2015 Quick guide to the SmartSimple on-line portal (making an application)

POWERED BY SMARTSIMPLE

Disclaimer

Please read this document carefully prior to using the on-line portal.

This document does not replace, but is complimentary to the following documents, available for download on http://www.epa.ie/pubs/reports/research/call2015:

- Guide for applicants
- 2015 Terms and Conditions for support of grant awards
- 2015 Call Technical Descriptions

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More Information

For further information and assistance with the EPA on-line portal (SmartSimple), please contact: research@epa.ie.

What is the purpose of this Guide…

This guide shows you how to use SmartSimple to make an application for a grant award.

For details of the topics in the call, refer to the 'Call Technical Description'

For hints and tips of what to include in the application upload and the budget template, refer to the '2015 Guide for applicants'

How to…

Click the links below to quickly navigate this document

Do five things to make life easier for myself

Our top five things to make life easier for you are:

1. Before you begin - **Enable pop-ups** from the portal

2. Before you begin - **Add** donotreply@epa.ie to your email contacts list

3. While using the portal - Make **'Save Draft'** your friend – and click it often

4. While using the portal – **don't** press the refresh button – it will log you out. Press 'save draft' instead
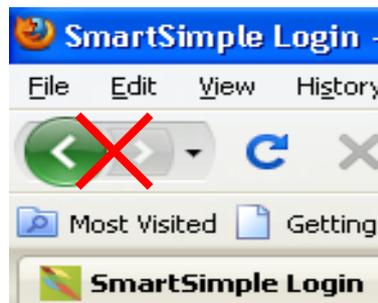
5. **Don't forget your dates!** Please note (a) the application deadline and (b) the organisation approval deadline, and make sure you don't miss either of them.

Applying for a grant is a 2-step process –it is YOUR responsibility to ensure that the application is submitted before the application deadline, and it is also YOUR responsibility to ensure that your organisation approves your submission before the organisation deadline. You must have organisational approval before the proposal is valid.

Deadline dates are specified in the Technical Description

Register myself as a user of the on-line system

Already registered…

If you have been awarded a grant since 2007, or have applied for a grant since 2010, you will already be a registered user of the system. Jump to: 'How to… Login to the system as a registered user'

New user…

1. Open the registration form:
   http://epa.smartsimple.ie/files/347278/f92681/grant_applicant_registration.html
2. The applicant registration page will be displayed:

3. Begin by typing in your organisation name. (Applicants for research fellowships should enter the name of their proposed host university). If your organisation is already registered in the system, it will appear (predictive text) once you begin to type.

If your organisation does not appear automatically, email research@epa.ie. The EPA will contact you regarding details of your organisation which will then be added to the database. Once the organisation is on the database, the EPA will email you advising that you can continue with your registration.

4. Complete all the boxes in the registration form.
5. Read the EPA privacy policy. Tick the box confirming that you have read and understood the privacy policy.

☐ * By ticking this box and registering as a user of the Site, you are confirming that you have fully read and understand the EPA Privacy Policy (click here to view the EPA Privacy Policy).

Submit

6. Click the 'Submit' button.
7. If you have completed the registration successfully, the message below will display automatically

Applicant Registration

THANK YOU

You have successfully registered to the EPA online Application Portal. An email containing your username & password will be sent to you shortly from donotreply@epa.ie. If you do not receive the email please check your spam filters. You may now close this window.

8. You will also receive an automated email from donotreply@epa.ie. This will include login details.
9. You are now a registered user of the portal.

Login to the system as a registered user

1. Click on the portal link: https://epa.smartsimple.ie/
2. This will open the login window below.
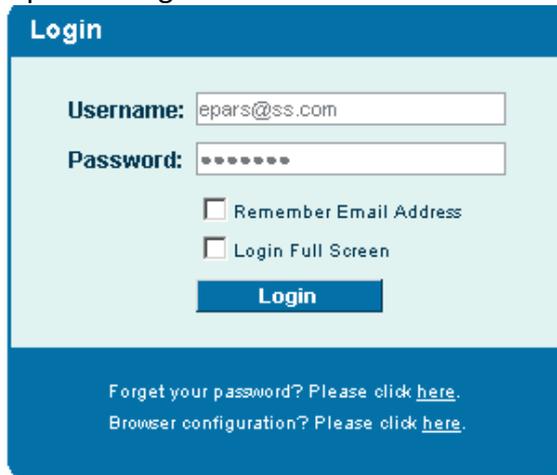
3. Login using:
    a. Your e-mail address as your username
    b. Your password (in the registration confirmation email from donotreply@epa.ie)
4. Click login, and you are now on your home page
5. Forgot your password: click 'Forgot your password', enter your email address when prompted, and a password will be sent to you.

Ensure my computer is compatible with the portal

The portal is accessed using the internet. You can access the portal from any computer connected to the internet.

In order to access the system, all users must have access to a computer meeting the minimum specifications listed below.

Minimum Hardware Requirements

Processor	Pentium P233
RAM	64MB
VDU	1024x768 display
Display	16 bit display colours

Minimum Software Requirements

Operating System	Microsoft Windows 95 or higher
	MAC OS 8 or higher
Screen Resolution	800x600 or higher
Browser	Internet Explorer 5.0 or higher
	Netscape 4.78 or higher
	Mozilla 1.73 or higher
	Mozilla Firebird or later
Session Cookies	Must support session cookies and must be enabled
JavaScript	Must be supported by the browser and must be enabled
Popups	Must be allowed

Enable pop-ups

1. You must enable pop-ups to use the portal correctly
2. When you logon to portal for the first time, the following window may be displayed. Right click on the bar indicated to un-block the pop-ups.
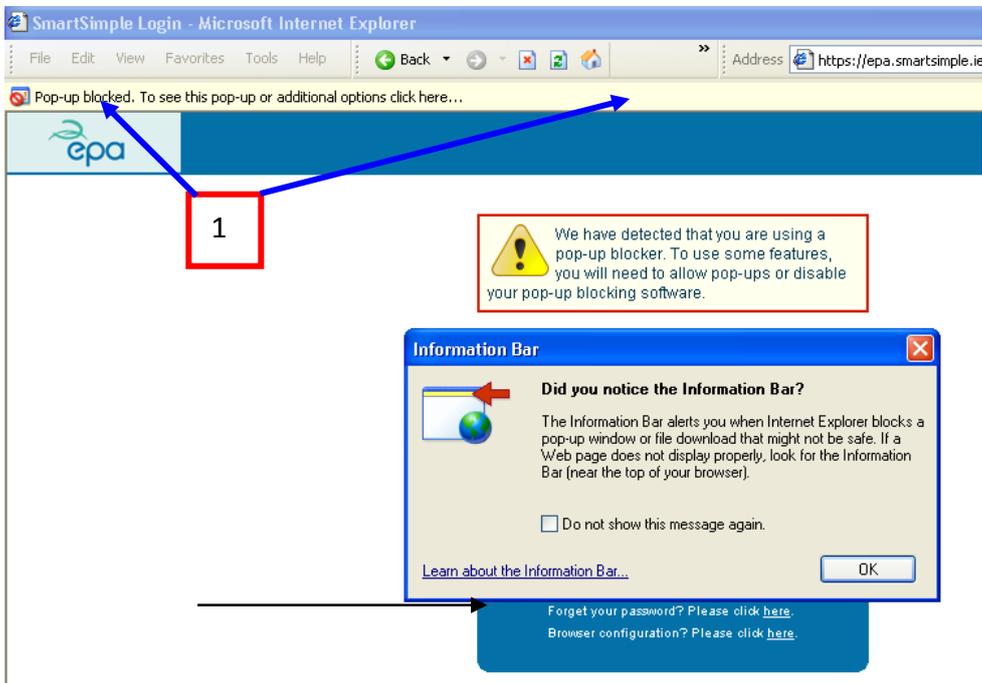
1. Choose the option 'Always allow pop-ups from this site'
2. Answer yes to the question 'Would you like to allow pop-ups from https://epa.smartsimple.ie?'

Navigate through the icons on the home screen

Once you login, you will see your customised home page, which will look something like the example below (don't worry if not exactly as per your view, these icons are customised per user):
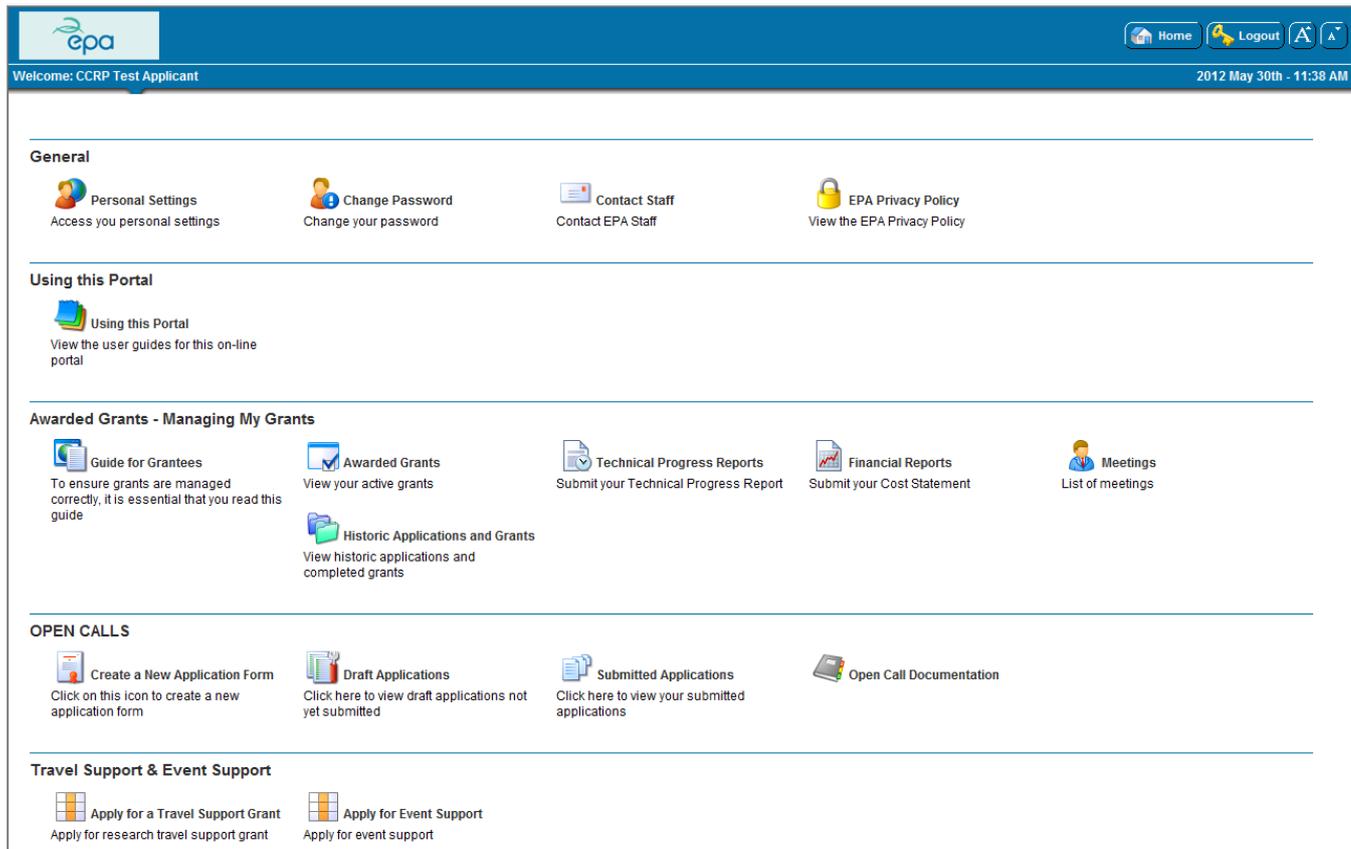
The following icons are required to make an application:

Section headed: General	
Personal Settings — Access you personal settings	Personal Settings gives you the option to change your personal details at any time.
Change Password — Click here to change your password	Change Password gives you the option to change your password at any time. It is recommended that you change your password the first time you login.
Section headed: Using this Portal	
Using this Portal — View the user guides for this on-line portal	User guides for the portal, in case you get stuck
Section headed: Open Calls	
Create a New Application Form — Click on this icon to create a new application form	Click on this icon to create a new application form

Draft Applications Click here to view draft applications not yet submitted	If you save your application to return to it at a later time, it will be saved here
Submitted Applications Click here to view your submitted applications	Once you are happy with your application, and submit it for authorization, it will be stored here.
Open Call Documentation	This icon contains the guide for applicants, terms and conditions for support of grant awards, and the call technical description
Travel Support & Event Support	
Apply for a Travel Support Grant Apply for research travel support grant	Use this icon to apply for travel support
Apply for Event Support Apply for event support	Use this icon to apply for event support

Update personal information

1. To view your personal details, as held in the database, click the personal setting icon:

   Personal Settings Access you personal settings

2. Your details will be displayed in an editable table:

First Name:	CCRP
Last Name:	Test Applicant
Position:	.
Salutation:	Ms
Phone:	123456
Email:	ccrp.applicant@epa.ie

Company:	Test Organisation-EPA Support
Address:	Test Address
Address 2:	
City/Town:	Test City
County:	
Country:	Ireland
Postal Code:	
Latitude: / Longitude:	

Phone Ext.:

Last Updated 30 May 2012 12:00PM

Updated By CCRP Test Applicant

Additional Information

* Applicant Gender: Female

Mobile:

Department:

EPA Pin: A881 85S5 7084 2C8X XXXX X

CGPP Applicant

Type of Organisation (CGPP Only):

Sector:

Save

3. We recommend that you keep your details up-to-date
4. To save any changes, press 'save'
5. Please note that this is where to find your EPA PIN

Change login password

1. We recommend that all new users change their password the first time they login, by clicking the 'change password' icon:

Change Password
Click here to change your password

2. Choose a secure password that meets the following minimum-security criteria:
   a. Minimum length should be at least six characters.
   b. Includes a mix of symbols, letters and numbers.
   c. Cannot be the same as your previous password.
3. Click 'submit' to confirm your new password
4. Passwords are case sensitive.

Create a new application form

1. Click on the icon titled 'Create a New Application Form'
2. Each project identified in the Technical Description has a unique Call Topic Reference. From the drop-down box, choose the Call Topic Reference that corresponds to the project you wish to apply for:

3. **DOUBLE CHECK:** Are you sure you've picked the correct Call Topic Reference – you will be applying for the wrong project if you get this wrong. For some call topic references you will also be asked to select the project type that you are applying for. Details of the scale and duration of each project type can be found in the Guide for Applicants.
4. Once you're sure, click 'create a new proposal'
5. The application form will then appear, with a pop-up reminding you to 'click save draft' – Click 'ok' on the pop-up
6. CLICK 'Save Draft' IMMEDIATELY
7. On the blue banner, press the 'Home' key to return to the home page
8. To return to your draft application click the 'draft applications' icon

Draft Applications
Click here to view draft applications not yet submitted

9. Your draft application form is stored here until you are ready to submit

Save my application form as a draft, to return to it later

1. You can save your draft application at any stage by clicking 'Save Draft'
2. When you are ready to work on the application again, log back into the system
3. Click the 'draft applications' icon on your homepage

Draft Applications

Click here to view draft applications not yet submitted

4. Your draft application form is stored here. Click on the application that you wish to complete, and it will open in editable format.

Complete the on-line application screen

1. Click the 'draft applications' icon on your home page

Draft Applications

Click here to view draft applications not yet submitted

2. Your draft application form is stored here. Click on the application that you wish to complete, and it will open in editable format.
3. Ensure that you complete all required on-screen fields. These fields come in several types, as outlined below:

Field type	What is required
Mandatory	Mandatory fields are indicated by a red asterix (*). You can leave a mandatory field blank while an application is in draft. However, all mandatory fields must be complete before clicking 'submit'
Dropdown menu	Select one of the options available from the dropdown menu.
Free-text	Word limits are applied to free-text fields – be careful if copying and pasting, as only the words up to the word-count limit will be copied into the field. Any extra words will NOT be copied.
Tick-box	Select one of the options available from the tick boxes available on screen.
Numeric	Only numeric characters (i.e. no commas, full stops or symbols) should be used in these fields.
Auto-Populated	Some fields will auto-populate from the information supplied by you at registration or by the EPA. You cannot amend such fields.
Template uploads	Where a template is provided, it MUST be used to submit an application. Any deviation will invalidate the proposal. Before writing your proposal, take note of the specified file format and page limits of the uploads.

4. Don't forget to click 'save draft' on a regular basis, to ensure you don't lose any of your work
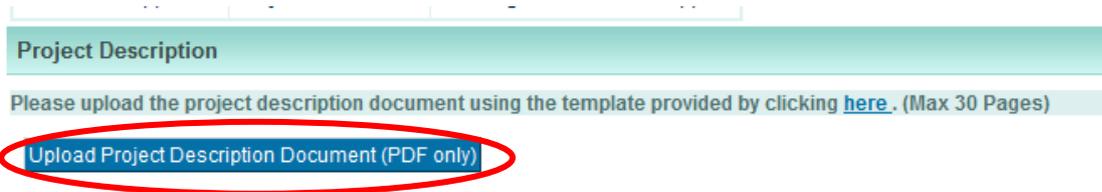
Upload my project description

Three important things to note:

1. **You MUST use the template (application forms not in the template layout will be invalid)**
2. **The upload will only be accepted in pdf format**
3. **Do not exceed the max page allowance for your type of project – if exceeded, the upload will be rejected by the EPA**

1. Scroll down the application screen to 'project description' section. Download the template by clicking 'here'.

Project Description

Please upload the project description document using the template provided by clicking here . (Max 30 Pages)

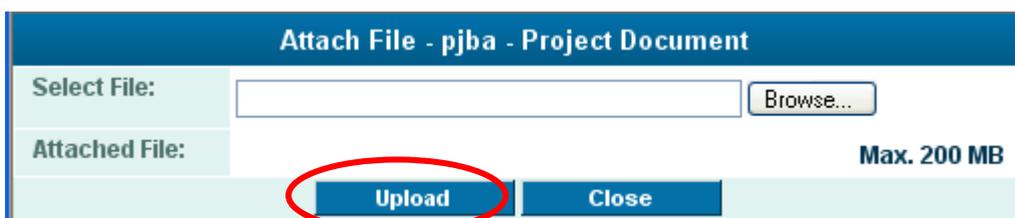Upload Project Description Document (PDF only)

2. Complete the template. Please refer to the 'guide for applicants', which provides tips and hints on making a good application.
3. Save your completed template on your computer. Convert it into pdf format and save again.
4. Click 'upload project description document (pdf only)'

Project Description

Please upload the project description document using the template provided by clicking here . (Max 30 Pages)

Upload Project Description Document (PDF only)

5. Select the file you wish to upload by clicking on the 'browse' button and choosing the appropriate file.

Attach File - pjba - Project Document

Select File:		Browse...
Attached File:		Max. 200 MB
	Upload	Close

6. Attach your application form by clicking 'upload'

Attach File - pjba - Project Document

Select File:		Browse...
Attached File:		Max. 200 MB
	Upload	Close

7. If upload is successful, the following pop-up will appear.

The page at https://epa.smartsimple.ie says:

⚠ File uploaded successfully. File name will be displayed when page is refreshed

OK

8. Click 'OK'
9. Click 'close'
10. Finally, to complete the upload, press 'Save draft'

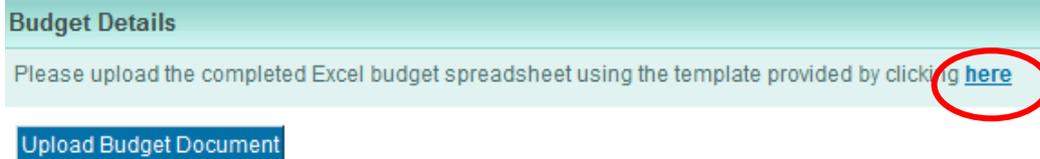**Note**: To replace/delete a document previously uploaded:
- Click on the 'Upload' button
- Click the **Delete** 'Delete' button in the 'Attach File' Window; and
- Repeat steps 6-11.

Upload my budget template

Two important things to note:

1. **You MUST use the template (application forms not in the template layout will be invalid)**
2. **The upload will only be accepted in xls format**

1. Scroll down the application screen to 'Budget Details' section
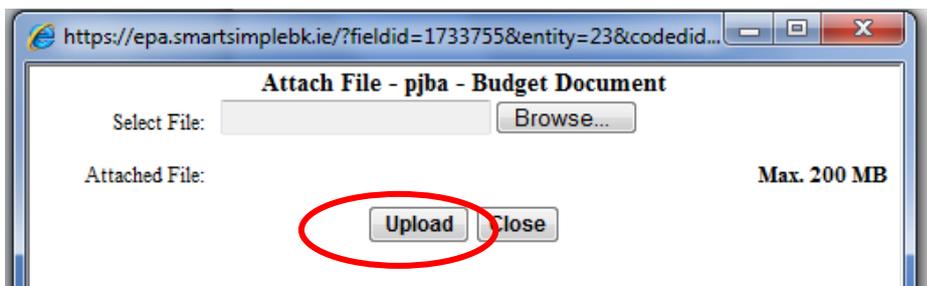2. Download the template by clicking 'here'.

3. Complete the template. Please refer to the 'Guide for Applicants' and the instructions on the template
4. Save your completed template on your computer in xls format.
5. Click 'Upload budget document)'
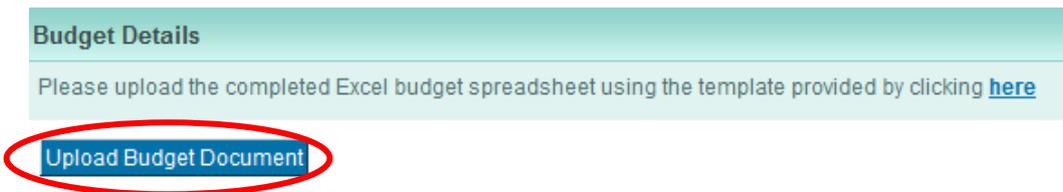
6. Select the file you wish to upload by clicking on the 'Browse' button and choosing the appropriate file.
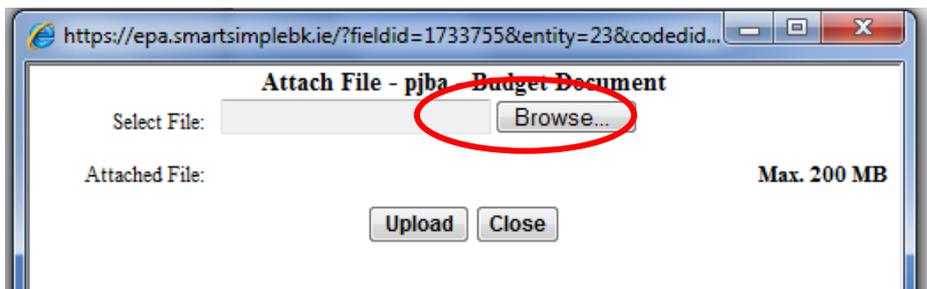
7. Attach your application form by clicking 'upload'

8. If upload is successful, the following pop-up will appear.

The page at https://epa.smartsimple.ie says:

⚠ File uploaded successfully. File name will be displayed when page is refreshed

[OK]

9. Click 'OK'
10. Click 'close'
11. Finally, to complete the upload, press 'Save draft'

Note: To replace/delete a document previously uploaded:
- Click on the 'Upload' button
- Click the [**Delete**] 'Delete' button in the 'Attach File' Window; and
- Repeat steps 6-11.

Find my EPA PIN number

1. Every registered user is given a unique personal information number (EPA PIN).
2. To find your EPA PIN, click the 'personal settings' icon on your home page

Personal Settings
Access you personal settings

3. Your EPA PIN number is shown on the 'additional information' section

4. The EPA PIN is used if:
   a. you want to add a project participant to your application
   b. another applicant wants to add you as a project participant to their application

Add a project participant (who has an EPA PIN number)

1. Ask your proposed participant to provide you with their EPA PIN
2. On the application screen, scroll down to the section headed 'adding project participants and their organisations'. Click 'Click here to add a Participant'

3. The 'assign project participant' window will open. Complete the 'EPA PIN' and 'researcher last name' fields. Click 'retrieve project participant'

4. The proposed participant's details will appear. If this is the person that you wish to add as a participant, click 'associate project participant with application'

5. A confirmation pop-up window will appear on the screen.

The page at https://epa.smartsimplebk.ie sa...

⚠ Alice Participant1 has been added to the Grant.

OK
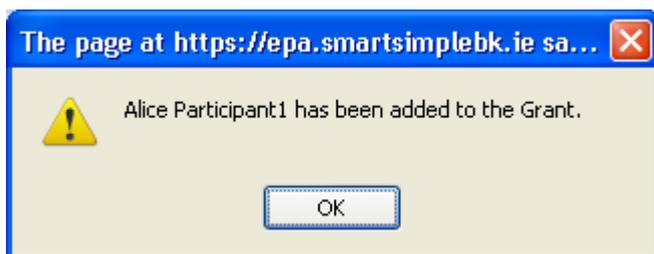
6. Click 'OK'
7. Click 'Close'
8. To complete the update, click 'save draft'
9. The name of the project participant will now appear in the project coordinator & participants table.

Project Coordinator and Participants

First Name	Last Name	Role	Organisation
Alice	Applicant	Project Coordinator	Test Organisation for Script
Alice	Participant1	Project Participant	Test Organisation 2

10. To add more project participants, repeat the steps 1-9 above

Add a project participant (who does not have a EPA PIN number)

If your proposed participant is not registered, you must invite them to do so.

1. Scroll down the application screen to the section titled 'adding project participants and their organisations'. Click 'here'
2. On the application screen, scroll down to the section headed 'Adding project participants and their organisations'. Click 'here'

3. The 'adding a project participant' window will open. Complete requested fields. Click 'submit'.

4. You must enter a valid email address for your participant, as the registration request is sent via email.
5. A pop-up window will appear.

6. Your proposed participant will receive an automated email asking them to register
7. We recommend that you contact the participant yourself, to ensure that they register on time. It is your responsibility, not the EPA's, to ensure all participants are registered.
8. Once the proposed project participants have registered, ask them to send you their EPA PIN.
9. You can then add them as a participant (details of how to do so are in this Guide under the section titled '…Add a project participant (who has a EPA PIN number)'

Submit the completed application form for authorisation

1) Check that you have done the following:

☐	I have double checked that the Call Topic Reference I selected (to create my application form) is correct
☐	I have read the Technical Description, and my proposal is relevant to the project I am applying for
☐	I have read the terms and conditions for support of grant awards award
☐	I have completed all fields on the application screen
☐	I completed and uploaded my project description, using the template from the portal and with reference to the '2012 guide for applicants'.
☐	I have completed and uploaded my budget form, using the template from the portal and with reference to the '2012 guide for applicants'.
☐	I have added all project participants (if necessary)

2) Then scroll down the application screen to the section titled: 'authorisation and declaration'. Check the boxes confirming that you agree with the declaration and that you have uploaded the appropriate documents

Authorisation and Declaration

Part A: Declaration
I confirm that I have read the Technical Description, Terms and Conditions and Guide for Applicants available in this portal via the home button.

I declare that the information I have provided in this application is complete and accurate.

I agree that the Environmental Protection Agency may make any enquiries it considers necessary to verify the information therein and consent to the release by other people or organisations of such information as may be necessary for that purpose.

I note that applicants may be disqualified from consideration for funding if false or misleading information is provided and/or the application is not specific to one of the topics listed in the associated Technical Description document available on the EPA website.

* Agree: ☐ I confirm agreement with the above statements

Name of Project Coordinator: CCRP Test Applicant

* I have uploaded all required documents (Including the Budget Document): ☐ Yes

Date: 30 May 2012

Email of Project Coordinator: ccrp.applicant@epa.ie

3) Click 'save draft'
4) Click 'submit'. The following pop-up will appear

The page at https://epa.smartsimple.ie says:

❓ Are you sure you want to submit this form? No further changes can be made once it has been submitted.

[OK]   [Cancel]

5) Click 'OK' to submit your form
6) The system will check the proposal to ensure uploads are in the correct format and that all mandatory fields have been completed. If all is in order, the following message will appear. You will also receive an automated email from donotreply@epa.ie confirming that your proposal has been successfully submitted pending organisational approval.
7) The content of your application is now locked. You can still view the application by clicking on the 'submitted applications' icon on the Home page.
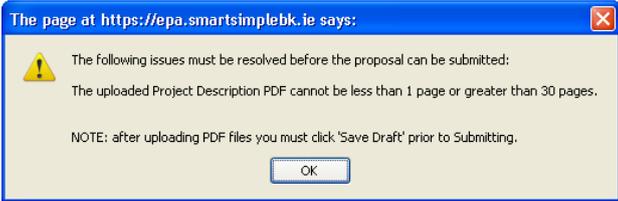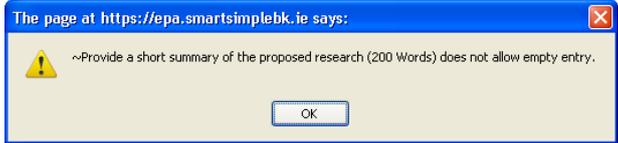
Submitted Applications
Click here to view your submitted applications

8) Note: There is no authorisation-step for submissions for researcher travel support grants, event support and small scale studies. Simply press submit when your application is complete

Error Messages on 'Submit' – what have I done wrong?

Error message	What it means	What do I do?
The page at https://epa.smartsimplebk.ie says: The following issues must be resolved before the proposal can be submitted: The uploaded Project Description PDF cannot be less than 1 page or greater than 30 pages. NOTE: after uploading PDF files you must click 'Save Draft' prior to Submitting. [OK]	Wrong file format or not respected the page limit	Click 'ok' and amend your upload
The page at https://epa.smartsimplebk.ie sa... Please complete Part A-Declaration. [OK]	Forgotten to tick the 'i agree' box in the declaration section	Click 'ok' and complete the 'declaration' section
The page at https://epa.smartsimplebk.ie says: Grant aid requested 1000000 must be less than Total cost of 500000 [OK]	Your total project cost requested is less than the total grant aid requested	Click 'ok' and amend the relevant fields.
The page at https://epa.smartsimplebk.ie says: ~Provide a short summary of the proposed research (200 Words) does not allow empty entry. [OK]	You did not complete a compulsory field	Click 'ok' and complete the relevant field.

Authorisation process – three possible outcomes, and what to do in each case

1. Once submitted, the application goes to your organisation for authorisation
2. The appropriate person in your organisation will be notified of the application submission by email
3. If your application has not been authorised before the organisation approval deadline, it will not be valid and will not be evaluated
4. The organisation has a limited time to review and authorise, as specified in the Call Technical Description document. If this deadline is missed, the application is not considered valid and is not sent for evaluation. It is the applicant's responsibility to ensure that organisational approval is received on time.
5. Within that limited time, the organisation has the opportunity to review the application. Following review, they have three options:

> Option 1.   Authorise the application;
> Option 2.   Decline the application;
> Option 3.   Request revisions.

Under option 1:

- You will be notified (by automated email from donotreply@epa.ie) that the proposal has been authorised by your organisation
- You need do nothing further – the EPA will send the application for evaluation
- You can view your proposal by clicking the 'submitted applications' icon on your home page.

Submitted Applications
Click here to view your submitted applications

Under option 2:

- You will be notified (by automated email from donotreply@epa.ie) that the proposal has not been authorised by your organisation
- You can view the reason/justification for this decision by viewing your submissions by clicking the 'submitted applications' icon on your home page.

Submitted Applications
Click here to view your submitted applications

- The justification will be visible in the 'authorisation-part B' section on the application screen.
- Your application will not be sent for evaluation
- In this case, we recommend that you discuss the matter with the relevant person in the organization. If the application was declined in error, please mail research@epa.ie at once.

Under option 3:

- You will be notified (by automated email from donotreply@epa.ie) that the proposal requires revision
- You can access the application by clicking the 'draft applications' icon on your home page.

Draft Applications

Click here to view draft applications not yet submitted

- The revisions requested by your organisation are in the 'justification' box in the 'authorisation – part B' section.
- Amend your form as required. Click 'save draft'. Once you are satisfied, click 'submit'
- Your application will then go through the authorisation process again.
- **VERY IMPORTANT**: Any revisions / subsequent re-authorisations must be made before the organisation approval deadline, or the application is invalid.

Print my application

1. To print off the application form, click

Print Form

2. This will open a web version of your application (with hyperlinks for all uploaded documents)
3. Turn this web view into pdf by clicking 'export as pdf' at the top of the web view

4. The application can then be saved as pdf and/or printed.

What to expect during the evaluation process

1. All valid, authorised submissions will be sent for evaluation.
2. For indicative timeframe, please see Call Technical Description
3. You will be notified in writing of the outcome of this process.

What to expect during the negotiation process

1. If your proposal has been recommended for funding, you must use the portal to respond to any technical and financial queries raised during the evaluation process. You will have 14 days to respond to any technical and financial queries

2. Login to the portal, and click on the 'submitted applications' icon on the home page.

Submitted Applications
Click here to view your submitted applications

3. Click on the 'Evaluation-Negotiation' link to view evaluator queries

Report - Grant List			
Print			
Proposal Number	Type	Institution	Project Coordinator
1617	CCRP - Project Based Awards	Test Organisation-EPA Support	Test_Alice Applicant
	Activity	Tracking Template Name	Status
	Evaluation - Negotiation	Evaluation - Negotiation	Revision Required

4. View the technical and budget queries by clicking the appropriate hyperlinks

Technical Queries

It is the responsibility of the Project Co-Ordinator to include technical responses from all project participants

Technical Queries:	#	File Name
	1.	Summary of Technical Queries raised by Evaluators and Compiled by EPA RS.pdf

Technical Queries Response: Multiple files... | Single file

* Latest Technical Query Responses uploaded:

Technical Queries Status: Technical Queries Submitted to Applicant

Budget Queries

It is the responsibility of the Project Co-Ordinator to include budget responses from all project participants

Budget Queries:	#	File Name
	1.	LHM_Budget_Queries_for_the_Applicant.xls

Budget Queries Response: Multiple files... | Single file

* Latest Budget Query Responses uploaded:

Budget Queries Status: Budget Queries Submitted to Applicant

5. Prepare and upload responses to technical and budget queries

6. Select 'yes' (i.e. response uploaded) option dropdown menu. You need to do this separately for Technical and budget query responses

7. Click 'save draft'
8. You do not have to upload financial and technical responses at the same time. However, the status will remain at 'draft' and the responses cannot be submitted until both technical and financial query responses have been uploaded.
9. Once you are happy with your responses, click 'submit'
10. Your responses will be evaluated.
11. If further revisions are required, you will be notified by email via donotreply@epa.ie. Repeat steps 2-9 as required.
12. If no further revisions are required, you will be notified email from donotreply@epa.ie that the negotiation process has now been successfully completed. You must now contact the EPA with a proposed project start date and/or student details. On receipt of this information, the EPA will then proceed with the grant offer process.

Event Support

1. Applications for Event support can be made on a rolling basis.
2. To apply, click on the "Apply for Event Support" icon on the home page and complete and submit your application

Travel Support & Event Support

Apply for Event Support

Apply for event support