.

About the offline programme

The Offline eTools application enables you to complete an eDocument for a humanitarian action without being connected to the internet.

- ◆ Install the 'eSingleForm offline' application on your computer.
- ◆ Create or complete your eDocument at any given moment, without an internet connection.
- ◆ Once completed, connect to the internet and upload the eDocument. Your modifications are now visible online.

This eDocumentation

eDocumentation different approaches

The different approaches of this eDocumentation are:

- ◆ **Written eDocumentation:** The written eDocumentation represents the largest part of this entire eDocumentation. You can find your way through all these texts by using one or more search functions of this eDocumentation.
- ◆ **Interactive trainings:** By following different interactive trainings, you get accustomed to the different functionalities within the application. You get an overview of the application and how each module interacts with each other.
- ◆ **Screen information:** The screen information, also known as online help, provides more specific information about a screen. The information is application based. When moving the mouse over certain titles within the application, the screen information is shown in an extra window.

The eDocumentation is available through the internet. Click on the question mark at the top right of the APPEL menu bar.



Remarks

- ◆ **This eDocumentation aims to get you accustomed with an application; it does not aim to give detailed information on how to manage a Humanitarian Aid project.**

eDocumentation search functions

There are several possible ways to search for your information in this eDocumentation. The different search functionalities are available in the top menu of this eDocumentation.

Search functionalities

1. **Contents:** Click on a book icon, representing a topic. Different titles are shown as links. Click on the preferred title.
2. **Search:** Introduce one or more search criteria in the search field and press enter. A result list is shown with all the pages containing your search criteria. Click on any page.
3. **Index:** An alphabetical list is shown. As soon as you introduce e.g. 'reference' in the search field, the cursor goes to the first keyword that begins with 'reference'.

eDocumentation icons

The eDocumentation makes use of different icons; these indicate different content or attention points.



Action paths, ways to navigate

The 'action path' icon illustrates the different paths for going to a specific screen in the application. Next to the icon, you have a start point and a function, for example: Menu > eRequest. 'Menu' is the start point, 'eRequest' is the function. Below the icon, the result of the action is shown, for example 'The search results list is shown'.



Step by step information

The 'step by step icon' is followed by an action. A list of steps is shown below. The steps are shown in the correct order and explain the action in details.



Profiles

The 'Profiles' icon explains which profile you need to undertake a certain action.



Tips

- ◆ The 'Tips' icon provides extra tips.



Remarks

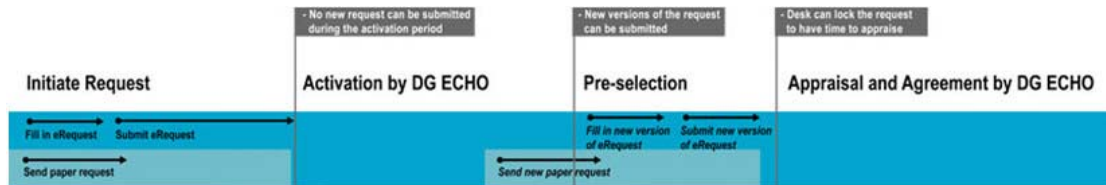
- ◆ **The 'Remarks' icon indicates a matter of importance. The important remark is always written in red.**

General

Workflow overview

Humanitarian action workflow overview

The following picture illustrates the workflow for preparing a humanitarian action in APPEL.



Search

Search in general

The APPEL application makes use of a lot of standard actions and functions. The different search possibilities are the same for the eRequests and Agreements.

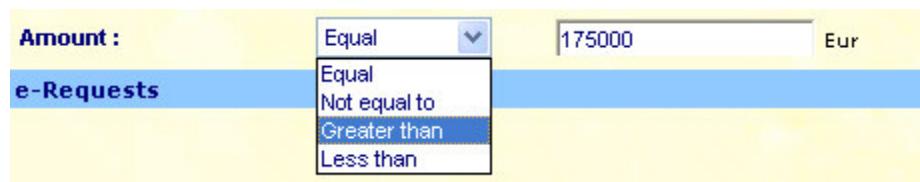
The search screens are built from different elements to help you and to allow refining your search. The search screens are built to optimise and facilitate the search operation:

- ◆ First select a search condition.
- ◆ Then introduce the value related to that condition.

This allows for a minimal of information encoding.

In a lot of cases the combination of 2 or more elements are required.

The following picture illustrates an example: to search on 'Amount' you use a drop down list to select a condition and then you introduce a value related to that condition.



The screenshot shows a search interface with a yellow background. On the left, there is a label 'Amount :' and a blue bar with the text 'e-Requests'. To the right of the label is a dropdown menu with a blue arrow pointing down. The dropdown menu is open, showing four options: 'Equal', 'Not equal to', 'Greater than', and 'Less than'. To the right of the dropdown menu is a text input field containing the value '175000'. To the right of the input field is a label 'Eur'.

The different elements to search with are:

- ◆ Drop down lists.
- ◆ Input Fields.
- ◆ Radio buttons.
- ◆ Functional buttons.
- ◆ Calendar tool.
- ◆ Filters.

To start the search you click on '**Search**'.



Tips

- ◆ The search fields are not case sensitive; you can introduce lower or uppercase characters.
- ◆ The 'undo typing' button returns to the last executed and saved search action; it does not clear all the fields.

Search criteria

Drop down lists

Drop down lists are used to define criteria and can have different functions:

- ◆ Select an item from a pre-defined list.
e.g. Select a country.
- ◆ Select a condition to refine other criteria.
e.g. To search for an amount, use the drop down list, select an option and introduce a value for this option.

Amount : Equal 175000 Eur

e-Requests

Equal
Not equal to
Greater than
Less than

Select an item from a list

1. Click on the arrow at the right of the list.

Country : All Countries

2. The list opens. Click on the item of your choice to select it.

Country : All Countries

Operation title : All Countries

Amount : ALBANIA

e-Requests ALGERIA

Reference number AMERICAN SAMOA

[1458] ANDORRA

ANGOLA

ANGUILLA

Conditions used in search elements

The different conditions used to refine a search criterion with strings. A string can be a combination of characters, numbers and special characters:

- ◆ **Contains**
The string introduced can be anywhere in the search criterion.
- ◆ **Begin with**
The string introduced is the exact beginning of that search criterion.
- ◆ **Is**
The string introduced is the exact value of that search criterion.

The different conditions used to refine an input field with numbers, like for instance "Amount":

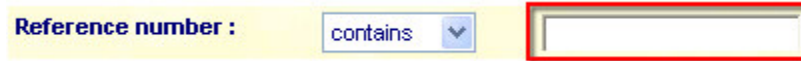
- ◆ **Equal**
The number introduced is the exact value of the amount.
- ◆ **Not equal to**
This returns all the projects except the projects with the amount introduced.

- ◆ **Greater than**
This returns all the projects with a value higher than the number introduced.
- ◆ **Less than**
This returns all the projects with a value lower than the number introduced.

Input Fields

An input field can contain a lot of different information; text, numbers, values... to help you refine your search. The input fields are used in combination with another element such as a drop down list.

The following picture illustrates an input field in combination with a drop down list:

A screenshot of a search interface. On the left, there is a label 'Reference number :'. To its right is a dropdown menu with the word 'contains' and a downward arrow. Further right is a rectangular input field, which is currently empty and has a red border around it.

Remarks

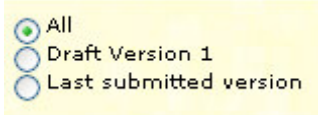
- ♦ Do not use full stops or commas in the input fields, not even when searching for an amount. E.g. 5.000,00 euros should be introduced as 5000 without the full stop or the comma.
- ♦ The search results are not correct or the application returns an error if you do use a full stop or a comma.

Radio buttons

Radio buttons help you to refine your search and helps you to find only the projects you wish to see. Clicking in the circle in front of a criterion brings down the search results to the selected criteria. You can only select one item of the provided options.

Options used in Search elements

The possible options as shown in the illustration to search **for e-Requests** are:



- ◆ **All**
This option is the default option and shows all the e-Requests.
- ◆ **Draft Version 1**
This option shows the e-Requests that are still in draft version and are not yet submitted to DG ECHO.
- ◆ **Last submitted version**
This option only shows the last submitted version of the e-Requests.

The possible options as shown in the illustration to search **for Agreements** are:



- ◆ **All**
This option is standard and shows all the Grant Agreements.
- ◆ **Ongoing**
This option shows the Grant Agreements that are still in action.
- ◆ **Closed**
This option only shows the finished Grant Agreements, due to a refusal of a proposal or ending an operation.

Functions search tab

The standard available functions:



1. **Undo typing**
Dismisses the last introduced criterion and returns to previous state of the search tab.
2. **Clear**
Dismisses all the introduced criteria and returns to the begin state of the search tab.
3. **Search**
Initiate the search, based on the introduced criteria
4. **Greyed out buttons**
The function cannot be used at that moment.

Calendar tool

The calendar tool is a pop-up window that is activated if you click on the calendar icon on the right of a date input field. It helps you to quickly select a date.

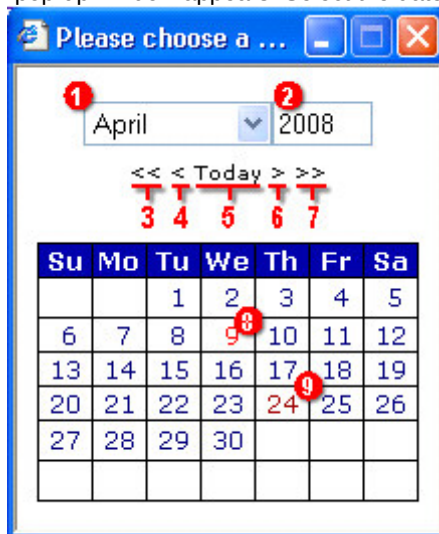
Select a date

- ◆ Click on the calendar icon

From: To:

From: To:

- ◆ A pop-up window appears. Select the date you wish.



- ◆ The different functions of the calendar tool are:
 1. Month.
 2. Year.
 3. Go back 1 year.
 4. Go back 1 month.
 5. Go to today
 6. Go forward 1 month.
 7. Go forward 1 year.
 8. The number of this day is highlighted in red.
 9. The day you wish to select is highlighted in dark red.

Remarks

- ◆ After selecting a date, the calendar tool is sometimes hidden.
If you click on the calendar tool again and it does not automatically show, you go to the Windows taskbar and select the tab 'Please choose...' to view the calendar tool.

Search filters

To facilitate recurring search processes, you can save your search criteria by creating a filter.



Create a search filter for eDocuments

1. Introduce your search criteria.
2. Introduce a name in the field next to **'Filter name'**.
3. Click on **'Search'**.

The next time you want to search with the same criteria, you use the previously created search filter.

Result lists

Result lists

To access a project or create requests and reports, APPEL uses the search functions to let you navigate to an eRequest or Grant Agreement.

The result lists are always displayed under the search screen;

- ◆ eRequest result list indicates the specific eSingleform.
- ◆ Grant Agreement result list combines the different eSingleforms and Reports by Agreement number.

Standard result lists

- ◆ Click on the '**title of the column**' in the results list to order the list according to the corresponding criteria. Click once and the list is ordered ascending, click twice and the list is ordered descending.
- ◆ Move the mouse over a line and click on it to view more detailed information.
- ◆ Export the results list to MS Excel.
- ◆ **Contracts** are shown in **black** or in **red**.
 - ◆ The black contracts are the amendments.
 - ◆ The red contracts are previous versions of the initial contract.



Remarks

- ◆ **You can introduce one or more search criteria. It is not mandatory to complete the entire form to start a search. The results list depends on the criteria introduced in the form.**

eRequest result list

The following picture illustrates the result list by eRequests:

The screenshot shows the 'e-Requests' interface. At the top, there is a search bar with 'Amount' set to 'Equal', a currency dropdown set to 'Eur', and a 'Filter name' field. Buttons for 'Undo typing', 'Clear', and 'Search' are present. The 'Search' button is labeled with a red '1'. Below the search bar, there are two buttons: 'New e-Request' (labeled with a red '2') and 'Track changes' (labeled with a red '2'). The main table has columns: Reference number, Country, Operation title, Amount, Vn, Status, Creation, Submission, Origin, and Diff.?. The table contains several rows. The row for '2008/00041/RQ/01/01 SOMALIA' is highlighted in yellow and labeled with a red '4'. The 'Operation title' column header is labeled with a red '3'. The 'Track changes' button is also labeled with a red '2'. The 'Diff.?' column has checkboxes, with the one for the yellow row labeled with a red '5'.

Reference number	Country	Operation title	Amount	Vn	Status	Creation	Submission	Origin	Diff.?
2008/00022/RQ/01/01	RUSSIA	ACC200809 A/2 - OL: Improvement of Socio-economica>>	360.000,00	1	Active	19/02/2009	28/10/2008	APPEL	☐
2008/00023/RQ/01/01	SRI LANKA	ACC200809 A/3 - OL: Protecting IDPs from the War's>>	800.000,00	1	Active	19/02/2009	28/10/2008	APPEL	☐
2008/00024/RQ/01/01	SOMALIA	ACC200809 A/1 - NR: Nutrition & Health programmes >>	1.476.000,00	1	Favourable	19/02/2009	29/10/2008	APPEL	☐
2008/00026/RQ/01/01	RUSSIA	ACC200809 A/2 - FR: Integrated, Area-based Return >>	1.099.580,00	1	Favourable	19/02/2009	29/10/2008	APPEL	☐
2008/00041/RQ/01/01	SOMALIA	ACC200809 B/2 - IR: Nutrition & Health programmes >>	1.476.000,00	1	Favourable	19/02/2009	03/11/2008	APPEL	☐
2008/00042/RQ/01/01	RUSSIA	ACC200809 B/2 - FR: Integrated, Area-based Return >>	1.099.580,00	1	Favourable	19/02/2009	03/11/2008	APPEL	☐
2008/00043/RQ/01/01	SRI LANKA	ACC200809 A/3 - NR: Protecting IDPs from the War's>>	800.000,00	1	Favourable	19/02/2009	03/11/2008	APPEL	☐

The different functions of the eRequest result list are:

1. The search button.
2. The action buttons are at the top of the list.
3. Click on the column title to order the result list.
4. The yellow line shows the selected item in the list. Click on the yellow row to open the selected item.
5. The track changes button compares two items of the list; therefore two items must be selected.



Tips

- ◆ The green rows indicate a draft version of an item.
- ◆ The grey rows indicate passive or refused items that can be consulted only.



Remarks

- ◆ Clicking on 'Track changes' without selecting two items of the list, causes the following message: 'You have to choose two documents to compare'.

Grant Agreements result list

The following picture illustrates the result list by Grant Agreements:

Country:

Operation title:

Grant Agreements

Fichop	Agreement number	Partner short name	Reference number	Country	Operation title	Amount	Status	Workflow	Found: 26
F	ECHO/-CF/BUD/2009/01016	CARITAS - BEL	2009/00003	BURUNDI	Cash For Work IV : Appui au développement éco>>	300,000,00	ONGOING	W	26
F	ECHO/-CF/BUD/2009/01017	CORDAID	2009/00004	BURUNDI	Appui aux programmes de santé de base dans le>>	200,000,00	ONGOING	W	4
F	ECHO/-CF/BUD/2009/01018	IMC UK	2009/00005	BURUNDI	Community-based management of nutrition inte>>	250,000,00	ONGOING	W	26

The different functions of the Grant Agreement result list are:

1. Click on the column title to order the result list.
2. Search button.
3. The yellow line shows the select item in the list.
Click on the yellow row to open the list of eDocuments of the operation.
4. The traffic light icon provides a quick overview of the operation status.



Tips

- ◆ The grey rows indicate closed items that can only be consulted.

List of eDocuments per Operations

The following illustration shows the list of eDocuments of an Operation:

Grant Agreement Back to list

Reference number	Country	Operation title	Amount	Status
2009/00093	RUSSIA	Integrated, Area-based Return and Livelihood Recovery (IARLR) in Chechnya	1.099.580,00	ONGOING

E-documents Found: 5

[New e-Interim](#)
[New e-Final](#)
[New e-Modification](#)
[Track changes](#)

Type	Reference Number	Vn	Creation	Submission	Status	Diff. ?	Origin
MODIFICATION REQUEST	2009/00011/MR/01/03	3	27/02/2009	04/08/2009	Submitted	☐	APPEL
INTERIM REPORT	2009/00011/IR/01/01	1	20/05/2009	04/08/2009	Active	☐	APPEL
MODIFICATION REQUEST	2009/00011/MR/01/02	2	25/02/2009	25/02/2009	Active	☐	APPEL
REQUEST	2009/00011/RQ/01/01	1	23/02/2009	25/02/2009	Favourable	☐	APPEL
MODIFICATION REQUEST	2009/00011/MR/01/01	1	25/02/2009	25/02/2009	Passive	☐	APPEL

Annexes Found: 1

#	Linked to	Filename	Description	Author	date	Origin	Actions	Add to zip
1.	2009/00093/RQ/01/01	2009_00093_RQ_01_01_25-Sep-09.pdf	Auto generated PDF		25/09/2009	APPEL		☐

[Create zip file](#)

The different parts of the result list are:

1. The Grant Agreement information tab. This consists out of the Reference number, the country, title, amount and the status of the Operation.
2. The eDocuments for the specific operation. This can consist out of the Initial Request and the different versions, the Modification request and the different versions, the Interim Report and the Final report. The track changes button allows you to overview the differences between two versions of an eDocument.
3. Buttons to create a new Intermediate report, an eFinal report, an eModification request.
4. The list of annexes linked to the grant agreement.
5. The page and the disk icons are used to generate a PDF without checking the box.
6. The check box and the 'create zip' functions are used to create the zip.

eDocument status

The **eDocument** can have 3 document statuses during its project life cycle;

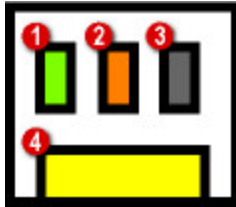
- ◆ **Draft**
The document is created and saved but there has been no validation yet.
- ◆ **Submitted**
The document is submitted and awaits activation and verification from the DG ECHO Desk. . During this period, creating and submitting a new version is possible, if the system is not 'locked' for this function. The locking mechanism is either automatic activated by the systems workflow or it is activated manually by the Desk Officer e.g. to have more time to finish the appraisal. A draft version of a new version can be created but not submitted, no alteration of any information is possible.
- ◆ **Refused**
The proposal is not accepted by DG ECHO and can only be viewed, no modifications are allowed after a refusal.

The **Operation** can have 3 modification statuses during its project life cycle;

- ◆ **Under Negotiation**
As soon as a new request is created and submitted for a project, the status of the project changes to UNDERNEG.
- ◆ **Ongoing**
As soon as a proposal is accepted and an agreement is made the project status changes to ONGOING.
- ◆ **Closed**
The project status changes to closed due to a refusal of a proposal or ending an operation.

Status of the operation

The following picture illustrates the traffic light icon and its functions:



The different indicators on the traffic light are:

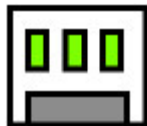
1. Initial eRequest (RQ).
2. Intermediate report (IR).
3. Final report (FR).
4. Modification request (MR).

The colors used on the traffic light are:

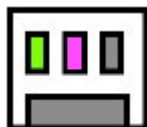
- ◆ Grey; None submitted.
- ◆ Yellow; Draft version.
- ◆ Green; Favourable.
- ◆ Orange; Active.
- ◆ Pink; Refused.

For example;

This illustration shows the traffic light icon for a successfully completed operation, no eModification Request has been submitted during the action. The operation name will appear in grey in the list, the status of the operation will indicate 'Closed'.



This illustration shows the traffic light icon for an operation that has been granted but has been suspended upon the refusal of the eIntermediate Report. The operation name will appear in grey in the list, the status of the operation will indicate 'Closed'.



Tips

- ◆ While holding the mouse hit on traffic lights, a help indicator appears and provides information using abbreviations of the indicator followed by the status.
- ◆ For example: RQ-Favourable, IR-Active, FR-None, MR-None.

Export to MS Excel



Results list > Export to Excel

To export the list to MS Excel you have two possibilities:

- ◆ Export the complete list with all criteria.
- ◆ Export only the criteria you wish to have in your MS Excel document.



Export a list with all criteria

1. On top of the screen click on '**Export to Excel**'
2. Choose to '**save**' the document to your hard disk or '**open**' the document in MS Excel.



Export a list with some of the criteria

1. Click on the fields you wish to view in your results list while pressing [Ctrl] to select several of them. To scroll through the list of possible criteria, click on the arrows on the right of the list.
2. On top of the screen click on '**Export to Excel**'
3. Choose to '**save**' the document to your hard disk or '**open**' the document in MS Excel.



Adjust the MS Excel document

If you notice that numbers in the generated Excel file are not properly displayed, make sure to use the following decimal and thousands separators:

- ◆ In the Excel file, go to **Tools/Options/International tab**.
- ◆ Deselect '**Use system separators**'.
- ◆ Introduce a comma [,] as decimal separator.
- ◆ Introduce a full stop [.] as thousands separator.

It might also be necessary to format the problematic cells:

- ◆ Select the cells that are not displayed as expected in the Excel file.
- ◆ Go to Format/Cells.../Number.
- ◆ Select category 'number'.
- ◆ Choose your formatting options.

Training Modules

Introduction training modules

The training modules show you the most important functionalities of the application. After taking one or more training modules, you are able to start using the application and you can perform the different actions needed for your activities.

Training modules

- ◆ General training module: Shows you how to work with the training modules.
- ◆ Create an ECAS account: Shows you how to create an ECAS account in order to logon to APPEL.
- ◆ Request APPEL login activation: Shows you how to request an activation of your APPEL login.
- ◆ eDocument training modules: Shows you the icons and buttons of the eDocument, shows you how search for eDocuments, create eRequests and Reports,...
- ◆ Offline eTools application training modules: Shows you how to work with the offline programme.

eDocument training modules

eDocument

- ◆ Search for an eDocument.
- ◆ Icons and buttons used to create or consult an eDocument.
- ◆ Navigating in an eDocument.
- ◆ Add or delete a row in an eDocument.
- ◆ Upload a file to attach to an eDocument.
- ◆ Introduce information in the Logical Framework Matrix.

Initial eRequest

- ◆ Draft and submit an eRequest.

New version of an eRequest

- ◆ Draft and submit a new version of an eRequest.

Modification Request

- ◆ Draft and submit an eModification Request.

Reports

- ◆ Draft and submit an eIntermediate Report
- ◆ Draft and submit an eFinal Report

Offline eTools application training modules

The training modules for the Offline eTools application show you the main actions that are needed to complete an offline activity.

Functions of the offline application

- ◆ General functions of the offline application.
- ◆ Functions within the eSingleForm.

eSingleForm offline

- ◆ Create an eRequest offline.
- ◆ Create an eModification Request offline.
- ◆ Create an eIntermediate or eFinal Report.
- ◆ Complete subchapters 4.3.1 and 4.3.2.
- ◆ Upload Requests and Reports.

Access rights

Register in ECAS

Introduction

To connect to APPEL, you will first need to create an ECAS user name and a password. Each user of your organisation must create his/her own ECAS account. ECAS allows the use of the same personal identifier for several European Commission information systems. Your user name will be linked to the email address that you provided when you signed up. Emails about your account will only be sent to this email address. Please make sure you remember the email address, user name and password in order to access APPEL.

The registration process in ECAS



APPEL > Authentication screen

The 'APPEL authentication' screen is shown.



The registration process in ECAS

1. The '**APPEL authentication**' screen is shown.
2. Click on '**Register in ECAS**' to create an account if you don't have an ECAS account yet. (See remark)
3. The '**ECAS login**' screen is shown.
4. Change the login domain to external, if necessary.
5. Register for ECAS.
6. Complete the registration with this ECAS mail.
7. Initialise the ECAS password.
8. Request for the APPEL login activation'.



Remarks

- ♦ **If you already have an ECAS account, you don't have to recreate an account specifically for APPEL. Activate your ECAS account to receive the user rights for APPEL.**

Register for ECAS



APPEL > Authentication screen

The 'APPEL authentication' screen is shown.



Profiles

People who need to sign up for ECAS are:

- ◆ Members of an external organisation who need to connect to APPEL and do not yet have an ECAS username or password.

People who already have an ECAS account and who want to access APPEL, can directly request for APPEL login activation.



Register in ECAS

1. Click on '**Register in ECAS**'.
2. The '**ECAS login**' screen is shown.
3. Change the login domain to 'External' if necessary.
4. Click on '**Not registered yet**' to create an account.
5. The '**ECAS user registration form**' is shown.
6. Introduce a username of your choice (optional). (See tips)
7. Introduce your first name.
8. Introduce your last name.
9. Introduce your e-mail address.
10. Repeat your e-mail address for verification.
11. Select your preferred language for the communication.
12. Read the privacy statement.
13. Select the box below to acknowledge that you have read and understood the privacy statement.
14. Introduce the characters shown on the image to do a security check.
15. Click on '**Submit**'.
16. The confirmation screen '**Thank you for registering, you will receive an email allowing you to complete the registration process**' is shown.
17. Complete the ECAS registration process with the mail you received.



Tips

- ◆ The user domain has to be 'External' because you are a member of an organisation external to the European Commission.
- ◆ When you do not introduce a username in the ECAS user registration form, the system generates one for you. The assigned username is informed to you afterwards. You receive it in the confirmation mail to complete the ECAS registration process.
- ◆ Click on the printer icon or the link 'privacy statement' to see a printer friendly version of the privacy statement.
- ◆ The security check is not case sensitive.
- ◆ Click on '**Try a different image**' to receive another security code when the characters of the security check image are illegible.



Remarks

- ◆ **All fields with an asterisk [*] are mandatory and have to be completed.**
- ◆ **The introduced e-mail address has to be personal. It is used to inform you about your account. Be aware that the European Commission will never ask you for your username and password.**

Change the login domain for ECAS



APPEL > Authentication screen

The 'APPEL authentication' screen is shown.



Profiles

People who need to change the login domain for ECAS to 'external' are:

- ◆ Members of an external organisation who wish to sign up for APPEL.
- ◆ Members of an external organisation who wish to login to APPEL.



Change the login domain to 'External'

1. Click on **'Register in ECAS'** listed under the new authentication system.
2. Click on **'change it'** if the domain is not 'External'.
3. The 'Domain selection' screen is shown.
4. Select **'Neither an institution nor a European body'**.
5. Select **'Remember my choice'** if necessary.
6. Click on **'Select'**.
7. You are redirected to the previous screen (step 2) and the domain has changed to **'External'**.



Tips

- ◆ The user domain has to be 'External' because you are a member of an organisation external to the European Commission.



Remarks

- ◆ **When you try to login to a wrong domain, your username and password are not accepted. An error message is shown: 'Incorrect username or password supplied for the selected domain. If you are not a member of this domain, please change it'. Click on the link in the error message to change the domain.**

Complete the ECAS registration process



Your inbox > ECAS mail

Check the inbox of the email address that you previously introduced during the creation of your ECAS account. An email from the ECAS Service should be in your inbox. (See remarks)



Complete the registration with the ECAS mail

1. Go to the mail from the European Commission Authentication Service (ECAS).
2. You received this mail to complete the registration process.
3. Your username is informed to you if you have not introduced one in the 'ECAS user registration form'.
4. Click on **'this link'** to create your password.
5. Initialise your ECAS password.



Tips

- ◆ If 'this link' provided in the mail does not work, you can always use the internet address listed below in the same mail.



Remarks

- ◆ **The mail is automatically sent after you have submitted the registration form for the ECAS account. You have 90 minutes to validate your account. According to the INTERNET provider, there could be a delay between the moment of submission of the form and the arrival of the email. If the mail has arrived more than 90 minutes later, the authentication system will ask you to redo the validation process for the account.**
- ◆ **When you do not receive the mail, please check your 'junk mail' inbox.**

Initialise your ECAS password



ECAS mail > Password initialisation

Click on 'this link' in the ECAS confirmation mail to complete the registration process. The 'Password initialisation' screen is shown.



Initialise your ECAS password

1. The **'New ECAS password'** screen is shown.
2. Introduce a password of your choice in the field **'New ECAS password'**.
3. Repeat the newly chosen password in the field **'Confirm new ECAS password'**.
4. Click on **'Submit'**.
5. You are connected to APPEL. The screen that is shown, is adjusted to the rights that are associated to your user account for APPEL.

The ECAS password requirements

The ECAS password

- ◆ may not include your username.
- ◆ must contain at least 10 characters chosen from at least 3 groups of the following 4 character groups:
 - ◆ Upper case: A to Z
 - ◆ Lower case: a to z
 - ◆ Numeric: 0 to 9
 - ◆ Special characters: !"#\$%&'()*+,-./:;<=>?@[\\]^_`{|}~

Only these characters are permitted, as well as the white space.

Examples of passwords are provided at the bottom of the screen. You can generate other sample passwords if necessary.



Remarks

- ◆ All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.
- ◆ Remember the password that you introduce. You will not receive any additional confirmation mail to remind you which password you have chosen.
- ◆ The password that you initialise cannot be changed within 24 hours.
- ◆ Due to security reasons, the system asks for password changes on a regular basis.
- ◆ You have 90 minutes to complete the registration process, starting from the moment you submit your personal information.

Register in APPEL

Request for APPEL login activation



Login with ECAS > APPEL home screen

Click on 'Connect to APPEL' on the 'APPEL authentication' screen. The 'ECAS login' screen is shown. Login with your ECAS account. The 'APPEL home' screen is shown.



Request for APPEL login activation

1. Click on **'Request for APPEL login activation'**.
2. The 'Request login activation' screen is shown.
3. Select the search term.
4. Introduce your information in the search field.
5. Click on **'Request'**.
6. The search result list with the possible organisations is shown.
7. Click on your organisation.
8. Select 'yes' or 'no' to indicate whether or not you are a user rights administrator for your organisation (see tips).
9. Click on **'Confirm'**.
10. Your login activation request for your organisation has been registered. An email is sent to you as soon as your user account is activated for APPEL.
11. Click on **'home'**.
12. The **'APPEL home'** screen is shown.



Tips

- ◆ Select 'yes' if you are a contact person between DG ECHO and your organisation. The contact person(s) manage(s) the user rights for all members of an organisation.

Register for FPA

Registration form (Step 1)



Login with ECAS > APPEL home screen

Click on 'Connect to APPEL' on the 'APPEL authentication' screen. The 'ECAS login' screen is shown. Login with your ECAS account. The 'APPEL home' screen is shown.



Registration form (Step 1)

1. Click on **'Register your organisation to become candidate to the FPA'**.
2. The **'Registration form (step 1)'** screen is shown. Read the text on the screen carefully.
 1. At the left of the screen, you will see a list of links to the different sections of the form, some are read only some can be completed.
 2. Click on **'General information'** and on **'Self assessment'** and complete the forms.
 3. Click on **'Save'** to save your data.
 4. Click on **'Check'** to check if the Form is ready for evaluation.
 5. If the message **'Ready for evaluation'** appears, click on **'Evaluation'** to go to the next step.
 6. The screen 'Info on Step 2' is shown.
 7. Read the text on the screen carefully and click on **'Continue'** at the bottom of the screen.
3. The 'Registration form (Step 2)' screen is shown.



Tips

- ◆ Move the mouse over the fields to get more information in the section 'General information'.
- ◆ Click on 'Help' next to a question to get more information In the section 'Self-Assessment'.
- ◆ You have 4 months to complete the registration process.



Remarks

- ◆ **All fields with an asterisk [*] are mandatory and have to be completed.**
- ◆ **Please save regularly during the completion of the questionnaire. An APPEL session expires after 90 minutes of inactivity.**

Registration form (step 2)



'Info on step 2' > Registration form (step 2)

The screen 'Info on step 2' is shown. Read the text carefully and click on 'Continue' at the bottom of the screen. The 'Registration form (step 2)' is shown.



Registration form (Step 2)

1. The screen '**Info on step 2**' is shown. Read the text carefully and click on '**Continue**'.
2. On the '**Registration form (step 2)**' you need to:
 1. Click on each section and continue the completion of the Registration form. The section which where 'read only' in the first step are now adaptable. The self-assessment section becomes 'read only' and can no longer be modified.
 2. Click on '**Save**' to save your data.
 3. Click on '**Check**' to check if the Form is ready for submission.
 4. Once all mandatory fields are completed, you can submit the form.
3. Click on '**Submit**'.
4. You receive the confirmation message '**Thank you for completing the questionnaire**'.
5. To finalise and formalise your application, you must send DG ECHO the mandatory documents listed on the screen.



Tips

- ◆ You have 4 months to send the complete application to DG ECHO.
- ◆ Once you've completed the questionnaire, you are a candidate for FPA.



Remarks

- ◆ **Before submitting the form, please make sure you completed all fields in all sections. Once the application is submitted, you cannot make any modifications anymore.**
- ◆ **Please save regularly during the completion of the questionnaire. An APPEL session expires after 90 minutes of inactivity.**
- ◆ **After the completion of the online questionnaire, you need to send a printed paper version to DG ECHO. An authorised member of your organisation needs to sign the printed version and send it with the other mandatory documents. When you failed to send the documents within the given time limit, your application will be cancelled.**

Refused questionnaire

Your application might be refused at the end of the selection process. The European Commission reserves the right to refuse applicants to the FPA if they do not satisfy the stated requirements.

The full responsibility for the accuracy of the information provided to the Commission by an FPA applicant lies with the applicant organisation. When false information is provided to DG ECHO, the FPA candidate is excluded from the FPA for two years.

When your application is refused, you can

- ◆ Apply to reconsider your case after rejection.
- ◆ Launch an appeal procedure.
- ◆ Make a complaint to the European Ombudsman.

You can find the links for these actions on the 'Request for admission' screen.

Go the 'APPEL home' screen. Click on 'Register your organisation to become candidate to the FPA' and the 'Request for admission' screen is shown.

APPEL

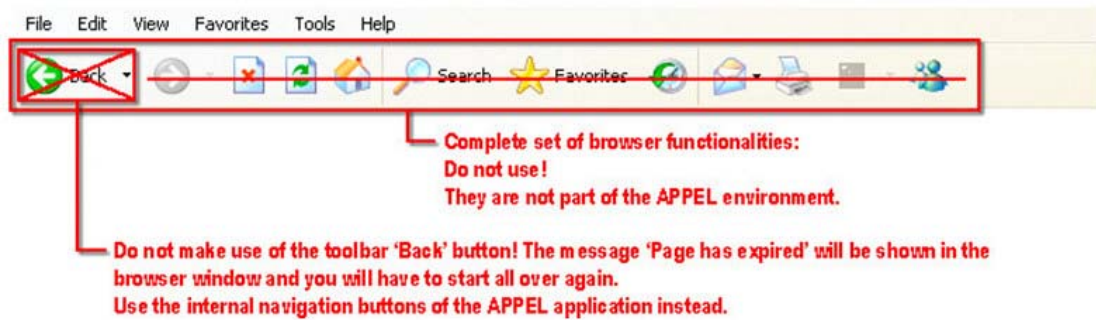
eDocument

Browser functions

APPEL is a web based application. This means that all functionalities are shown within a browser window. The browsers toolbar is automatically visible as well.

Please do not use the functionalities of the browser toolbar: Error messages may appear and you will loose some of the introduced information.

The Browser functionalities are not needed since all required functionalities are built within APPEL.



Print or export an eDocument



eDocument > 'Print'

Click on 'Agreement' or 'e-Request' in the main menu of APPEL. Search for a Grant Agreement or eRequest in the search screen. The function 'Print' is available in the navigation tab of the eDocument or at the end of each page.



Print an eSingleForm

1. Click on **'Print'**.
2. The application opens a pdf download screen.
3. Click on **'Open'** or **'Save'**.
4. The PDF document including the PDF menu bar is shown.
5. Click on the printer icon.
6. Select the print range:
 - ◆ **'all'** to print all;
 - ◆ **'current view'** to print the selection that is shown at the moment;
 - ◆ **'current page'** to print the page that you are on
 - ◆ **'pages'** to select the pages you wish to print.
7. Click on **'Ok'**.

Annexing files



eDocument > 'Annexes'

Click on 'Agreement' or 'e-Request' in the main menu of APPEL. Search for a Grant Agreement or eRequest in the search screen. The function 'Annexes' is available in the navigation tab of the eDocument.

The eDocuments are based on the original 'paper' forms. If necessary you can attach other documents, pictures, excel files... to the electronic version.



Annex files to the eDocument

1. Click on '**Annexes**' in the navigation tab.
2. An overview of the annexed files is shown in the content tab.
3. Click on '**Browse...**' next to the field '**File to upload**'.
4. A pop-up window is shown.
5. Select the file that you want to annex and click on '**Open**'.
6. The document path is shown in the field '**File to upload**'.
7. Introduce a description of the file in the field '**File description**'.
8. Click on '**Upload**' at the bottom right of the screen.
9. The file is now shown in the content tab.



Tips

- ◆ To upload several files at a time, please compress them first in a ZIP archive.
- ◆ The description of the file can be changed after uploading it.
- ◆ Click on the page icon or the floppy disc icon to open or save the file.
- ◆ Click on the red cross in the list to remove the file from the project.



Remarks

- ◆ **The allowed file types for uploading are: .csv, .doc, .gif, .htm, .html, .jpg, .jpeg, .pdf, .png, .rtf, .txt, .xls or .zip files.**
- ◆ **If the file you upload is bigger than 5 megabyte, the message 'Error to upload the file: Maximum size is exceeded' is shown.**

File types

The file types supported by the system for uploads are the ones with the following extensions:

- ◆ **.csv**: From within Microsoft Excel or a different spreadsheet program export as csv. The CSV ("Comma Separated Value") file format is often used to exchange data between disparate applications. The file format, as it is used in Microsoft Excel, has become a pseudo standard throughout the industry, even among non-Microsoft platforms.
- ◆ **.doc**: Microsoft Word document. In computing, DOC or doc (an abbreviation of 'document') is a file extension for word processing documents; most commonly for Microsoft Word.
- ◆ **.gif**: Image file format. The Graphics Interchange Format (GIF) is an 8-bit-per-pixel bitmap image format that was introduced by CompuServe in 1987 and has since come into widespread usage on the World Wide Web due to its wide support and portability.
- ◆ **.htm - .html**: Internet / webbased file format. HTM or HTML, an initialism of HyperText Markup Language, is the predominant mark-up language for web pages. It provides a means to describe the structure of text-based information in a document — by denoting certain text as links, headings, paragraphs, lists, and so on — and to supplement that text with interactive forms, embedded images, and other objects. HTML is written in the form of tags, surrounded by angle brackets
- ◆ **.jpg - .jpeg**: Image file format. JPG or JPEG (pronounced JAY-peg) is a commonly used method of compression for photographic images. The degree of compression can be adjusted, allowing a selectable tradeoff between storage size and image quality. JPEG typically achieves 10 to 1 compression with little perceivable loss in image quality.
- ◆ **.pdf**: Adobe PDF files. The Portable Document Format (PDF) is the file format created by Adobe Systems in 1993 for document exchange. PDF is a fixed-layout format used for representing two-dimensional documents in a manner independent of the application software, hardware, and operating system.
- ◆ **.png**: Image file format. Portable Network Graphics (PNG) is a bitmapped image format that employs lossless data compression. PNG was created to improve upon and replace the GIF format, as an image-file format not requiring a patent license.
- ◆ **.rtf**: Text document format. From within a word processing application use export (or save) as rtf. The Rich Text Format (RTF) is a free document file format developed by Microsoft in 1987 for cross-platform document interchange. Most word processors are able to read and write RTF documents.
- ◆ **.txt**: Text document format. From within a word processing application use export (or save) as txt. txt is a filename extension for files consisting of text usually contain very little formatting (ex: no bolding or italics). The precise definition of the .txt format is not specified, but typically matches the format accepted by the system terminal or simple text editor. Files with the .txt extension can easily be read or opened by any program that reads text and, for that reason, are considered universal (or platform independent).
- ◆ **.xls**: Microsoft Excel Spreadsheet document. Microsoft Excel (full name Microsoft Office Excel) is a proprietary spreadsheet application written and distributed by Microsoft for Microsoft Windows and Mac OS X. It features calculation, graphing tools, pivot tables and, except for Excel 2008 for Mac OS X, a macro programming language called VBA (Visual Basic for Applications). It is overwhelmingly the dominant spreadsheet application available for these platforms and has been so since version 5 in 1993[citation needed], and is bundled as part of Microsoft Office.
- ◆ **.zip**: Compression file format. Mainly used to put together multiple documents. The ZIP file format is a popular lossless data compression and archival format. A ZIP file contains one or more files that have been compressed, to reduce their file size, or stored as-is.

Track changes

To compare two different **versions** of an eDocument, you search for eRequests or Agreements. In the result list on the right there is a column with check boxes.

The following picture illustrates an example how to use track changes:

E-documents							Found: 5
Type	Reference Number	Vn	creation	Submission	Status	Diff. ?	Origin
REQUEST	2008/00075/RQ/03/01	1	03/06/2008	06/05/2008	Passive	☐	APPEL
REQUEST	2008/00075/RQ/03/02	2	03/06/2008	06/05/2008	Favourable	☒	APPEL
MODIFICATION REQUEST	2008/00075/MR/03/01	1	03/06/2008	07/05/2008	Submitted	☐	APPEL
MODIFICATION REQUEST	2008/00075/MR/03/02	2	03/06/2008	07/05/2008	Submitted	☐	APPEL
INTERJM REPORT	2008/00075/IR/01/01	1	03/06/2008		Draft	☐	APPEL

1. In the result list, you select two versions to compare.
2. Click on the check box to select two documents to compare.
3. Click on **'Track changes'** at the bottom right of the screen.



Tips

- ◆ Click on the column title **'Reference Number'** to order the result list.



Remarks

- ◆ Click on **'Track changes'** without checking two items of the list and the following message is be shown: **'You have to choose 2 documents to compare'**.

Track changes result

The following picture illustrates the different elements for a result with 'track changes':

2008/00074	2008/00074
Country	Country
Operation title	Operation title
Amount	Amount
Vn	Vn
Status	Status
Creation	Creation
Submission	Submission

Project REF : 1713 Project CMP : 1719

Collapse All Expand All Toggle All

1. GENERAL INFORMATION

1.5 Implementation rule

Co-financing Co-financing

Title of the action

Saving Humania Saving Humania

Start date of the action 3

01-05-08 01-08-08

11.5.1 Reason of starting operation before - comment

Is the start date for eligibility of expenditure equal to the date of submission ?

Yes Yes

11.5 Eligibility of expenditures - date

11.5.2 Eligibility date before operation start date - comment

1. The project information for the first selected eDocument.
2. The project information for the second selected eDocument.
3. The changes are highlighted in red.

eSingleForm

Introduction eSingleForm

All documents of the Project Cycle Management of a Humanitarian Operation are called eDocuments. The whole of eDocuments are brought together to reflect to the eSingleForm on paper that have been used in the previous years.

The different eDocuments are:

- ◆ eRequest (eRQ): The first proposition and new version to validate by DG ECHO. It can be sent by the Partner or encoded by the Archivist if the Partner sends only a paper version.
- ◆ eModification Request (eMR): The Partner sends it to report changes in the project. The modifications need to be validated by DG ECHO.
- ◆ eIntermediate Report (eIR): to report on intermediate progress within the Humanitarian project, to introduce unilateral changes. The eIR also needs to be validated by DG ECHO.
- ◆ eFinal Report (eFR): Document is the last report to send to DG ECHO, it reports on the results of the Humanitarian project. The financial report is not included in the eFR, it is attached as an annex to it. The e-FR also need to be validated by DG ECHO.

Partners submit eDocuments to DG ECHO via APPEL, DG ECHO has to appraise any eDocument. Each eDocument is appraised by a tandem Desk Officer/Field Expert.

The appraisal process is split into two major workflows:

- ◆ The pre-appraisal: where the actual appraisal is prepared;
- ◆ The Appraisal: in which the eDocument (e-RQ, e-MR, e-IR) are verified, validated or refused.

An appraisal can lead to a Favourable opinion or a refusal. According to the eDocument, the appraisal may require the submission of a new version of the eDocument.

The following chapters guide you through the process of completing each of the eDocuments.

Paper version versus eDocuments

The differences between the paper version and the eDocuments are numerous:

- ◆ Formal validation of eDocuments;
- ◆ Possibility to trace on the screen the status of the action and the status of the documents;
- ◆ The Partner can work on a draft version before submitting the eDocument to DG ECHO;
- ◆ Different possibility of temporary validations before the formal "sent" to DG ECHO;
- ◆ Sending of up to date versions of eRequest , eModification;
- ◆ Possibility to annex files (documents, images, excel files,...).

The advantages are obvious:

- ◆ Possibility for distance control;
- ◆ Possibility to add data's any time;
- ◆ Progressive integration of financial data;
- ◆ Possibility to create .XML files for upcoming versions;
- ◆ Simplification and reduction of paper exchange between Partners and ECHO;
- ◆ Simultaneous consultation of eDocuments;
- ◆ Online exchange of information between the field, field offices, the headquarters and DG ECHO;
- ◆ Certainty that what you see is the last version.

Guidelines

The input fields in the eDocument have some limitations and possibilities.

Limitations of the fields

- ◆ **The number of characters** that can be introduced per field are limited. The maximum is indicated at the bottom of the input field. If you want to introduce more information, upload a file as an annex.
- ◆ Only the chapters and subchapters with an icon in front can be changed.
- ◆ All chapters of the form, indicated with the **mandatory icon (!)** have to be saved even if you do not alter any of the information.
- ◆ You can paste text and tables from Word.
 - ◆ The following message might be shown: 'The text you want to paste, seems to be copied from Word. Do you want to clean it before pasting?' Click on 'cancel' to maintain the text style as in Word.
- ◆ The **information shown in green** is automatically completed by the system. The fields shown in black have to be completed if required.
- ◆ If a bar with an arrow is shown at the top of a field, you have the possibility to format the introduced information. Click on the arrow to open the **formatting toolbar**. This toolbar can be used to introduce tables, special characters, numbered lists,... in the field.
- ◆ **'Background colour'** highlights the text.

Financial overview

The financial overview becomes annex II of the signed Agreement. This financial overview is also strongly related to the Final financial report. For more details and advice, please consult the Guidelines of the Final Financial Report on the DG ECHO intranet.

- ◆ **Eligible cost of Action**
The partner can use another representation of eligible costs in line with the current practice in its organisation. These headings will become the chapters of the final financial reporting. In case personnel costs and the costs on information, communication and visibility are not explicitly available in section 4.3.2, these have to be explicitly mentioned in this table.
- ◆ **Subtotal direct eligible costs**
This amount has always to be equal to the total of all **'total amounts per result'** and the **'total amount other costs'** in section 4.3.2.
- ◆ **Direct revenue from the Action**
In case the Action itself creates income, the budgeted/finally real amount has to be mentioned here. As this income will be considered as income, it can increase the overall amount of the Action. It will also be deducted when fixing DG ECHO's contribution.
- ◆ **DG ECHO % of total funding**
In the case of multi donor contracts, the % of DG ECHO funding is **not required**. Total Costs will always be equal to 'Total Funding'.

Screen structure

eDocument

The following picture illustrates the general layout of the screen:

The screenshot shows the eDocument interface with the following components:

- 1. Header:** A navigation bar at the top with links: Logout, Contact, IT support, Echo EPA, Home, E-request, Agreement, Downloads.
- 2. Metadata:** A section below the header containing:
 - Partner short name: HUMANIA
 - Country: ANTARCTICA
 - Category: NGO-Non Governmental Organisations
 - Operation title: Livelihood support in NE Jharkhand
 - Amount: 0,00
 - Vn: 1
 - Status: Draft
 - Creation: 06/11/2009
 - Submission: (empty)
 - Back to list button
- 3. Navigation:** A sidebar on the left with a tree structure:
 - Buttons: Delete, Submit, Upload, Annexes, Print
 - New request 2009/01629
 - Single Form (REQUEST)
 - 1. GENERAL INFORMATION
 - 2. NEEDS ASSESSMENT
 - 3. HUMANITARIAN ORGANISATION IN THE AREA OF INTERVENTION
 - 4. OPERATIONAL FRAMEWORK
 - 4.3 Objectives, results and activities
 - 4.3.1 Operational Overview of the Action: Log-frame
 - 4.3.2 More detailed information per result
 - 4.3.2.4 Other costs
 - 4.4 Work plan
 - 4.5 Monitoring, evaluation, audit and other studies
 - 5. CROSS-CUTTING ISSUES
 - 6. FIELD COORDINATION
 - 7. IMPLEMENTING PARTNERS

- 4. Content:** The main area on the right, currently displaying:
- 6. FIELD COORDINATION**
- 6.1 Field co-ordination** (indicate the Humanitarian Organisation's participation in coordination mechanisms with other relevant stakeholders, e.g. clusters, IIGOs, UII agencies, others to be specified as well as the links with the Consolidated Appeal Process, when relevant)
- 6.2 National and local authorities** (relations established, authorisations, coordination)

The eDocument and Grant Agreement screens contain the following tabs:

1. Menu
2. Heading
3. Navigation tab
4. Content tab

Heading

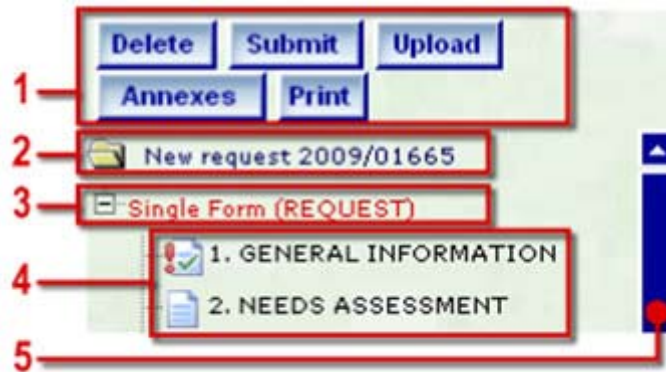
The heading shows a brief overview of the eDocument or the Grant Agreement.

Partner short name : SAVE THE CHILDREN - UK		Country : UNITED KINGDOM	Category : NGO-Non Governmental Organisations	
Grant Agreement				Back to list
Reference number	Country	Operation title	Amount	Status
2008/00005	SOMALIA	Emergency Nutrition & WASH Intervention	1,201,300,00	ONGOING

As soon as the initial eRequest is submitted to DG ECHO a project reference number is created. During the life cycle of a project the eDocuments and the Grant Agreement can have several statuses.

Navigation tab

The following picture illustrates the general layout of the navigation tab:



The navigation tab contains the following information:

1. Functionalities affecting the entire eDocument
2. Project number.
3. Type of the Document.
After submitting the initial eRequest, all eDocuments for that project will be added automatically in the tree view.
Click on '-' to collapse the tree view.
Click on '+' to expand the tree view.
4. The chapters and sub-chapters for the selected eDocument.
Click on the icons or the name of the subchapter to navigate through the form.
The different icons indicate mandatory fields, saved information
5. Scroll bar.
Click the up or down arrow to scroll through the tree view.
Drag the vertical scroll box to scroll through the tree view.

Content tab

The following picture illustrates the general lay out of the content tab:

The screenshot shows a web-based form interface for 'Human resources'. It features a title bar with '10. Human resources' and a status indicator 'Draft'. Below the title bar is a sub-section header '10.1 Indicate global figures per function and status'. The main area contains a table with columns: 'Title/function', 'Status', 'Number of staff', 'Mans / months', and 'Comments'. The table has one row with a dropdown menu for 'Status' showing '<Select>', and numerical values '0' for 'Number of staff' and 'Mans / months'. Below the table is an 'Add a row' button. At the bottom are four buttons: 'Save as draft', 'Save', 'Undo typing', and 'Print'. Red lines and numbers 1 through 5 point to specific elements: 1 points to the title, 2 points to the sub-section header, 3 points to the table, 4 points to the 'Add a row' button, and 5 points to the 'Draft' status indicator.

This tab displays the information of the active form section, as shown in the title.

The content tab contains the following information:

1. The chapter or title.
2. The sub-chapters or eDocument section.
3. The different form fields to introduce (text fields, option buttons, list boxes...).
4. The function buttons.
5. Text indicating the status of the section:
 - ◆ 'Modified' appears as soon as information is introduced.
 - ◆ 'Draft' appears after clicking '**Save as draft**'.
 - ◆ 'Saved' appears after clicking '**Save**'.

Chapter status icons

The little icons used in the navigation tab in front of a section or chapter indicate the following:



The information is read only as indicated by the magnifying glass.



The information is optional and has not been changed from the previous version.



The information is mandatory as indicated by the red exclamation mark and has not been changed from the previous version.



The information is optional and has been saved as indicated by the green check mark.



The information is mandatory and has been saved as indicated by the red exclamation mark and the green check mark.



The information is optional and has been saved as draft as indicated by the red capital 'D'.



The information is mandatory and has been saved as draft as indicated by the red exclamation mark and the red capital 'D'.

eDocument Functions

The functions in the navigation tab affect the entire eDocument. There are three possible combinations of functions that are shown.

The standard available functions:



1. **Annexes**

In read only mode the Annexes function shows a list of all the attached documents to the eDocument.

- ♦ In all other modes the Annexes function shows a list of the already attached documents to the eDocument and allows uploading other documents to attach.

2. **Print**

Generates a PDF document of only this screen or chapter. The PDF document can then be

- ♦ Sent to a printer.
- ♦ Saved on your hard disk or network disk.
- ♦ Previewed in the content tab.

The functions available when creating a new eDocument:



3. **Delete**

Deletes a draft eDocument before submitting it. Click on 'OK' to confirm the suppression of this draft document, or click on 'Cancel' to continue creating the document and no information will be lost.

4. **Submit**

Sends the eDocument to DG ECHO. Once the form is dispatched to a DG ECHO Unit, the partner receives an acknowledgment receipt.

5. **Upload**

Uploads a document, created with the offline application. Sends the eDocument to DG ECHO.

The function available to create a new version of an eDocument:



6. **New version.**

This function creates a new version of an already existing eSingleForm. The version number will be automatically shown in the project information tab. This function is active once an eDocument is dispatched to a DG ECHO unit.



Remarks

- ♦ If the status of a project is locked, the function 'New version' is not active. A project can be locked by a Desk Officer for example if he/she awaits additional information from a Field Expert. The project is locked by the system depending on the activity that is in operation.

Content functions

The standard available functions:



1. **Save as draft**
Saves the information you introduced into the screen. It does not check the validity of the information yet.
2. **Save**
Saves the information you introduced into the screen after validating the data and the mandatory fields. The missing mandatory information is indicated in red or with a red line.
3. **Undo typing**
Dismisses all the information introduced and returns to the last saved version of that screen.
4. **Print**
Generates a PDF document of only this screen or chapter. The PDF document can then be;
 - ♦ Sent to a printer.
 - ♦ Saved on your hard disk or network disk.
 - ♦ Be previewed in the content tab.



Remarks

- ♦ Always click on 'Save as draft', 'Save' or 'Undo typing' before navigating to another chapter or screen! If not the following message is shown 'Do you want to save your changes? Click OK to save or Cancel for leaving.'
- ♦ If you click 'OK' the data introduced will be validated and saved when clicking 'Cancel' newly introduced changes will not be saved.

Reference number

The reference number, also called eDoc ID, is automatically generated as soon as the initial eRequest is created.

There are several types of reference numbers;

- ◆ Initial eRequest before submitting consists out of four digits.
- ◆ After submitting the initial eRequest, all eDocuments have the following structure;



The reference number contains the following information:

1. The year when the first eRequest for a project was submitted, it consists out of four digits.
2. The sequential project number contains five digits.
3. The type of eSingleForm is a two characters string:
 - ◆ RQ = Request.
 - ◆ MR = Modification Request.
 - ◆ IR = Intermediate Report.
 - ◆ FR = Final Report.
4. The sequential request or report number for a particular eDocument.
5. The version number of the request or report.

Letter Of Intent

Introduction Letter Of Intent

With the publication of a HIP, DG ECHO informs its partners of the availability of funds for a specific country or crisis and of the planned procedure for allocation of these funds.

Because of the increased level of transparency, DG ECHO expects to receive more proposals from some countries than was the case in the past. In such cases, Partners might be asked to submit Letter of Intent (LOI) in order to give DG ECHO a global view on how Partners expect to cover the identified needs, without having to draft a full Single Form.

The information to be provided in the Letter of Intent for the first assessment round will be precised in the HIP. It will generally include at least:

- ◆ area of intervention
- ◆ sector
- ◆ duration
- ◆ beneficiaries
- ◆ context/needs assessment
- ◆ proposed response (results, activities)
- ◆ estimated costs
- ◆ requested contribution
- ◆ contact details

The proposal that is created as a result of the Letter Of Intent has to be created as a new version of the LOI, not as a new eRequest.

The term Letter Of Intent is often abbreviated to LOI.
November 2012

Functions

Create a new Letter of Intent



eRequests search screen > New Letter of Intent

Click on **'e-Request'** in the main menu of APPEL. The 'e-Requests search' screen is shown. The function 'New Letter of Intent' is shown.



Profiles

People who can create Letters of Intent have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create a new Letter of Intent

1. Click on **'New Letter of Intent'**.
2. Click on **'OK'** to confirm the creation of a new Letter of Intent.
3. Start completing the Letter of Intent by clicking on each chapter (see tips).
4. Click on **'Submit'**.



Tips

- ◆ You can also use the 'upload' function to upload a validated Letter of Intent made in the Offline eTools application.
- ◆ Click on 'Validate' to verify whether all mandatory chapters and fields are completed.
- ◆ In order to be able to submit at least one result as needed, you should encode an amount (an estimation of the amount or one symbolic euro if you don't know the amount yet).



Remarks

- ◆ The indications in the fields of the Letter Of Intent are only in English, e.g. the fields that are not mandatory in the LOI contain the remark 'Facultative for Letter Of Intent unless specified in HIP'.
- ◆ All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed, unless they contain the text 'Facultative for Letter of Intent unless specified in HIP'.
- ◆ Add at least one result and complete the details for this result.
- ◆ In chapter 11 'Financial overview', you need to add the amounts of your results so the 'Total amount' is correct.
- ◆ In chapter 11 'Financial overview', you need to add at least 1€ in the 'Eligible costs of action' field. This symbolic amount can be added in case you don't have any financial information yet. When adding it, please make sure that the other fields are empty so you can validate this section with 1€ as the 'total financing' amount.

November 2012

Submit a Letter of Intent



eRequests search screen > New Letter of Intent

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Search for the Letter of Intent of your choice and click on it.



Profiles

People who can submit Letters of Intent have:

- ◆ A Sender profile.



Submit a Letter of Intent

1. Introduce at least all mandatory information. Please see the previous topic if necessary.
2. Save each chapter.
3. Upload the necessary annexes.
4. Click on '**Submit**'.
5. A confirmation message is shown, click on 'ok'.
6. Another confirmation message with your reference number is shown (See remarks).
7. Click on 'print the acknowledgement receipt' if necessary.
8. Click on '**Back**'.
9. The Letter of Intent is now submitted.

If the desk needs more information or clarifications, a message will be sent to the Partner to ask to submit a new version of the Letter of Intent.



Remarks

- ◆ **The confirmation message serves as an acknowledgement receipt. This message has a legal value. It proves that DG ECHO has received the document.**

November 2012

New version of the Letter of Intent



eRequests search screen > New version of Letter of Intent

Click on **'e-Request'** in the main menu of APPEL. The 'e-Requests search' screen is shown.



Profiles

People who can create new versions of the Letter of Intent have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create a new version of the Letter of Intent

1. Search for the **'Letter of Intent'** for which you want to create a new version.
2. Click on the title of the **'Letter of Intent'** to open it.
3. Click on **'New version'** in the navigation tab.
4. A window is shown, where you need to click on 'New version of the Letter Of Intent' to create a new version for that Letter of Intent. The Desk might ask for an eRequest instead of a new version of the Letter of Intent. In this case, please create a new eRequest starting from the LOI.
5. Complete the **eSingleForm** by clicking on each chapter.
6. Click on **'Submit'**.



Remarks

- ◆ A new version can be created and submitted as soon as a Desk Officer was assigned for the appraisal of the Letter of Intent.
- ◆ The Desk Officer can 'lock' the Request (the status is shown on the traffic lights of the Grant Agreement search result list) and no new version can be submitted.
- ◆ No new version can be submitted once the evaluation of the desk is terminated.
- ◆ All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed unless they contain the text 'Facultative for Letter of Intent unless specified in HIP'.

November 2012

Create a new eRequest from a LOI



eRequests search screen > eRequest starting from Letter of Intent

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown.



Profiles

People who can create eRequests from Letters of Intent have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create an eRequest starting from a Letter of Intent

1. Search for the '**Letter of intent**' for which you need to create a new version.
2. Click on the title of this '**Letter of Intent**' to open it.
3. Click on 'New version' in the tree view.
4. A window is shown, click on 'Create an eRequest from the LOI' to create an eRequest starting from this Letter Of Intent.
5. Complete the eSingleForm by clicking on each chapter.
6. Click on 'Submit' to submit the eRequest created from your LOI.



Remarks

- ◆ **The Desk can 'lock' the eRequest (the status is shown on the traffic light icon in the Agreements list) so a new version cannot be submitted.**
- ◆ **No new version can be submitted once the evaluation of the Desk is terminated.**
- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

November 2012

eRequest

Introduction eRequest

The eRequest is the first document of all the different eDocuments. It is the initial Request that the Partner sends to DG ECHO.

This initial Request can be accepted or denied by DG ECHO. When it is denied, the Partner will have to create a new version of the Request. When the eRequest is accepted, the Partner is considered to be a candidate for the Humanitarian Action.

Functions

Create a new eRequest

eRequests search screen > New eRequest

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. The function 'New e-Request' is shown.

Profiles

People who can create eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.

Create a new eRequest

1. Click on '**New e-Request**'.
2. Click on '**OK**' to confirm the creation of a new eRequest.
3. Start completing the eRequest by clicking on each chapter.
4. Click on '**Submit**'.

Tips

- ◆ You can also use the 'upload' function to upload a validated eRequest made in the Offline eTools application.
- ◆ An eRequest can also be created starting from the Letter of Intent.

Remarks

- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

November 2012

Submit an eRequest



eRequests search screen > eRequest

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Search for the eRequest of your choice and click on it.



Profiles

People who can submit eRequests have:

- ◆ A Sender profile.



Submit an eRequest

1. Introduce at least all mandatory information for:
 - ◆ Chapter 1;
 - ◆ Chapter 2 to 9;
 - ◆ Subchapter 4.3.1;
 - ◆ Subchapter 4.3.2;
 - ◆ Chapter 8;
 - ◆ Chapter 10;
 - ◆ Chapter 11;
 - ◆ Chapter 12;
 - ◆ Annex A.
2. Save each chapter.
3. Upload the necessary annexes.
4. Click on '**Submit**'.
5. A confirmation message with your reference number is shown (See remarks).
6. Click on '**Back**'.
7. The eRequest is now submitted.

If the desk needs more information or clarifications, a message will be sent to the Partner to ask to submit a new version of the eRequest.



Tips

- ◆ Instead of introducing all mandatory information online, you can also upload an eRequest which was created offline. Only chapter 12 contains mandatory information that needs to be added after uploading the eRequest, because not all information in chapter 12 is available offline. Some information can only be selected online. This information is available in the system, linked to the Partner module.



Remarks

- ◆ **The confirmation message serves as an acknowledgement receipt. This message has a legal value. It proves that DG ECHO has received the document.**
- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

November 2012

Create a new version of an eRequest



eRequests search screen > eRequest

Click on **'e-Request'** in the main menu of APPEL. The 'e-Requests search' screen is shown.



Profiles

People who can create new versions of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



New version of an eRequest

1. Search for the **'eRequest'** for which you want to create a new version.
2. Click on the **'e-Request'** of your choice.
3. Click on **'New version'** in the navigation tab to confirm the creation of a new version for that eRequest.
4. Complete the **eSingleForm** by clicking on each chapter.
5. Click on **'Submit'**.



Remarks

- ◆ A new version can be created and submitted as soon as a Desk Officer was assigned for the appraisal of the proposal of the action.
- ◆ The Desk Officer can 'lock' the Request (the status is shown on the traffic lights of the Grant Agreement search result list) and no new version can be submitted.
- ◆ No new version can be submitted once the evaluation of the desk is terminated.
- ◆ All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.

November 2012

Chapters

Complete chapter 1: General information (RQ)



eRequest > Chapter 1

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on chapter 1 '**General information**'.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter 1: General information

1. Introduce at least all mandatory information.
2. The '**name of Humanitarian Organisation/Country of registration**' are already shown in the field. They are automatically completed by the system according to your organisation's information. They have been introduced previously just before launching the creation of a new eRequest.
3. Click on the calendar icon and select a '**Start date**'. If the Action has already started, you introduce the reason that justifies this situation (e.g. Primary Emergency or Urgent Action).
4. Is the start date for eligibility of expenditure equal to the date of submission?
 1. Yes: introduce the explanation of the expenses charged to the budget between date of submission and start date of the action.
 2. No: click on the calendar icon, select the '**start date**' and introduce an explanation.
5. Select the **requested funding modality for this agreement**:
 1. 100% financing: justify the request.
 2. Co-financing.
6. Urgent action:
 1. Yes: select '**ECHO Primary emergency decision**', '**ECHO emergency decision**' or '**Other ECHO Decision**'. If you select the last option, justify it.
 2. No.
7. The fields 1.9 and 1.10 are greyed out. Later on, they will be automatically completed by the system with information from within the application.
8. Click on '**Save**'.



Tips

- ◆ The mandatory field 'Title of the Action' can no longer be modified after signature of the Agreement. The Partner should avoid data that might change, such as the number of beneficiaries, the exact location or sub-region of implementation, etc. It may include some notion of the sector of the Action and mention the country/ies.
- ◆ The exact locality/ies for the 'Area of intervention' will be detailed under 4.1 with maps and relevant reference points.
- ◆ The start date of the action should be the actual starting date of the Action in the field, it should not necessarily be the first day of a month. It may be different from the date for eligibility of expenditure. If the Action has already started explain the reason that justifies this situation.
- ◆ The mandatory field 'Duration of the Action in months' covers the implementation period of the Action in the field from the start date. It covers the entire duration of the Action. It should be preferably in whole months. E.g. 2 months and 10 days or 3 months and 0 days (the fields 'months' and 'days' cannot be empty. So even when it are zero days, you need to introduce '0'). Fractions of months should be avoided. The period for finalising the final report (max 3 months) is not included in the total duration.

- ◆ The nature of expenditure corresponding to the eligibility period (time elapsed between the eligibility date and start date) should be clearly identified at chapter 4.3.2 and agreed with DG ECHO.
- ◆ The 100% financing option is an exception that has been foreseen for Humanitarian Actions in duly justified circumstances. The Partner must provide relevant justification on the 100% funding.
- ◆ The 'Action total amount' and the 'DG ECHO contribution requested' in chapter 1.7 are copied from chapter 11.



Remarks

- ◆ **The duration of any Action cannot go beyond the duration of the ECHO Financing Decision, except in case of suspensions during the implementation of the Action.**
- ◆ **Click on 'Add a row' to add another area of intervention if necessary.**
- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

Complete chapters 2 to 9 (RQ)



eRequest > Chapter 2 to 9

Click on **'e-Request'** in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on chapter 2 to 9.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapters 2 to 9

1. Click on each chapter and subchapter in the navigation tab on the left side of the screen.
2. Introduce at least all mandatory information for each chapter and subchapter.
3. Click on **'Save'**.



Tips

- ◆ Field 2.3 **'Summarise findings of the assessment...'** should form the basis for the intervention logic. If there is a report of the assessment it may be annexed and the results summarised here with regard to the proposed Action. When relevant, assessment of risks potentially arising from natural disasters should be provided.
- ◆ For field 3.1 **'Humanitarian Organisation's presence in the area of intervention...'**, you indicate:
 - ◆ A brief overview of current and future strategy in the country;
 - ◆ The current and recent activities in the country;
 - ◆ A brief overview of the presence in the country (number of years, type of intervention, regions, type of set-up).
- ◆ Click here for more details about the logical framework of chapter 4.
- ◆ Click here for more details about 'Other costs' of chapter 4.
- ◆ Click here for more details about chapter 8.
- ◆ To delete a line, select the check box on the left and click on 'Save'.



Remarks

- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

Complete subchapter 4.3.1: Logical framework (RQ)



eRequest > Subchapter 4.3.1

Click on **'e-Request'** in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on subchapter 4.3.1 **'Operational overview of the action: log-frame'**.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete subchapter 4.3.1: Operational overview of the action: log-frame

1. The **'Title of the Action'** is already completed by the system.
2. Introduce the **'principal objective'**.
3. Specific objective:
 1. Introduce the 'Specific objective'.
 2. Click on **'+i'** to add an indicator for the specific objective.
 3. Introduce the necessary information in the fields.
 4. Click on **'X'** to delete the indication and its source of verification.
 5. Introduce the **'Preconditions'**.
4. Results (See remarks):
 1. Click on **'+r'** to add a result.
 2. Introduce the **'result'**.
 3. Click on **'+i'** to add an indicator for the specific objective.
5. Introduce the necessary information in the fields.
6. Click on **'X'** to delete the indication and its source of verification.
7. Activities:
 1. Click on **'+a'** (in the result field) to add an activity.
 2. Introduce the **'activity'**.



Tips

- ◆ Select **'yes'** or **'no'** for **'Autosave'** at the top of the screen if you wish to automatically save the introduced information.
- ◆ The title of the action should be the same as the one of chapter 1.2. It is automatically copied by the system from chapter 1.2, once 1.2 has been completed.
- ◆ The principal objective should be in line with one of the relevant DG ECHO financing decision specific objectives, if it is already available.
- ◆ Click on **'Maximize'** to open a new window for 4.3.1.
- ◆ Click on the pink exclamation mark of each field to have more information about the field.
- ◆ Tips on the limitations and mandatory information to complete the logical framework.



Remarks

- ◆ **The detail of each introduced result can be completed on this screen, or on subchapter 4.3.2.**
- ◆ **You can give the details for each of the added results in subchapter 4.3.2.**
- ◆ **The information introduced in subchapter 4.3.2 is partly visible in the logical framework.**
- ◆ **You can add maximum 5 indicators.**
- ◆ **The logical framework shows only a maximum of 3 main activities per result. If there are more activities, the 3 most important activities should be put first when completing subchapter 4.3.2.**

Complete subchapter 4.3.2: More detailed information on specific objectives and results (RQ)



eRequest > Subchapter 4.3.2.

Click on **'e-Request'** in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on subchapter 4.3.2. **'More detailed information on specific objective and results'**.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.

In subchapter 4.3.2.1 you introduce the details and objectively verifiable indicators of the specific objective. The details of every result in subchapter 4.3.1 are shown under subchapter 4.3.2.2 and the following subchapters. The number of subchapters depends on the number of results that you have.



Complete subchapter 4.3.2.2 and the following subchapters

1. Click on the result of your choice.
2. Click on **'Detail'**.
3. Click on **'Detail'** in subchapter 4.3.2 in the navigation tab on the left side of the screen.
4. The form of the **'Detail'** has four tabs: 'Details', 'Objectively Verifiable Indicators', 'Activities' and 'Means and costs'.
5. Click on each tab and introduce at least all mandatory information.
6. Click on **'Save'** to save the data on each tab.



Tips

- ◆ The information introduced under subchapters 4.3.2.2 and the following subchapters, is partly visible under subchapter 4.3.1.
- ◆ Select **'Automatic saving'** at the top of the screen if you wish to automatically save the introduced information.
- ◆ Click on **'+'** to add an indicator, activity or mean.
- ◆ Click on **'Delete'** to delete information.
- ◆ Click on **'X'** to delete a cost.



Remarks

- ◆ **The Result's short description should not be left empty.**
- ◆ **The Global Cost should not be left empty.**
- ◆ **At least one Sector should be selected.**
- ◆ **The number of beneficiaries cannot be empty.**
- ◆ **At least one Type of beneficiaries should be selected.**
- ◆ **You can add maximum 5 indicators.**
- ◆ **The Short description on the Indicator tab should not be left empty.**
- ◆ **The Short description on the Activities tab should not be left empty.**

Complete chapter 8: Contingency measures and security (RQ)



eRequest > Chapter 8

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on chapter 8 '**Contingency measures and security**'.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter '8. Contingency measures and security'

1. Introduce at least all mandatory information.
2. Has a specific security protocol for this action been established?
 1. Yes: introduce an explanation of the protocol
 2. No.
 3. Standard procedures.
3. Click on '**Save**'.



Tips

- ◆ For the contingency measures under 8.1, in case some of the assumptions or risks materialize, the Partner should explain how he would react in order to mitigate their effects on the implementation of the Action and what other options would be proposed for the achievement of the foreseen results.
- ◆ To delete a line, select the check box on the left and click on 'Save'.

Complete chapter 10: Human resources (RQ)



eRequest > Chapter 10

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on chapter 10 '**Human resources**'.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter '10. Human resources'

1. Introduce at least all mandatory information.
2. Introduce the '**person/month per project**'.
 - ◆ For example; 5 persons working on a project for 6 months equals 30 people/month.
3. Click on '**Add a row**' to introduce more global figures per function and status.
4. Click on '**Save**'.



Tips

- ◆ Personnel meeting only one or none of the criteria for the status shall fall under the category of 'local staff'.
- ◆ Information on implementing partner staff is needed for key staff, in particular when no expatriate staff of the partner directly manages the Action at the local level.
- ◆ To delete a line, select the check box on the left and click on 'Save'.

Complete chapter 11: Financial overview (RQ)



eRequest > Chapter 11

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on chapter 11 '**Financial overview**'.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter '11. Financial overview'

1. Introduce at least all mandatory information.
2. Click on '+' to add a cost.
3. Click on 'X' to delete a cost.
4. Click on '**Save**'.



Tips

- ◆ In chapter 11 of the eSingleForm, the left column (Eligible cost of Action) should reflect the main chapters of the Partners financial reporting structure, as these lines will become later the chapters of the final financial report. It is advisable to have around 10 headings.

Complete chapter 12: Administrative information (RQ)



eRequest > Chapter 12

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on chapter 12 '**Administrative Information**'.



Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter '12. Administrative Information'

1. Introduce at least all mandatory information.
2. The '**FPA number**' is automatically completed by the system.
3. Introduce the necessary information in the three fields phone, fax and email.
4. The '**Bank account**' information is automatically completed by the system.
5. Click on '**Save**'.



Tips

- ◆ The various people to be kept informed in the Humanitarian Organisation can be identified in subchapter 12.3, which contains the person(s) to be mentioned in Article 7 of the Agreement. The Partner may add the names of up to 2 persons who may launch unilateral modifications as well as amendment request on behalf of the Humanitarian Organisation. All information sent out by DG ECHO Brussels for the related Action will be automatically copied via e-mail to these addresses.
- ◆ To delete a line, select the check box on the left and click on 'Save'.

Complete Annex A: Procurement table (RQ)

eRequest > Annex A

Click on '**e-Request**' in the main menu of APPEL. The 'e-Requests search' screen is shown. Select the eRequest of your choice. Click on Annex A '**Procurement table**'.

Profiles

People who can complete the chapters of eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.

Complete annex A: Procurement table

Introduce the necessary information in the Procurement table and give a comment.

1. Introduce at least all mandatory information.
2. Introduce the '**launch date procedure**' as dd/mm/yyyy.
3. Introduce the '**contracting date**' as dd/mm/yyyy.
4. Click on '**Save**'.

Tips

- ◆ Annex A is only mandatory for Agreements with an A-control mechanism. All sections of this section should be filled in. It regroups the main significant procurement procedures for this Action and will be filled in at proposal stage and updated at intermediate report and final report stage.
- ◆ The Partner may attach a table with another layout (e.g. used inside the project) provided that all necessary information is available. Partners that signed an agreement with a P-control mechanism do not have to provide such a table with the Single Form at proposal or reporting stages. A whole procurement procedure will be dealt with per row.
- ◆ A procurement procedure cannot be split because it is used in several activities. If a procurement procedure has to be split, an explanation has to be given. The dates for launching and contracting can also be expressed in number of weeks after the start of the Action.
- ◆ To delete a row, select the check box on the left and click on 'Save'.

Remarks

- ◆ **You need to click on 'save' even if you do not introduce any information.**

eModification Request

Introduction eModification Request

The eModification Request provides a way to adjust the original eRequest after it has already been granted by DG ECHO.

The eModification permits to request modifications to the signed Agreement. The modifications are limited though. Not all data can be changed.

For example the title of the Action and the Principal Objective can no longer be modified after signature of the Agreement. Also the control mechanism that is applied cannot be modified for a specific Action during its lifetime. For the eligible cost of action, the denomination of headings cannot be modified during the lifetime of the Action. New headings can be added if necessary.

To modify the eRequest before the Agreement is signed, you can create a new version of the eRequest.

Functions

Create a new eModification Request



Agreements search screen > New eModification

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement in the status 'ongoing'. The function 'New e-Modification' is shown.



Profiles

People who can create eModification Requests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create a new eModification Request

1. Click on **'New e-Modification'**.
2. Click on **'OK'** to confirm the creation of a new eModification.
3. Click on the chapters that need to be modified.
4. Introduce the required information in the fields. (See tips)
5. Click on **'Save'**.
6. Click on **'Annexes'** at the top of the navigation tab to add annexes.
7. Click on **'Submit'** at the top of the navigation tab.



Tips

- ◆ The fields that you modify for the eModification Request have to be completed the same way as in the eRequest. Go to the eDocumentation about the eRequest to learn how to complete the fields of the eModification Request.
- ◆ You can also use the 'upload' function to upload a validated eModification that was completed in the Offline eTools application.



Remarks

- ◆ **All chapters with an exclamation mark are mandatory and have to be completed.**
- ◆ **Annexes are not mandatory.**
- ◆ **The eModification request can be submitted only if the mandatory screens are completed.**

Submit an eModification Request



Agreements search screen > New eModification

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement in the status 'ongoing'. The function 'New e-Modification' is shown.



Profiles

People who can submit eModification Requests have:

- ◆ A Sender profile.



Submit a new eModification Request

1. Introduce at least all mandatory information:
 - ◆ Amendment Request;
 - ◆ Chapters 1 to 12;
 - ◆ Subchapter 4.3.1.
2. Save each chapter.
3. Upload annexes if necessary.
4. Click on '**Submit**'.
5. A confirmation message is shown with your reference number (See remarks).
6. Click on '**Back**'.
7. The eModification Request is submitted.

If the desk needs more information or clarifications, a message will be sent to the partner to ask to submit a new version of the eModification Request.



Tips

- ◆ Instead of completing all mandatory information online, you can also upload an eModification Request that was created offline. Only chapter 12 contains mandatory information that should be added after having uploaded the eModification Request, because chapter 12 is not available in the Offline eTools application.



Remarks

- ◆ **The confirmation message serves as an acknowledgement receipt. This message has a legal value. It proves that DG ECHO has received the document.**
- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

Create a new version of an eModification Request



Agreements search screen > New version of an eModification

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement. Select the Grant Agreement for which you wish to create a new version of the eModification Request.



Profiles

People who can create new versions of eModification Requests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create a new version of an eModification Request

1. Click on the Grant Agreement for which you wish to create a new version of the eModification Request.
2. Click on the eModification Request linked to this Grant Agreement.
3. Click on **'New version'** in the navigation tab to confirm the creation of a new version for that eModification request.
4. Click on **'OK'** to confirm the creation of a new eModification.
5. Click on the tabs that need to be modified.
6. Introduce the required information in the fields. (See tips)
7. Click on **'Save'**.
8. Click on **'Annexes'** at the top of the navigation tab to add annexes.
9. Click on **'Submit'** at the top of the navigation tab.



Tips

- ◆ The fields that you modify for the eModification Request have to be completed the same way as in the eRequest. Go to the eDocumentation about the eRequest to learn how to complete the fields of the eModification Request.



Remarks

- ◆ **All chapters with an exclamation mark are mandatory and have to be completed.**
- ◆ **The eModification request can only be submitted if the mandatory screens are completed.**

Chapters

Amendment request (MR)



eModification Request > Complete the amendment request

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement. Select the Agreement of your choice. Go to the eModification Request and complete the chapter 'Amendment Request'.



Profiles

People who can create amendment requests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Request Amendments

1. Introduce the '**Name**', '**Telephone**', '**Fax**' and '**eMail**' of the people who request the amendments.
2. List of the requested amendments.
 1. Introduce the information relative for the amendment request.
 2. If other amendments are requested, click on '**Add a line**'.

An amendment is a modification to an Agreement to reflect operational or other changes in the implementation of the Action. A unilateral modification can be done by an eIntermediate Report.

Modifications that results in an Exchange of Letters or a Supplementary Agreement must be done through a Modification Request.

For the paper version of the eSingleForm it is possible to ask for an amendment by way of the Intermediate Report. In the paper version of the eSingleForm, a modification to an Agreement is to reflect operational or other changes in the implementation of the Action. In APPEL, it is no longer possible to ask for an amendment by use of the Intermediate Report.



Tips

- ◆ There should be one row for each change in a chapter that affects the Grant Agreement (chapters 1 to 5 and 8). For unilateral changes this is not necessary.
- ◆ To delete a line, select the check box on the left and click on 'Save'.



Remarks

- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

Complete chapters 1 to 12 (MR)



eModification Request > Complete the chapters

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement. Select the Agreement of your choice. Go to the eModification Request and complete chapters 1 to 12.



Profiles

People who can complete the chapters of eModification Requests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Chapters 1 to 12

1. Click on each chapter and under each chapter in the navigation tab to the left of the screen.
2. For each chapter and subchapter, complete, modify and introduce an explication in the appropriate fields.
3. Click on '**Save**'.



Tips

- ◆ Click here for more details about the logical framework of chapter 4.
- ◆ **Chapter 10: Human resources**
 - ◆ You can modify global figures per function and status.
 - ◆ New functions can be added.
- ◆ **Chapter 11: Financial overview**
 - ◆ The total Cost and total Funding are automatically calculated by the system.
 - ◆ If an Intermediate Report has been submitted, the intermediate budget will be present. If no Intermediate Report was submitted, the Intermediate budget will remain empty. The Intermediate budget cannot be altered in the Modification Request stadium.
 - ◆ Total Cost and Total Funding must be equal.



Remarks

- ◆ **In most chapters, the information is completed by the system. This information has been provided with the creation of the initial eRequest. You can complete and/or modify the information.**
- ◆ **The eModification Request gives you the possibility to modify and/or complete existing information.**
- ◆ **All fields with an asterisk [*] are mandatory and have to be completed.**
- ◆ **Introduce the revised work plan if it has been changed after proposal.**

Complete subchapter 4.3.1: Logical Framework (MR)



eModification Request > Complete the Logical Framework

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement. Select the Agreement of your choice. Go to the eModification Request and complete the Logical Framework.



Profiles

People who can complete the chapters of eModification Requests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete subchapter 4.3.1: Logical framework

1. Select **'Yes'** or **'No'** for the autosave.
2. The **'Title of the action'** remains the same as introduced in the eRequest.
3. The **'principal objective'** remains the same as introduced in the eRequest.
4. Specific objective.
 1. The **'specific objective'** remains the same as introduced in the eRequest.
 2. Click on **'I+il'** to add an indicator for the specific objective.
 3. Introduce the necessary information in the fields.
 4. Click on **'IxI'** to delete the indicator and its source of verification.
 5. Introduce the **'Preconditions'**.
5. Results
 1. Click on **'+r'** to add a result.
 2. Introduce the **'result'**.
 3. Click on **'I+il'** to add an indicator for the result.
6. Introduce the necessary information in the fields.
7. Click on **'IxI'** to delete the indicator and its source of verification.
8. Click on **'leditl'** to edit the result.
9. Activities
 1. Click on **'I+al'** (in the result field) to add an activity.
 2. Introduce the **'activity'**.



Remarks

- ◆ Select **'Autosave'** at the top of the screen if you want to automatically save the introduced information.
- ◆ Objectives, results and activities data were completed by the system as the information was provided upon creating the initial eRequest.
- ◆ The Title of the action, the Principal objective and the Specific objective remain as introduced in the eRequest, they cannot be modified.
- ◆ New indicators for the Specific objective can be added.
- ◆ The eModification will allow you to complete the information and to add new results and/or new activities.
- ◆ Click on the pink question mark to see more information about the desired data to introduce.

Complete Annex A: Procurement table (MR)



eModification Request> Annex A

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for the Agreement for which you wish to create an eModification Request or click on an existing eModification Request linked to this Grant Agreement. Click on Annex A **'Procurement table'**.



Profiles

People who can complete chapters of eModification Requests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete Annex A: Procurement table

If any change has occurred in the procurements, complete the Procurement table and give a comment.

1. Click on **'Add a row'**, Introduce the necessary information in the fields and click on the arrow to select **'Yes'** or **'No'**
2. Click on the calendar icon to add the **launch date of the procedure**.
3. Click on the calendar icon to add the **contracting date**.
4. If necessary you can introduce a comment.
5. If necessary introduce the reference of the documents that you will annex.
6. Click on **'Save'**



Tips

- ◆ To delete a line, select the check box on the left and click on 'Save'.



Remarks

- ◆ **Repeat steps 1 to 3 for each change in the procurements.**
- ◆ **This chapter is mandatory and you have to click on 'Save' even if you do not alter any of the information.**

eIntermediate Report

Introduction eIntermediate Report

For each humanitarian action an intermediate report has to be sent to DG ECHO to report on the progress of the project. The Intermediate Report should be used as a monitoring tool. To apply any modifications, the eModification Request should be used.

As in the Initial Request all chapters indicated with the mandatory icon have to be saved even if you do not alter any of the information.

The information shown in green is automatically copied from the Initial Request, only the fields written in black have to be completed if necessary. Only the chapters and subchapters with an icon in front can be changed.

Functions

Create a new Intermediate Report



Agreements search screen > Agreement

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement in the status 'ongoing'. The function 'New e-Interim' is shown.



Profiles

People who can create eIntermediate Reports have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create a new eIntermediate Report

1. Click on **'New e-Interim'**.
2. Click on **'OK'** to confirm the creation of a new e-Intermediate report.
3. Click on each chapter starting from the first.
4. Introduce the required information in the fields.
5. Click on **'Save'**.
6. Click on **'Annexes'** at the top of the navigation tab to add annexes.
7. Click on **'Submit'** at the top of the navigation tab.



Tips

- ◆ You can also use the 'upload' function to upload a validated eIntermediate Report made in the Offline eTools application.



Remarks

- ◆ **All fields with an exclamation mark are mandatory and have to be completed.**
- ◆ **The activity can only be submitted after having completed all mandatory fields.**

Submit an Intermediate Report



Agreements search screen > Agreement

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement in the status 'ongoing'. The function 'New e-Interim' is shown.



Profiles

People who can submit eIntermediate Reports have:

- ◆ A Sender profile.



Submit an eIntermediate Report

1. Introduce at least all mandatory information:
 - ◆ Chapters 1 to 10;
2. Save each chapter.
3. Upload annexes if necessary.
4. Click on '**Submit**'.
5. A confirmation message is shown with your reference number (See remarks).
6. Click on '**Back**'.
7. The eIntermediate Report is submitted.

If the desk needs more information or clarifications, a message will be sent to the partner to ask to submit a new version of the eIntermediate Report.



Tips

- ◆ Instead of completing all mandatory information online, you can also upload an eIntermediate Report that was created offline.



Remarks

- ◆ **The confirmation message serves as an acknowledgement receipt. This message has a legal value. It proves that DG ECHO has received the document.**
- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

Chapters

Complete chapters 1 to 10 (IR)



eIntermediate Report > Complete chapters 1 to 10

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for the Agreement for which you wish to create an eIntermediate Report or click on an existing Intermediate Report linked to this Grant Agreement. Click on chapters 1 to 10.



Profiles

People who can complete chapters of eIntermediate Reports have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter 1: General Information

If any supplementary agreement(s) have been appraised towards this action complete the field 1.11

1. Click on **'Add a row'**.
2. Click on the calendar icon to add the **date of request**.
3. Click on the calendar icon to add the **date of Agreement**.
4. Introduce the subject of the agreement.
5. If necessary you can introduce the reference of the documents that you will annex.
6. Click on **'Save'**.



Remarks

- ◆ **Repeat these steps for each supplementary agreement.**



Chapters 2 to 10

For each chapter, complete the fields to reflect the evolution of the Action:

1. Introduce the necessary information for each question of the chapter.
2. Introduce, if necessary, the reference to the documents that are annexed.
3. Click on **'Save'**.



Remarks

- ◆ **All chapters with an exclamation mark are mandatory and have to be completed.**
You have to click on 'Save' even if you do not alter any of the information.

eFinal Report

Introduction eFinal Report

The eFinal Report gives the possibility to report any relevant or significant activities, changes and problems.

At final report stage, it is recommended to mention particular difficulties faced during the implementation, lessons learnt, ideas for future projects and to provide any other information which is considered useful for a better understanding/evaluation of the implemented actions and its achievements. Chapter 13 of the eFinal Report permits you to add conclusions and comments.

Descriptions of the related costs and means can be required, as well as any copies of press releases, press cuttings, all publications and audiovisual materials produced and any relevant visibility items or pictures thereof. As described in the guidelines for the Final Financial Report, the documents which complete the Final Report have to be annexed to the Final Report.

Functions

Create a new eFinal Report



Agreements search screen > New eFinal Report

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement in the status 'ongoing'. The function 'New e-Final' is shown.



Profiles

People who can create eFinal Reports have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Create a new eFinal Report

1. Click on **'New e-Final'**.
2. Click on **'OK'** to confirm the creation of a new e-Final report.
3. Click on each tab starting from the first.
4. Introduce the required information in the fields.
5. Click on **'Save'**.
6. Click on **'Annexes'** at the top of the navigation tab to add annexes.
7. Click on **'Submit'** at the top of the navigation tab.



Tips

- ◆ You can also use the 'upload' function to upload a validated eFinal Report made in the Offline eTools application.



Remarks

- ◆ **Tabs with a magnifying glass are 'read only'.**
- ◆ **All tabs with an exclamation mark are mandatory and have to be completed.**
- ◆ **Annexes are mandatory.**
- ◆ **The activity can only be submitted after having completed all mandatory fields.**

Submit an eFinal Report



Agreements search screen > New eFinal Report

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements search' screen is shown. Search for an Agreement in the status 'ongoing'. The function 'New e-Final' is shown.



Profiles

People who can submit eFinal Reports have:

- ◆ A Sender profile.



Submit an eFinal Report

1. Introduce at least all mandatory information:
 - ◆ Chapters 1 to 10.
 - ◆ Chapter 11;
 - ◆ Chapter 13.
2. Save each chapter.
3. Upload annexes if necessary.
4. Click on '**Submit**'.
5. A confirmation message is shown with your reference number (See remarks).
6. Click on '**Back**'.
7. The eFinal Report is submitted.

If the desk needs more information or clarifications, a message will be sent to the partner to ask to submit a new eFinal Report.



Tips

- ◆ Instead of completing all mandatory information online, you can also upload an eFinal Report that was created offline.



Remarks

- ◆ **The confirmation message serves as an acknowledgement receipt. This message has a legal value. It proves that DG ECHO has received the document.**
- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**

Chapters

Complete chapters 1 to 10 and Annex A (FR)



eFinal Report > Chapters 1 to 10 and Annex A

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements' search screen is shown. Search for an Agreement. Select the Agreement for which you wish to create an eFinal Report or click on an existing eFinal Report linked to this Agreement. Click on chapters 1 to 10 and Annex A.



Profiles

People who can complete the chapters of the eFinal Reports have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Chapters 1 to 10 and Annex A

1. Click on each chapter on the left side of the screen.
2. Introduce a justification in the fields of each chapter. Explain why a progress, goal or result was achieved or why not.
3. Complete the fields that are additionally shown.



Remarks

- ◆ **Chapters 1 to 10 and Annex A have been completed by the system.**
- ◆ **The newly added fields in these chapters have to be completed.**

Complete chapter 11 (FR)



eFinal Report > Chapter 11

Click on '**Agreement**' in the main menu of APPEL. The 'Agreements' search screen is shown. Search for an Agreement. Select the Agreement for which you wish to create an eFinal Report or click on an existing draft eFinal Report linked to this Agreement. Click on chapter 11.



Profiles

People who can complete the chapters of the eFinal Reports have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter 11: Financial overview

1. Introduce the '**Final Budget**' for each listed operation.
2. Introduce the '**Final Budget**' of the indirect costs.
3. Click on '**Save**'.
4. If the introduced amounts do not comply with the validation rules, the financial overview is not saved and the message 'Data validation' is shown.
5. Correct the amounts and click on '**Save**' once more.



Tips

- ◆ Click on the green exclamation mark right of the title to see a description of the fields and the list of the validation rules of the data.
- ◆ Only the 'Final Budget' is introduced in the Final Report.
- ◆ The 'Initial Budget', the 'Modified Budget' and the 'Committed amount' are introduced by the system because they have been provided upon the submission of the initial eRequest, the eModification Request and Intermediate Report.
- ◆ The total costs and the total financing are automatically calculated by the system.
- ◆ The intermediate and final budgets are automatically calculated by the system.



Remarks

- ◆ **All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed.**
- ◆ **As described in the guidelines for the Final Financial Report, the documents which complete the Final Report have to be annexed to the Final Report.**

Complete chapter 13 (FR)



eFinal Report > Chapter 13

Click on **'Agreement'** in the main menu of APPEL. The 'Agreements' search screen is shown. Search for an Agreement. Select the Agreement for which you wish to create an eFinal Report or click on an existing draft eFinal Report linked to this Agreement. Click on chapter 13.



Profiles

People who can complete the chapters of the eFinal Reports have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Complete chapter 13: Conclusions and comments on the humanitarian organisation

1. Introduce the **'Comments and conclusions'**.
2. Click on **'Save'**.



Remarks

- ◆ Chapter 13 only appears at the level of the eFinal Report.

Useful links

Useful links

To obtain more information about the Framework Partnership Agreement and the eSingleForm click the links below:

- ◆ More information on the FPA general web page.
- ◆ More information on the eSingleForm (final!) guidelines.
- ◆ More information on the Partner helpdesk site.

The following list shows you the Frequently used pages of the eDocumentation:

- ◆ Grant Agreement result list
- ◆ Status of the operation
- ◆ Screen structure
- ◆ eDocument functions

FAQ

Frequently Asked Questions APPEL

General questions

What is APPEL used for?

APPEL gives the opportunity to organisations that are not yet recognised as ECHO Partners, to become known to ECHO by applying for the Framework Partnership Agreement (FPA) in order to become an ECHO Partner.

APPEL is also used by existing ECHO Partners to update their administrative data. This helps the smooth and fast management of projects.

At the same time, it allows Partners to update operational and financial information which can then be used by ECHO for the periodic assessment of Partners foreseen under the FPA.

The ECHO Partner submits the eDocuments of the [eSingleForm](#) to ECHO via APPEL. He can follow up on these eDocuments at all times.

Why are there two authentication systems in APPEL?

APPEL is currently being transformed to a more comprehensive tool for a two-way electronic exchange of information between ECHO and its Partners.

Therefore, a new authentication system based on ECAS is being introduced.

The previous authentication system is still available, however Partners and potential Partners are encouraged to create their own ECAS account as soon as possible in order to familiarize themselves with the new authentication system.

Which are the types of access in ECAS?

ECAS allows three different types of profiles to access APPEL and other applications that require an ECAS account:

- ◆ A profile to consult;
- ◆ A profile to update;
- ◆ A profile to submit.

Who should use the new authentication system in APPEL?

The new authentication system is recommended for connecting to APPEL. It has to be used by all new organisations that wish to apply for the Framework Partnership Agreement (FPA).

In order to be able to connect to APPEL via the new authentication system, you first need to create your ECAS account by registering yourself in ECAS.

How can I work with the system APPEL?

You go to the site <https://webgate.ec.europa.eu/appe/>.

1. If you are already registered in ECAS
 - ◆ Click on 'connect to APPEL' listed under the new authentication system.
 - ◆ The 'ECAS login' screen is shown.
 - ◆ Change the login domain to 'External' if necessary.
 - ◆ Introduce your ECAS username and password.
 - ◆ Click on '**Submit**'.
 - ◆ The 'APPEL home' screen is shown.
2. If you are already registered and you have an APPEL username and password
 - ◆ Introduce your APPEL username and password under the old authentication system.
 - ◆ Click on 'Login'.
 - ◆ The 'APPEL home' screen is shown.
3. If you are not yet registered in ECAS or APPEL
 - ◆ Click on 'Register in ECAS' listed under the new authentication system.
 - ◆ Follow the registration process in ECAS.

What is the legality of the green colour for the traffic light?

The green status of the traffic light icon is given to the action as soon as ECHO signed the Agreement and sent it to the Partner. The traffic light itself is not legally binding.

What is the difference between 'save' and 'save as draft'?

The 'save' function checks the validity of the data and saves when the information is correct. When you save, you can still change the information afterwards as long as you haven't submitted the data. 'Save as draft' only saves the information without validating. The information always has to be saved before it is submitted.

When is an eRequest visible to DG ECHO?

The eRequest or any other eDocument is only visible in DG ECHO when it is submitted.

What is a new version of an eRequest?

As soon as you submit your eRequest, you cannot change it anymore or add extra attachments. If you want to change or add information or attachments you can use the function 'New version'. The system provides you a copy of your original version and you can alter any information. The function 'New version' becomes available as soon as you have submitted an eRequest and the Desk Officer starts with the appraisal/evaluation of your proposal. A new version can be used to introduce changes to the initial request before the signature of the Agreement.

How can an eDocument be changed once it has been submitted to DG ECHO?

eDocuments that have been submitted to DG ECHO cannot be modified. However, a new version can be created from the previous one. As long as this new version is in the status 'Draft', you can make all required changes. The new version of the eDocument will have to be submitted to DG ECHO again.

I updated the partner data in APPEL, but the changes are not visible in the system. Why?

Before your modifications are visible, DG ECHO has to approve them. Once accepted, the data will be visible in the system.

In the offline eTools application, there is a 'validation' button. Why can't I see it in APPEL?

In APPEL, the validation is done when clicking on 'save'. In the offline eTools application, there is an automatic saving function without validation. Therefore, you have a 'validation' function in the offline eTools application.

Go to the FAQ of the offline eTools application.

Is it possible to modify the control status (A or P)?

You cannot change the control status, it is automatically added by APPEL. The control status depends on your FPA. When the control status is revised, APPEL will take this into account. E.g. projects that started before a certain date will keep control status A, and the projects as of a certain date will have control mechanism P.

eSingleForm questions

You can find quite some questions about the eSingleForm on the site of the DG ECHO Partner's helpdesk.

Can APPEL be used for primary emergencies?

Yes, APPEL can be used for primary emergencies.

You can select 'yes' for the question 'Urgent action' in chapter 1 of the eRequest. Then you select 'ECHO Primary emergency decision', 'ECHO emergency decision' or 'Urgent action in the framework of another decision'.

The emergency type determines the amount of fields and the validation rules. When you create a primary emergency, fewer fields will need to be completed.

How to create a create a proposal from a Letter Of Intent?

To create a proposal starting from a Letter of Intent, you go into your LOI and click on 'New version'. A window is shown, click on 'Create an eRequest starting from the LOI' to create an eRequest starting from the LOI.

How do I submit a revised proposal?

You should submit a new version of an eRequest:

1. Go to APPEL/Requests.
2. Search for the '**eRequest**' for which you want to create a new version.
3. Click on the '**e-Request**' of your choice.
4. Click on '**New version**' in the navigation tab to confirm the creation of a new version for that eRequest.
5. Complete the **eSingle Form** by clicking on each chapter.
6. Click on '**Submit**'.

Why can't I submit a new version of an eRequest?

This can be caused by two reasons:

- ◆ You cannot submit a new version when the Desk is still working on the last submitted eRequest.
- ◆ You cannot submit a new version of the eRequest when the signature of the agreement has been launched. The system has a security control option to avoid that the Request is changed while the process for the signature is ongoing. However, the responsible Desk Officer can stop the process for the signature and allow the submission of a new version.

Why can't I create a new version of an eRequest?

New versions cannot be created or submitted during certain stages of the evaluation process.

E.g. It is impossible to create / submit a new version

- ◆ until the eDocument is assigned to a Desk Officer
- ◆ after the finalisation of the appraisal.

In case you still have to create / submit a new version, please contact the Desk Officer how to proceed.

Why can I only add 3 activities in the Logical framework, subchapter 4.3.1 of the eRequest?

The logical framework follows the FPA guidelines. The fact to have only 3 activities in the logical framework was discussed at length during the consultation on the new 2008 FPA.

The logical framework has to provide a good overview of the proposed action in line with the basics of project cycle management. It is an abbreviated version which contains a maximum of 3 main activities per result and no means and costs. The means and costs should be provided in subchapter 4.3.2. As a general rule, the logical framework should contain a maximum of three pages.

The idea is that the main activities are presented in the logical framework and all the details should be explained under subchapter 4.3.2. The logical framework in subchapter 4.3.1 should not merely be a copy of subchapter 4.3.2.

For more information, please consult the DG ECHO Partner's helpdesk.

I can introduce maximum 5 indicators per result in the logical framework. Why?

In the paper SingleForm, it was technically possible to give more than 5 indicators in the logical framework, but this was in fact not according to the rules of the eSingleForm. So in fact, the limitation to 5 indicators per result has not changed. APPEL follows the rules of the Single Form guidelines.

Technical questions

Which are the configuration requirements for APPEL?

The technical requirements for external access to APPEL are:

- ◆ An internet connection of > 256 Kb is recommended
- ◆ Internet browser IE 6.x or higher
- ◆ A screen resolution of 1280 x1024 is Recommended

Which browser should I use?

The online application runs with Internet Explorer. The offline application runs with Internet Explorer or Firefox.

Should I submit the Modification Request (MR) first, or the Intermediate Report (IR)?

In case you wish to submit a MR and an IR simultaneously, there are two ways to submit the Intermediate Report and the Modification Request:

- ◆ First the IR, then the MR
When the Intermediate Report is created, it is based on the last submitted eSingleForm. Therefore, the Intermediate Report cannot take the changes of the MR into account.
- ◆ First the MR, then the IR
In this case, the creation of the IR will have to wait until the MR is approved. This way the Intermediate Report is based on the last agreed data of the MR. The changes of the MR are reflected in the IR.

A Modification Request can be submitted any time, regardless of the IR.

PDF eSingleForm

Introduction to the PDF eSingleForm

The PDF eSingleForm is a document that presents the eSingleForm in a PDF format.

This format has been developed to replace the current Offline eTools application.

Like the present Offline eTools application, the new PDF eSingleForm is linked to an XML file. The method for working offline has been simplified thanks to a form presented in one document and entirely reusing the eSingleForm.

To start working on an eDocument, you simply need to import an empty or a started XML file, depending on what you would like to do.

The eDocument can be exchanged with your colleagues or can be exported to be transferred to the online application.

In order to understand the functioning of this new tool, please read the step-by-step documentation explained in the chapters following this introduction.

You can also contact the DG ECHO partners helpdesk to receive more information about the functionality of the PDF eSingleForm.

January 2013

Guidelines

Limitations and improvements

This new PDF eSingleForm contains several improvements but also contains some inconveniences:

- ◆ The system contains a limitation of bytes for each field, which is 3800 bytes for most fields.
- ◆ You can introduce more than 3800 bytes per field, but this amount has to be reduced to 3800 before exporting the file. A warning message is shown to indicate that you went over the byte limitation.
- ◆ The system doesn't allow the creation of the copy/pasting of tables in the fields. This is technically impossible with the PDF technology.
- ◆ It is not advised to work simultaneously on the same PDF file when it is placed on a shared drive. You may lose information.

The technical improvements provided by the PDF eSingleForm are the following:

- ◆ The logical framework is one of the most important tools for preparing and managing humanitarian aid actions. The visualisation of the matrix has improved to give a better overview of the vertical logic and also the relations between the objectives, the results, the indicators, the activities and the risks that come along.
- ◆ The PDF format also provides the possibility to highlight the modifications from other colleagues in different colours. This function, which will be explained in detail later on, facilitates the cooperation between the different people working on the document.

In general you will see that the navigation between the different chapters of the eSingleForm has been simplified compared to the previous Offline eTools application.

January 2013

Fields

Text fields



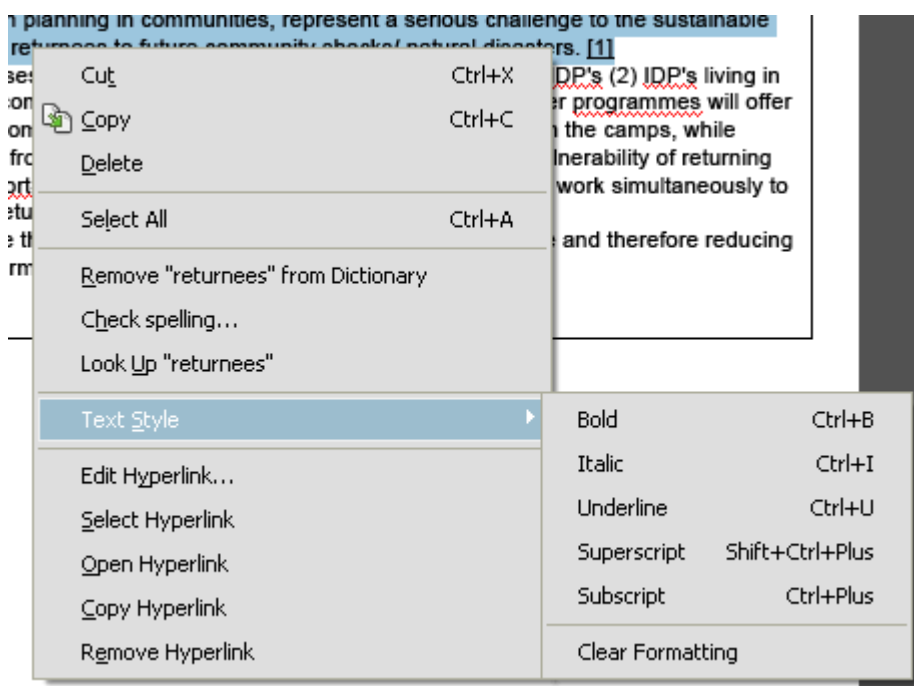
Introduce text

1. Click in the text field.
2. Introduce or paste text.
3. Click outside the field to see your text.
4. The amount of used bytes is shown left below the field.



Format text

1. Select the text that needs to be formatted.
2. Right-click with your mouse.
3. Go to 'text style'.
4. Select the styles that you prefer.



Tips

- ◆ You can also use the short key CTRL+E to format text.
- ◆ Among the formatting options, the following styles will stay: bold, colour, underline and italic.



Remarks

- ◆ The text fields do not support any tables. If you want to import an XML file containing tables, these will be transformed into non-formatted text. A warning message will be shown to inform you.
- ◆ For consultation, the tables in non-formatted text are attached to the PDF in HTML format. These cannot be transferred online.
- ◆ If you wish to add tables, please annex them via APPEL online.

Date field



Insert date

1. Click in the date field.
2. An arrow is shown right of the field.
3. Click on the arrow.
4. A calendar is shown.
5. Select a date.

01/10/2011	< October, 2011 >	
ission of the	Sun Mon Tue Wed Thu Fri Sat	he action *
	25 26 27 28 29 30 1	
start date of	2 3 4 5 6 7 8	
	9 10 11 12 13 14 15	
	16 17 18 19 20 21 22	
	23 24 25 26 27 28 29	
	30 31 1 2 3 4 5	
	☐ Today: 1/14/2013	

Save and validate

Save

- ◆ The floppy disc icon on the top left of your screen saves your document but it doesn't validate it.



Tips

- ◆ When you leave or when you lock your pc, please save the PDF file by clicking on the floppy disc icon in order not to lose any introduced information.

Validate

You can either validate the entire eSingleForm, or validate per chapter or section:

- ◆ To validate the entire eSingleForm, you go to the home page and click on '**Validate eSingleForm**'. This validation can also be done on the last page of the PDF at the end on the eSingleForm.
- ◆ To validate per chapter or section, you click on '**Validate Chap x**' in the top right corner of the PDF eSingleForm page.

The result of the validation can be different:

- ◆ If the eSingleForm or the chapter isn't ok, a new page 'Form validation: validation error details' will be shown at the end of the PDF file. This page contains a list of mistakes in the eSingleForm or in the validated chapter with the location and description of the errors.
- ◆ If the eSingleForm or the chapter is ok, the message 'Validation successful' is shown.



Tips

- ◆ To facilitate the correction of the indicated mistakes in the validation form, you can navigate through the mistakes by clicking on '**Go to next error**' in the bottom right corner of the eSingleForm PDF page.
- ◆ Fields that are not validated are indicated in red.
- ◆ Underneath each chapter, an icon is shown, which is either a green 'V' or a red 'D'. If the icon is a red 'D', the chapter is not ok. If the icon is a green 'V', the chapter is validated and ok.

Janvier 2013

Screen structure

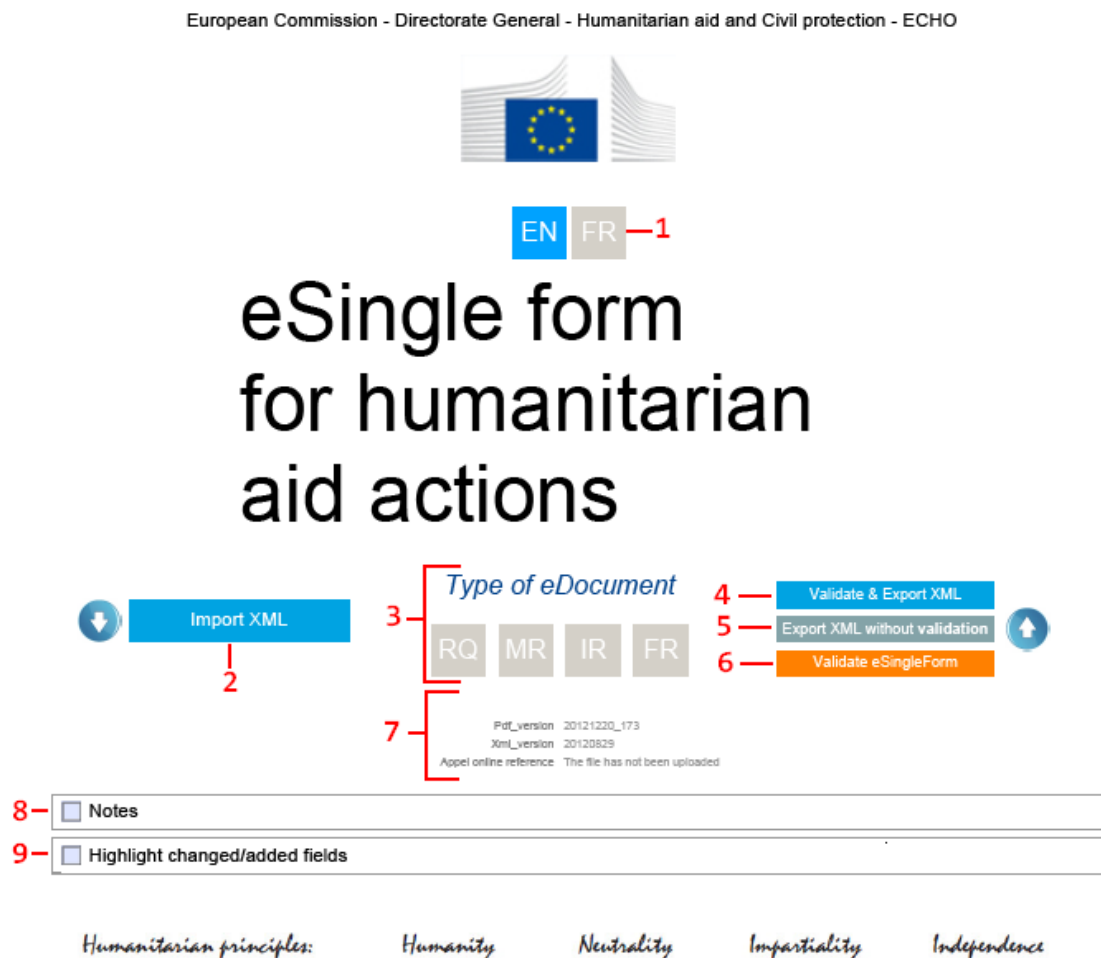
PDF eSingleForm

PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.

Home page

The image below gives a detailed description of the functions on the home page of the PDF eSingleForm:



1. EN for English or FR for French: Select the language of your choice.
2. Import XML: Click on this function to import an XML file.
3. Document type: Indicates the type of document you are working on.
4. Validate & Export: Click on this function to validate and export the eDocument.
5. Export XML without validation: Click on this function to export the XML file without validating it.
6. Validate eSingleForm: Click on this function to validate the eSingleForm.
7. Version of the PDF eSingleForm and of the XML file.
8. Notes: Select this option if you want the notes to be shown.
9. Highlight changed/added fields: Select this option if you want to see all modifications created in this eDocument.

Adobe PDF Reader functions

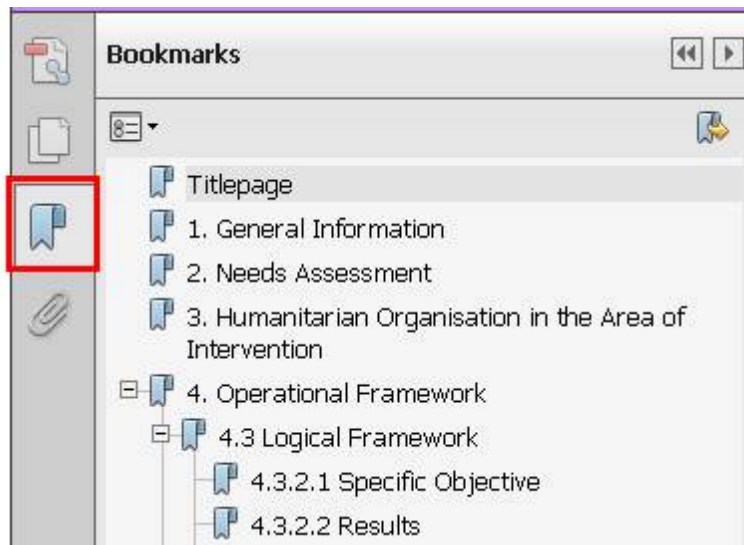
Navigate through the eSingleForm

PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.

Navigate through the eSingleForm

1. Import an existing eDocument or an XML file template.
2. Click on '**Bookmarks**'.
3. The list of chapters is shown.
4. Click on the chapter of your choice to access the chapter directly.



Tips

- ◆ You can also navigate through the eSingleForm by clicking on the scroll bar.

January 2013

Highlight mandatory fields



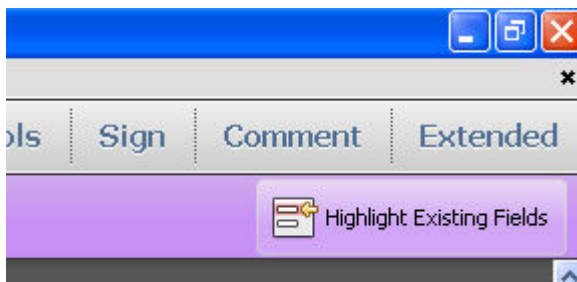
PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Highlight mandatory fields

1. Import an existing eDocument or an XML file template.
2. Click on '**Highlight Existing Fields**' in the top right corner of your screen.
3. The modifiable and mandatory fields are shown in red frames.
4. Complete the eSingleForm.
5. The modified fields are highlighted in yellow.
6. To delete the red frames, click on '**Highlight Existing Fields**' once more in the top right corner of your screen.
7. The modified fields stay highlighted in yellow.



Tips

- ◆ Only mandatory fields have a red frame.
- ◆ Modifiable fields have a background color.
- ◆ Non-modifiable fields have a white background.
- ◆ In certain stages of the eSingleForm, there will be fields that become inactive. E.g. in the eIntermediate Report, only the fields of the eIntermediate Report can be changed.

January 2013

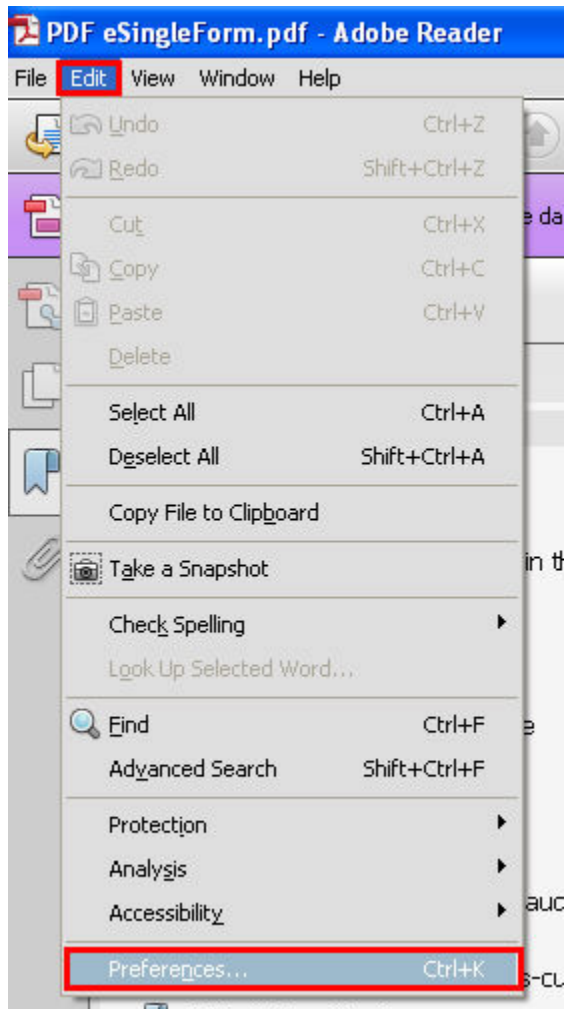
Change auto correction language

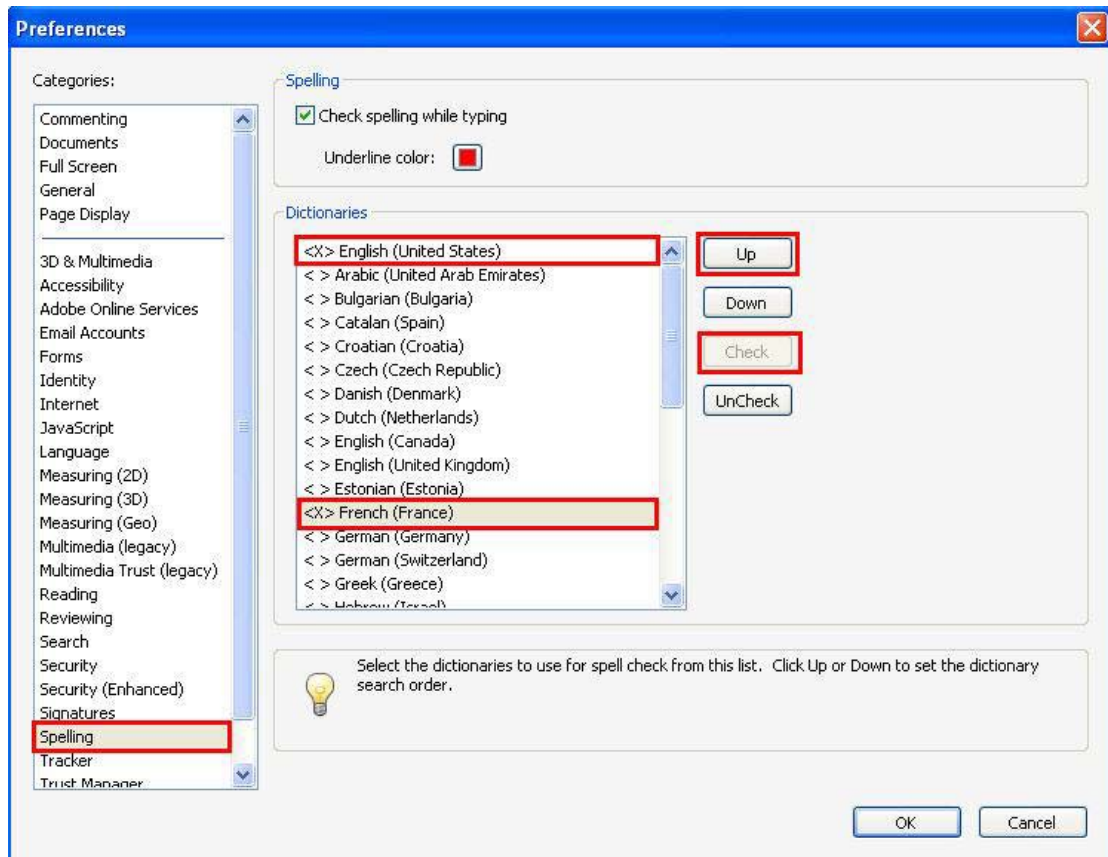
PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.

Change auto correction language

1. Import an existing eDocument or an XML file template.
2. Click on **'Edit'**.
3. Click on **'Preferences'**.
4. Click on **'Spelling'** in the category list.
5. Select the language that Adobe Reader should use for the spelling corrector.
6. Click on **'Check'**.





Tips

- ◆ In the image above, the system will correct in '**English (United States)**'. If you want the system to correct e.g. in '**French (France)**', then you need to select this language (as shown below) and click on '**Up**' to move this language to the top of the list.
- ◆ Click on a language and click on '**UnCheck**' to deselect the language.

January 2013

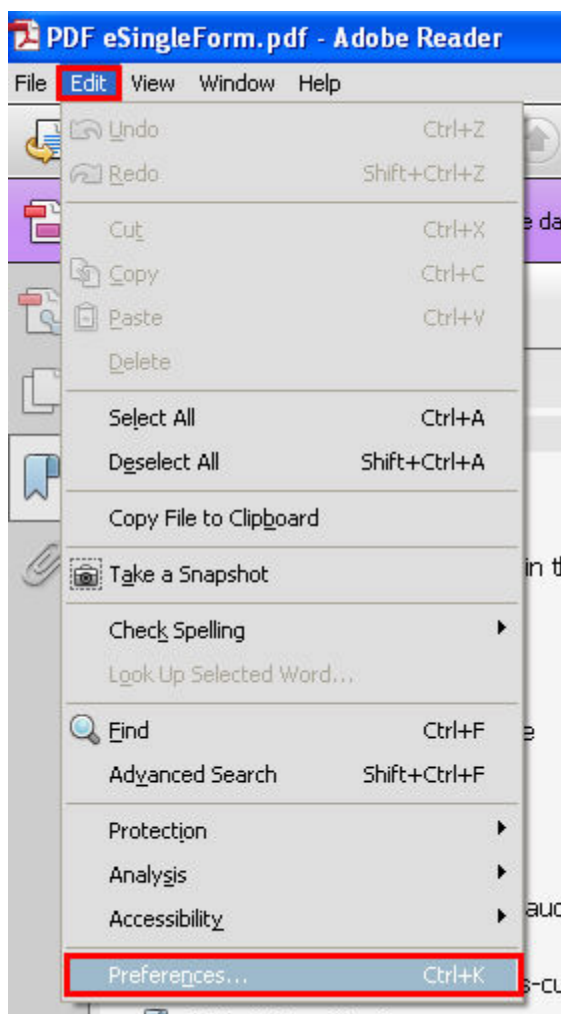
Change colours

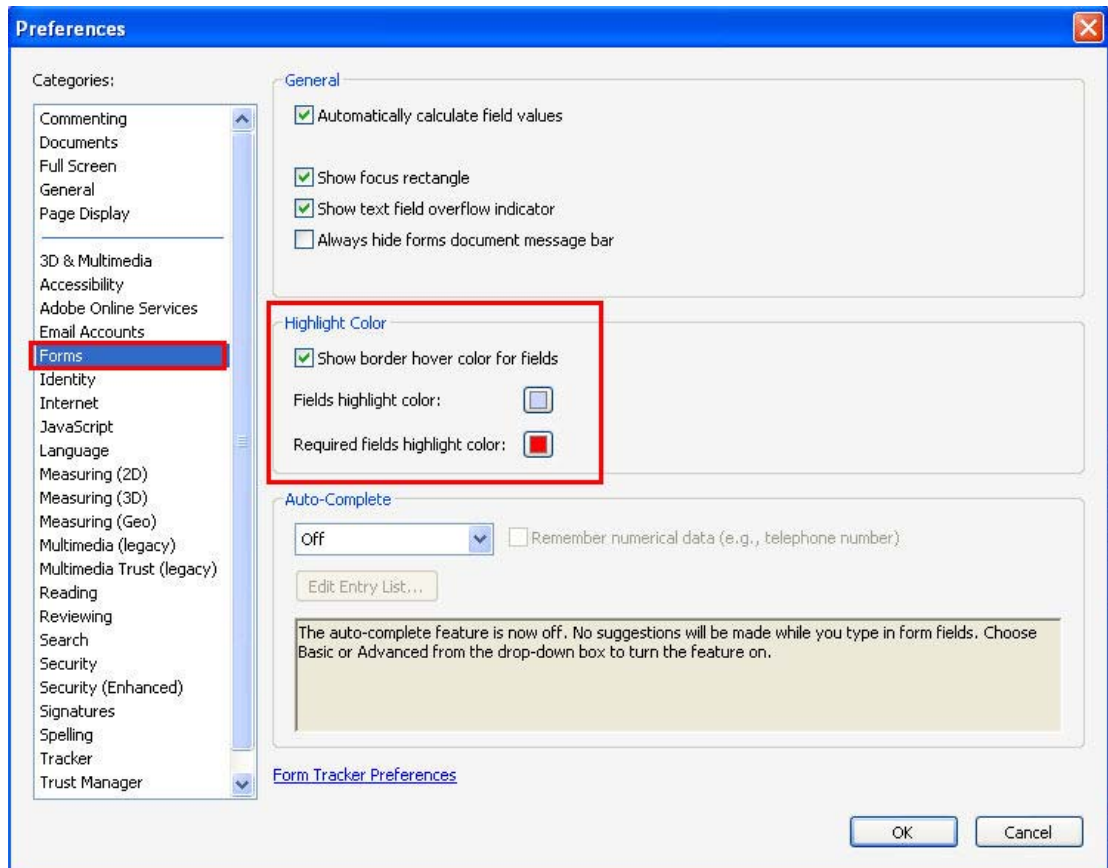
PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.

Change colours of the highlighted fields or mandatory fields

1. Import an existing eDocument or an XML file template.
2. Click on '**Edit**'.
3. Click on '**Preferences**'.
4. Click on '**Forms**' in the category list.
5. Go to the frame '**Highlight color**' and click on the colour that you wish to modify.
6. The background colour of the fields and the field frames of the mandatory fields can be modified.





January 2013

Annex documents



PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Annex documents

1. Import an existing eDocument or an XML file template.
2. Click on the icon '**Annexes**'.
3. Click on '**Add**' to attach a document.



Tips

- ◆ When you add annexes to the PDF, don't forget to add these annexes in APPEL afterwards because the annexes are not exported together with the eSingleForm content.



Remarks

- ◆ **The annexes need to be added afterwards in APPEL.**
- ◆ **Only the XML file (not the annexes) will be imported in APPEL.**

January 2013

eSF Functions

Download PDF



DG ECHO Partners Helpdesk > Download the PDF

Go to the site <http://www.dgecho-partners-helpdesk.eu> and to the section '**eTools**' to download the PDF.



Download the PDF

1. Click on the most recent version of the PDF eSingleForm.
2. Create a new file on your desktop, on a USB stick or elsewhere on your pc and name the file e.g. 'PDF eSingleForm'.
3. Download the PDF file onto the newly created file.



Tips

- ◆ For more information about the functioning of the PDF eSingleForm, please follow the interactive trainings and consult the FAQs on the DG ECHO partner helpdesk site. The contact information for support are available on the site.

January 2013

Import an xml file

PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.

Import an XML file

1. Click on the function '**Import XML**'.
2. Select the XML file that you wish to open.
3. The type of the imported eDocument will be shown in blue on the home page.



Tips

- ◆ After importing the file, you select a language on the home page of the eSingleForm.

January 2013

Complete a Humanitarian Action



PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Complete a Humanitarian Action

1. Import an existing eDocument or an XML file template.
2. Go through the PDF eSingleForm file.
3. Complete at least all mandatory information.
4. On the home page or on the last page of the PDF eSingleForm, click on 'Validate the eSingleForm' to verify the form.
5. If the eSingleForm is not ok, a new page 'Form validation: Validation error details' is added at the end of the PDF file. This page contains a list with the errors that were found in the form, with a description and the location of the errors.
6. If the eSingleForm is ok, the message 'Validation successful' is shown.
7. Click on 'Ok'.



Tips

- ◆ Please also check the chapter 'Save and validate'.
- ◆ The system contains a limitation of bytes for each field, which is 3800 bytes for most fields.
- ◆ You can introduce more than 3800 bytes per field, but this amount has to be reduced to 3800 before exporting the file. A warning message is shown to indicate that you went over the byte limitation.
- ◆ If a field contains more than 3800 bytes, the field cannot be exported. You need to reduce the amount of bytes before exporting the file.
- ◆ When you move the mouse over a field, you receive tips about the content of the field.

January 2013

Complete the logical framework



PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Complete the logical framework

1. Import an existing eDocument or an XML file template.
2. Go to chapter 4.3.1.
3. Introduce the '**Principal objective**'.
4. Introduce the '**Specific objective**'.
5. Click on '**Add an indicator**'.
6. Complete the fields of the indicator.
7. Click on '**Add a result**'.
8. Complete the fields of the result.
9. The '**Total amount**' of the result is shown after introducing it in chapter 4.3.2.
10. Add and complete all the results that are needed.
11. Go to chapter 4.3.2.
12. The information introduced in chapter 4.3.1 is copied to chapter 4.3.2.
13. Complete and introduce details in the fields wherever needed.



Tips

- ◆ You can add maximum 10 indicators for the specific objective and maximum 5 indicators per result.
- ◆ Only the three first activities per result are shown in the system.
- ◆ Only 3 activities can be added per result in chapter 4.3.1.
- ◆ You can add more activities per result in chapter 4.3.2.
- ◆ Click on '**X**' on the right of the field to delete the field.
- ◆ Click on '**Delete**' to delete an element.
- ◆ Click on '**Show**' to see the result details in chapter 4.3.2.

January 2013

Add notes



PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Add notes

1. Import your XML file.
2. Select 'Notes' at the bottom of the home page in the PDF eSingleForm.
3. Add notes in the field 'Notes' that is shown at the bottom of each chapter.

☒ Notes	Clear all notes
☐ Highlight changed/added fields	



Tips

- ◆ The text introduced in the field '**Notes**' can be formatted the same way as the other text fields.
- ◆ The fields for the notes do not have a byte limit. The field can contain as many characters as you want.
- ◆ Deselect '**Notes**' to hide the notes.
- ◆ Click on '**Delete notes**' to delete the notes.

January 2013

Highlight changes



PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Highlight changes

1. Import an XML file.
2. Select 'Highlight changed/added fields' at the bottom of the home page of the PDF eSingleForm.
3. Introduce your name in the field 'Current reviewer'.
4. The colour of the field with your name, is the colour that indicates your changes.
5. Start your changes.

☐ Notes			
☒ Highlight changed/added fields	Current reviewer: Amina	Change Reviewer	Lieselot Amina
			V



Change reviewer

1. Go to the bottom of the home page of the PDF eSingleForm.
2. Click on 'Change reviewer'.
3. Introduce your name (new reviewer).
4. Start your changes.



Stop tracking changes without validation

1. Go to the bottom of the home page of the PDF eSingleForm.
2. Deselect 'Highlight changed/added fields'.
3. The name(s) of the reviewer(s) stay visible after deselecting this option.
4. The modified fields stay highlighted in the colour of the reviewer.



Validate the changes and stop highlighting changes

1. Go to the bottom of the home page of the PDF eSingleForm.
2. Click on the 'V' that is shown next to the reviewer to validate the modifications of this person(s) and to stop the track changes.
3. The names of the reviewers are no longer shown.
4. The changed fields are no longer highlighted.

January 2013

Export XML file



PDF eSingleForm > Home page

The home page of the PDF eSingleForm is shown.



Export an XML file

1. At the bottom of the PDF eSingleForm, click on '**Validate and export XML**' to validate and export your eSingleForm, completed offline. Click on '**Export XML without validation**' to export without validating.
2. The message '**Save as**' is shown.
3. Save the XML file.



Remarks

- ◆ If one of the fields in the eSingleForm contains more bytes than authorised, you will not be able to export the file. The fields with too many bytes will be mentioned on the last page of the eSingleForm.
- ◆ If the eSingleForm is not ok, the validation error details will be shown on the last page of the eSingleForm.
- ◆ The file can either be uploaded completely or partially into APPEL online.

January 2013

Upload an offline completed Humanitarian Action



APPEL > eRequests

The eRequests search page is shown.



Profiles

People who can create eRequests have:

- ◆ An Encoder profile.
- ◆ A Sender profile.



Upload an offline completed Humanitarian Action

Upload an eSingleForm that was completed offline into APPEL online.

1. Click on **'New letter of Intent'** or **'New eRequest'**.
2. A confirmation message for the creation of the new Letter of Intent or a new eRequest is shown. Click on **'Ok'**.
3. Click on **'Upload'** at the bottom of the screen.
4. A confirmation message is shown for the creation of a new document starting from an XML file. Click on **'Ok'**.
5. Click on **'Browse'**.
6. In the message **'Choose file'**:
 1. Choose the XML file corresponding to the eSingleForm that needs to be uploaded. This XML file is located on your pc (where you saved it)
 2. Click on **'Open'**.
7. Select **'Full upload'** or **'Partial upload'** for your XML file (See tips).
8. Click on **'Upload offline document'** if you wish to submit the selected XML file.
9. If you selected **'Partial upload'**, select the parts of the document that you wish to upload.
10. Click on **'Process upload'**.
11. The message **'Upload of project is ok'** is shown.
12. Click on **'Back to eDocument'**.
13. The offline completed humanitarian action is now accessible online.



Tips

- ◆ Chapter 12 cannot be completed offline, it needs to be completed online.
- ◆ When you only completed a part of the eSingleForm, the person uploading the file (Sender) has the possibility to upload only that completed part by selecting 'Partial upload'.
- ◆ To upload an eIntermediate Report, an eRequet, and eModification Request or an eFinal Report, please consult the APPEL manual or click on **'Help'** online.



Remarks

- ◆ **When you select the incorrect XML file to upload, an error message is shown.**
- ◆ **The annexes need to be added when working online.**
- ◆ **If you only upload a part of the project, you need to validate the chapters one by one in APPEL online, also those chapters that have no new content after the upload. When everything is uploaded, click on 'Validate' in the top left corner of the online eDocument.**
- ◆ **After having uploaded the eSingleForm, you click on 'Save' and 'Submit' online, to complete the eDocument. The eDocument is now submitted to DG ECHO.**

January 2013

Offline eTools application

Introduction Offline eTools application

This online eDocumentation groups the how to's and the online trainings of the eSingleForm offline application of DG ECHO.

- ◆ Learn the eSingleForm offline application with the online training modules.
- ◆ Follow the Step by Step explanation on how to perform any functionality of the application.

The eSingleForm offline application provides you with the possibility to prepare and follow up on a humanitarian action without the need of an Internet connection.

Once you have created a Humanitarian Action with the aid of the offline application, all modifications, different requests and reports are bundled within one document on your computer. Each time you want to upload a request or report you make use of this unique document.

Get started

In order to work with the eSingleForm offline application you have to install the application on your computer. You open and install the provided 'offline_esf_x.exe' or you go to the APPEL home page where you can download the latest version from the 'downloads' menu to your computer.

Once installed, you double click on the 'Offline' application;

- ◆ The window 'ECHO – working offline' is shown.
- ◆ Click on 'start browser'.
- ◆ Your Internet browser shows the welcome screen of the offline application.
- ◆ Click on 'offline e-SingleForm'.
- ◆ Introduce your user name and password and click on login or enter.
- ◆ The start screen of the offline eSingleForm application is shown.

The different steps to create and follow up on a new Humanitarian Action are:

- ◆ Create the new action.
- ◆ Create the Initial eRequest and validate it.
- ◆ Upload it to APPEL online.

What is the eSingleForm

The eSingleForm combines different eDocuments describing the Humanitarian Action in detail.

The different eDocuments are:

eRequest

The eRequest is the first document and contains the proposal for a Humanitarian Action. The eRequest is needed in order to get permission to start a Humanitarian Action. This results in a Grant Agreement.

All following documents link/refer to this initial eRequest.

eModification Request

As soon as a Humanitarian Action has been granted by DG ECHO, any changes should be requested by use of an eModification Request. Once agreed upon, this results in a supplementary agreement and exchange of letters.

eIntermediate Report

An eIntermediate Report can be requested by DG ECHO in order to follow up your Humanitarian Action.

eFinal Report

Once a Humanitarian Action is finished, an eFinal Report is mandatory in order to close the project and make up the balance.

How to use the eSingleForm offline application eDocumentation

The eDocumentation consists out of different parts you can consult by navigating in the left column;

How to learn; Explains how the eDocumentation is structured and allows you to get to know the application by use of interactive trainings.

eSingleForm; Describes how to perform the possible actions and gives an overview of each screen of the application.



- ◆ To consult the online eDocumentation, click on the following link:
<https://webgate.ec.europa.eu/appeal/> and click then on the question mark.

Guidelines

General

To work with the Offline eTools application, you should keep the following tips in mind:

Enriched text features (bold, colours...)

Text boxes contain buttons to add enriched text features, its functioning is similar to visual editors as in MS Word.

Save to avoid data loss

Before the computer is left unattended or locked, you need to save any unfinished offline file and close the browser window to avoid data loss.

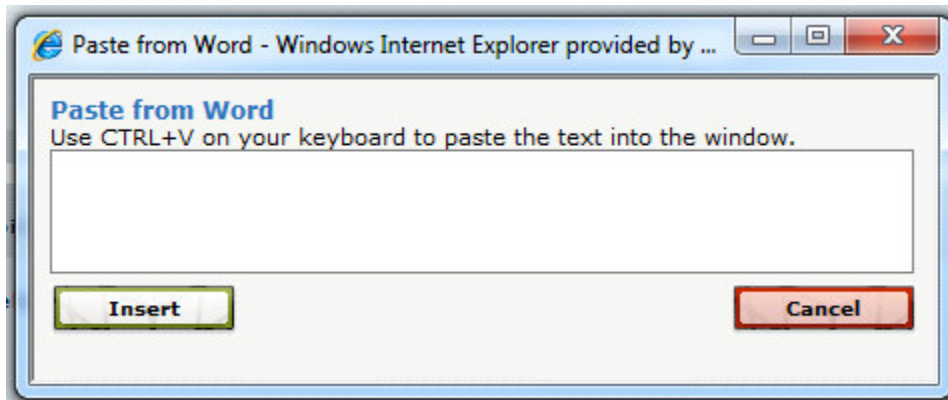
Renaming XML files

If a Partners wishes to rename the xml file, the file name cannot contain any space or any special character (accents,...). It can contain underscores or special characters. The extension always has to be .xml, otherwise the online application will not recognize the file. E.g. project_offline_01.xml is a good file name.

Copy/paste

The system has a copy/paste function. The copied text can be either a .doc format, or a .rtf format which offers the possibility to copy more characters in the field. The copying is done in an intermediate window that the system opens automatically.

Each text field has a limited amount of bytes, for example an 'é' contains 2 bytes. The number of bytes allowed is indicated under the text field. To better evaluate the number of bytes in a text, please use the notes function of the eTools offline. The 'Notes' field has no bytes limitations and allows you to correct the text before inserting it in the field. The more bytes the fields contain, the slower the application will be.



The intermediate window only appears with the browser Internet Explorer, the browser Firefox allows a direct copy/paste.

Many times the destination field does not support the size of the copied buffer. Besides, in this case, the actual size of the buffer remains unknown. Before reducing the text itself, some checks can be done:

- ◆ Bear in mind that the size of the data in the Web format will be always greater than the number of characters of the copied portion. That is why it is recommended to add the character counter in the toolbar (in Word : Tools – WordCount; in Open Office : Tools – Statistics) and to check that the selection has no more characters than the destination size.
- ◆ Many times the document has many style definitions which are transmitted in the copy/paste. To get rid of them, you can create an empty document, and paste a first time the copied data into it, specifying to "match to the destination format". The pasted text gets rid of many useless data, and its size is reduced.
- ◆ If the size is still too big, then the copy/paste must be done on less text, and you have to process text simplification.

Tables in text fields

The system allows the creation of tables inside text fields. This option has to be used carefully, because the large size of the tables in the database.



Create a table in a text field

1. Click in the text field;
2. Click on the table inserting icon;
3. The screen '**Insert/modify table**' is shown;
4. Define the general or advanced properties of the table.

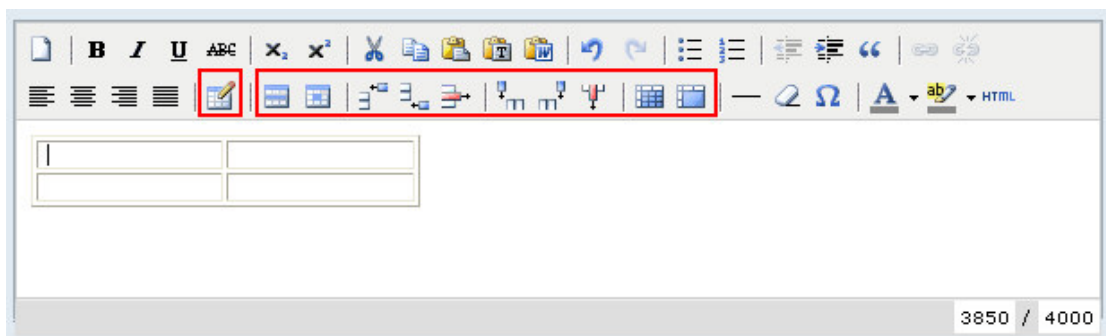


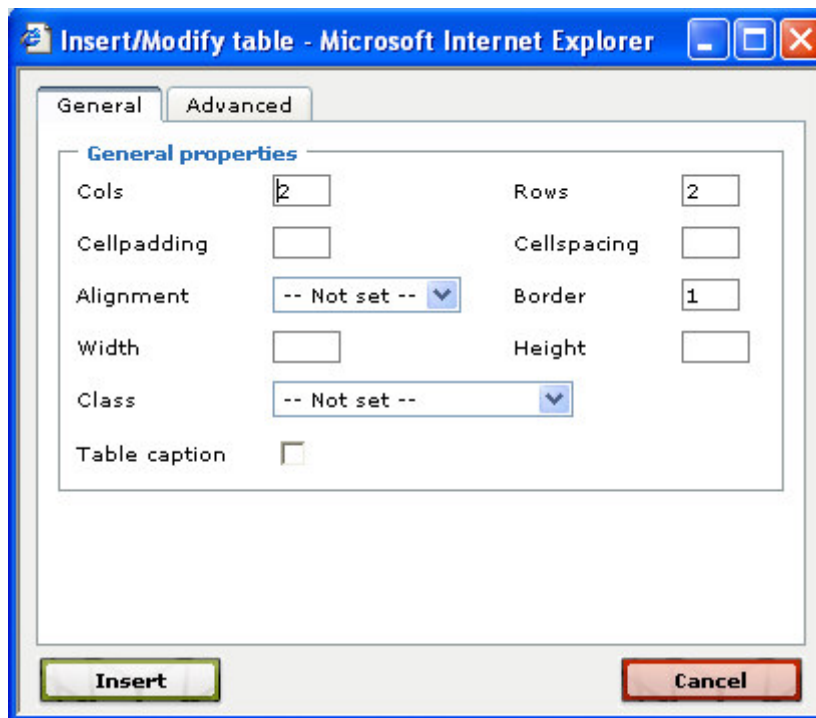
Modify a table in a text field

1. Click on the table in the text field;
2. Click on the table inserting icon;
3. The screen '**Insert/modify table**' is shown;
4. Define the general or advanced properties of the table.

Table properties

1. General properties
 1. Cols; columns (vertical).
 2. Rows; rows (horizontal);
 3. Cell padding; the space between the border of the cell and the text.
 4. Cell spacing; the space between the individual cells in the table.
 5. Alignment; the place of the table within the text field.
 6. Border; the frame around the table.
 7. Width; the width of each cell in the table.
 8. Height; the height of each cell in the table.
 9. Class; formats the text in the table.
 10. Table caption; adds a caption to the table.
2. Advanced properties
 1. Id; you can provide the table with an identity code.
 2. Summary; you can provide a summary for the table.
 3. Style; automatically summons the width, height, background image,... that you introduced in before.
 4. Language code; you can provide the table with a language code.
 5. Background image; you can introduce a url for the background image.
 6. Frame; adjusts the frame, e.g. the option 'lhs' creates a frame only on the left hand side of the table.
 7. Rules; determines how the table is divided, e.g. the option 'rows' shows no frame division between the cells on one row.
 8. Language direction; left to right or right to left.
 9. Border color; the colour of the border around the table.
 10. Background color; the colour within the table.



**Tips**

- ◆ When working in a table, the other functions of the table are activated in the toolbar (see illustration above).
- ◆ This text field is limited to 4000 bytes.

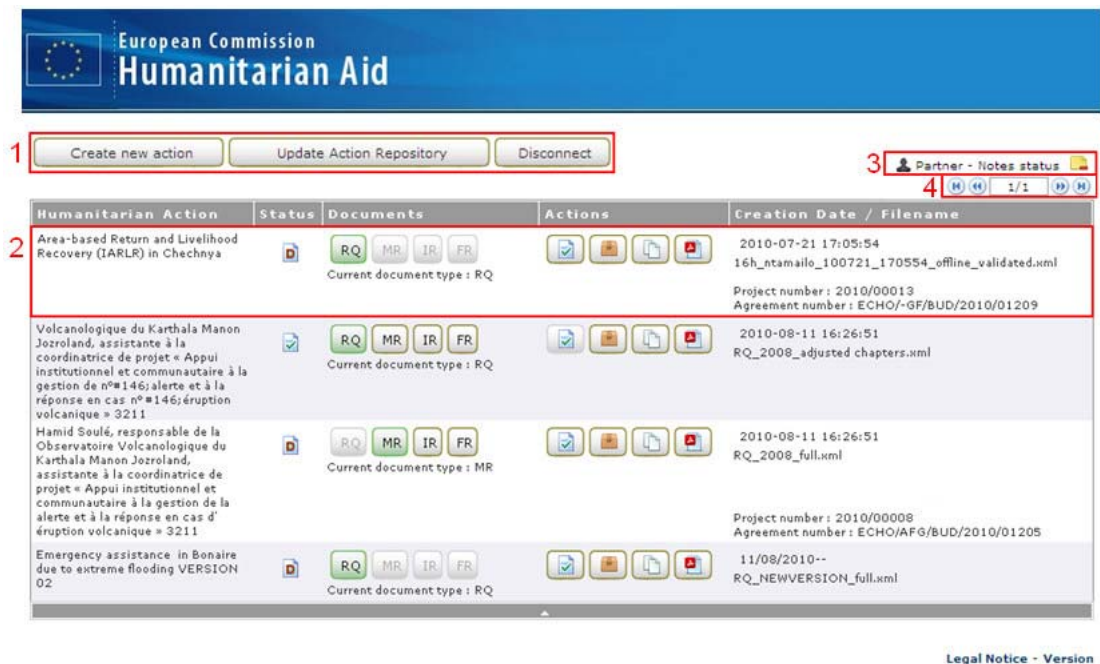
Screen structure

eSingleForm start screen

Login screen > Offline eTools application

Login to the Offline eTools application. The start screen of the Offline eTools application is shown.

The image below shows the details of the functions of the start screen of the Offline eTools application:



The Offline eTools application start screen

1. General functions:

- ◆ Create new action: starts a new Humanitarian Action.
- ◆ Update Action Repository: updates the action list.
- ◆ Disconnect: stops the application.

2. Details of an action:

- ◆ Humanitarian Action: action name as introduced by the creator.
- ◆ Status: status of the active eDocument: D for 'Draft' and V for a 'Validated' document.
- ◆ Documents: the current document type is shown together with all possible eDocuments to manage a Humanitarian Action:
 - ◆ RQ: eRequest
 - ◆ MR: eModification Request
 - ◆ IR: eIntermediate Report
 - ◆ FR: eFinal Report
- ◆ Actions: four actions are possible per eDocument:
 - ◆ Validate: to validate the introduced information. The validation is necessary to be able to upload a complete project and to be able to move on to the next document (create an IR, FR or MR).
 - ◆ Archive: to delete the action from the action list, but not from the computer.
 - ◆ Copy: create a new action based on this document.
 - ◆ Create a PDF: create a PDF file of this offline eSingleForm.
- ◆ Creation Date / Filename: contains:
 - ◆ The creation date of the action

- ◆ The filename of the project which is used to upload eDocuments to the online application.
- ◆ The project number: (If available). The project number is only available when you submitted the eRQ and exported the file.
- ◆ Agreement number: (if available). The Agreement number is only available when the eRQ is approved and you exported the file.

3. Login information and notes status

- ◆ Profile icon: the profile icon shows with which account/name has been logged on to the Offline eTools application.
- ◆ Notes status: you can click on the notes icon to show or hide the notes.

4. Page number and number of actions shown per page:

- ◆ Go to the first page in the action list.
- ◆ Go back one page in the action list.
- ◆ Page number: page number of the actions that are shown.
- ◆ Go one page further in the action list.
- ◆ Go to the last page of the action list.



Tips

- ◆ Click on the title of the column in the action list to order the list according to the corresponding criteria. Click once and the list is ordered ascending, click twice and the list is ordered descending.
- ◆ The document availability can change during the life cycle of a humanitarian action. The availability is indicated with the colours green and grey:



Green border: selected or active.



Dark grey border: inactive but accessible.



Greyed out: inactive and not accessible.



Remarks

- ◆ **The notes are only to be used for communication within your organisation. They are only available in the Offline eTools application and cannot be uploaded to APPEL.**

Functions

Install the application



DG ECHO partners helpdesk > eTools download

Go to <http://www.dgecho-partners-helpdesk.eu/etools/download> and download 'ECHO_eTools_Offline_xx' from the DG ECHO Partners helpdesk.



Install the application

1. Click on the most recent version of the Offline eTools application.
2. Create a new folder called 'ECHO-eTools' on your desktop or elsewhere on your pc, or even on a USB memory stick. Do not place it anywhere else, to avoid security issues or malfunctions.
3. Download the zip file and save it in this folder.
4. Unzip the file:
 - ♦ For Windows XP and later: Right click on the zip file and choose: 'Winzip: Extract to here'.
 - ♦ For Mac OSX: Double click on the .zip file.
5. Several files and folders are installed, such as:
 - ♦ Project_repository: the folder containing your offline files.
 - ♦ Offline: to start the application.
6. Double click on '**Offline**' (.jar file) to start the Offline eTools application.



Tips

- ♦ The Offline eTools application works on any PC (Win XP/Vista/7)/Mac(OSX)/Linux that is equipped with Java version 1.5 and higher, and a Web browser, Mozilla Firefox is advised for its speed of execution, but it can be Internet Explorer 7 and higher.
- ♦ Opera, Google Chrome and Safari are no recommended browser systems for the Offline eTools application. Even if they may perform well for most of the processing, the development team does not guaranty any support to users having problems with these browsers.



Remarks

- ♦ **Security warnings might be shown. If so, please click on 'run' to continue.**
- ♦ **Please make sure not to install the application on a shared drive, as this may cause issues with the Offline eTools application. If your desktop is on a shared drive, please install the application elsewhere, e.g. on a USB memory stick or on the hard drive of your pc.**

Upgrade to a new version



www.osor.eu/projects/echooffline

Go to <http://www.osor.eu/projects/echooffline> and download 'ECHO_eTools_Offline_xx' from OSOR.eu.



Upgrade the application

1. Go to the location where the Offline eTools application is installed on your pc.
2. Copy the folder 'partner' from **ECHO_eTools_offline\project_repository\partner** to somewhere else and remember this location.
3. Uninstall or delete the old version of the Offline eTools application from your pc.
4. Download and install the new version of the Offline eTools application to your pc.
5. Replace the 'partner' folder from **ECHO_eTools_offline\project_repository\partner** of the new Offline eTools application with the 'partner' folder copied from the old version of the Offline eTools application.

Due to an upgrade, you might have problems with old .xml projects that were created in a previous version of the Offline eTools application. It is possible to reuse old .xml projects.



Reuse old .xml project

1. Upload the old .xml projects to the online version.
2. Online, you create a new draft document with the old .xml project.
3. Export the draft document to the Offline eTools application.
4. Make sure you complete all fields, because some fields might lose their data when uploading them to the online application.



Tips

- ◆ An old xml project needs to be uploaded online so that the .xml file receives all necessary files and the correct structure.

Start the application



Your desktop > ECHO eTools folder

This is the location where you installed the files and folders for the Offline eTools application.



Start the application

1. Double click on '**Offline.jar**'.
2. The window '**ECHO – working offline**' is shown.
3. Click on '**Start browser**'.
4. The Offline module screen is shown in your internet browser with the URL <http://localhost:8080/waitserver.html>.
5. Click on '**offline e-SingleForm**' .
6. Introduce your user name in the field '**username**' (default 'partner').
7. Introduce your password in the field '**password**' (default 'echo').
8. The language can be chosen by selecting 'English' or 'French' in the drop down list.
9. Click on '**login**' or enter to continue.
10. The 'Offline module' start screen is shown.

'ECHO – working offline' is not shown

If nothing happens the first time you double click on '**Offline.jar**', do the following to resolve the problem:

In the location where you saved the 'Offline.jar', you also see a file named 'init.bat'. Double click on '**init.bat**'. Possible outcomes:

1. The '**ECHO – working offline**' screen is shown; you can continue as described in step 3.
2. The following error message is shown in the screen:

'JAVA_HOME environment variable is set incorrectly or Java runtime could not be located.

Please set the JAVA_HOME variable appropriately.'

Java 1.5 or a higher version is required to run the application. If this error message is shown, you go to <http://www.java.com> and install the java application on your computer. Once done, you double click on 'Offline.exe' to start the eSingleForm application and continue as described in the step by step information.

My computer does not recognize a ZIP file

It may happen that Windows does not know what to do with a Zip file. To overcome this problem, you can either install WinZip if your organisation has licenses on this product, or 7-zip, a free Open source file extractor that works very well (get it at <http://www.7-zip.org/>).

The URL <http://localhost:8080/waitserver.html> does not show the Welcome screen

This problem happens often in secured configurations, where localhost is not defined as the local machine. In this case use the following URL: <http://127.0.0.1:8080/waitserver.html>



Remarks

- ◆ Click on the arrow next to '**e-SingleForm offline module**' to go back to the previous screen.

- ♦ **Keep the window 'ECHO – working offline' open while working with the Offline eTools application. If you close this window, no data is saved in the file even though the programme looks functional. This window must be left open all the time.**

Username and password



Login screen > Offline eTools application

The 'Offline eTools application' login screen is shown.



Options of the login screen

1. '**username**' field.
2. '**password**' field.
3. '**login**' function: Introduce your username and password and click on 'login' or enter.
4. '**change password**' function: Click on 'change password' to change your password.
5. '**create new account**' function: Click on 'create new account' to create a new account.



Change your password

1. Introduce your '**username**'.
2. Introduce your current '**password**'.
3. Choose and introduce a '**new password**'.
4. Introduce the new password again in '**confirm new password**' to prevent typing errors.
5. Click on '**change password**'.
6. One of the following messages is shown:
 1. '**Change password procedure has failed, Wrong user password.**'
Your username or old password is incorrect. Please try again.
 2. '**The specified password is null or has not been correctly confirmed.**'
'New password' and 'confirm new password' do not match, or nothing was introduced. Please try again.
 3. '**Password modified successfully.**'
Your current password is now the one you introduced as 'new password'.
7. Click on '**Get back to homepage**' to go back.



Create a new account

1. Introduce a '**new username**'.
2. Select one or more '**role(s)**':
 1. Expert
 2. Partner
3. Introduce a '**new password**'.
4. Introduce the new password again in '**confirm new password**' to prevent typing errors.
5. Click on '**create new account**'.
6. One of the following messages is shown:
 1. '**Creation of new account procedure has failed.**'
The account you try to create already exists; the username has already been used.
You forgot to select the role(s) or to introduce a new username or password.
Please try again.
 2. '**The specified password is null or has not been correctly confirmed.**'
'New password' and 'confirm new password' do not match.
Please try again.
 3. '**Account created successfully.**'
The new account can now be used.
7. Click on '**Get back to homepage**' to go back.



Tips

- ◆ Both username and password are case sensitive.
- ◆ Always introduce a username and password.
- ◆ The default username is 'partner' and the default password is 'echo'. You can create new accounts in order to see who adjusts something in the Offline eTools application.

- ◆ Changing or creating passwords, usernames and accounts in the offline module does not affect the given passwords, usernames and accounts for the online application.

Create a new Humanitarian Action offline



Login screen > Offline eTools application

The 'Offline application' start screen is shown.



Create a new Humanitarian Action offline

1. Click on **'Create new action'**.
2. Introduce the basic data:
 1. Introduce the **'Title of the Action'**
 2. **'Urgent action'**: select **'yes'** or **'no'**.
 3. If you select **'yes'**: click on the arrow to select the kind of urgent action from the drop down list.
 4. Click **'Save'** or **'Cancel'**.
3. The action is created.
4. The saved action is shown in the list.

After the creation of a Humanitarian Action, four types of documents can be completed:

1. eRequest;
2. eModification Request;
3. eIntermediate Report;
4. eFinal Report.



Remarks

- ◆ **The title can no longer be modified after signature of the Agreement.**
- ◆ **The title should not contain data that might change, such as the number of beneficiaries.**
- ◆ **The title should include the geographical sector and the country/ies.**
- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Complete a Humanitarian Action



Login page > Offline eTools application

The 'Offline application' start screen is shown.



Complete a created Humanitarian Action offline

1. Click on the eDocument for your Humanitarian Action.
2. Click on a chapter in the tree view.
3. Introduce at least the mandatory information.
4. Click on **'validate'** to check the form for incomplete information.
5. One of the following messages is shown:
 - ◆ **'Validation is ok'** and you can continue.
 - ◆ **'Validation is not ok'**, with the incomplete information listed below.
6. Click on **'close'**.
7. Repeat these steps until the Humanitarian Action is completed and validated.
8. Click on the arrow in the bar above your action to go back to the action list.

Your Humanitarian Action is not shown in the action list

If your Humanitarian Action is not shown in the action list, try the following solutions:

- ◆ Click on the arrows at the top to search for the action on another page in the action list.
- ◆ Click on **'Update action repository'** to make sure the action list is up to date.

Auto save

Complete the action and introduce your information in the fields. The information is saved automatically when leaving a field.

Validation

By validating, you can check for mistakes;

- ◆ To check one page for mistakes, click on **'validate'** in the form.
- ◆ To check the entire eDocument for mistakes, click on **'validate'** in the list of Humanitarian Actions.



Tips

- ◆ You can create a PDF file of a certain chapter by clicking on the PDF icon next to 'Validate' at the top. If you need a PDF file of the entire Humanitarian Action, you click on the PDF icon in the list of Humanitarian Actions.



Remarks

- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Upload an offline Humanitarian Action



APPEL > eRequest

The search for eRequests screen is shown.



Profiles

People who can upload an offline Humanitarian Action to the online application have:

- ◆ An encoder profile.
- ◆ A Sender profile.



Upload an offline Humanitarian Action

To upload a completed Humanitarian Action to the online application:

1. Click on '**new Letter of Intent**' or on '**new eRequest**'.
2. A confirmation message is shown, click on '**OK**'.
3. Click on '**Upload**'.
4. A confirmation message is shown, click on '**OK**'.
5. Click on '**Browse**'.
6. In the screen 'Choose file':
 1. Select the XML file corresponding to the eSingleForm, which can be found under 'offline > project repository > Partner' on your computer.
 2. Click on '**Open**'.
7. Select '**Full upload**' or '**Partial upload**' of your XML file. (See tips)
8. Click on '**Upload offline document**' to submit the selected eSingleForm .xml file.
9. If you selected a partial upload, you need to select the part(s) of document that you want to upload.
10. Click on 'Process upload'.
11. A summary of the activity with the message 'Upload of project is ok' is shown.
12. Click on 'Back to the eDocument'.
13. The offline completed Humanitarian Action is now accessible online.



Tips

- ◆ The name of the xml file is shown on the 'eSingleForm Offline start screen' in the 'action list' in the column 'Detail'.
- ◆ Chapter 12 cannot be completed offline, it has to be completed online.
- ◆ If you are only responsible for a part of the eSingleForm, the Sender can upload only that part by choosing a partial upload.



Remarks

- ◆ **An error message is shown if the wrong file is chosen to upload.**
- ◆ **Annexes have to be added while working online.**
- ◆ **After uploading only one or a few chapters of the project, you will have to validate all chapters one by one online. You will also have to validate the chapters that have not been uploaded to the online version. The uploaded content is shown online.**
- ◆ **After uploading the Humanitarian Action, use the online functions 'Save' and 'Submit' to complete the eDocument. The eDocument is then submitted to DG ECHO.**

Upload an offline eDocument

APPEL > Agreement

Upload an offline eModification Request, eIntermediate or eFinal Report

As soon as the eRequest is validated and accepted online, the reports that were created in the Offline eTools application can also be uploaded online.

To upload a completed eDocument to the online application:

1. Select the appropriate Agreement in the search result list.
2. Click on **'New eModification Request', 'New eIntermediate Report' or 'New eFinal Report'** depending on the eDocument you wish to upload.
3. A confirmation message is shown.
4. Click on **'OK'**.
5. Click on **'Upload'**.
6. A confirmation message is shown.
7. Click on **'OK'**.
8. Click on **'Browse'**.
9. In the screen 'Choose file':
 1. Select the XML file corresponding to the eSingleForm, which is found under 'offline > project repository > partner ' on your computer.
 2. Click on **'Open'**.
10. Select **'Full upload'** or **'Partial upload'** of your XML file. (See tips)
11. Click on **'Upload offline document'** to submit the selected eSingleForm .xml file.
12. If you selected a partial upload, you need to select the part(s) of document that you want to upload.
13. Click on 'Process upload'.
14. A summary of the activity with the message 'Upload of project is ok' is shown.
15. Click on 'Back to the eDocument'.
16. The offline completed eSingleForm is now accessible online.

Tips

- ◆ The name of the xml file is shown on the 'Offline eTools start screen' in the 'action list' in the column 'Detail'.
- ◆ Chapter 12 cannot be completed offline, so it has to be completed online.
- ◆ If you are only responsible for a part of the eSingleForm, the Sender can upload only that part by choosing a partial upload.

Remarks

- ◆ **An error message is shown if the wrong file is chosen to upload.**
- ◆ **Annexes have to be added while working online.**
- ◆ **When you upload only part of a project, you have to validate all chapters afterwards. If you upload a complete project, you do not need to validate the project anymore afterwards. Whenever you upload a file partially, all chapters become 'draft' again. So first you should upload all partial documents, and at the end you save each chapter online.**
- ◆ **After uploading the Humanitarian Action online, use the functions 'Save' and 'Submit' to complete the eDocument.**

Export an eDocument to the Offline eTools application



APPEL > Agreement



Export an eDocument to the Offline eTools application

1. Search for the Grant Agreement of your choice.
2. Click on the Grant Agreement in the results list.
3. Click on 'Export'.
4. The window '**File Download**' is shown.
5. Click on '**Save**' to save the XML file.
6. Select the path '**Offline > project repository > partner**'.
7. Click on '**Save**'.
8. Connect to the Offline eTools application.
9. Click on '**Update action repository**'.
10. The action linked to the exported eDocument is shown in the list with Humanitarian Actions offline.

Archive an action



Login screen > Offline eTools application

The 'Offline application' start screen is shown.



Archive an action

1. In the action list, you click the box icon 'archive action'.
2. The project has disappeared from the action list, but not from the computer. Archived projects are placed in the 'Archive repository' on your pc.



Move an archived project back to the humanitarian action list

1. Go to the location where you installed the Offline eTools application.
2. Navigate to archive_repository/partner in the Offline eTools application.
3. Select your project from the archived projects and copy or cut it.
4. Navigate to project_repository/partner in the Offline eTools application and paste the project in the project repository.



Tips

- ◆ Archived projects are placed in the 'Archive repository' on your pc. This repository can also be opened by clicking on 'open archive folder' in the 'ECHO - working offline' screen that is shown when you start the Offline eTools application.

eSingleForm

Introduction eSingleForm

All eDocuments of the Project Cycle Management of a Humanitarian Operation are called eDocuments. All eDocuments are similar to the paper version of the SingleForm.

The different eDocuments are:

- ◆ **eRequest** (referred to as RQ).
The eRequest is the first document and contains the proposal for a Humanitarian Action. The eRequest is needed in order to get permission to start a Humanitarian Action. This results in a Grant Agreement.
All following documents link/refer to this initial eRequest.
- ◆ **eModification Request** (referred to as MR).
As soon as a Humanitarian Action has been granted by DG ECHO, any changes should be requested by use of an eModification Request. Once agreed upon, this results in a supplementary agreement and exchange of letters.
- ◆ **eIntermediate Report** (referred to as IR).
An eIntermediate Report can be requested by DG ECHO in order to follow up your Humanitarian Action. It can also be sent by the Partner to ask for additional prefinancing and/or unilateral modifications.
- ◆ **eFinal Report** (referred to as FR).
Once a Humanitarian Action is finished, an eFinal Report is mandatory in order to close the project and liquidate final payments.

These four documents constitute the paper version of the SingleForm. All chapters of the form, indicated with the mandatory icon have to be saved even if you do not alter any of the information.

Online versus Offline

The eSingleForm online is globally the same as the eSingleForm offline. There are some differences though.

The main differences between the eSingleForm online and the eSingleForm offline are the following:

- ◆ **Layout:** The layout of the offline version is different from the layout of the online version.
- ◆ **Tables:** The tables function in the Offline eTools application is more advanced than the tables function in the online application. More information can be found in the tips file.
- ◆ **Save automatically:** In the Offline eTools application, the system automatically saves the information field per field.
- ◆ **Communication:** The Offline eTools application is used as a means of communication, by exchanging the XML files and the notes. It is only used internally or to communicate with the Field Officer, Desk or RSO.
- ◆ **Notes:** The notes function is limited to the offline eTools application, and is not available online.
- ◆ **Question marks:** The users of the offline eTools application can click on the question mark to get an explanation about the screen that is shown.
- ◆ **Subchapters 4.3.1 and 4.3.2:** Subchapters 4.3.1 and 4.3.2 of the eSingleForm differ in the online and the offline systems. In the online version, encoding the results of the logical framework (4.3.2) can be done under 4.3.1. In the offline version the results have to be encoded in 4.3.2., they cannot be encoded under 4.3.1.
- ◆ **Chapter 11:** In the Offline eTools application, chapter 11 'Financial overview of the Action' contains three columns extra: one for the intermediate committed amount, one for the Final Committed Amount and one for the Final state.
- ◆ **Chapter 12:** Chapter 12 cannot be completed offline. It can only be completed online because it contains administrative data that is only available in APPEL.
- ◆ **Partner internal follow up informations:** The chapter 'Partner internal follow up informations' is only available in the offline application. The information entered in this chapter is not part of the eSingleForm and will not be visible in the online eSingleForm transmitted to DG ECHO. It is for internal use only.

Guidelines

To complete the different chapters of the eDocuments of the eSingleForm, it is necessary to follow these guidelines:

Transfer of information

As soon as you save the chapter 'General Information', some of the information introduced is transferred by the system to the Operational Framework. In this screen subchapter 4.3.1.2, the title of the action is copied from subchapter 1.2 and has been introduced by the system.

Validate

Above the Logical Framework, the function 'Validate' is shown. Before validating introduced information, you need to leave the modified field. Once you click on 'Validate', the system checks whether your information was introduced correctly.

Enriched text features (bold, colours,...)

Text boxes contain buttons to add enriched text features, its functioning is similar to visual editors as in MS Word.

Limitations and mandatory fields

To complete the Logical Framework please consider the following limitations;

1. When clicking in a field, the maximum number of characters is shown below.
2. 4.3.1. Operational Overview;
 - ◆ At least 1 result for the project has to be introduced.
 - ◆ Per result you can add a maximum of 5 indicators.
 - ◆ The content of a result cannot be null.
3. Result details;
 - ◆ The result's global costs must be greater or equal than the sum of the costs of all related activities.
 - ◆ If the emergency is other than a primary emergency, the sector and sub sector are mandatory.

Financial overview

The financial overview becomes annex II of the signed Agreement. The final financial report should remain consistent with the financial overview.

To complete the financial overview, please take the following points into account:

- ◆ **Eligible cost of Action**

The Partner can use another representation of eligible costs in line with the current practice in its organisation. These headings will become the chapters of the final financial reporting. In case personnel costs and the costs on information, communication and visibility are not explicitly available in section 4.3.2, these have to be explicitly mentioned in this table.
- ◆ **Subtotal direct eligible costs**

This amount has always to be equal to the total of all 'total amounts per result' plus the 'total amount of other costs'.
- ◆ **Direct revenue from the Action**

In case the Action itself creates income, the budgeted/finally real amount has to be mentioned here. This income can increase the overall amount of the Action. It will also be deducted when deciding DG ECHO's contribution.

Notes

The 'Notes' function enables the Partner to communicate with DG ECHO. The Partner can add a note to a field of the eSingleForm. DG ECHO members can respond to this note, in order to help the Partner to complete the eSingleForm in a better way. The notes can also be used by the members within an organisation as a means of communication for the Humanitarian Action. The files containing the notes can only be sent as XML format to be used in the Offline eTools application, and they can never be transferred to the online application. Only the online form, without the notes, will be taken into account for the evaluation by DG ECHO.

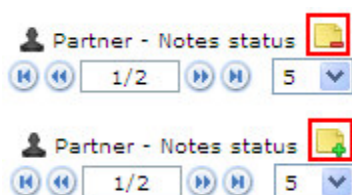
Besides a communication means, the notes can be used to make a draft version of the answers for the fields of the eSingleForm. The characters introduced in the answer fields of the eSingleForm are limited. The notes field can contain an unlimited number of bytes. The use of the notes enables you to see the number of bytes of the text before inserting it in the appropriate answer field. Copying a text from MS Word directly into the field of the eSingleForm might cause trouble, because the characters are counted in Word, not the bytes. It is advisable to edit the text in the 'Notes' field before putting it in the field of the eSingleForm.

An illustrated explanation of the use of the notes function:

Show/Hide the notes

The icon 'Notes status' top right on the screen can show or hide the notes:

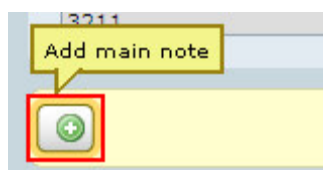
- ◆ Click on the red '-' to show the notes.
- ◆ Click on the green '+' to hide the notes.



Add a note

The note is shown in a field at the bottom of the field where you wish to add a note:

- ◆ Click on the '+' to add a principal note in the yellow field that is shown below each field.
- ◆ Click on the bin icon to delete a main note.



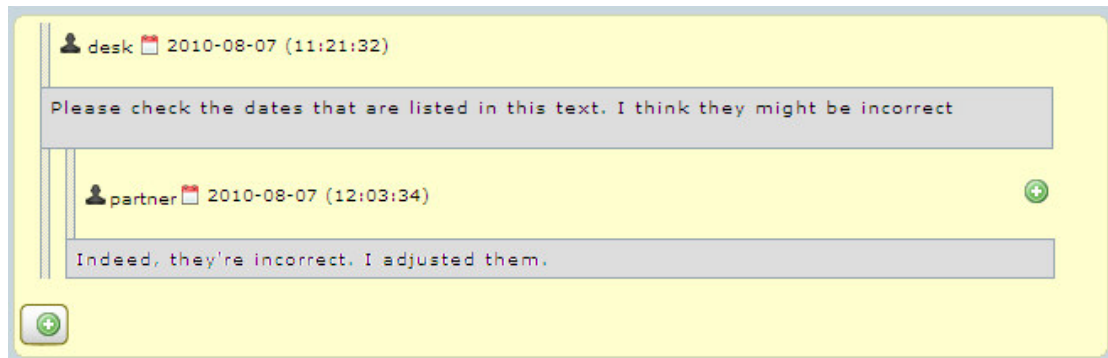
Date of request	Date of agreement	Subject	Reference
partner 2010-08-07 (11:21:49)			

Respond to a note

To respond to a note:

- ◆ Click on the '+' on the right side of the notes field.

As shown here, the notes are shown as a dialog under the field of the eSingleForm.



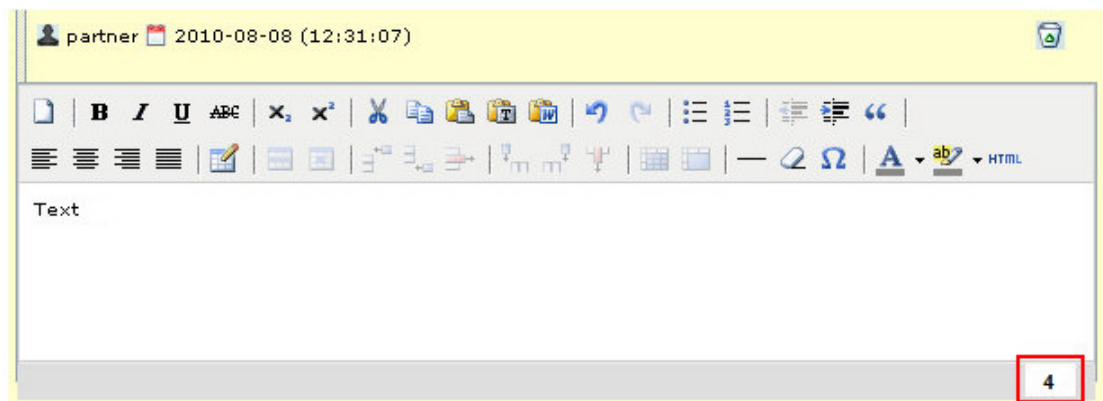
Tips

- ◆ The notes are only to be used for communication within your organisation. They are only available in the offline eSingleForm and cannot be uploaded to APPEL.
- ◆ The standard username and password are 'partner' and 'echo'. You can change this standard username and password if you wish to.

Text field

To estimate the size of your text, you can use the notes field before introducing your answer in the field of the eSingleForm:

- ◆ The Notes field can contain an unlimited number of bytes.



Remarks

- ◆ The number of bytes in the 'Reply' of the eSingleForm are limited.

Letter Of Intent

Copy the template



<http://www.dgecho-partners-helpdesk.eu> > Template for the Letter of Intent

Go to the DG ECHO Partner helpdesk site via the link http://www.dgecho-partners-helpdesk.eu/preparing_an_action/financing_decision/intention_letter.



Copy the template of the Letter of Intent

1. Save the zipped file with the template that will allow you to start a Letter of Intent in the Offline eTools application.
2. Unzip the zipped file on your pc.
3. Copy and paste the .xml file of the Letter of Intent template into the file 'Project repository/partner' that can be found on your pc on the location where you installed the Offline eTools application.



Tips

- ◆ The template can also be exported from APPEL. When creating a new Letter of Intent online, you can click on 'export' and use the exported file to work in the Offline eTools application.

November 2012

Create a new Letter of Intent offline



Offline eTools application > Start screen

This function shows the Offline application start screen with the list of humanitarian actions.



New Letter of Intent

1. Start the Offline eTools application.
2. Click on 'Update action repository'.
3. Click on '**RQ**' to complete the Letter of Intent.
4. Click on each chapter and complete the necessary information.
5. On each completed page, you click on 'Validation' to validate the data.
6. In the list with humanitarian action, you click on the 'V' to validate the entire eDocument.
7. Upload the xml file to APPEL online.



Tips

- ◆ In order to be able to submit at least one result as needed, you should encode an amount (an estimation of the amount or one symbolic euro if you don't know the amount yet).



Remarks

- ◆ All fields with an asterisk [*] and all chapters with an exclamation mark are mandatory and have to be completed, unless they contain the text 'Facultative for Letter of Intent unless specified in HIP'.
- ◆ Add at least one result and complete the details for this result.
- ◆ In chapter 11 'Financial overview', you need to add the amounts of your results so the 'Total amount' is correct.
- ◆ In chapter 11 'Financial overview', you need to add at least 1€ in the 'Eligible costs of action' field. This symbolic amount can be added in case you don't have any financial information yet. When adding it, please make sure that the other fields are empty so you can validate this section with 1€ as the 'total financing' amount.

November 2012

eRequest

Functions

Create a new eRequest



Offline eTools application > Start screen

This function shows the Offline application start screen with the list of humanitarian actions.



New eRequest

1. The 'humanitarian action' list is shown.
2. Click on '**RQ**' next to the action to create an eRequest.
3. The empty form of the eRequest is shown.
4. Click on each chapter to complete the eRequest.
5. Click on '**Validation**' to verify the eRequest.



Tips

- ◆ To see how to create a new humanitarian action, click [here](#).



Remarks

- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Chapters

Complete chapter 1: general information (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on chapter 1.



Complete chapter 1: General Information

1. Not applicable.
2. The '**Title of the Action**' was completed before, but you can change it if necessary.
3. Click on the arrow of the drop down list and select one (or more) '**Continent**' and '**Country**'. Click on '+' to add the area of intervention and specify the '**Region**'.
4. Click on the first calendar icon and select a '**Start date**'. If the Action has already started introduce the reason that justifies this situation. With the second calendar icon you delete the introduced date.
5. Introduce the number of months and days of the '**Action duration**'.
6. **Is the start date for eligibility of expenditure equal to the date of submission?**
 - ◆ Check 'Yes' or 'No'.
 - ◆ If yes, introduce the **explanation of the expenses charged to the budget between date of submission and start date of the action**.
 - ◆ If no, click on the calendar icon, select the '**start date**' and introduce an explanation.
7. Select the **requested funding modality for this agreement**.
 - ◆ In case of **100%** financing, introduce the **justification of the request**.
8. Urgent action
 - ◆ Check '**Yes**' or '**No**'.
 - ◆ If '**Yes**', select between, 'ECHO Primary emergency decision', 'ECHO emergency decision' and 'Urgent action in the framework of another decision'.
 - ◆ If you check '**Urgent action in the framework of another decision**', introduce a justification.

Rules to respect

- ◆ The exact locality/ies for the 'Area of intervention' will be detailed under 4.1 with maps and relevant reference points.
- ◆ The start date of the action should be the actual starting date of the Action in the field, it should not necessarily be the first day of a month. It may be different from the date for eligibility of expenditure. If the Action has already started explain the reason that justifies this situation.
- ◆ The mandatory field 'Duration of the Action' covers the implementation period of the Action in the field from the start date. It covers the entire duration of the Action. It should be preferably in whole months. E.g. 2 months and 10 days or 3 months and 0 days (the fields 'months' and 'days' cannot be empty. So even when it are zero days, you need to introduce '0'). Fractions of months should be avoided. The period for finalising the final report (max 3 months) is not included in the total duration. The duration of an action cannot be longer than the duration of the ECHO financing Decision, except when there are suspensions during the implementation of the action.
- ◆ The nature of expenditure corresponding to the eligibility period (time elapsed between the eligibility date and start date) should be clearly identified at chapter 4.3.2 and agreed with ECHO.
- ◆ The 100% financing option is an exception that has been foreseen for Humanitarian Actions in duly justified circumstances. The partner must provide relevant justification on the 100% funding.



Tips

- ◆ To learn more about the notes function, [click here](#).



Remarks

- ◆ **You need to add as many countries as involved in the humanitarian action.**
- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Complete chapter 2 to 4 (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on chapters 2 to 4.



Complete chapter 2: Needs Assessment

- ◆ From question 2.1 to question 2.3, introduce the appropriate information in the fields.
- ◆ Annex the necessary tables (see tips).
- ◆ Introduce the supplementary information tables if necessary.

Field 2.3 '**Summarise findings of the assessment...**' should form the basis for the intervention logic. If there is a report of the assessment it may be annexed and the results summarised here with regard to the proposed Action. When relevant, assessment of risks potentially arising from natural disasters should be provided.



Complete chapter 3: Humanitarian organization in the area of intervention

For questions 3.1 and 3.2; introduce the appropriate information in the fields.

For field 3.1 '**Humanitarian Organisation's presence in the area of intervention...**', you indicate:

- ◆ A brief overview of current and future strategy in the country;
- ◆ The current and recent activities in the country;
- ◆ A brief overview of the presence in the country (number of years, type of intervention, regions, type of set-up).



Complete chapter 4: Operational framework

1. Introduce
 - ◆ A location next to each added country.
 - ◆ The reference of the document '**Map of action location**' that you can annex online.
2. Beneficiaries
 1. Introduce the '**Total number of direct beneficiaries**' and add possible **comments**.
 2. Select one or more '**Status of the direct beneficiaries**'.
 3. Introduce the appropriate information in the field.
 4. Introduce the appropriate information in the field.
 5. Introduce the appropriate information in the field.
 6. Introduce the number of the '**Other potential beneficiaries**' and introduce more information in the required field.
 7. Select one or more sectors and introduce the '**Number of beneficiaries**' per selected sector.



Tips

- ◆ Annexed files can be attached during the upload to the online application.
- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Complete subchapters 4.3.1: Logical Framework (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on subchapters 4.3.1.



Complete subchapter 4.3.1: Objectives, results and activities

Operational overview of the action: Logical framework.

1. Introduce the '**principal objective**'.
2. Introduce the '**risks and assumptions**'.
3. Specific objective.
 1. Introduce the '**Specific objective**'.
 2. Click on '+' to add an indicator for the specific objective.
 3. Introduce the '**indicator**'.
 4. Introduce the '**target value**'.
 5. Introduce the '**source of verification**'.
 6. Click on the '**bin**' icon to delete the indicator and its source of verification.
4. Introduce the '**Preconditions**'.
5. Results
 1. Click on '+r' to add a result.
 2. Introduce the '**result**'.
 3. Click on the '**bin**' icon to remove a result.



Tips

- ◆ Click on the question mark on the right of the title '4.3.1 Operational overview of the action: log- frame' to show the help screen that explains how to complete this subchapter.
- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ The principal objective has to be according to one of the specific objectives of the corresponding ECHO Financial Decision.
- ◆ The result can be completed from here or from 4.3.2.
- ◆ Under subchapter 4.3.2 you can give the details for each of the added results.
- ◆ The information introduced at 4.3.2 is partly visible here.

Complete subchapter 4.3.2: more detailed information per result (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on subchapter 4.3.2.



Complete subchapter 4.3.2: More detailed information per result

4.3.2 More detailed Information per result

The details of each result introduced under subchapter 4.3.1 are shown under subchapter 4.3.2. In the navigation tab, click on the result you want to complete.

The information introduced under this subchapter is partly visible under subchapter 4.3.1.

The '**Detail**' screen has four tabs:

- ◆ Details
- ◆ Verifiable indicators
- ◆ Activities
- ◆ Means and costs

1. Click on the '**Details**' tab.
 1. Introduce a '**Result's short description**'.
 2. Introduce the '**Total amount (eur)**'.
 3. Click on the drop down list and select a '**Sector**' and a '**Sub-sector**'.
 4. Introduce the '**number of beneficiaries**'.
 5. Select the '**status of beneficiaries**'.
 6. Introduce a '**Detailed description**'.
2. Click on the '**Objectively verifiable indicators**' tab.
 1. Click on '**Add tab**' to add an indicator.
 2. Introduce the '**Short description**' of the indicator.
 3. Introduce the '**target value**'.
 4. Introduce the '**Sources of verification**'.
 5. Introduce a '**Detailed description**'.
 6. Click on '**delete**' to delete an indicator.
3. Click on the '**Activities**' tab.
 1. Click on '**Add tab**' to add an activity.
 2. Click on the calendar icon and select a '**Start date**'.
 3. Click on the calendar icon and select an '**End date**'.
 4. Introduce a '**Short description**'.
 5. Introduce a '**Detailed description**'.
 6. Click on '**delete**' to delete an activity.
4. Click on the tab '**Means and costs**'.
 1. Click on '**Add tab**' to add a mean.
 2. Introduce a '**Short description**'.
 3. Introduce a '**cost**'.
 4. Introduce a '**Detailed description**'.
 5. Click on '**delete**' to delete a mean.

4.3.2.4. Other costs

1. Click on '+' to add a new cost.
2. Introduce an '**Other cost**'.
3. Introduce the '**Initial amount**'.
4. Click on the '**bin**' icon to delete a cost.



Tips

- ◆ To learn more about the notes function, click [here](#).
- ◆ Click on 'Remove' to delete the result that is shown. This option is only available for the results.



Remarks

- ◆ **You can add maximum 5 indicators.**

Complete subchapters 4.4 and 4.5: Work plan and monitoring (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on subchapters 4.4 and 4.5.



Complete chapter 4.4: Work Plan

4.4 Introduce the description of the '**Work Plan**'.



Complete chapter 4.5: Monitoring, evaluation, audit and other studies

4.5.1 Introduce the explanation of the '**Monitoring of activities**' in the field.

4.5.2 Indicate the studies that will be undertaken by selecting '**Yes**' or '**No**' for each study.

4.5.3 Other studies:

1. Select '**Yes**' or '**No**'.
2. If '**Yes**', introduce an explanation in the field.



Tips

- ◆ To learn more about the notes function, click [here](#).
- ◆ Click on the question mark on the right of the title to show the help screen that explains how to complete the chapter.

Complete chapter 5 to 9 (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on chapters 5 to 9.



Complete chapter 5: Cross-cutting issues

From question 5.1 to question 5.3, introduce the appropriate information in the field.



Complete chapter 6: Field coordination

From question 6.1 to question 6.3, introduce the appropriate information in the field.



Complete chapter 7: Implementing Partners

From question 7.1 to question 7.3, introduce the appropriate information in the field.



Complete chapter 8: Security and contingency measures

1. Introduce the '**Contingency measures**' in the field.
2. Security considerations
 1. Introduce '**Security situation in the field**'.
 2. Has a specific security protocol for this action been established?
 1. Click on the arrow of the drop down list and select '**Yes**', '**No**' or '**Standard procedure**'.
 2. If you check '**Yes**', introduce an explanation of the protocol.
 3. Are field staff and expatriates informed of and trained in these procedures?
 1. Check '**Yes**' or '**No**'.

For the contingency measures under 8.1, in case some of the assumptions or risks materialize, the Partner should explain how it would react in order to mitigate their effects on the implementation of the Action and what other options would be proposed for the achievement of the envisaged results.



Complete chapter 9: Communication, visibility and information activities

From question 9.1 to question 9.3, introduce the appropriate information in the fields.



Tips

- ◆ To learn more about the notes function, click [here](#).

Complete chapter 10 and 11 (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on chapters 10 or 11.



Complete chapter 10: Human resources

1. Indicate global figures per function and status.
 1. Click on '+' to add a function.
 2. Introduce the '**Title/function**'.
 3. Click on the arrow of the drop down list and select a '**Status**'.
 4. Introduce the '**Number of persons**'.
 5. Introduce the '**Person/month per project**'.
For example; 5 persons working on a project for 6 months equals 30 man/months.
 6. Introduce '**Comments**'.
 7. Click on '+' to introduce more global figures per function and status.



Complete chapter 11: Financial Overview

1. Financial Overview (See remarks)
 1. Click on '+' to add a cost.
 2. Introduce the '**Initial Budget**' for each cost.
 3. Introduce the '**Initial Budget**' for each contribution.

In chapter 11 of the eSingleForm, the left column (Eligible cost of Action) should reflect the main chapters of the Partners financial reporting structure, as these lines will become later the chapters of the final financial report. It is advisable to have around 10 headings.



Tips

- ◆ Click on the question mark on the right of the title to show the help screen that explains how to complete the chapter.
- ◆ Chapter 11 contains the columns
 - ◆ 'Initial Budget' which can only be completed in the eRequest,
 - ◆ 'Intermediate Committed Amount' which can only be completed in the Intermediate Report
 - ◆ 'Final Committed Amount' and the 'Final state' which can only be completed in the Final Report.
- ◆ To learn more about the notes function, click here.



Remarks

- ◆ Click on '+' to add more information lines.
- ◆ The total cost and total funding are automatically calculated.
- ◆ The total cost and total funding must be equal. Click here for more information.

Complete annex A: Procurement table (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on '**Annex A: Procurement table**'.



Complete Annex A: Procurement table

Introduce the necessary information in the Procurement table and give a comment.

1. Click on '+' to add a line.
2. Complete the fields '**Description**', '**Quantity**', '**Amount (EUR)**' and '**Procurement procedure**'.
3. Select '**Yes**' or '**No**' for the '**Derogation**'.
4. Click on the calendar icon to add the '**Launch date procedure (literal)**'.
5. Introduce the '**duration (weeks)**' in the field.
6. Click on the calendar icon to add the '**Contracting date (literal)**'.
7. Introduce the '**Duration (weeks)**' in the field.
8. Introduce any necessary comments.

Rules to respect

- ◆ The Partner may attach a table with another layout (e.g. used inside the project) provided that all necessary information is available. Partners that signed an agreement with a P-control mechanism do not have to provide such a table with the Single Form at proposal or reporting stages. A whole procurement procedure will be dealt with per row.
- ◆ A procurement procedure cannot be split because it is used in several activities. If a procurement procedure has to be split, an explanation has to be given. The dates for launching and contracting can also be expressed in number of weeks after the start of the Action.



Tips

- ◆ Click on the question mark on the right of the title to show the help screen that explains how to complete the chapter.
- ◆ To learn more about the notes function, click here.



Remarks

- ◆ Click on '+' to add a new '**Description**' of the supplies, services or works in the fields.
- ◆ Repeat these steps for each change in the procurement table.

Complete Partner internal follow-up informations (RQ)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**RQ**'. The Request is shown. Click on Partner internal follow-up information.



Complete Partner internal follow-up information

1. Click on '+' to add an information line.
2. Click on the 'calendar icon' to add a '**Date**'.
3. Click on the arrow to select an '**Action**'.
4. Introduce a '**Description**' and a '**User ID**'.
5. Introduce '**Other comments**' if applicable.



Tips

- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ **This chapter does not upload to the online application. It is for internal follow-up purposes only.**

eModification Request

Functions

Create a new eModification Request



Offline eTools application > Start screen

This function shows the eSingleForm start screen with the list of humanitarian actions.



New eModification Request

1. The 'humanitarian action' list is shown.
2. Click on **'MR'** next to the action to create an eModification Request.
3. The eModification Request is shown.
4. Click on each chapter to complete the eModification Request.
5. Click on 'Validation' to verify the eModification Request.



Tips

- ◆ To see how to create a new humanitarian action, click [here](#).



Remarks

- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Chapters

Complete chapter 1: general information (MR)



Offline eTools application > Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on chapter 1.



Complete chapter 1: General Information

1. Chapter 1 is completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. Modify and/or complete, if necessary, the active fields (not greyed out) of chapter 1.
3. The two new greyed out fields that are shown in chapter 1 of the eModification Request are not activated until the Intermediate or Final Report.
- 1.10 [INT] List the supplementary agreements and exchange of letters after signature of the Agreement up to the Intermediate Report stage:
 - ◆ Date of request
 - ◆ Date of agreement
 - ◆ Subject
 - ◆ Reference
- 1.11 [FIN] List the supplementary agreements and exchange of letters after signature of the Agreement up to the Final Report stage:
 - ◆ Date of request
 - ◆ Date of agreement
 - ◆ Subject
 - ◆ Reference



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ The information between brackets [] indicate at which stage of the eSingleForm a question will be activated: [INT] indicates the Intermediate Report and [FIN] indicates the Final Report.
- ◆ To learn more about the notes function, click [here](#).

Complete chapter 2 to 4 (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on chapters 2 to 4.



Complete chapters 2 to 4

1. Chapters 2 to 4 are completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. Modify and/or complete, if necessary, the active fields (not greyed out) in the chapters 2 to 4.
3. Complete the newly active fields that are shown in the eModification Request.
4. The new greyed out fields that are shown in chapter 2.4 of the eModification Request are not activated until the Intermediate or Final Report.
 - ◆ 2.4 [INT] If changes in needs assessment at intermediate report stage, please explain.
 - ◆ 2.5 [FIN] If changes in needs assessment at final report stage, please explain
 - ◆ 3.3 [FIN] List other actions carried out by the humanitarian organisation or its implementing partners in the same period in that area of intervention and how risks for double funding were avoided.
 - ◆ 4.2.8 [INT] In case of changes, please explain.
 - ◆ 4.2.9 [FIN] In case of changes, please explain.
 - ◆ 4.2.10 [FIN] Estimate per type of beneficiaries.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ The information between brackets [] indicate at which stage of the eSingleForm a question will be activated: [INT] indicates the Intermediate Report and [FIN] indicates the Final Report.
- ◆ To learn more about the notes function, click [here](#).

Complete subchapter 4.3.1: objectives, results and activities (MR)**Offline eTools application > eModification Request**

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on subchapter 4.3.1.

**Complete subchapter 4.3.1: Objectives, results and activities**

1. The subchapter 'objectives; results and activities' is completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. Modify and/or complete the active fields of the subchapter 4.3.1. These fields are 'Risks and assumptions' and 'Results'.

**Tips**

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, click [here](#).

**Remarks**

- ◆ **The result can be completed from here or from 4.3.2.**
- ◆ **Under subchapter 4.3.2 you can give the details for each of the added results.**
- ◆ **The information introduced at 4.3.2 is partly visible here.**

Complete subchapter 4.3.2: more detailed information per result (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on subchapter 4.3.2.



Complete subchapter 4.3.2: More detailed information per result

1. The subchapter 'More detailed information per result' is completed by the system from the moment that this information has been introduced during the creation of the initial **eRequest**.
2. Modify and/or complete the active (not greyed out) fields of the subchapter 4.3.2.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ The information between brackets [] indicate at which stage of the eSingleForm a question will be activated: [INT] indicates the Intermediate Report and [FIN] indicates the Final Report.
- ◆ All fields of subchapter 'More detailed information per result' are modifiable.
- ◆ To learn more about the notes function, click [here](#).

Complete subchapters 4.4 and 4.5 (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on subchapters 4.4 to 4.5.



Complete subchapter 4.4 and 4.5

1. The subchapters 'monitoring, evaluation, audit and other studies' are completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. Modify and/or complete the active (not greyed out) fields of the subchapter 4.4 and 4.5.
3. The new greyed out fields that are shown in chapter 4.4 of the eModification Request are not activated until the Intermediate Report.
4.4.1 [INT] Revised work plan, if changed after proposal



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ The information between brackets [] indicate at which stage of the eSingleForm a question will be activated: [INT] indicates the Intermediate Report and [FIN] indicates the Final Report.
- ◆ To learn more about the notes function, click [here](#).

Complete chapter 5 to 9 (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on chapters 5 to 9.



Complete chapters 5 to 9

1. Chapters 5 to 9 are completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. The eModification Request gives you the possibility to modify and/or complete the active fields of the mentioned chapters.
3. The new greyed out fields that are shown in chapters 5 to 9 of the eModification Request are not activated until the Intermediate or Final Report.
 - ◆ 5.4 [INT] In Case of changes or problems to be addressed, please explain.
 - ◆ 5.5 [FIN] In Case of changes or problems to be addressed, please explain.
 - ◆ 6.4 [INT] In case of changes or coordination problems, please explain.
 - ◆ 6.5 [FIN] In case of changes or coordination problems, please explain.
 - ◆ 7.4 [INT] In case of changes, please explain.
 - ◆ 7.5 [FIN] In case of changes, please explain.
 - ◆ 8.3 [INT] In case of changes or problem to be addressed, please explain.
 - ◆ 8.4 [FIN] In case of changes or problem to be addressed, please explain.
 - ◆ 9.4 [INT] In case of changes, please explain.
 - ◆ 9.5 [FIN] In case of changes, please explain.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ The information between brackets [] indicate at which stage of the eSingleForm a question will be activated: [INT] indicates the Intermediate Report and [FIN] indicates the Final Report.
- ◆ To learn more about the notes function, click [here](#).

Complete chapter 10 to 11 (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on chapters 10 to 11.



Complete chapters 10 to 11

1. Chapters 10 to 11 are completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. Modify and/or complete the active (not greyed out) fields of the chapters 10 and 11.
3. The new greyed out fields that are shown in chapters 10 to 11 of the eModification Request are not activated until the Intermediate or Final Report.
 - 10.2 [INT] In case of changes, please explain.
 - 10.3 [FIN] In case of changes, please explain.
 - 11.1 [FIN] In case of other donors, please identify the donors and the amount provided



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ The information between brackets [] indicate at which stage of the eSingleForm a question will be activated: [INT] indicates the Intermediate Report and [FIN] indicates the Final Report.
- ◆ To learn more about the notes function, click [here](#).

Complete chapter 13 (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on chapter 13.



Complete chapter 13: conclusion and comments of the humanitarian organisation

1. The eModification request contains the new chapter '**Conclusions and comments of the humanitarian organisation**'.
2. This chapter contains one question:
 13. [FIN] Conclusions and comments



Tips

- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ **Field 13 is not activated until the Final Report.**

Complete annex A: Procurement table (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on Annex A.



Complete annex A: Procurement table

1. Chapter 'Annex A' has been completed by the system from the moment that this information has been introduced during the creation of the initial eRequest.
2. Modify and/or complete the active (not greyed out) fields of the subchapter 4.3.2.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, [click here](#).

Complete Partner internal follow-up informations (MR)



Offline eTools application > eModification Request

Select your Humanitarian Action in the list. Click on '**MR**'. The Modification Request is shown. Click on Partner internal follow-up information.



Complete Partner internal follow-up information

1. The chapter Partner internal follow-up informations is automatically completed by the system as soon as the information is provided when creating the initial eRequest.
2. The eModification allows you to modify and/or complete the information.



Tips

- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ **This chapter does not upload to the online application. It is for internal follow-up purposes only.**

eIntermediate Report

Functions

Create a new eIntermediate Report



Offline eTools application > Start screen

This function shows the eSingleForm start screen with the list of humanitarian actions.



New eIntermediate Report

1. The 'humanitarian action' list is shown.
2. Click on '**IR**' next to the action to create an eIntermediate Report.
3. The eIntermediate Report is shown.
4. Click on each chapter to complete the eIntermediate Report.
5. Click on 'Validation' to verify the eIntermediate Report.



Tips

- ◆ To see how to create a new humanitarian action, click [here](#).



Remarks

- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Chapters

Complete chapter 1 to 4 (IR)



Offline eTools application > Intermediate Report

Select your Humanitarian Action in the list. Click on '**IR**'. The Intermediate Report is shown. Click on chapter 1 to 4.



Complete chapters 1 to 4

1. Chapter 1 and chapters 2 to 4 are completed by the system during the creation of the initial eRequest and the eModification Request.
2. Complete the newly active fields that are shown in chapter 1 and chapters 2 to 4 of the eModification Request. The fields are activated in the Intermediate Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, click [here](#).

Complete subchapters 4.3.1 and 4.3.2 (IR)



Offline eTools application > Intermediate Report

Select your Humanitarian Action in the list. Click on 'IR'. The Intermediate Report is shown. Click on subchapters 4.3.1 to 4.3.2.



Complete subchapter 4.3.1: Operational overview of the action - Logical framework

All fields completed from the moment the information has been introduced during the creation of the initial eRequest and the eModification Request are greyed out and are no longer modifiable.



Complete subchapter 4.3.2: More detailed information per result

1. Subchapter 4.3.2 is completed during the creation of the initial eRequest and the eModification Request.
2. Complete the new fields:
 - Tab **Details**:
 - ◆ Introduce the '**Actual number of beneficiaries**'.
 - ◆ Add a **comment** in the field 'Detailed description comment'.
 - Tab **Objectively verifiable indicators**:
 - ◆ Introduce, for each indicator, the necessary information.
 - ◆ Add a **comment** for each indicator.
 - Tab **Activities**
 - ◆ Add a **comment** for each activity.
 - Tab **Means and costs**
 - ◆ Introduce, for each mean, the necessary information.
 - ◆ Add a **comment** for each mean.
 - Subchapter **4.3.2.4 Other costs**
 - ◆ Introduce the '**Intermediate Amount**'.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, click [here](#).

Complete subchapters 4.4 and 4.5 (IR)



Offline eTools application > Intermediate Report

Select your Humanitarian Action in the list. Click on '**IR**'. The Intermediate Report is shown. Click on subchapters 4.4 to 4.5.



Complete subchapters 4.4 and 4.5

1. The subchapters 'Work plan' and 'Monitoring, evaluation, audit and other studies' are completed from the moment the information has been introduced during the creation of the initial eRequest and the eModification Request.
2. Complete field 4.4.1 is greyed out in subchapter 4.4 of the eModification Request.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, [click here](#).

Complete chapter 5 to 8 (IR)



Offline eTools application > Intermediate Report

Select your Humanitarian Action in the list. Click on '**IR**'. The Intermediate Report is shown. Click on chapter 5 to 8.



Complete chapters 5 to 8

1. Fields completed from the moment the information has been introduced during the creation of the initial eRequest and the eModification Request are greyed out and are no longer modifiable.
2. Complete the new greyed out fields in chapters 5 to 8 of the eModification Request. These fields are active in the eIntermediate Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, [click here](#).

Complete chapters 9 to 11 (IR)



Offline eTools application > Intermediate Report

Select your Humanitarian Action in the list. Click on '**IR**'. The Intermediate Report is shown. Click on chapter 9 and 11.



Complete chapters 9 to 11

1. Chapter 9 and Chapters 10 to 11 completed from the moment the information has been introduced during the creation of the initial eRequest and the eModification Request are greyed out and are no longer modifiable.
2. Complete, if necessary, the greyed out 'Actual intermediate amount' in the initial eRequest. The field can only be completed in the Intermediate Report.
3. Complete the new greyed out fields of chapter 9 and chapters 10 to 11 of the eModification Request. These fields are active in the Intermediate Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, [click here](#).

Complete annex A and internal follow up informations (IR)



Offline eTools application > Intermediate Report

Select your Humanitarian Action in the list. Click on '**IR**'. The Intermediate Report is shown. Click on Annex A or internal follow up information.

Complete annex A: Procurement table

Fields completed and modified in the initial eRequest and the Modification Request can still be updated in the Intermediate Report.

Complete Partner internal follow-up informations

Fields completed and modified in the initial eRequest and the Modification Request can still be updated in the Intermediate Report.



Tips

- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ **The chapter 'Partner internal follow-up informations' does not upload to the online application. It is for internal follow-up purposes only.**

eFinal Report

Functions

Create a new eFinal Report



Offline eTools application > Final Report

This function shows the eSingleForm start screen with the list of humanitarian actions.



New eFinal Report

1. The 'humanitarian action' list is shown.
2. Click on **'FR'** next to the action to create an eFinal Report.
3. The eFinal Report. is shown.
4. Click on each chapter to complete the eFinal Report.
5. Click on 'Validation' to verify the eFinal Report.



Tips

- ◆ To see how to create a new humanitarian action, click [here](#).



Remarks

- ◆ **All fields with an exclamation mark or an asterisk [*] are mandatory and have to be completed.**

Chapters

Complete chapter 1 to 4 (FR)



Offline eTools application > Final Report

Select your Humanitarian Action in the list. Click on 'FR'. The Final Report is shown. Click on chapter 1 to 4.



Complete chapters 1 to 4

1. Chapter 1 and chapters 2 to 4 are completed from the moment the information has been introduced during the creation of the initial eRequest and the eModification Request.
2. Modify and/or complete, if necessary, active fields (not greyed out) in the chapters 1 to 4.
3. Complete the new fields of chapter 1 and chapters 2 to 4 of the eModification Request. These fields are active in the eFinal Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, click [here](#).

Complete subchapters 4.3.1 and 4.3.2 (FR)



Offline eTools application > Final Report

Select your Humanitarian Action in the list. Click on '**FR**'. The Final Report is shown. Click on subchapters 4.3.1 to 4.3.2.



Complete subchapter 4.3.1: Operational overview of the Action: Logical framework

All fields completed from the moment the information has been introduced during the creation of the initial eRequest and the eModification Request are greyed out and are no longer modifiable in the eFinal Report.



Complete subchapter 4.3.2: More detailed information per result

1. Subchapter 4.3.2 is completed from the moment the information has been introduced during the creation of the initial eRequest, the eModification Request and Intermediate Report.
2. Complete the new fields:
 - Tab **Details**:
 - ◆ Introduce the '**Final actual value**' in the field 'Amount'.
 - ◆ Introduce the '**Final actual number of beneficiaries**'.
 - ◆ Add a **comment** in the field 'Detailed description comment'.
 - Tab **Objectively verifiable indicators**:
 - ◆ Introduce, for each indicator, the necessary information.
 - ◆ Add a **comment** for each indicator.
 - Tab **Activities**
 - ◆ Add a **comment** for each activity.
 - Tab **Means and costs**
 - ◆ Introduce, for each mean, the necessary information.
 - ◆ Add a **comment** for each mean.
 - Subchapter **4.3.2.4 Other costs**
 - ◆ Introduce the '**Final Amount**'.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ Certain fields, completed and modified during the initial eRequest and the eModification Request are greyed out and can no longer be modified in the eFinal Report.
- ◆ To learn more about the notes function, [click here](#).

Complete subchapters 4.4 and 4.5 (FR)



Offline eTools application > Final Report

Select your Humanitarian Action in the list. Click on '**FR**'. The Final Report is shown. Click on chapter 4.4 to 4.5.



Complete subchapters 4.4 and 4.5

The subchapters 'Work plan' and 'Monitoring, evaluation, audit and other studies' are completed from the moment the information has been introduced during the creation of the initial eRequest, the eModification Request and the eIntermediate Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ Certain fields, completed and modified during the initial eRequest and the eModification Request are greyed out and can no longer be modified in the eFinal Report.
- ◆ To learn more about the notes function, [click here](#).

Complete chapters 5 to 8 (FR)



Offline eTools application > Final Report

Select your Humanitarian Action in the list. Click on '**FR**'. The Final Report is shown. Click on chapter 5 to 8.



Complete chapters 5 to 8

1. Chapters 5 to 8 are completed from the moment the information has been introduced during the creation of the initial eRequest, the eModification Request and the eIntermediate Report.
2. Complete the new greyed out fields in chapters 5 to 8 of the eModification Request. These fields are active in the eFinal Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, [click here](#).

Complete chapters 9 to 11 (FR)



Offline eTools application > Final Report

Select your Humanitarian Action in the list. Click on '**FR**'. The Final Report is shown. Click on chapter 9 to 12.



Complete chapters 9 to 11

1. Chapter 9 and chapters 10 to 11 are completed from the moment the information has been introduced during the creation of the initial eRequest, the eModification Request and the eIntermediate Report.
2. Complete, if necessary, the greyed out 'Actual final amount' in the initial eRequest. The field can only be completed in the eFinal Report.
3. Complete the new greyed out fields of chapter 9 and chapters 10 to 11 of the eModification Request. These fields are active in the eFinal Report.



Tips

- ◆ Greyed out fields are not modifiable.
- ◆ To learn more about the notes function, [click here](#).

Complete conclusions, annexes and internal follow up (FR)



Offline eTools application > Final Report

Select your Humanitarian Action in the list. Click on '**FR**'. The Final Report is shown. Click on Conclusions, Annexes and internal follow up.



Complete the conclusions and humanitarian organizations comments

Chapter 13 is new and is shown in the eFinal:

13 Introduce 'Conclusions and humanitarian organizations comments'



Complete Annex A: Procurement table

Fields completed and modified in the initial eRequest and the Modification Request can still be updated in the Final Report.



Complete the internal follow-up informations

Fields completed and modified in the initial eRequest and the Modification Request can still be updated in the Final Report.



Tips

- ◆ To learn more about the notes function, click [here](#).



Remarks

- ◆ **Chapter 'Partner internal follow-up informations' does not upload to the online application. It is for internal follow-up purposes only.**

FAQ

Frequently Asked Questions Offline

General questions

What is the offline eTools application?

The offline eTools application gives you the possibility to follow up on a Humanitarian Action without being connected to the internet.

How do I install the offline eTools application?

To install the offline eTools application, please go to the topic 'Install the offline eTools application on your computer'.

What is the difference between a full upload and a partial upload?

A partial upload is used to upload one or a few chapters of the document. You can choose 'Upload' -> 'Partial Upload' in APPEL and then indicate which chapters you want to upload to the draft document in APPEL.

A partial upload results in a non-validated document in APPEL. This means that you will need to go to each chapter and click the 'save' button at the bottom of the screen.

After uploading a chapter, the whole document in APPEL becomes draft again, even if some of the chapters were validated or saved online before. Therefore, it is best to upload all chapters first, then save them, and then submit the document.

A full upload is used to upload an entire document. It is best to validate it in the offline eTools application. A complete validated upload results in a document that is also validated in APPEL.

How are different users created in the offline eTools application?

A user account only works on the computer where you added the new account.

Go to the 'username and password' topic in the eDocumentation to learn how to create a new user account.

Technical questions

Which browser should be used?

The offline application runs with Internet Explorer or Firefox. The online application runs with Internet Explorer.

The error message 'resource not found' is shown. What should I do?

The error message 'resource not found' can be shown when starting the offline eTools application due to security settings on some computers.

The standard url in the offline eTools application browser window is <http://localhost:8080/waitserver.html>. You can change this standard url to <http://127.0.0.1:8080/waitserver.html> to avoid this error message.

To learn more about possible startup problems, please go to the topic 'Start the application'.

Can the filename of the .xml be changed?

Changing the name of the .xml file directly in the offline eTools application is not possible.

To change the .xml filename, you can go to 'offline > project repository > partner ' on your computer, and rename the filename here. You can choose any name, however no special characters can be used not even accents (e.g. 'é'). You cannot use spaces either, underscores can be used instead. These rules should be respected to avoid problems when uploading the file to APPEL.

Can the action repository be moved, e.g. to a shared server?

This is not possible at the moment, because the offline eTools application was created to be used in the field, where there is no access to internet or a shared server. It is only recently that the offline eTools application is used at the office as well, due to the efficiency of the application.

My text is not too long according to MS Word, why can't I paste it in the offline application?

This is because word counts the characters of the text, and the offline eTools application counts the bytes of the text when copy/pasting.

So each text field in the offline application has a limited amount of bytes, for example an 'é' contains 2 bytes. To better evaluate the number of bytes in a text, please use the notes function of the eTools offline.

Should I uninstall the offline eTools application before I install a new version?

No, you don't have to uninstall the offline eTools application before you install a new version.

You can have different versions of the offline eTools application on your computer. They will not conflict with each other, or affect each other.

Can I use my previously created .xml files in the new version of the offline eTools application?

Yes you can. When you upgrade to a new version of the offline eTools application, you can reuse the .xml files that you created in the previous version of the offline eTools application. You will just have to follow these steps:

1. Upload the old .xml projects to the online version.
2. Online, you create a new draft document with the old .xml project.
3. Export the draft document to the Offline eTools application.
4. Check whether all fields are completed. The fields can loose information during the upload process.

Glossary

A

Action: A humanitarian aid Operation implemented by a Humanitarian Organisation and funded by the European Commission.

Ad Hoc Decision: One of the four categories of Financing Decisions. It intends to give a one-off response to meet localised humanitarian needs, and is generally built on the basis of a limited set of elements. It can be articulated on the basis of a single sector or theme of intervention, a single or limited number of Partners or a limited set of specific objectives.

Agreement: A generic term covering both Grant Agreements and Contribution Agreements. Encompasses the General Conditions, Special Conditions, Annexes I and II (description of the Action; financial overview), and Action proposal.

Amendment: Gives you the possibility to modify a signed contract. After the creation of the amendment, the contract has different versions. These are shown in the search results list of a contract and the consultation screen of a contract.

APPEL: The web application of DG ECHO that permits the partners of DG ECHO to manage humanitarian projects.

C

Commitment: A commitment of payments and recovery orders that come from the information systems ABACWKFL and ABACFED.

Committed costs: Costs for which a legal obligation exists (e.g. on the basis of a contract) and is entered into the Partner's accounts. (See also Eligible Costs).

D

Decision: A financial decision about a humanitarian action taken by DG ECHO to provide assistance to victims of humanitarian disasters in the world. Decisions are also a module of the HOPE intranet application, accessible through the intranet of DG ECHO.

Decommitment: An annulment of a commitment.

DG ECHO: The Directorate General European Commission Humanitarian Organisation.

Direct costs: Any expenditure directly linked to the implementation of the Action.

E

ECAS: The European Commission Authentication System which is an authentication system recommended for the use of APPEL. An ECAS account consists of a unique personal identifier (username and password) that permits to establish a secured connection with all applications of the commission that use the same authentication system instead of having to create a different identifier for each application.

Eligible costs: Costs that are (i) necessary and reasonable for the implementation of the Action, (ii) actually incurred, complying with the principles of sound financial management, (iii) committed during the Eligibility Period of the Action, (iv) identifiable, recorded in the accounting records of the Humanitarian Organisation or its implementing partners, (v) determined according to the applicable accounting standards of the country where the Humanitarian Organisation is established and according to the usual cost accounting practices of the Humanitarian Organisation, (vi) backed by original supporting evidence, verifiable, and (vii) complying with the requirements of applicable tax and social legislation.

Emergency (financing) decision: One of the four categories of Financing Decisions covering new crises and established humanitarian crises where humanitarian aid is already under way, but where continuing uncertainty and instability requires an appropriate, rapid and flexible response, e.g. where there are sudden deteriorating weather conditions within a natural disaster situation (a crisis within a crisis).

eSingleForm: The form to be completed by the Partners for the submission of their Action proposals and reports. The single form evolves along with the Action it refers to. The eSingleForm evolves with the action that it is linked with.

F

Financing Decision: Act by which the Commission allocates funds from the General Budget to finance humanitarian Actions. It identifies i.e. the objectives of humanitarian interventions, the region, and type of activities, funds to be committed, eligibility period and potential partners. There are 4 categories of Financing Decisions: Primary Emergency Decisions, Emergency Decisions, Global Plans and Ad Hoc Decisions.

Framework Partnership Agreement (FPA): An agreement between DG ECHO and the NGOs which establishes the principles of partnership between DG ECHO and the NGOs defines their respective roles, rights and obligations and establishes the rules applicable to the Actions implemented by the NGOs and financed by DG ECHO.

G

Grant Agreement: An agreement signed by DG ECHO and an NGO, covering an Action. This agreement results from the approval of the final proposition of the financial request sent by the partner to DG ECHO.

I

IDP: Internally Displaced People. These people were forced to flee from their residence but stayed within their home country.

Indirect costs: Costs necessary for the functioning of the organisation which cannot be directly linked to the implementation of the Action. They amount to a maximum of 7% of the total Direct Costs.

M

Modification: A modification is a convention to reflect operational or other changes in the execution of the action. A modification can be a unilateral modification, of an exchange of letters or of a complementary convention.

P

Partner: A Humanitarian Organisation which has signed one of the following partnership agreements: the Framework Partnership Agreement with Non- Governmental Organisations, the Framework Partnership Agreement with International Organisations and the Financial and Administrative Framework Agreement between the United Nations and the European Community

Primary emergency (financing) Decision: One of the four categories of Financing Decisions designed to cover the first immediate needs of the people concerned in the hours and days after the outbreak of a new humanitarian crisis. Such crises are unpredictable in terms of where, when and how they strike. It is a first initial response which does not aim to cover all needs. The Primary Emergency Financing Decision is appropriate in the case of sudden onset of conflicts or natural disasters such as earthquakes.

R

Request: A financial request of a humanitarian action sent by a partner to DG ECHO.

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