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An Ghníomhaireacht um Chaomhnú Comhshaoil

EPA Research Programme 2014 – 2020

EPA's Online Grant Management and Application Portal – Registration & General User Notes

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EPA Research Programme 2014- 2020

EPA's Online Grant Management and Application Portal – Registration & General User Notes

Introduction

This document is a guide for all users of the EPA's Grant Management and Application Portal. It explains the registration process for applicants and describes the functionality and features which are common to all users.

Please read this document carefully prior to using the EPA Grant Management and Application Portal.

This document does not replace, but is complimentary to the:

1. EPA Research Terms and Conditions for Support of Grant Award
2. EPA Research Guide for Applicants
3. EPA Research Guide for Grantees
4. EPA's Online Grant Management and Application Portal – User Guide for Applicants
5. EPA's Online Grant Management and Application Portal – User Guide for Grantees
6. EPA's Online Grant Management and Application Portal – User Guide for Evaluators and Reviewers

The above documents are available to download from the Portal or the EPA website (www.epa.ie).

More Information

For further information and assistance with the EPA Grant Management and Application Portal, please contact: research@epa.ie.

Disclaimer

Although every effort has been made to ensure the accuracy of the material contained in this document, complete accuracy cannot be guaranteed. The Environmental Protection Agency does not accept any responsibility whatsoever for loss or damage occasioned or damages claimed to have been occasioned, in part or in full, as a consequence of any person acting, or refraining from acting, as a result of a matter contained in this document.

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Definitions

The following terms may be used throughout this document and other EPA guidance and call documents:

- Application Form:** This is the online form which contains all the information in relation to an application.
- Grant View:** This is the online form which contains all the information in relation to an awarded grant.
- Project Description Document:** This is a pre-defined template which is completed and uploaded as an attachment to the application.
- Activities:** Specific to the management of a project, there are two categories of activities:
- **Pre-generated activities:** Technical Progress Reports and Financial Reports (Cost Statements), which have been pre-generated for the lifetime of a project.
 - **User Generated Activities:** These are activities that can be created as required during the lifetime of a project. These include miscellaneous requests (budget reallocation, no-cost time extension, approval of travel outside EU); submission of final reports (Final Report, Synthesis Report and State of Knowledge Report for Fellowship projects) and submission of End of Project Questionnaires and Metadata/Datasets.
- Transaction List:** Transaction lists are sub-windows (with fields to be completed) opening from a link on an activity/form. Information regarding a project can be entered and saved on a transaction list, and then be attached to the activity/form (e.g. adding research team members' details in a Technical Progress Report; adding a paper/conferences, etc.).
- EPA Research Officer:** This refers to the EPA Research Team member administering a project.

Security and Privacy

Security

Your username and password are unique to you and **must not** be disclosed to anyone else under any circumstances. If you suspect your password may have been accidentally disclosed you should change it immediately by using the **Forgot Password link** on the login screen (see page 8), or by using the **Change My Password link** in the home page banner (see page 13).

Privacy

Personal information supplied to the EPA Research Programme will be stored in electronic and structured manual data formats e.g., hard copy folder or database, for use only in connection with the purpose for which it was supplied and the administration of the EPA Research Programme and publication of results. The provisions of Data Protection Legislation shall be complied with by the EPA and users of the EPA's Grant Management and Application Portal with respect to the processing of personal data.

Data Protection Legislation shall mean the Data Protection Acts 1988 to 2018 and Directive 95/46/EC, any other applicable law or regulation relating to the processing of personal data and privacy (including the E-Privacy Directive and the European Communities (Electronic Communications Networks and Services) (Privacy and Electronic Communications) Regulations 2011, as such legislation shall be amended, revised or replaced from time to time, including by operation of the EU General Data Protection Regulation (2016/679) (GDPR) (and laws implementing or supplementing the GDPR and/or the E-Privacy Regulations).

The provisions of the applicable Terms and Conditions with respect to data protection, and the terms of the EPA Privacy Policy, shall apply to the processing of personal data in connection with the EPA Research Programme.

All users of the EPA's Grant Management and Application Portal will be required to confirm that you have read and understood the EPA Privacy Policy and Terms of Use of EPA Websites as well as agreeing to the provisions of the EPA Conflict of Interest and Confidentiality Agreement.

Enabling Pop-ups

Please ensure that your browser settings permit pop-ups from the web site address displayed by the EPA's Grant Management and Application Portal.

IMPORTANT: If you do not enable pop-ups many functions will appear not to work because the associated pop-up windows cannot be displayed.

Registration Process - Applicants

If you are a new user of the EPA's Grant Management and Application Portal you will need to register as an applicant to be able to complete and submit a proposal for funding.

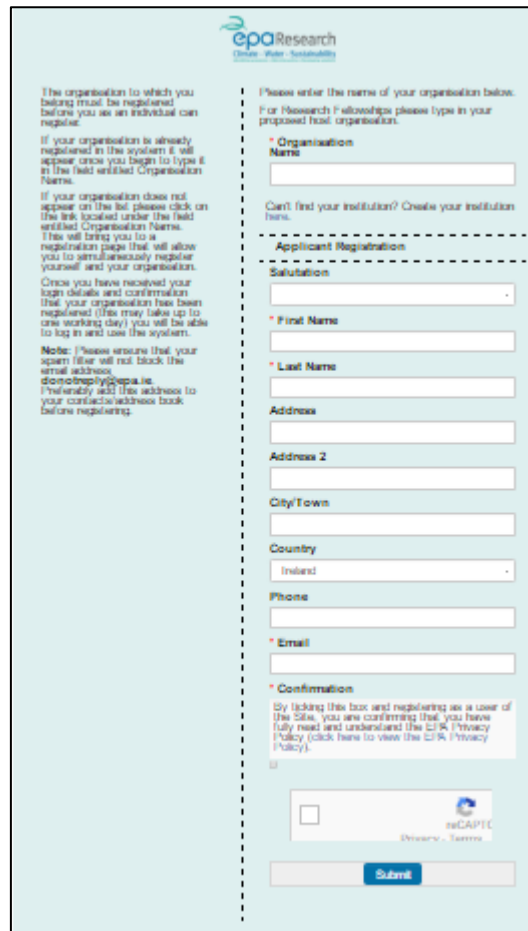
To register as an applicant, you must complete the online Applicant Registration form. Click on the following link to open the Login window:

https://epa.smartsimple.ie/s_Login.jsp

1. Click on the **Register here** link as shown in the image below:

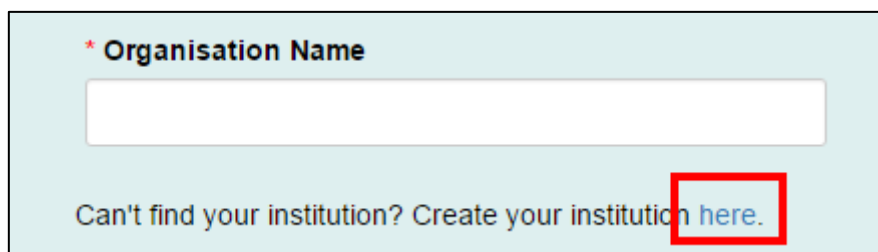
The screenshot shows the EPA grant application and project management portal. The main content area includes a welcome message, a list of services provided (Applications for funding, Technical Progress Reports, Cost Statements, Final Reports, and Other miscellaneous requests), a note about spam filters, and a link to the EPA home page. The right-hand sidebar contains a login form with fields for Email and Password, a Login button, a Forgot Password? link, and a **Register as applicant: Register here** link, which is highlighted with a red box.

2. The Applicant Registration page will now be displayed, as shown in the following image:



The screenshot shows the 'Applicant Registration' page. On the left, there is explanatory text: 'The organisation to which you belong must be registered before you as an individual can register.' It also provides instructions for existing and new organizations and a note about email addresses. The main form area on the right includes a dropdown for 'Organisation Name' with a link 'Can't find your institution? Create your institution here.' Below this is a dashed line and the 'Applicant Registration' section, which contains fields for 'Salutation', 'First Name', 'Last Name', 'Address', 'Address 2', 'City/Town', 'Country' (with 'Ireland' selected), 'Phone', 'Email', and 'Confirmation'. A reCAPTCHA widget is at the bottom of the form, and a 'Submit' button is at the very bottom.

3. Your organisation must be registered on the system and approved by the EPA before you can submit an application. If your organisation is already registered in the system, it will appear (predictive text) once you begin to type it in the field entitled Organisation Name. Applicants for Research Fellowships should enter the name of their proposed Host University.
4. If your organisation does not appear on the dropdown menu:
 - a) Click on the link located directly below the field Organisation Name as shown in the following image:



b) The Organisation Registration page will now be displayed:



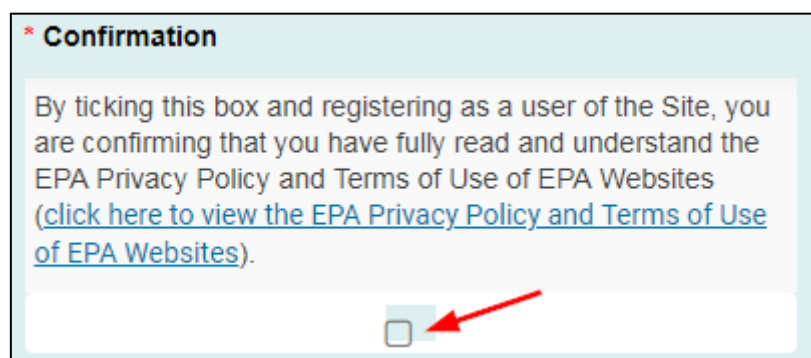
The screenshot shows the 'Organization Registration' form. On the left, under 'IMPORTANT - PLEASE READ', it states that users cannot be registered as both an applicant and primary/secondary contact using the same email address. It also notes that for private companies, NGOs, or charities, the Managing Director, CEO, or Finance Officer should be the primary contact. For third-level institutions, it should be research administration staff. For sole traders, alternate email addresses should be provided for the applicant and primary contact roles.

The registration form fields include:

- Organization Name
- Address
- Address 2
- Postal Code
- City
- Country (dropdown menu, currently set to Ireland)
- Phone
- Web Site
- Primary Contact Salutation (dropdown menu)
- Primary Contact First Name
- Primary Contact Last Name

IMPORTANT: when registering a new organisation you will need to use a different email address for the Primary Contact to that used for the Applicant – failure to do so will result in your organisation registration request being rejected by the EPA.

- When you have completed the Applicant Registration form, you must read the EPA Privacy Policy and Terms of Use of EPA Websites by clicking on the links as shown in the following image. By submitting the Registration form, you are confirming that you have read and understood the EPA Privacy Policy and Terms of Use of EPA Websites.

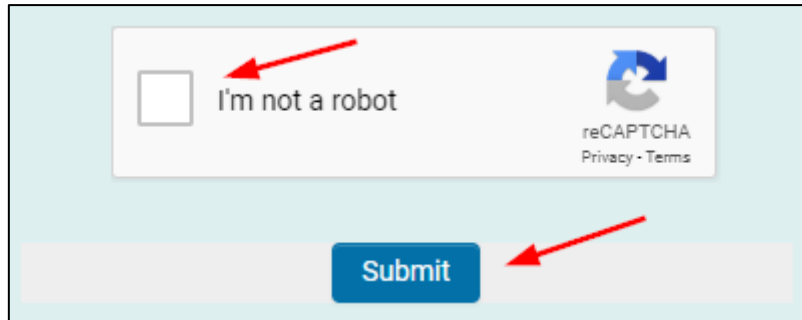


*** Confirmation**

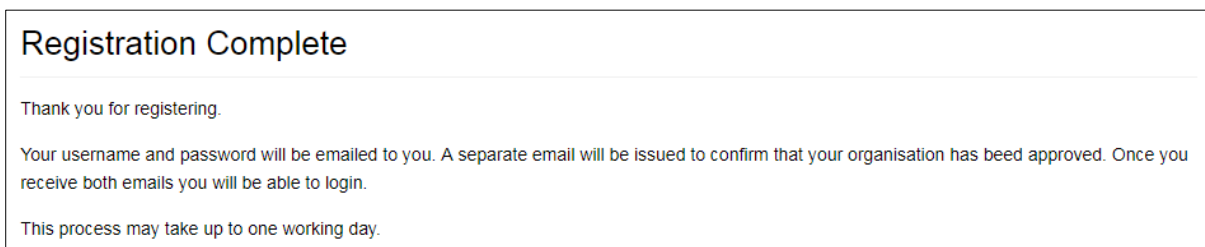
By ticking this box and registering as a user of the Site, you are confirming that you have fully read and understand the EPA Privacy Policy and Terms of Use of EPA Websites ([click here to view the EPA Privacy Policy and Terms of Use of EPA Websites](#)).

A red arrow points to the checkbox.

- To complete the registration process, click on the reCAPTCHA validation tick box and then click on the Submit button at the bottom of the form:



- The following message will appear on screen:



- Your username and password will be issued via an automated email from donotreply@epa.ie. Please ensure that your spam filter will not block this email address. Preferably, you should add it to your contacts/safe senders list before registering.

Registration Process – Other Users

All other users of the portal should contact research@epa.ie for details of the registration process and requirements. This applies to the following user types:

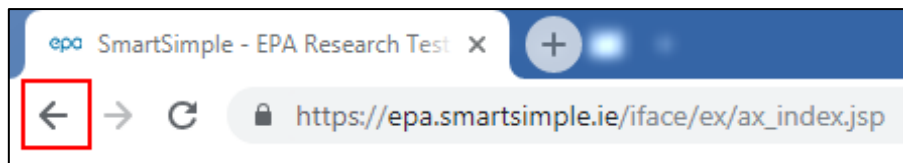
- Research Office Administrators
- Finance Office Contacts
- Primary Contacts for organisations
- Secondary Contacts for organisations
- Grant Evaluators
- Report Reviewers
- Steering Committee Members

Navigation

When logged into the portal it is important that you use the links and buttons provided to navigate to different sections or refresh/reload pages. The links and buttons are covered later in this guide and in the user-specific guides, however please note **the following should not be used**:

Back Arrow

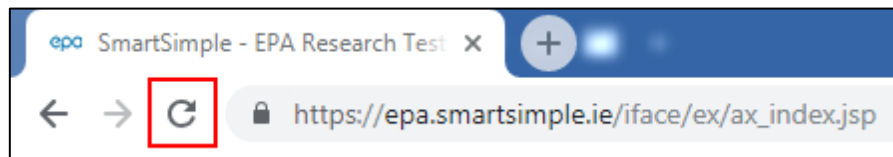
The **back arrow** in your internet browser (shown below) should not be used, as this may log you out of the EPA's Grant Management and Application Portal. Clicking on the **Home** link in the banner at the top of the page will bring you back to your Home Page.



Refresh Button

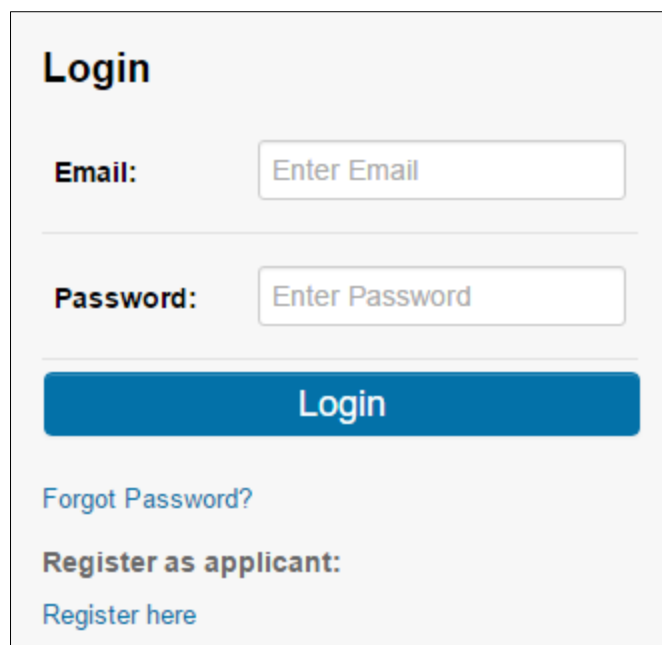
The **Refresh Button** in your internet browser (shown below) should not be used, as this may log you out of the EPA's Grant Management and Application Portal.

To refresh the view of an application, activity or form, (following creation of a Transaction List window or upload of document, for example), click on the **Save Draft** button at the bottom of the screen.



Logging In

The EPA Grant Management and Application Portal live link is https://epa.smartsimple.ie/s_Login.jsp - clicking on this link will open the Login window as shown in the screenshot below:



The screenshot shows a login form with the following elements:

- Login** (Section Header)
- Email:** Input field with placeholder text "Enter Email"
- Password:** Input field with placeholder text "Enter Password"
- Login** (Blue button)
- [Forgot Password?](#) (Link)
- Register as applicant:** (Section Header)
- [Register here](#) (Link)

Logging in for the First Time

Enter your username (your email address) and the password which has been sent to you in the auto-generated email from donotreply@epa.ie.

Your password is:

- 1) **Case sensitive** – enter the password exactly as it appears in this email notification
- 2) **Space sensitive** – do not copy and paste the password as this can cause issues, passwords should be typed into the field
- 3) **Character sensitive** - do not add additional characters, for example a full-stop at the end

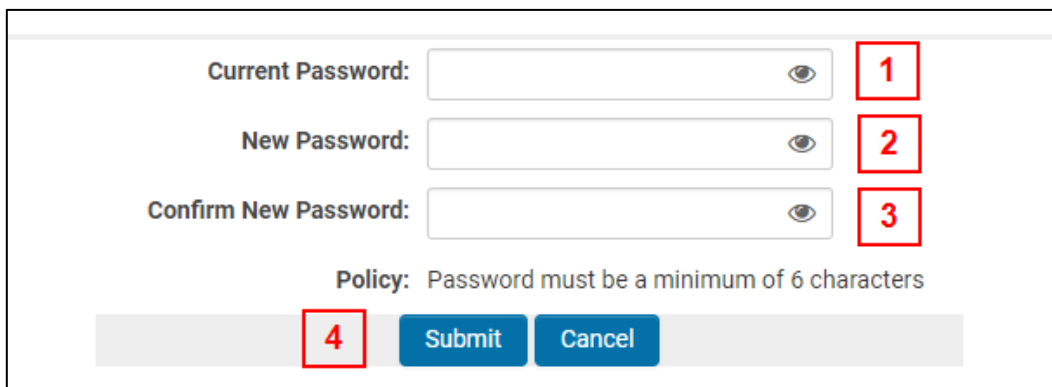
Please note: the password issued in the automated email is a one-time-only password and you will immediately be prompted to change it.

You must choose a password that is secure and meets the following minimum-security criteria:

- 1) Minimum length must be at least six characters
- 2) It is recommended your password includes a mix of symbols, letters, and numbers

IMPORTANT: Common or unsecure passwords will not be accepted.

When you have entered the one-time-only password into the field shown in the previous image, click on the **Login** button. The following pop-up window will appear:



The screenshot shows a password change form with the following elements:

- Current Password:** A text input field with an eye icon to its right, labeled with a red box containing the number **1**.
- New Password:** A text input field with an eye icon to its right, labeled with a red box containing the number **2**.
- Confirm New Password:** A text input field with an eye icon to its right, labeled with a red box containing the number **3**.
- Policy:** A text label stating "Policy: Password must be a minimum of 6 characters".
- Buttons:** A "Submit" button and a "Cancel" button, both in blue. A red box containing the number **4** is positioned to the left of the "Submit" button.

- 1) Enter the password from the automated email in the field indicated at **1**
- 2) Enter your chosen password in the field indicated at **2**
- 3) Confirm your chosen password in the field indicated at **3**
- 4) Submit the change request using the button indicated at **4**

Logging in Subsequently

When you next login to the portal you will need to use the same username (your email address) and your chosen password.

You can use the **Forgot Password?** link to request a password reset – this will be sent by email from donotreply@epa.ie. If you request a password reset, you will be issued with a new one-time-only password and will be prompted to change it as described in the section Logging in for the First Time.

Please note - passwords are:

- 1) **Case sensitive** – enter the password exactly as it appears in this email notification
- 2) **Space sensitive** – do not copy and paste the password as this can cause issues, passwords should be typed into the field
- 3) **Character sensitive** - do not add additional characters, for example a full-stop at the end

Multiple incorrect password entries will result in you being temporarily locked out of the system.

Home Page

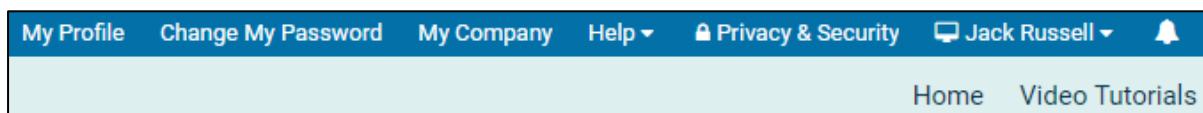
When you log on to the EPA Grant Management and Application Portal, you will be presented with your Home page.

The homepage layout is specific to each user type and details are provided in the relevant EPA Online Grant Management and Application Portal User Guide.

Home Page Banner

The home page banner (blue banner across the top of the window) will remain the same while you are logged on to the EPA Grant Management and Application Portal. It provides the following links:

Applicants Banner



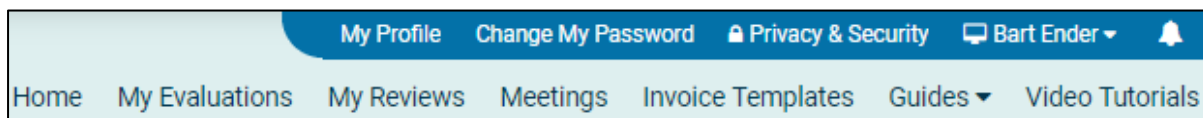
- **My Profile** opens your profile page where you can update your personal details if necessary
- **Change My Password** gives you the option to change your password at any time. Please note, passwords must be a minimum of 6 characters.
- **My Company** displays the contact details for your linked organisation
- **Help** provides access to available help documents.
- **Privacy and Security** provides a link to the EPA Privacy Policy and Terms of Use of EPA Websites
- **To Logout** of the EPA’s Grant Management and Application Portal click on your name in the top right-hand corner and select Logout.
- **Home** (located in the top right-hand corner) loads your Home page. You can use this link to return to your Home page at any time.
- **Video Tutorials** opens a new window with access to the various video tutorials.

Research and Finance Office Contacts Banner



- **My Profile** opens your profile page where you can update your personal details if necessary
- **Change My Password** gives you the option to change your password at any time. Please note, passwords must be a minimum of 6 characters.
- **Privacy and Security** provides a link to the EPA Privacy Policy and Terms of Use of EPA Websites
- **To Logout** of the EPA’s Grant Management and Application Portal click on your name in the top right-hand corner and select Logout.

Evaluators and Reviewers Banner




- **My Profile** opens your profile page where you can update your personal details if necessary
- **Change My Password** gives you the option to change your password at any time. Please note, passwords must be a minimum of 6 characters.
- **Privacy and Security** provides a link to the EPA Privacy Policy and Terms of Use of EPA Websites
- **To Logout** of the EPA's Grant Management and Application Portal click on your name in the top right-hand corner and select Logout.
- **Home** loads your Home page. You can use this link to return to your Home page at any time.
- **My Evaluations** loads your Evaluators Workbench
- **My Reviews** loads your Reviewers Workbench
- **Meetings** opens a list of project Steering Committee meetings which you have been invited to
- **Invoice Templates** opens a link to the templates which must be used when submitting claims for expenses etc.
- **Guides** provides access to available help documents.
- **Video Tutorials** opens a new window with access to the various video tutorials.

Your User Profile

You can view your user profile by clicking on the **My Profile link** in the home page banner. This will open your contact details window as shown below.

Prof. Jack Russell

<p>* First Name: <input type="text" value="Jack"/></p> <p>* Last Name: <input type="text" value="Russell"/></p> <p>* Status: Active</p> <p>Position: <input type="text"/></p> <p>Salutation: Prof. ▼</p> <p>Phone: <input type="text" value="0123 456 789"/></p> <p>Phone Ext.: <input type="text"/></p> <p>* Email: <input type="text" value="test.applicant@fake.ie"/></p> <p>Profile Photo: </p> <p>Last Updated: 07/03/2019 22:59</p> <p>Opt-out From Email Broadcast: ▼</p> <p>* Applicant Gender: Male ▼</p> <p>Mobile: <input type="text"/></p> <p>Department: <input type="text"/></p> <p>EPA Pin: <input type="text"/></p>	<p>Company: EPA Research Test Organisation</p> <p>Address: <input type="text" value="PO Box 3000, Johnstown Castle Estate"/></p> <p>Address 2: <input type="text" value="Johnstown Castle Estate"/></p> <p>City/Town: <input type="text" value="Wexford"/></p> <p>Country: Ireland ▼</p> <p>County: Co Wexford</p> <p>Postal Code: <input type="text" value="Y35 W821"/></p> <p>Latitude: <input type="text" value="52.295882"/></p> <p>Longitude: <input type="text" value="-6.501502"/></p> <p>Updated By: <input type="text"/></p>
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[Save](#)

Click the **Save** button to save any changes made to your profile. Please remember to check your details regularly and update any fields as necessary. All fields marked with a red asterisk (*) are compulsory and must be completed.

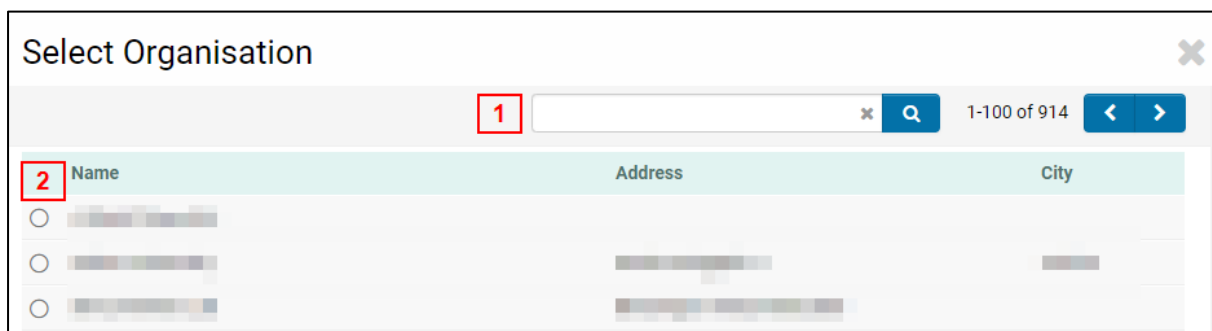
Company (Organisation) Lookup

The **Lookup Button** (binoculars icon) will be available when amending your person details.



The Lookup button allows you to search the list of registered organisations on the EPA's Grant Management and Application Portal and can be used to update your details if you have moved to a different organisation. Click on the Lookup button to open the Select Organisation window:

- 1) Search for your organisation by typing the name into the field indicated at **1** and clicking on the search button (magnifying glass icon):



- 2) Select the organisation by ticking the radio button located beside the organisations Name field **2**
- 3) Click on the Use Company Address button (down arrow icon) to automatically populate the address fields:



- 4) Click on the **Save** button at the bottom of the screen to confirm the changes.

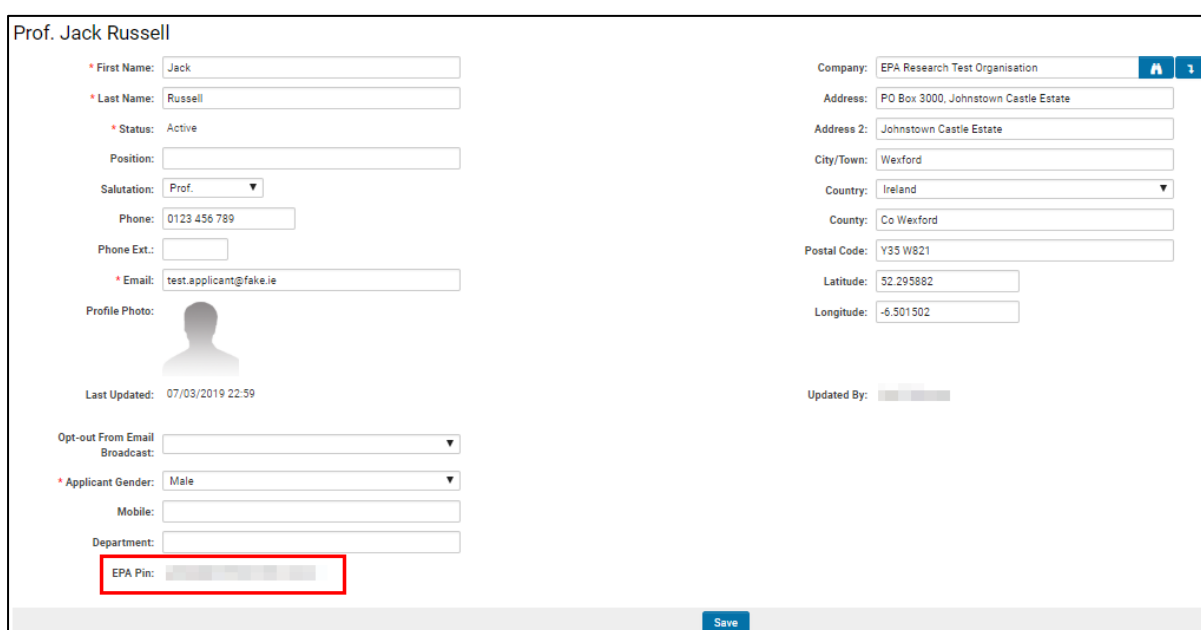
EPA PIN

Every Applicant and Project Participant registered on the EPA Grant Application and Management Portal is automatically allocated a unique EPA Personal Information Number (PIN). This unique identifier is used to identify and add project participants when creating an EPA application.

The purpose of the PIN is to ensure that you can only add participants to your proposals if they are registered on the EPA's Grant Management and Application Portal.

Likewise, only other registered users with whom you have shared your PIN can associate your profile with their proposals.

Your EPA PIN is displayed at the bottom of your contact details page:



Prof. Jack Russell

* First Name: Jack
* Last Name: Russell
* Status: Active
Position:
Salutation: Prof.
Phone: 0123 456 789
Phone Ext.:
* Email: test.applicant@fake.ie
Profile Photo:
Last Updated: 07/03/2019 22:59
Opt-out From Email Broadcast:
* Applicant Gender: Male
Mobile:
Department:
EPA Pin:

Company: EPA Research Test Organisation
Address: PO Box 3000, Johnstown Castle Estate
Address 2: Johnstown Castle Estate
City/Town: Wexford
Country: Ireland
County: Co Wexford
Postal Code: Y35 W821
Latitude: 52.295882
Longitude: -6.501502
Updated By:

Save

Changing Your Password

The **Change My Password** link in the home page banner provides the option to change your password at any time. You must choose a password that is secure and meets the following minimum-security criteria:

- 1) Minimum length should be at least six characters
- 2) It is recommended your password includes a mix of symbols, letters, and numbers
- 3) The password cannot be the same as your previous password

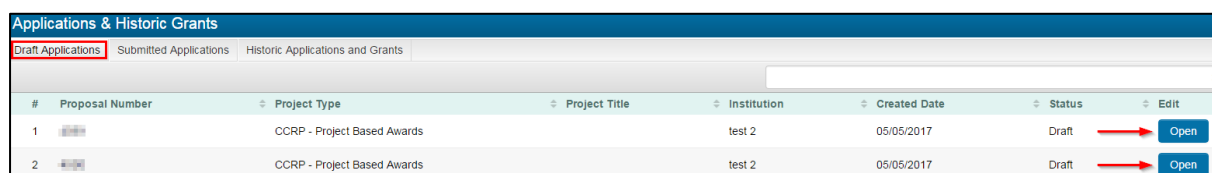
IMPORTANT: Common or unsecure passwords will not be accepted.



Saving and Submitting Applications, Activities, and Forms

The **Save Draft** button will save the details of a new application, activity or form on the EPA’s Grant Management and Application Portal at Draft Status. This will also refresh the information on your application/activity/form following the creation of a Transaction List window, upload of documents, etc. You can also save a draft version before logging out of the EPA’s Grant Management and Application Portal and then return to it later.

It is good practice to regularly click on the Save Draft button to reduce the risk of losing your work.

To edit fields on a previously saved draft application/activity/form, you must first click on the **Open** button. The example in the following image shows a draft grant application:

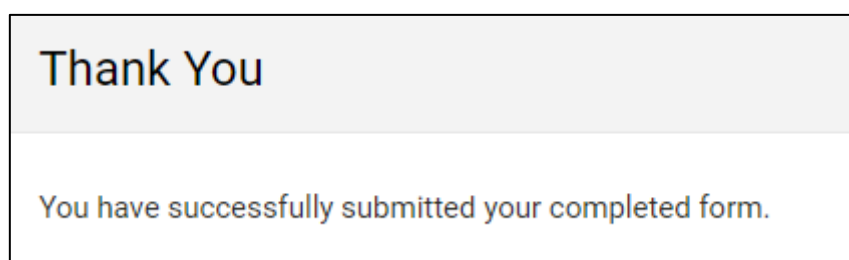


#	Proposal Number	Project Type	Project Title	Institution	Created Date	Status	Edit
1		CCRP - Project Based Awards		test 2	05/05/2017	Draft	
2		CCRP - Project Based Awards		test 2	05/05/2017	Draft	

When you have completed your application/activity/form and saved all changes you will need to click on the **Submit** button which is located at the bottom of the page/screen.

Once the Submit button has been clicked, you cannot make any further change to your application/activity/form. The status of your application/activity/form will automatically update (for example, from Draft to Submitted¹).

A confirmation message will appear on screen when you have successfully submitted your application/activity/form, like the example shown in the following image²:



You will also receive an automated email from donotreply@epa.ie confirming your submission.

¹ The new status will vary depending on the type of application/activity/form which you have submitted.

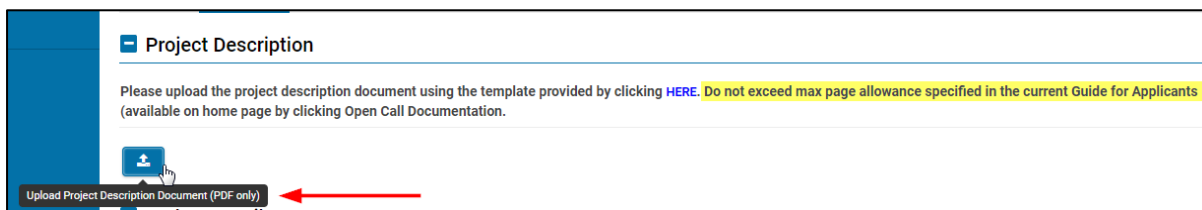
² The content and appearance of the confirmation message will vary depending on the type of application/activity/form which you have submitted.

Uploading Documents and Files

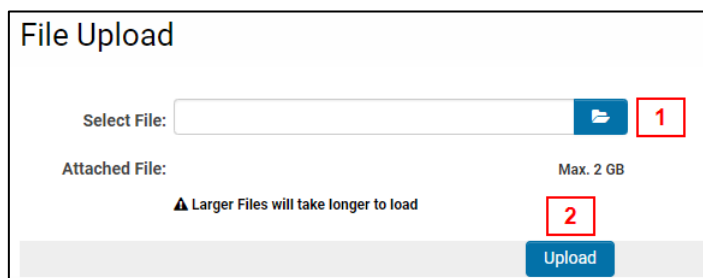
Where an application, activity or form requires you to upload additional items (for example, reporting templates or supporting documentation), an Upload field will be provided. To enable the upload features on the application/activity/form that you are working on, you may need to click on the **Save Draft** button first.

There are two types of uploads on the EPA’s Grant Management and Application Portal:

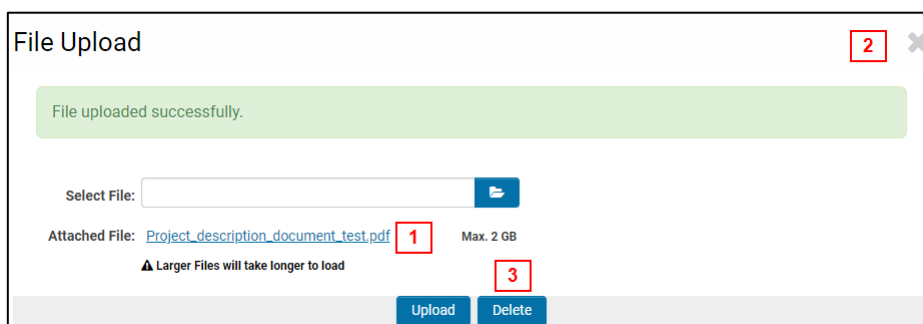
- 1) **Upload of single specific documents** via a button which names the document to be uploaded and specifies the required format (in the example shown in the following image the file must be uploaded in PDF format). Generally, such uploads are limited to a certain number of pages. If the incorrect file format is uploaded or the maximum page limit is exceeded an error message will appear when you try to submit your application/activity/form.



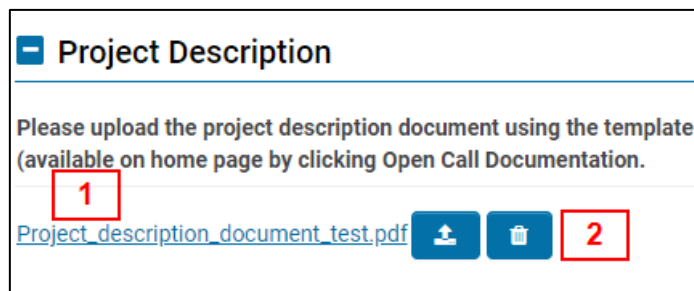
- a. Clicking on the Upload button will open the File Upload pop-up as shown in the following image. Click on the **Browse** button (1) to navigate to your file, then click on the **Upload** button (2) to add the file.



- b. The file will now appear as an attachment in the File Upload pop-up (1). To close the upload pop-up click on the **X** in the top right-hand corner (2), or to remove a file uploaded in error click on the **Delete** button (3) and repeat the previous steps:

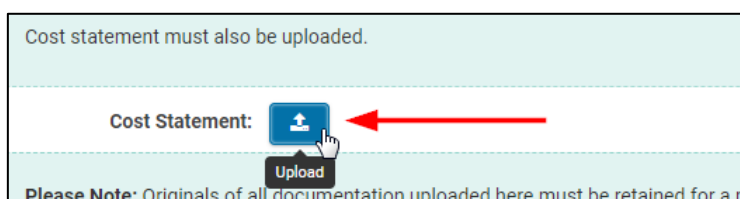


- c. When the file has been correctly uploaded it will appear as a **hyperlink (1)** on the application/activity/form. If you wish to replace the document with an updated version click on the **Delete button (2)** and repeat the earlier steps:

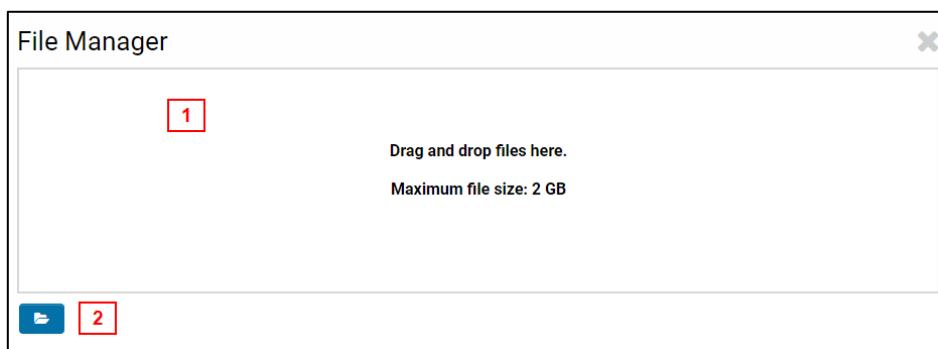


- d. If you are unable to see your uploaded file after following the above steps, click on the **Save Draft** button at the bottom of the screen.

- 2) **General document upload** where the format and document size is not specified, or where multiple files may be required, the upload button will not specify the file type required:



- a. Clicking on the Upload button will open the File Manger pop-up. To upload multiple files, you can either drag and drop files into the space shown in the following image (1) or navigate to the files using the browse button (2)



- b. Click on the **X** in the top right-hand corner of the File Manager pop-up to close it. Your file(s) should now appear as hyperlinks on the application/activity/form. If you are unable to see your uploaded file(s) after following the above steps, click on the Save Draft button at the bottom of the screen.

Print Form Facility

To print an application activity or form, click on the Print Form button as shown below:



This will open a PDF version of an application/activity/form as shown in the following image (**NB** the hyperlinks for all documents attached to it **will not be live**). The file can then be saved and/or printed by clicking on the download and print icons in the top right-hand corner.



IMPORTANT: forms may be downloaded for offline use/review, however they **must not** be circulated outside of the EPA's Grant Management and Application Portal (e.g. by email) under **any** circumstances.

Logging Out

When you have finished using the EPA Grant Management and Application Portal, you should log out from the system by clicking on your name in the Home Page Banner and selecting the Logout option from the drop-down list:

