CaixaResearch



Grants"la Caixa" online system

Manual For Submission

Validate

2022

"la Caixa" Foundation

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1 User registration

Grants "la Caixa" can be accessed through the link "la Caixa" Foundation (fundacionlacaixa.org). Once on the webpage, plese click on register (Figure 1.1)

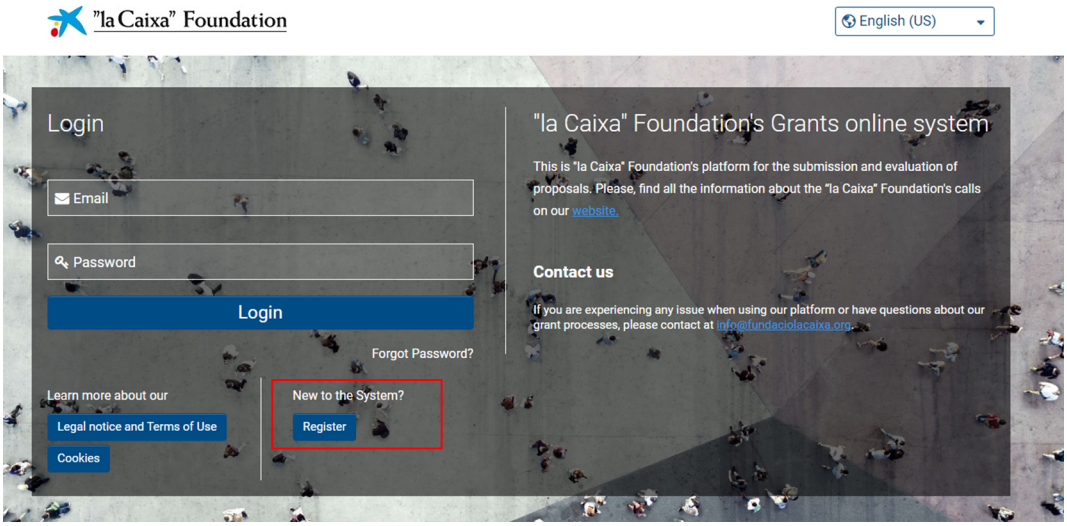


Figure 1.1. Grants "la Caixa" webpage.

Users can register on the login page by clicking REGISTER AS REARCHERS OR CSO (Project Leaders and Partners) or REGISTER AS ORGANISATION MANAGER (OM). A form for entering contact details will then appear in a new window. All profiles should register linked to an Organisation, which should appear in the list. Should the organisation not be found, it can be included by entering its name and identification details (NIF if the organisation is Spanish and VAT number for non-Spanish institutions). **This will be the organisation signing the Grant Agreement**.

It is essential that the applicant registers only one user profile in the system with his/her personal data (name, valid ID and email – institutional email recommended). It will not be possible to register more than one profile with the same ID. The email introduced by the Project Leaders and the Organisation Managers will be used to send all important information on this Call.

After user registration, you will receive an e-mail with an activation link to introduce the password into Grants "la Caixa".

If you experience technical problems, please contact Grants "la Caixa": ci_info@fundaciolacaixa.org.

2 Project Leader - Creating an application

2.1 First Step: Creating an application pre-draft.

To initiate a new application, Project Leaders (PLs) first need to identify the call they wish to apply for in the Open Calls table (Figure 2.1). It is necessary to check and/or complete your profile by accessing your PERSONAL PROFILE in the right upper button and clicking on Update Profile.

As PL, some eligibility conditions are required here in order to start an application, including being linked to a Host Non-profit Organisation based in Spain or Portugal and having only 1 open application in this call.

After choosing the CaixaResearch Validate 2022 call by clicking the GO TO CALL button, initiate an application by clicking the APPLY NOW button.

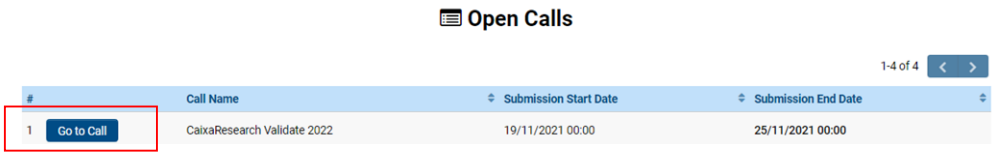


Figure 2.1 Open calls table at the bottom of the home page.

Once done that, your **pre-draft application** is created. At this point, you will have access to the first tab: General Data and Proposal Information (Figure 2.2)

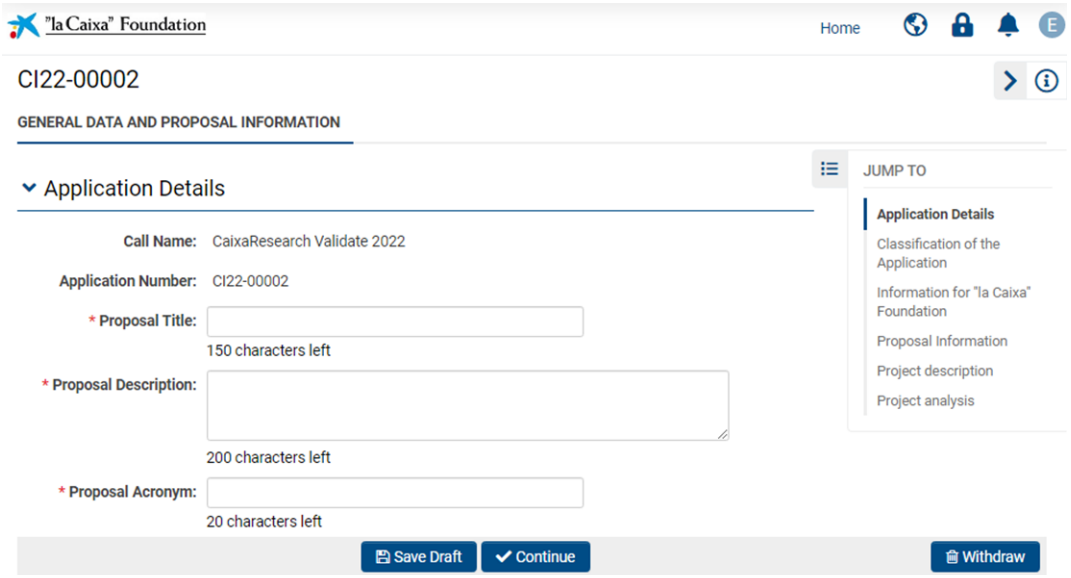


Figure 2.2 General Data and proposal information tab

Within this first tab, you will have to fill in the classification of the application, information for "la Caixa" Foundation, Proposal information, Project description, Work Plan and Project Analysis. All fields marked with an asterisk have to be filled.

Please note that to add your publications (up to 5) you have to click on the OPEN button and add the references in the pop-up window. Each new publication is added on the plus, clicking on the save button to store the information, which also returns you to the previous tab (Figure 2.3)



Figure 2.3 Table to add publications

Also, in the work plan section, remember to add the tasks you plan to develop within the frame of the grant using the Gantt Chart. Clinking on the +, a new pop-up window will appear to include your tasks' information. Click on confirm to enter the proposed activities (Figure 2.4).

Warning: Please be advised that once confirmed, the task cannot be deleted or modified. We recommend you to save your tasks using Save Draft until you are sure no modification will be made.

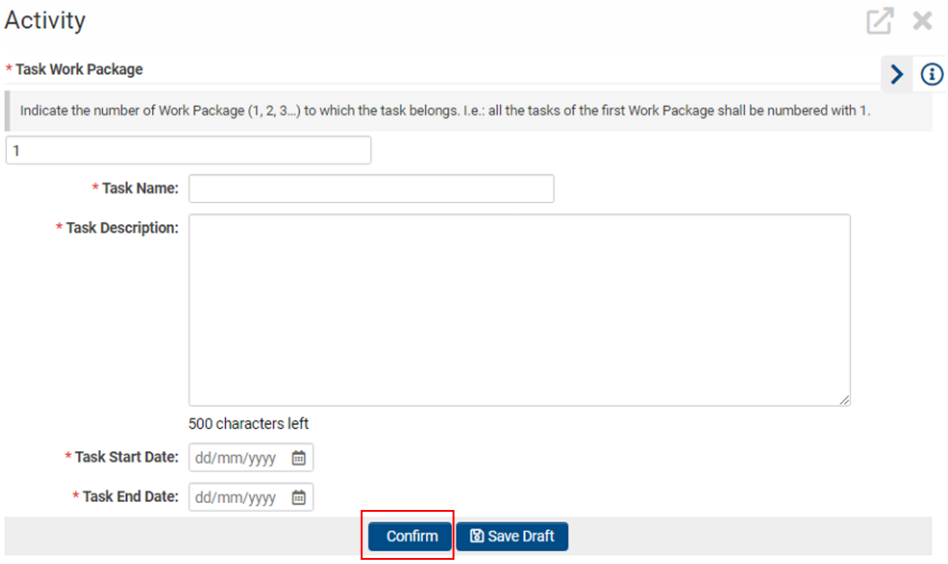


Figure 2.4 Fields required to add an activity to the Gannt chart

The activities included on your Work plan will appear in the Gantt Chart below after clincking on Save Draft in the main screen, as it is shown in Figure 2.5.

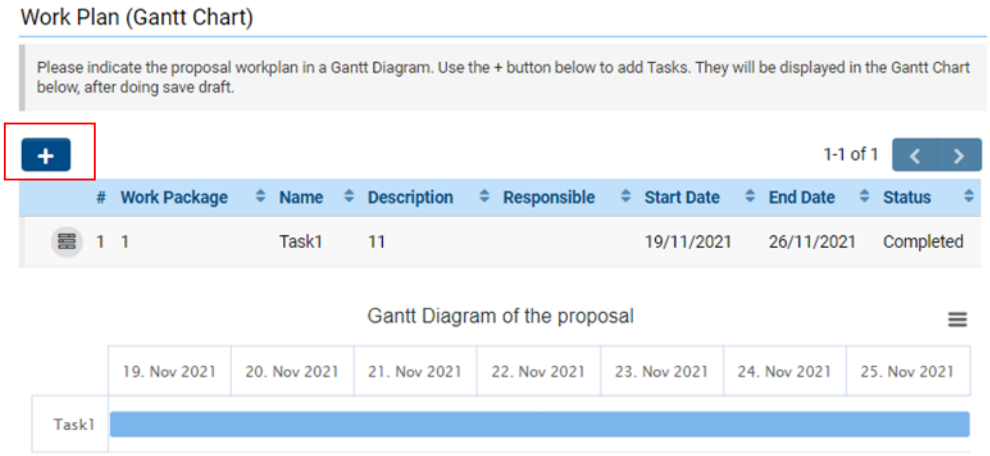


Figure 2.5 Gantt Chart showing the tasks included in the project

Finally, **if you are applying as a consortium**, you have to select which institution will be responsible for each task. To be able to assign this, please move your proposal from the pre-draft into the draft stage (see how below), and invite your partners to join the project.

2.2 Second Step: Moving the application into draft stage

Once all compulsory fields are filled in the General Data and information tab, you may click on CONTINUE at the bottom of the screen to advance in the application. At this point, please be aware that your partners in the project will have to confirm again their participation if the sections *Proposal Description* and *Classification of the application* are modified after clicking continue, as it is explained in the warning (Figure 2.6) Therefore, we would recommend having these two sections consolidated before clicking on continue and moving the application from pre-draft into draft stage.

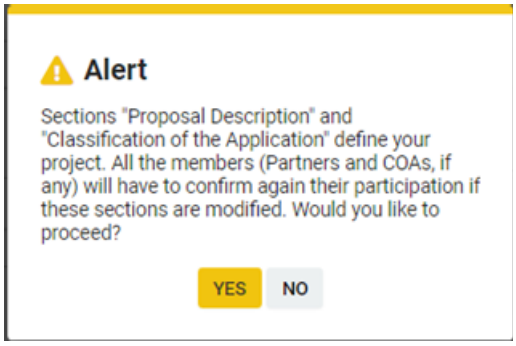


Figure 2.6 Warning message before moving into the drat stage.

2.3 Third step: Inviting your partners and co-owners of the asset (CoA)

In Consortium proposals and/or when the Asset/s is co-owned, partners must be invited by the PL to join the project. All the invitations shall be managed through the *Invitations* tab in the upper left corner (Figure 2.7), by adding the information on the name, email and role of the invited partners (Figure 2.8).

"la Caixa" Foundation advises you to invite all members of this proposal at once (accounting these contacts will need to approve their participation in the proposal), as changes to this table (removal of members) will require the re-approval of all other members in the proposal.

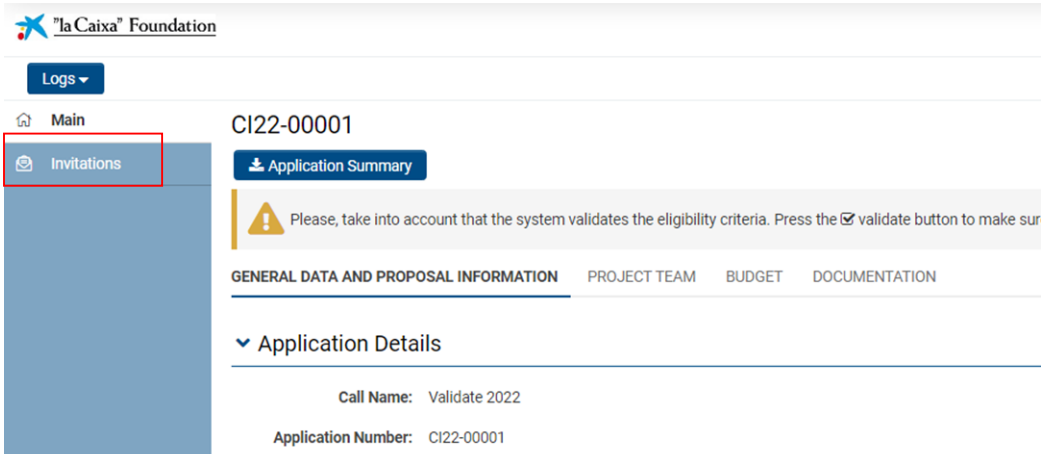


Figure 2.7 Invitations tab on the left column of the draft application.

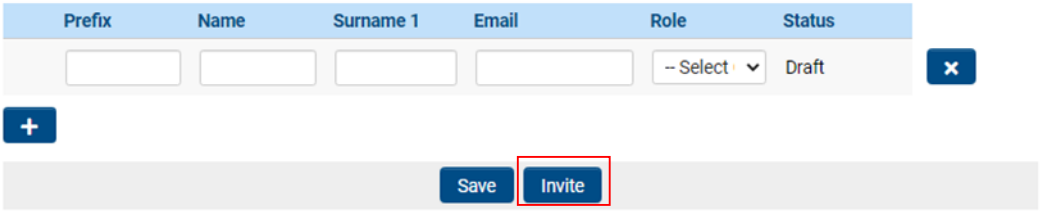


Figure 2.8 Table to invite partners and/or CoAs to the project

If any partner and/or CoA decline their participation, PLs must delete them from two different sites:

- Table of project participation acceptance status in the *Project Team* section (Figure 2.9)

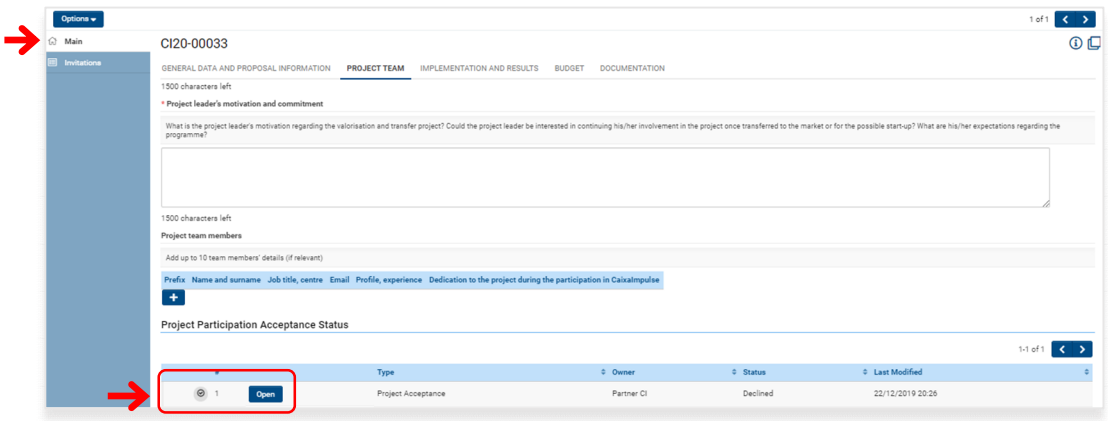


Figure 2.9 Location of the project participation acceptance status table on the project team tab

Click DISCARD to delete their participation in the proposal (Figure 2.10)

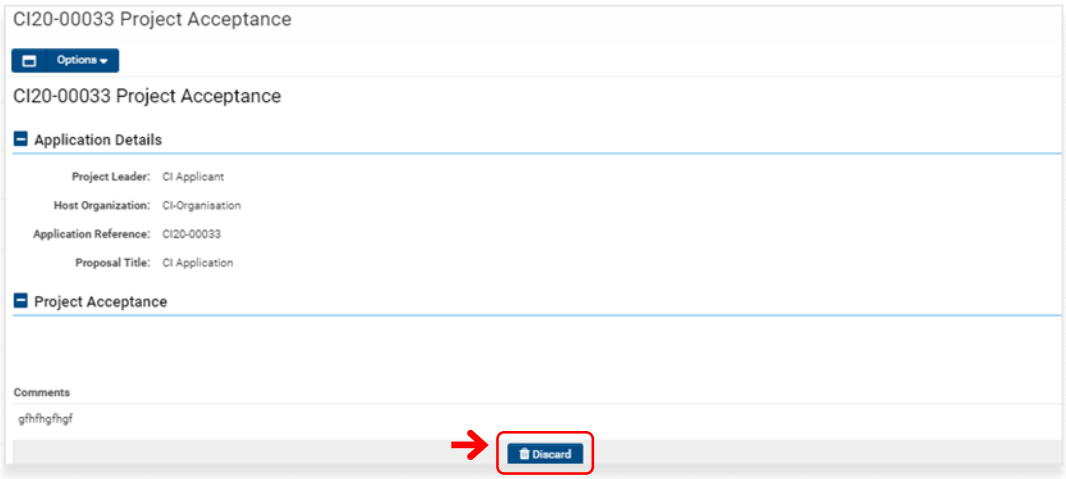


Figure 2.10. Discarding a project acceptance.

- Invitations section. Click on the X to delete the invitation (Figure 2.11)

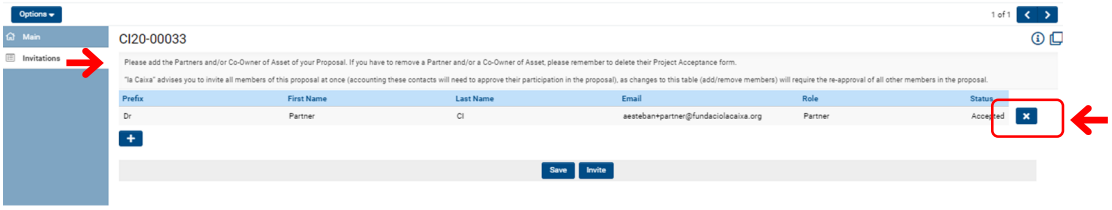


Figure 2.11 Delating an invitation at the invitation table.

In this section, Consortium partners and COAs that have not accepted the participation or that have been removed by the PL will remain in the list as DISCARDED.

On the contrary, if you wish to cancel the invitation to any partner who has already accepted it, please make sure to navigate to *Project Participation Acceptance Status* table in the *Project Team* tab and discard the corresponding form.

Each Partner receiving the invitation shall register if they are accessing the system for the first time and validate the proposal. It is necessary to complete their profile by accessing your Personal Profile in the right upper button.

2.4 Fourth step: Completing your application

After clicking in continue, 3 new tabs will appear: Project team, budget, and documentation (Figure 2.12).

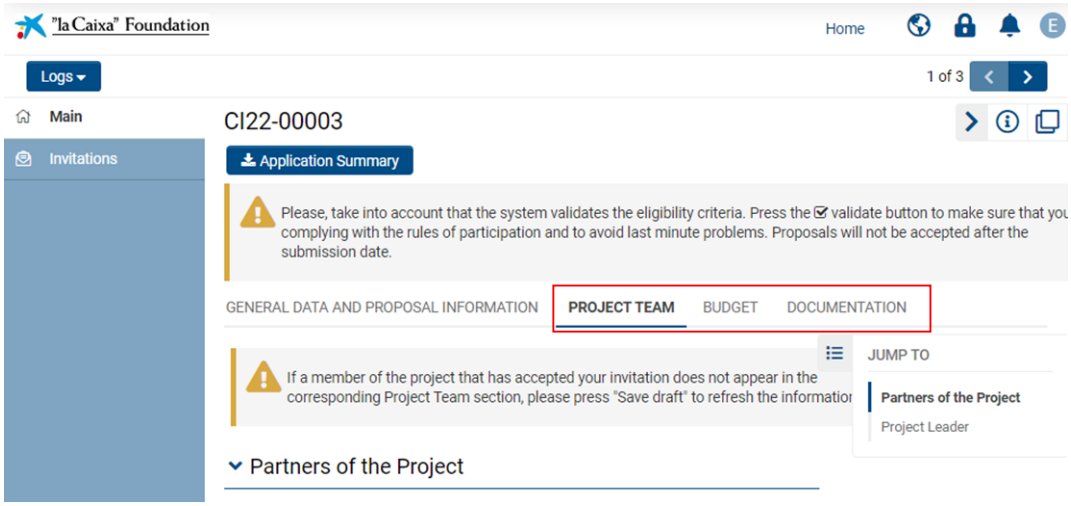


Figure 2.12 New tabs available at the draft stage.

On the **project team** tab, please note that you may add any relevant team member by clicking + in the table displayed at the bottom of the screen (Figure 2.13).

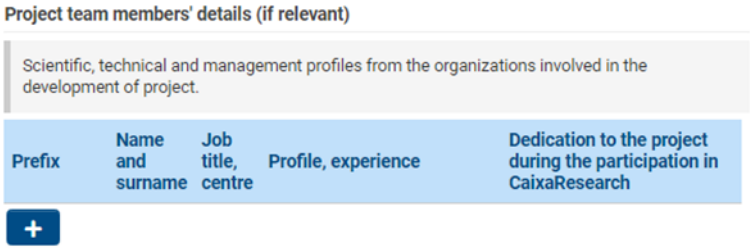


Figure 2.13 Table to add project team members to the project.

On the **budget** tab, OPEN the table and complete the information. Comments are required in all details boxes in order to save the changes (Figure 2.14).

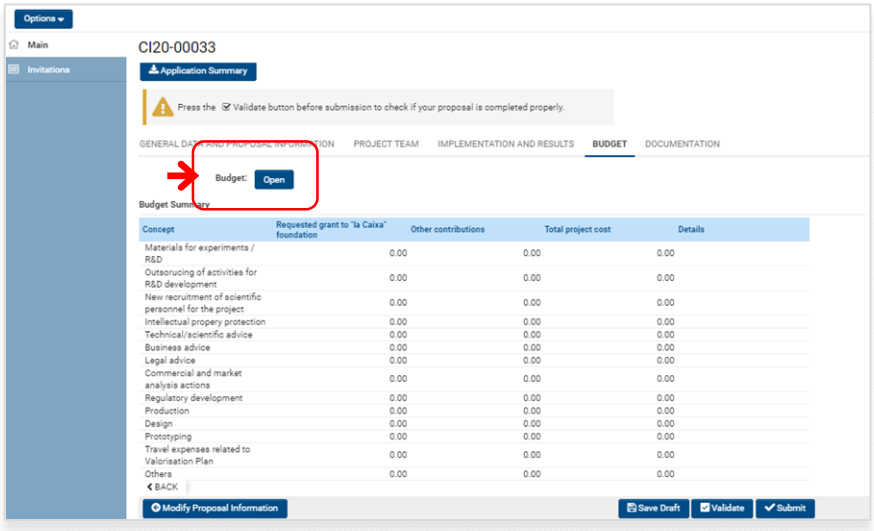


Figure 2.14. Open button to upload the budget.

On the **documentation** tab, you may add any PDF document of your patent, letters of support and prototype (Figure 2.15)

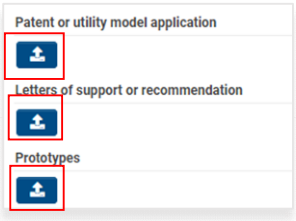


Figure 2.15 Upload of supplementary documents.

2.5 Fitfh step: Submitting your application

The application must be submitted electronically via the application system by clicking submit before **February 10th, 2022, at 14.00h (CET).**

You can save and subsequently edit a draft version of the application until the deadline. Only one draft can be active in this call, which can be saved by clicking SAVE DRAFT and may be deleted at any time before the deadline by clicking WITHDRAW. Please notice that withdrawn drafts cannot be recovered.

A VALIDATION button is available during the application process to check that the data provided is correct. We suggest using this validation button throughout the process to ensure that everything is properly filled in before the submission deadline. An application is not submitted to "la Caixa" Foundation until the applicant has clicked SUBMIT.

Once the application has been submitted, you will receive a confirmation of receipt by e-mail. If you do not receive a confirmation of receipt (please check your spam folder before), you should contact "la Caixa" Foundation as soon as possible at ci_info@fundaciolacaixa.org.

Also, If you wish to withdraw a submitted application after the deadline, please contact us through the beforementioned email address.

3 Organization Manager – Endorsing the proposal

3.1 Registration and accreditation

Register as an ORGANISATION MANAGER and link to your organisation, as shown in section 1. If the organisation is not in the list, register it with name, country and tax ID.

Check your email to click on the activation link and define your password.

Complete your personal profile and add the accreditation document in your personal profile by clicking on the circle in the upper right corner that contains your initial (Figure 3.1)

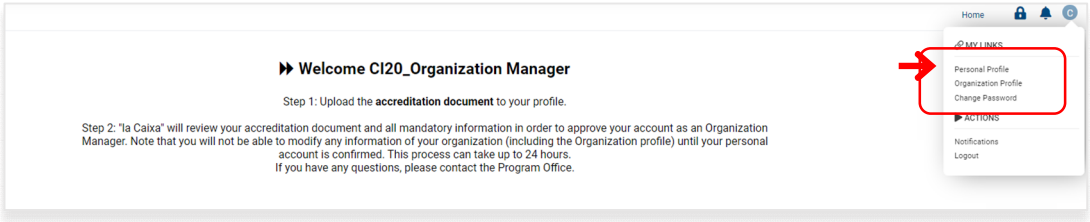


Figure 3.1 Personal profile access at the Organisation Manager home page

In the DOCUMENTS SECTION, download and complete the template for the accreditation document. Add the required documentation in the same pdf and upload it to the system (Figure 3.2)

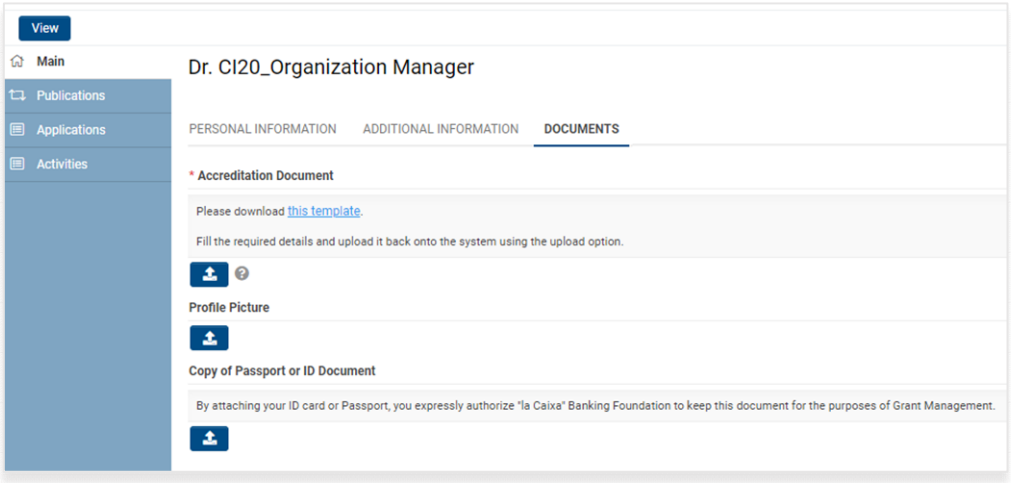


Figure 3.2 Documents tab

Once the profile is updated with the information and the required document, please wait for the CaixaResearch Programme Office to validate your information.

3.2 Introducing your organisation's information

If your organisation is not active, complete the information in the Organisation profile. The CaixaResearch Programme Office will also validate the Organisation information after clicking in Send for approval (Figure 3.3)

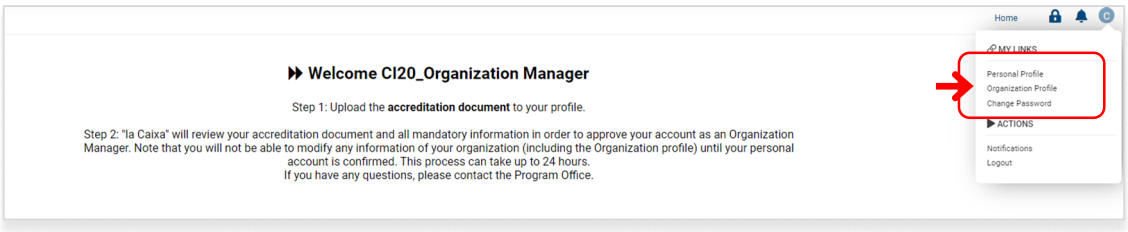


Figure 3.3 Location of the Organization Profile at the OM home page.

3.3 Endorsing the proposal

Once your data has been validated, you can now access the initial screen with the endorsed applications (applications validated by the OM) and actions to complete (applications to validate by the OM) (Figure 3.4)

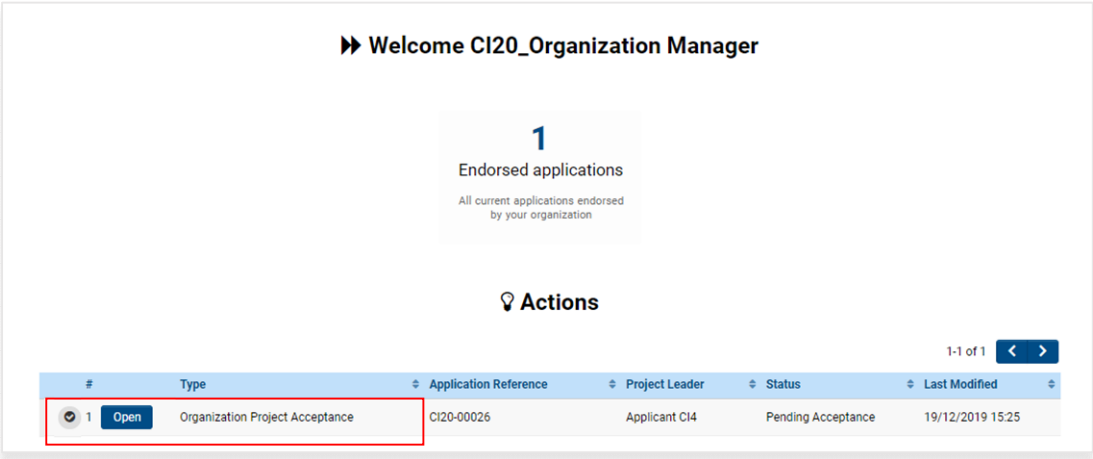


Figure 3.4 Access to the project in the OM home page.

To endorse a proposal, click on OPEN and AUTHORISE the proposal. You can visualize the proposal (General data and proposal information – Project team - Budget) by clicking on OPTIONS – Applications to split view. (Figure 3.5)

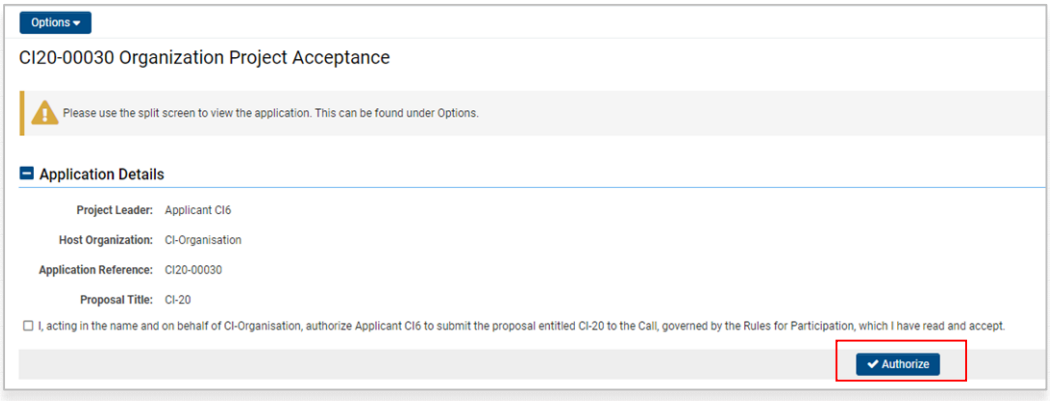


Figure 3.5 OM window to endorse a proposal.

The endorsement of a proposal by the OM is mandatory before submitting the proposal. Please make sure this validation is completed on time.

4 Consortium Partners and Co-owners of the Asset/s (CoA)

Both the consortium partners and the Co-owners of the Asset will receive an email coming from the Project Leader inviting them to register in the platform. Once done that (see section 1), they may endorse the project.

In the case of **Co-Owners of the asset (CoA),** they will be considered as Organisation Managers of their own institutions. Therefore, the procedure to endorse the application is the same as the one described for Organisation Managers in Section 3.

On the other hand, after registering, **consortium partners** will visualised the project under the Actions table on their homepage. By clicking in OPEN button (Figure 4.1), they may access the application.

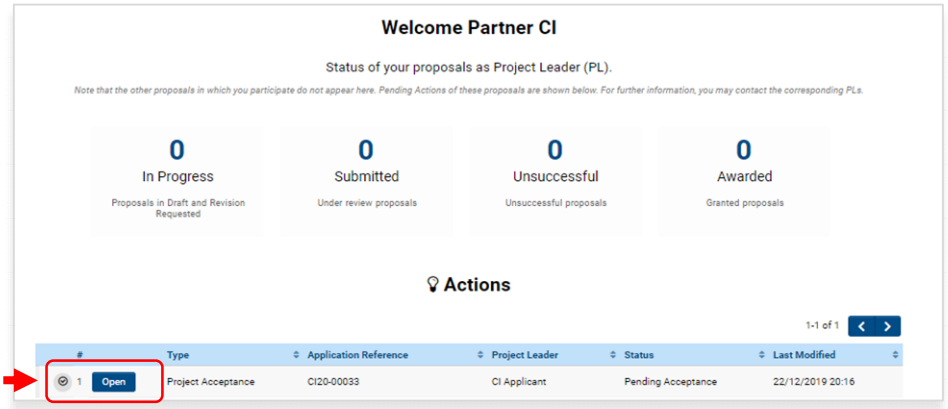


Figure 4.1 Access to the project in the partner home page.

After this, the partner will see the tab shown in Figure 4.2. If you wish to see the details of the application, click on OPTIONS – view application in split screen. To endorse the project, please check the box on project acceptance, add a comment and click on ACCEPT (Figure 4.2).

Please be aware that partners and CoAs should accept their participation in the project before submitting the application.

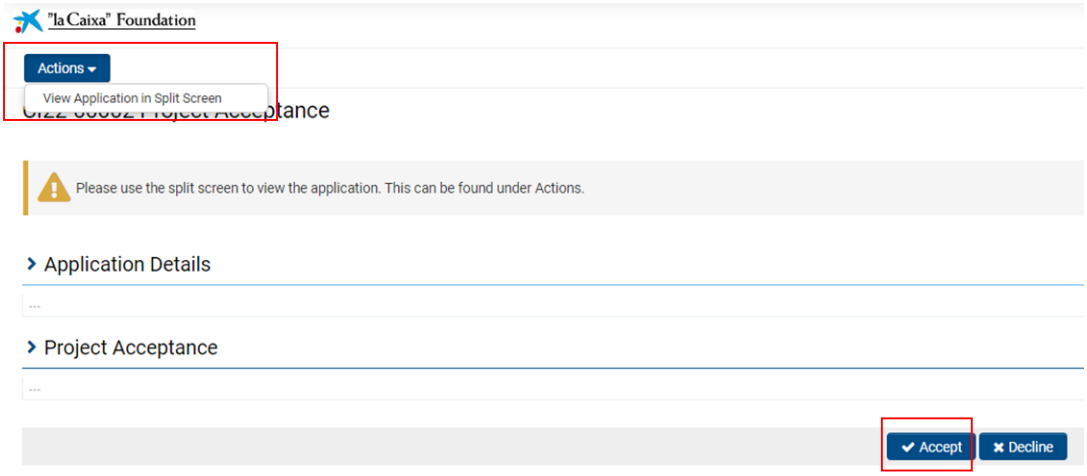


Figure 4.2 Partner participation acceptance.

5 Text and illustrations

For all applications, the fields must be completed in English and in accordance with these guidelines.

Text from e.g. Word can be copied and pasted into most text fields of the application. It is, however, important to check that formatting, special letters and symbols, have not been converted or lost in the text fields after copying and pasting. Every text box has a countdown of characters (with spaces).