



# Grant Agreement Preparation

Presentation for the Beneficiaries

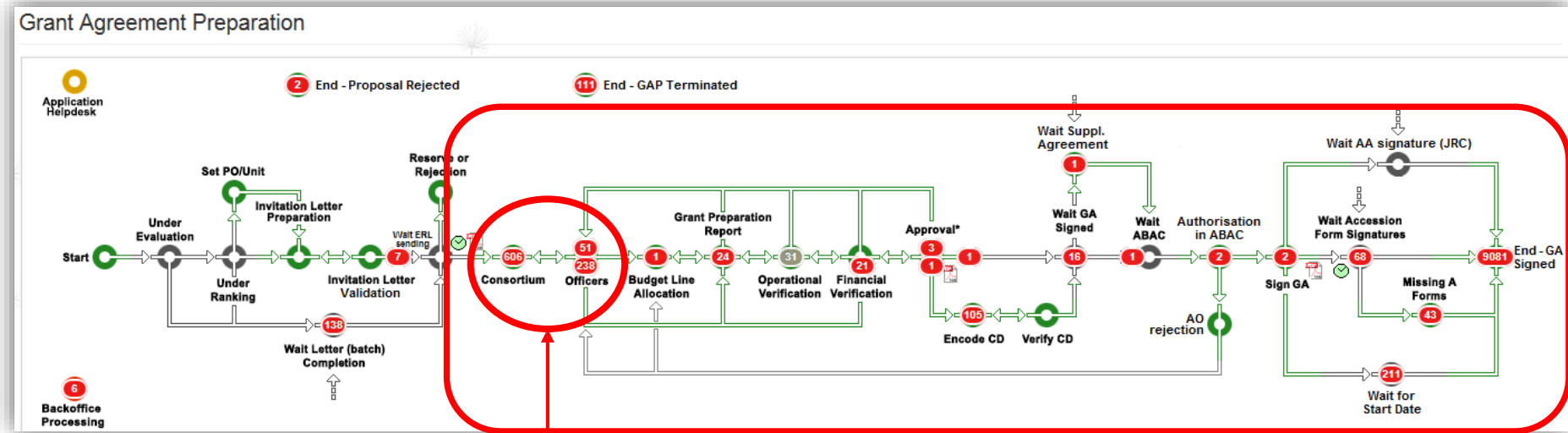
*EACEA October 2021*

# Contents

- Overview of the process and context
- Before we start: useful resources for support
- The steps (end to end)

# GAP – Grant Agreement Preparation

## Overview of the process and context



This presentation will focus on the 'iterative process' between you, as a Project Coordinator, and the Project Officer of the Agency.

# Useful resources for support

More detailed information can be found on the Funding & Tender Portal under the Support tab by [following this link](#).

The screenshot displays the European Commission's Funding & Tender Portal (SEDIA). The top navigation bar includes the European Commission logo, the title 'Funding & tender opportunities', and the subtitle 'Single Electronic Data Interchange Area (SEDIA)'. A 'Welcome' message is visible on the right. The main navigation menu on the left lists various user areas: 'Manage my area', 'My Person Profile', 'My Organisation(s)', 'Grants', 'My Proposal(s)', 'My Formal Notification(s)', 'My Expert Area', and 'My Task(s)'. The top navigation bar also features several tabs: 'SEARCH FUNDING & TENDERS', 'HOW TO PARTICIPATE', 'PROJECTS & RESULTS', 'WORK AS AN EXPERT', and 'SUPPORT'. The 'SUPPORT' tab is highlighted with a red box. Below the navigation bar, the 'Guidance & Manuals' section is displayed. It includes a filter bar with 'GRANTS' and 'TENDERS' buttons. The main content area lists several resources: 'Reference documents', 'Online Manual', 'H2020 Online Manual', and 'IT How to'. The 'IT How to' resource is highlighted with a red box and a red arrow pointing to it from the text on the right. The 'IT How to' resource is described as an 'IT support guide with step-by-step walkthroughs and videos.'

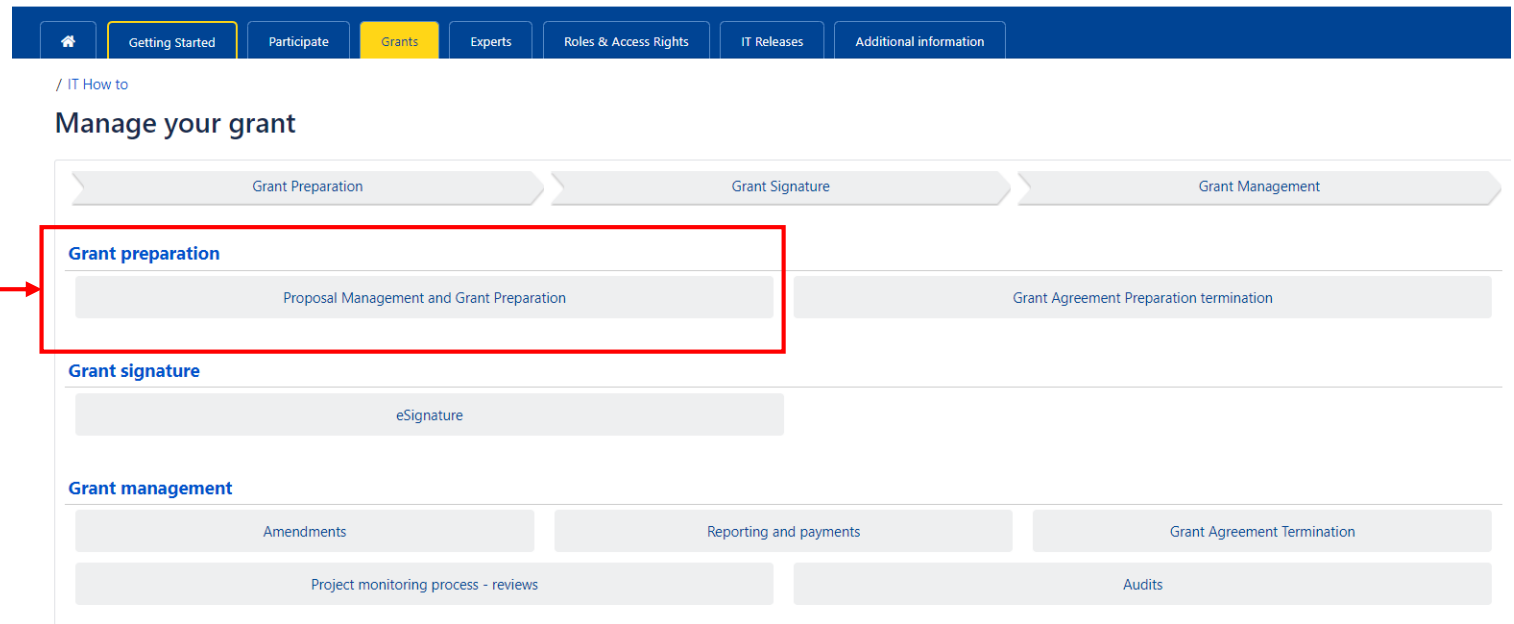
Tjis presentation is based on the IT How to.

# Useful resources for support



Manage Your Grant

Grant Preparation



# How to access your project

English EN

Register Login

(1)

European Commission | Funding & tender opportunities | Single Electronic Data Interchange Area (SEDIA)

Welcome Marianne PAREZ (parezmn)

Manage my area

My Organisation(s)

Grants

My Proposal(s)

**My Project(s)**

My Formal Notification(s)

My Expert Area

My Project(s)

Online manual "Grant management"

IT HOW TO "Grant management"

More info

Results: 1

Download excel list

Search..

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
WWWWWWW	EACEA-30-2019	EPLUS2020	88888888		Actions

(2)

(3)

Project Consortium

Manage Projects (4)

View Proposal

# Grant Agreement Data Preparation and Submission

The Coordinator clicks on **Grant agreement data preparation** to edit and complete the necessary form. (1/3)

The screenshot displays the 'RESEARCH & INNOVATION Participant Portal - Grant Management Services' interface. The top navigation bar includes the European Commission logo, the title 'RESEARCH & INNOVATION', a 'Help' dropdown, and the user role 'Generic DEVUSERCOORDINATOR'. The main content area is divided into two primary sections: 'MY PROJECT' on the left and a project management timeline on the right.

**MY PROJECT** section details:

- Call: UCPM-2017-PP-AG
- Type of Action: UCPM-INT-AG
- Acronym: 925500 Patrick 9.0.9
- Current Phase: Grant preparation
- Number: 925500
- Duration: 24 months
- Start Date:
- Estimated Project Cost: €545.70
- Requested EU Contribution: €20.00
- Contact: Camilla ELSETH

Below the project details is a sidebar menu with five items, all of which are highlighted with a red border:

- Latest Legal Data
- Active Processes
- Document Library
- Communication Centre
- Archived Processes

The main project management area on the right features a timeline titled 'Launch new interaction with the EU'. The timeline includes stages: Submitted (01 Apr 2018), Informed, Invited, Prepared, Signed (01 Jan 2019, 10/275 days), and Paid. A 'Terminate' button is located above the timeline. Below the timeline, a list of actions is shown, with 'Grant agreement data preparation' highlighted by a red box. Other actions include 'GA Declaration - GAP-925500 - 973276467 signature' and 'Submit to EU'. At the bottom of the main area, there are links for 'Process documents', 'Process communications' (with 'New messages (0)' next to it), and 'Process history'. A footer bar at the bottom contains the 'H2020 ONLINE MANUAL' link and a 'HOW TO' button.

# Grant Agreement Data Preparation and Submission

And the person in the organisation that has the role 'PLSIGN' signs the Declaration of Honour (DoH) electronically. (2/3)

Please note that if there are Affiliated Entities (Linked Third Parties) in the Consortium, the responsible Beneficiary will have a separate task for the DoH for each Affiliated Entity ([you can find more information by following this link](#)).

The screenshot displays the 'RESEARCH & INNOVATION Grant Management Services' interface. On the left, the 'MY PROJECT' sidebar for 'HORIZON 2020' lists project details: Call: H2020-SCC-2015, Type of Action: CSA, Acronym: 195983 [GAP], [H2020\_SCC] Automation tests, Current Phase: Grant preparation, Number: 195983, Duration: 36 months, Start Date, Estimated Project Cost: €819.00, Requested EU Contribution: €50.00, and Contact: Virginie BRAEKMAN. A sidebar menu includes 'Latest Legal Data', 'Active Processes', 'Document Library', 'Communication Centre', and 'Archived Processes'. The main content area shows a timeline from 'Submitted' (01 Apr 2020) to 'Paid' (02 Dec 2020, 22/245 days). A task titled 'GA Declaration - GAP-195983 - 973276467 signature' is highlighted with a red box. The task description states: 'The signature of the Declaration of Honour (DoH) is a prerequisite for signing the Grant Agreement. The DoH must be signed electronically by your Project Legal Signatory (PLSIGN). If you have linked third parties, you will also have to upload signed DoHs for them. Please download, for each linked third party, the DoH templates from the task below, ask them to sign and send them back, and then upload the signed PDFs and submit them to the EU by clicking on "Complete". In case you do not see tasks below for the DoHs for your linked third parties, please ask your linked third parties to download the template from Portal Reference Documents, send it to you filled out and signed, and then send it to us through Formal Notification. This can be done by clicking on "Launch Interaction with the EU" and selecting "Launch Formal Notification". For more details and requirements please consult the corresponding section of the H2020 Online Manual. Checking status ...'. A red arrow points from the 'Sign' button in the bottom right corner of the task box to the 'Submit to EU' button in the top right corner of the main content area.



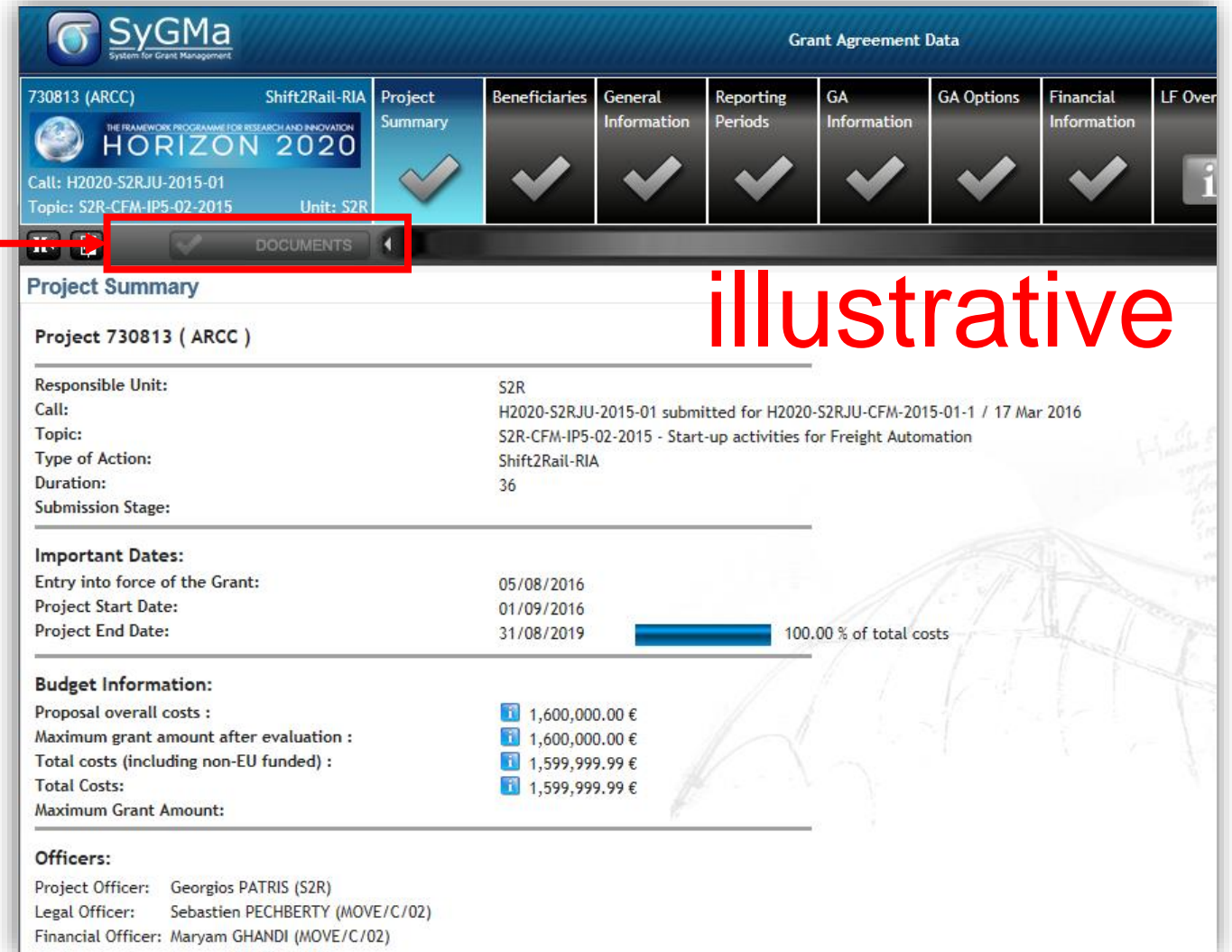
# Grant Agreement Data Preparation and Submission

NB: for multi-beneficiaries Agreements, each one of them will have to sign. (3/3)

The screenshot displays the 'Participant Portal - Grant Management Services' for the 'RESEARCH & INNOVATION' program. The user is logged in as 'Marianne PAREZ'. The main section shows a project timeline with stages: Submitted (14 Feb 2017), Informed, Invited, Prepared, Signed (17 Oct 2017, 197/245 days), and Paid. Below the timeline, a list of tasks is shown, with 'Grant agreement data preparation' highlighted. This task includes two 'GA Declaration' entries, each with a 'Sign' button. A red box encloses these two entries, and a red arrow points to the 'Sign' button for the second declaration. The left sidebar contains project details for 'HORIZON 2020', including call number, type of action, acronym, current phase, number, duration, start date, estimated project cost, requested EU contribution, and contact information. At the bottom, there are links for 'Latest Legal Data', 'Process List', 'Document Library', 'Communication Centre', and 'H2020 ONLINE MANUAL'.

# Grant Agreement Data Preparation and Submission Documents

Once the Coordinator has clicked the Grant Agreement Data preparation task, he or she can complete the necessary forms in the Grant Management Services tool, which opens with the **Project Summary screen**.



**SyGMA**  
System for Grant Management

Grant Agreement Data

730813 (ARCC) Shift2Rail-RIA

THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**

Call: H2020-S2RJU-2015-01  
Topic: S2R-CFM-IP5-02-2015 Unit: S2R

Project Summary ✓

Beneficiaries ✓

General Information ✓

Reporting Periods ✓

GA Information ✓

GA Options ✓

Financial Information ✓

LF Over

**DOCUMENTS**

**Project Summary**

**Project 730813 ( ARCC )**

Responsible Unit: S2R

Call: H2020-S2RJU-2015-01 submitted for H2020-S2RJU-CFM-2015-01-1 / 17 Mar 2016

Topic: S2R-CFM-IP5-02-2015 - Start-up activities for Freight Automation

Type of Action: Shift2Rail-RIA

Duration: 36

Submission Stage:

**Important Dates:**

Entry into force of the Grant: 05/08/2016

Project Start Date: 01/09/2016

Project End Date: 31/08/2019

100.00 % of total costs

**Budget Information:**

Proposal overall costs : 1,600,000.00 €

Maximum grant amount after evaluation : 1,600,000.00 €

Total costs (including non-EU funded) : 1,599,999.99 €

Total Costs: 1,599,999.99 €

Maximum Grant Amount:

**Officers:**

Project Officer: Georgios PATRIS (S2R)

Legal Officer: Sebastien PECHBERTY (MOVE/C/02)

Financial Officer: Maryam GHANDI (MOVE/C/02)

illustrative

# Grant Agreement Data Preparation and Submission Documents

The following **annexes** need to be uploaded under **Documents**:

Annex 1 - Description Of Action (part B) (mandatory)

Grant Management

Grant Agreement Data

909151 909151 CSA

HORIZON 2020

Call: H2020-SCC-2014-2015

Topic: SCC-02-2014 Unit: ENER/C/02

Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information LF Overview Work Packages Deliverables Milestones Reviews Critical Risks Ethics Info

DOCUMENTS

Documents

Title

Grant Agreement

Grant Agreement

Annex 1 - Description of the action (part A)

Annex 1 - Description Of Action (part B)  Browse... Upload

Annex 2 - Estimated budget of the action

Annex 3 - Accession Forms

Annex 4 - Model for the Financial statement

Annex 5 - Model for the certificate on the financial statements

Annex 6 - Model for the certificate on the methodology

Grant Agreement Summary

Grant Agreement Data Sheet

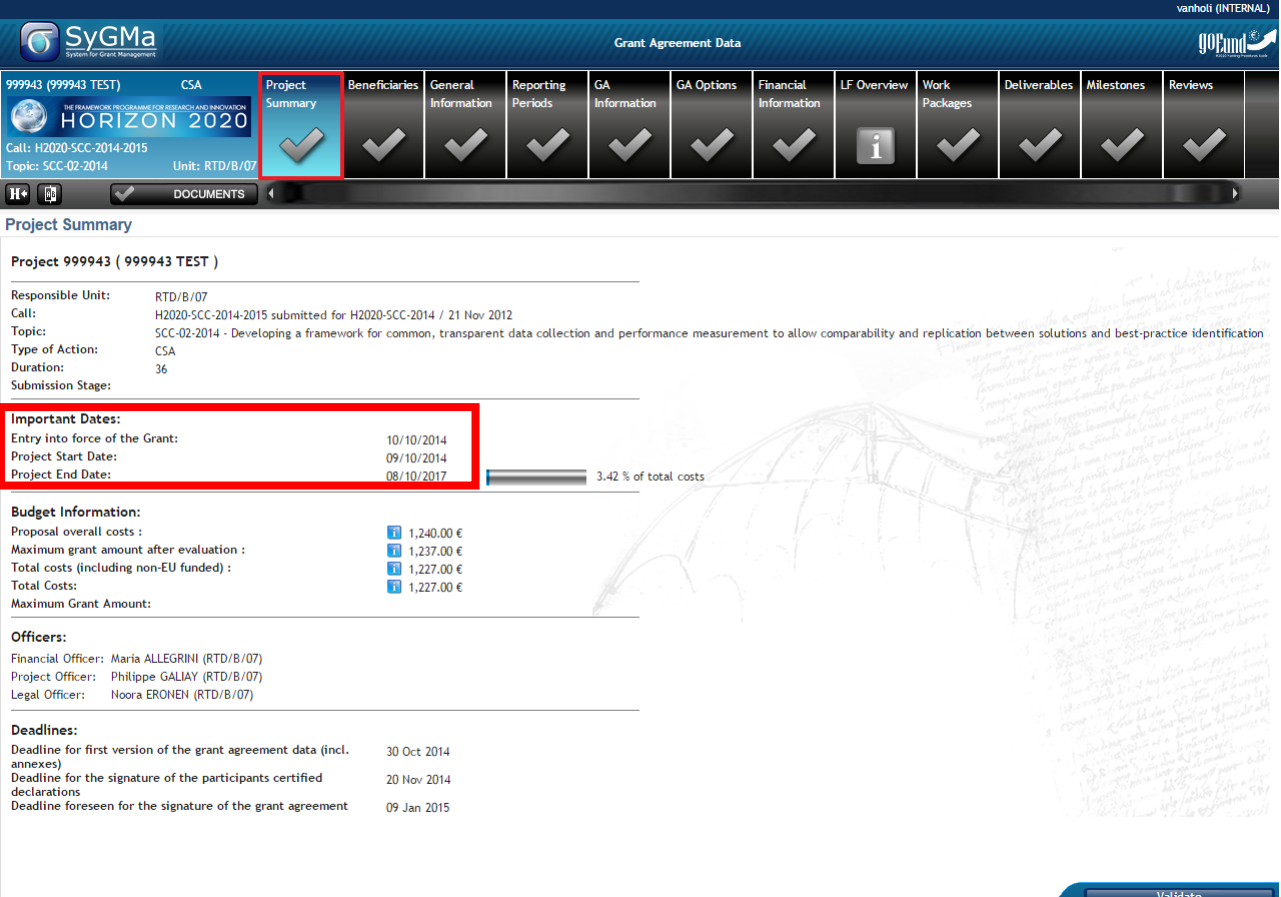
Documents at this stage are 'under construction'

Validate

Commission

# Grant Agreement Data Preparation and Submission Project Summary

Once the grant has been signed, the 'entry into force date of the grant' will also be displayed.



The screenshot displays the SyGMA (System for Grant Management) interface for the 'Grant Agreement Data' section. The 'Project Summary' tab is selected and highlighted with a red box. Below the tab, the project details for 'Project 999943 ( 999943 TEST )' are shown. The 'Important Dates' section is highlighted with a red box, and a red arrow points from the text on the left to this section. The 'Important Dates' section includes the 'Entry into force of the Grant' (10/10/2014), 'Project Start Date' (09/10/2014), and 'Project End Date' (08/10/2017). A progress bar indicates that 3.42% of the total costs have been entered. The 'Budget Information' section shows the proposal overall costs (1,240.00 €), maximum grant amount after evaluation (1,237.00 €), total costs (including non-EU funded) (1,227.00 €), and total costs (1,227.00 €). The 'Officers' section lists the Financial Officer (Maria ALLEGRIINI), Project Officer (Philippe GALIAY), and Legal Officer (Noora EROHONEN). The 'Deadlines' section lists the deadline for the first version of the grant agreement data (30 Oct 2014), the deadline for the signature of the participants (20 Nov 2014), and the deadline for the signature of the grant agreement (09 Jan 2015). A 'Validate' button is located at the bottom right of the interface.

Project 999943 ( 999943 TEST )	
Responsible Unit:	RTD/B/07
Call:	H2020-SCC-2014-2015 submitted for H2020-SCC-2014 / 21 Nov 2012
Topic:	SCC-02-2014 - Developing a framework for common, transparent data collection and performance measurement to allow comparability and replication between solutions and best-practice identification
Type of Action:	CSA
Duration:	36
Submission Stage:	
<b>Important Dates:</b>	
Entry into force of the Grant:	10/10/2014
Project Start Date:	09/10/2014
Project End Date:	08/10/2017
3.42 % of total costs	
<b>Budget Information:</b>	
Proposal overall costs :	1,240.00 €
Maximum grant amount after evaluation :	1,237.00 €
Total costs (including non-EU funded) :	1,227.00 €
Total Costs:	1,227.00 €
Maximum Grant Amount:	
<b>Officers:</b>	
Financial Officer:	Maria ALLEGRIINI (RTD/B/07)
Project Officer:	Philippe GALIAY (RTD/B/07)
Legal Officer:	Noora EROHONEN (RTD/B/07)
<b>Deadlines:</b>	
Deadline for first version of the grant agreement data (incl. annexes)	30 Oct 2014
Deadline for the signature of the participants certified declarations	20 Nov 2014
Deadline foreseen for the signature of the grant agreement	09 Jan 2015

# Grant Agreement Data Preparation and Submission

## Beneficiaries screens

The **Coordinator** and the **Beneficiaries** are automatically listed after receiving the invitation letter.

909151 (909151) CSA  
HORIZON 2020  
Call: H2020-SCC-2014-2015  
Topic: SCC-02-2014 Unit: ENER/C/02

Beneficiaries

Number	Short Name	Legal Name	Role	Country	PIC	PIC Status	Actions
1	AST	AST ADVANCED SPACE TECHNOLOGIES GMBH	CO	DE	973276467	VALIDATED	
2	CNRS	CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE	BEN	FR	999997930	VALIDATED	

Please check all missing information and warnings.

SyGma  
Grant Agreement Data

685527 (NCP-PLAYGROUND-33-RIA)  
HORIZON 2020  
Call: H2020-Adhoc-2014-20  
Topic: MCP-playground Unit: RTD/J/03

Project Summary Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information LF Overview Work Packages Deliverables

Granting Authority  
Missing information for Granting Authority

Ok

Warning

Error, or missing information

Validate

# Grant Agreement Data Preparation and Submission

## Beneficiaries - Partner Summary

You are invited to hover along the screens and check the data (could be outdated).

‘Read-only’ data is validated (or to be validated) by the *EU Validation team*.

Beneficiary 1	Partner Summary	Financial Information	Project Representation	Bank Account	Linked Third Parties	Specific Legal Information
<b>ERASMUS +</b> Call: EPLUS2020-EHEA09-2019 Topic: KA3-EHEA-2019 Unit: EACEA/A/01	<b>Beneficiary 1:</b> XXXXXXXXXXXXXXXX <b>Legal Name:</b> XXXXXXXXXXXXXXXX <b>PIC:</b> 55555555 <b>Status:</b> VALIDATED <b>Legal Address:</b> XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX	✓	✓	⚠	✗	✓

Partner Summary	
PIC	55555555 (validation status: VALIDATED)
⚠ Short Name	XXXXXXXXXXXXXXXXXXXX
Legal Name	XXXXXXXXXXXXXXXXXXXX
Legal address	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX
Phone:	-
Fax:	-
Email:	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX
Website:	
VAT Number:	
Registration Data:	
Legal Form:	UNK
Legal Status	Legal Person / Non Profit Public Body
Financial:	

# Grant Agreement Data Preparation and Submission

## Beneficiaries- Project representatives

The Project Coordinator will appear as the contact person.

The legal signatory is selected in the Portal, under Manage Consortium.

System for Grant Management

ERASMUS +

Call: EPLUS2020-EHEA09-2019  
Topic: KA3-EHEA-2019 Unit: EACEA/A/01

Beneficiary 1: VOWWEEVWSWV  
Legal Name: VAWWEEVWSWV  
PIC: 88888888 Status: VALIDATED  
Legal Address: XXXXXXXX

Partner Summary Financial Information **Project Representa...** Bank Account Linked Third Parties

Project Representatives ⚠

Legal Signatory

Function	User Id	Family Name	First Name	Email
<input type="checkbox"/>	XXXXXX	XXXXXX	XXX	XXXXXXXXXXXXXXX

Contact Persons

User Id	Family Name	First Name	Email
XXXXXX	XXXXX	XXXXX	XXXXXXXXXXXXXXX



# Grant Agreement Data Preparation and Submission

## General Information

The **Project General Information** is automatically listed after receiving the invitation letter.

The **start date** needs to be completed.

The screenshot displays the 'Grant Agreement Data' interface. The top navigation bar includes tabs for Project Summary, Beneficiaries, General Information (highlighted with a red box), Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Associated Partners, Work Packages, Deliverables, Milestones, Reviews, Critical Risks, and Ethics Info. Below the navigation bar, the 'General Information' section is active, showing a form for project details. The 'Start Date Option' field is highlighted with a red box, and a red arrow points to the date selection dropdown menu. The dropdown menu shows the selected date as 'The first day of the month after the signature. Used in Grant Agreements'.

Field	Value
Project Number	211965
Acronym	211965 SUBRSAR - SUBRAMANIAN Saranya
Title	This is a mockup for project with number 211965 for SUBRSAR - SUBRAMANIAN Saranya
Duration	24
Topic	ERASMUS-JMO-2021-JMSC-CoEB-OG-IBA
Call	ERASMUS-JMO-2021-JMSC-OG-IBA submitted for ERASMUS-JMO-2021-JMSC-OG-IBA / 01 Jan 2021
Start Date Option	The first day of the month after the signature. Used in Grant Agreements
Abstract	The first day of the month after the signature. Used in Grant Agreements A specific fixed date
Free Keywords	test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2
Security Constraints	<input type="checkbox"/>



# Grant Agreement Data Preparation and Submission

## General Information

In case it's a specific date, a **justification** needs to be provided.

The screenshot displays the 'Grant Management' interface for 'Grant Agreement Data'. The top navigation bar includes tabs for Project Summary, Beneficiaries, General Information (selected), Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Associated Partners, Work Packages, Deliverables, Milestones, Reviews, Critical Risks, and Ethics Info. The 'General Information' tab is active, showing fields for Duration (24), Topic (ERASMUS-JMO-2021-JMSC-CoEB-OG-IBA), Call (ERASMUS-JMO-2021-JMSC-OG-IBA submitted for ERASMUS-JMO-2021-JMSC-OG-IBA / 01 Jan 2021), Start Date Option (A specific fixed date), and a red box highlighting the 'Justification for Fixed Date' field. Below this, the Abstract field contains 'Test\_Shree\_Eramus' and the Free Keywords field contains 'test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2'. The Security Constraints field is at the bottom. A red arrow points from the text 'In case it's a specific date, a justification needs to be provided.' to the 'Justification for Fixed Date' field. The interface also includes a 'DOCUMENTS' section and a 'Validate' button at the bottom right.

Grant Management

Grant Agreement Data

211965 (211965 SUBRSAR ..) ERASMUS-OG

Call: ERASMUS-JMO-2021-JMSC-OG-IBA  
Topic: ERASMUS-JMO-2021-JMSC-CoEB-OG-IBA

Project Summary Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information LF Overview Associated Partners Work Packages Deliverables Milestones Reviews Critical Risks Ethics Info

DOCUMENTS

General Information

Duration 24

Topic ERASMUS-JMO-2021-JMSC-CoEB-OG-IBA

Call ERASMUS-JMO-2021-JMSC-OG-IBA submitted for ERASMUS-JMO-2021-JMSC-OG-IBA / 01 Jan 2021

Start Date Option A specific fixed date

Fixed Date

Justification for Fixed Date

Abstract Test\_Shree\_Eramus

Free Keywords test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2test WF SE 2

Security Constraints

Validate

# Grant Agreement Data Preparation and Submission

## Reporting Period

The **Project Reporting Periods** will be available.

The default reporting option is established in the call and will be displayed accordingly.

These reporting periods are linked to a payment.

This can be changed **ONLY** by the EU officer if necessary.

The screenshot shows the 'Grant Agreement Data' interface. The 'Reporting Periods' tab is highlighted with a red box and a green checkmark. The interface includes a header with 'Grant Management' and 'Grant Agreement Data'. Below the header, there are various tabs: Beneficiaries, General Information, Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Work Packages, Deliverables, Milestones, Reviews, Critical Risks, and Ethics Info. The 'Reporting Periods' tab is currently active, showing a green checkmark. The interface also displays project details: 909151 (909151) CSA, HORIZON 2020, Call: H2020-SCC-2014-2015, Topic: SCC-02-2014, and Unit: ENER/C/02. A 'DOCUMENTS' button is visible at the bottom left of the interface.

### Reporting Periods

This screen is only editable by EU Officers

Reporting Period No.	From Month	To Month	Duration
1	1	18	18
2	19	36	18

Validate

# Grant Agreement Data Preparation and Submission

## Project GA Information

The **Project Grant Agreement Information** will be available and is read-only.

Any missing fields will be completed by the EU officer.

The screenshot shows the 'Grant Agreement Data' interface. The 'GA Information' tab is selected and highlighted with a red box. A red arrow points from the text 'Any missing fields will be completed by the EU officer.' to the 'GA Information' tab. The 'GA Information' section contains the following fields:

Field	Value
Model Grant Agreement	Horizon Europe AGA – Multi & Mono - V1.0
Granting Authority	Agency
Granting Authority Service	ERCEA/A/01
Grant Implementing Service	ERCEA/C/02
Consortium agreement required	<input checked="" type="radio"/> Yes <input type="radio"/> No

# Grant Agreement Data Preparation and Submission

## GA Options

The **Project Grant Agreement Options** will be available and are read-only.

Any missing fields will be completed by the EU officer.

These options are those that will appear in the Agreement (see earlier slide on Documents).

Grant Management

221144 (221144 KALASLA...) HORIZON...

Call: HORIZON-ERC-2021-VICECHAIRS-IBA  
Topic: HORIZON-ERC-2021-VICECHAIRS-IBA

Grant Agreement Data

Project Summary Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information LF Overview Associated Partners Work Packages Deliverables Milestones Reviews Critical Risks Ethics Info

DOCUMENTS

Grant Agreement Options

This screen is only editable by EU Officers

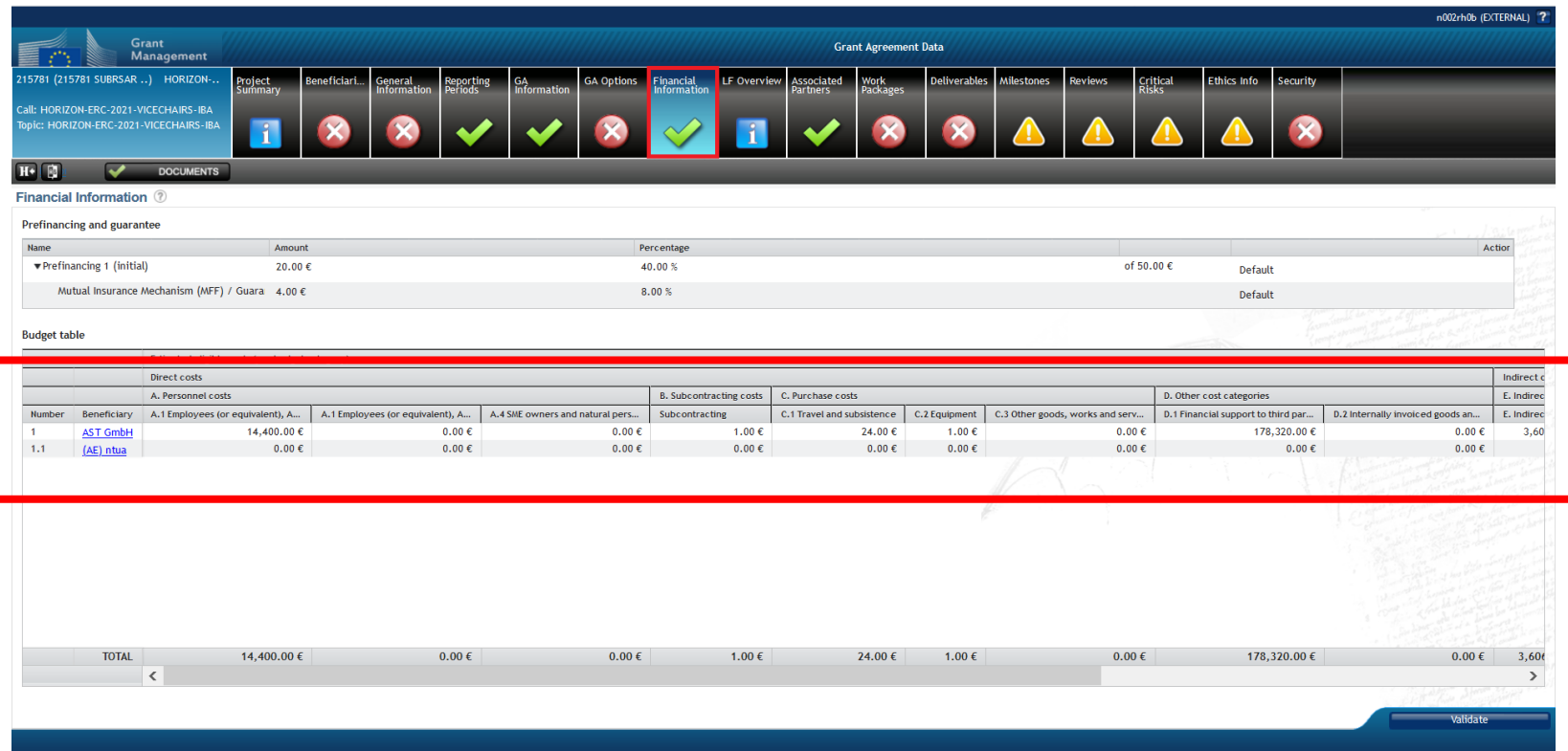
AUTOMATED	Reference	Description	View	Download
<input type="checkbox"/>	GA09	Affiliated entities (AE) (Data Sheet, Article 8)		
<input type="checkbox"/>	GA010	Associated partners (AP) (Data Sheet, Article 9.1)		
<input checked="" type="checkbox"/>	GA011	Third parties giving in-kind contributions (Articles 6.1, 6.3, 9.2)		
<input checked="" type="checkbox"/>	GA012	Subcontractors (Article 9.3)		
<input checked="" type="checkbox"/>	GA013	Recipients of financial support to third parties (Article 9.4)		
<input checked="" type="checkbox"/>	GA014	Non-EU participants (Article 10.1)		
<input checked="" type="checkbox"/>	GA015	International organisations (IO) (Data Sheet, Article 10.2)		
<input checked="" type="checkbox"/>	GA016	Pillar-assessed participants (PA) (Data Sheet table, Article 10.3)		
<input checked="" type="checkbox"/>	GA023	Personnel costs (Data Sheet 3, Article 6)		
<input checked="" type="checkbox"/>	GA033	Subcontracting costs (Data Sheet 3, Article 6)		
<input type="checkbox"/>	GA034	Eligible cost country restrictions (Data Sheet 3, Article 6)		
<input checked="" type="checkbox"/>	GA036	Purchase costs (Data Sheet 3, Article 6.2.C)		
<input checked="" type="checkbox"/>	GA038	Travel and subsistence costs (Data Sheet 3, Article 6)		
<input checked="" type="checkbox"/>	GA039	Equipment type of cost (depreciation/full) (Data Sheet 3, Article 6)		
<input checked="" type="checkbox"/>	GA083	Other goods, works and services costs (Article 6.2.C.3)		
<input type="checkbox"/>	GA040	Financial support to third parties (Data Sheet 3, Article 6)		
<input checked="" type="checkbox"/>	GA042	Indirect cost base (Data Sheet 3, Article 6)		

Validate

# Grant Agreement Data Preparation and Submission Project Financial Information (for Budget Based funding)

For projects being funded through a **Budget Based mechanisms** the Project Financial Information is automatically listed after receiving the invitation letter:

Check whether the budget table is correct and whether all cost categories are present.



The screenshot shows the 'Grant Management' interface with the 'Financial Information' tab selected. The 'Budget table' section is highlighted with a red box. A red arrow points to the 'Budget table' section.

Direct costs		B. Subcontracting costs		C. Purchase costs		D. Other cost categories		Indirect costs							
A. Personnel costs		Subcontracting		C.1 Travel and subsistence		C.2 Equipment		C.3 Other goods, works and serv...		D.1 Financial support to third par...		D.2 Internally invoiced goods an...		E. Indirect	
Number	Beneficiary	A.1 Employees (or equivalent), A...	A.1 Employees (or equivalent), A...	A.4 SME owners and natural pers...	Subcontracting	C.1 Travel and subsistence	C.2 Equipment	C.3 Other goods, works and serv...	D.1 Financial support to third par...	D.2 Internally invoiced goods an...	E. Indirect				
1	AST GmbH	14,400.00 €	0.00 €	0.00 €	1.00 €	24.00 €	1.00 €	0.00 €	178,320.00 €	0.00 €	3,60				
1.1	(AE) ntua	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €				
TOTAL		14,400.00 €	0.00 €	0.00 €	1.00 €	24.00 €	1.00 €	0.00 €	178,320.00 €	0.00 €	3,60				

# Grant Agreement Data Preparation and Submission Project Financial Information (for Lump Sum funding)

For projects being funded through a **Lump Sum** mechanism, the Project Financial Information is 'empty'.

You will have to **set up the Work Packages first** and associate the appropriate budget amount.

The system will build up the table automatically.

The screenshot shows the SyGMA Grant Agreement Data interface. The 'Financial Information' tab is selected, indicated by a blue checkmark icon. Below the tab, the 'Financial Information' section is displayed. It includes a 'Preliminary and guarantee' table and a 'Budget table'.

**Preliminary and guarantee**

Name	Amount	Percentage		Action
Prefinancing 1 (Initial)	68,000.00 €	80.00 %	of 85,000.00 €	Default

**Budget table**

Estimated eligible lump sum contributions (per work package)																	
Number	Beneficiary	WP 1	WP 2	WP 3	WP 4	WP 5	WP 6	WP 7	WP 8	WP 9	WP 10	WP 11	WP 12	WP 13	WP 14	WP 15	Maximum grant ...
1		40,000.00 €	1,000.00 €	2,000.00 €	700.00 €	1,000.00 €	2,000.00 €	2,400.00 €	600.00 €	1,500.00 €	1,200.00 €	1,200.00 €	20,000.00 €	7,400.00 €	2,000.00 €	2,000.00 €	85,000.00 €

A red box highlights the 'Budget table' section, and a red arrow points from the text 'The system will build up the table automatically.' to the table.



# Grant Agreement Data Preparation and Submission

## Project LF Overview

The **Project LF Overview** will be available and is read-only.

It gives the legal and financial situation of each beneficiary of the project.

**SyGMA** System for Grant Management

Grant Agreement Data

768824 (HYBUILD) RIA

THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION  
**HORIZON 2020**

Call: H2020-EEB-2016-2017  
Topic: EEB-06-2017 Unit: RTD/D/02

Project Summary Beneficiaries General Information Reporting Periods GA Information GA Options Financial Information **LF Overview** Work Packages

DOCUMENTS

**Legal and Financial Overview**

Number	Legal Name	PIC	Role	Legal Information	Financial Information	Request for financial	Lear Appointment	Lear extended ma
▼ 1	COMSA CORPORACION DE INFRAESTRUCTURAS SL	972392409	CO	✓	✓	✓	✓	✓
1	COMSA INSTALACIONES Y SISTEMAS INDUSTRIALES SL	951956740	TP	✓	✓	✓	✓	✓
2	UNIVERSIDAD DE LLEIDA	999838559	BEN	✓	✓	✓	✓	✓
3	CONSIGLIO NAZIONALE DELLE RICERCHE	999979500	BEN	✓	✓	✓	✓	✓
4	AIT AUSTRIAN INSTITUTE OF TECHNOLOGY GMBH	999584128	BEN	✓	✓	✓	✓	✓
5	NOBATEK	994163865	BEN	✓	✓	✓	✓	✓
6	CSEM CENTRE SUISSE D'ELECTRONIQUE ET DE MICROTECHNIQUE SA -	999958839	BEN	✓	✓	✓	✓	✓
7	ACCADEMIA EUROPEA DI BOLZANO	999887253	BEN	✓	✓	✓	✓	✓
8	FAHREH	999887253	BEN	✓	✓	✓	✓	✓
9	Mikrometal sro	933926574	BEN	✓	✓	✓	✓	✓
▼ 10	SVILUPPO TECNOLOGIE E RICERCA PER L'EDILIZIA SISMICAMENTE SICI	966010294	BEN	✓	✓	✓	✓	✓
1	D'APPOLONIA SPA	999951467	TP	✓	✓	✓	✓	✓
11	NATIONAL TECHNICAL UNIVERSITY OF ATHENS - NTUA	999978142	BEN	✓	✓	✓	✓	✓
12	FRESNEX GMBH	929989635	BEN	✓	✓	✓	✓	✓
13	ENGINEERING - INGEGNERIA INFORMATICA SPA	999960488	BEN	✓	✓	✓	✓	✓
14	DAIKIN AIRCONDITIONING HELLAS SA	943400370	BEN	✓	✓	✓	✓	✓

The LEAR has been appointed and validated

All mandatory legal information is present and validated

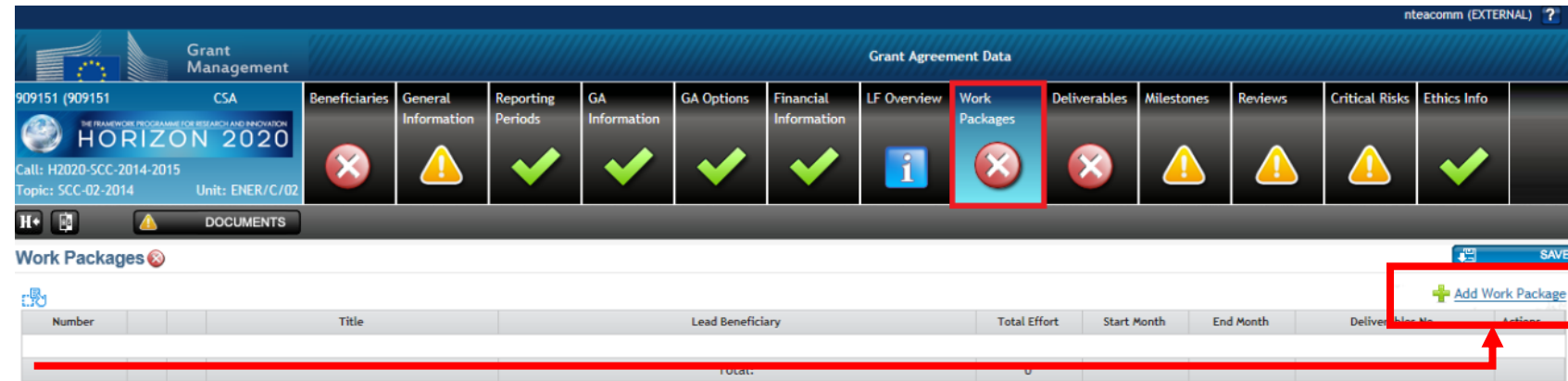
LEAR data is missing

Data Status Workflow status  
Core DECLARED WAITING\_FOR\_VALIDATION

# Grant Agreement Data Preparation and Submission Project Work Packages

The **Project Work Packages** are not automatically listed after receiving the invitation letter.

- Complete all necessary work packages.
- Please note that you can change the order of the work packages by dragging and dropping.
- Please reuse the naming and the order as declared in the application (easier to follow-up and cross-check).



The screenshot displays the 'Grant Management' interface for 'Grant Agreement Data'. The 'Work Packages' tab is highlighted with a red box. Below the tab bar, a table for 'Work Packages' is shown. A red arrow points to the 'Add Work Package' button in the top right corner of the table area.

Number	Title	Lead Beneficiary	Total Effort	Start Month	End Month	Deliverables	Actions
<div>+</div> Add Work Package							



# Grant Agreement Data Preparation and Submission

## Project Deliverables (1/2)

The **Project Deliverables** are not automatically listed after receiving the invitation letter.

- Complete all necessary Deliverables.
- Please note that you can change the order by dragging and dropping.
- Please reuse the naming and the order as declared in the application.

The screenshot displays the 'Grant Management' interface for a specific project. The top navigation bar includes tabs for various sections: Project Summary, Beneficiaries, General Information, Reporting Periods, GA Information, GA Options, Financial Information, LF Overview, Associated Partners, Infrastruct..., Researchers, Work Package, Deliverables, Milestones, and Reviews. The 'Deliverables' tab is highlighted with a red box. Below the navigation bar, the 'Deliverables' section is visible, showing a table with columns: Number, Relative Number in WP, Title, Lead Beneficiary, Type, Dissemination Level, Due Date (in months), and Actions. A red box highlights the 'Add Deliverable' button in the top right corner of the table. A red line connects the 'Add Deliverable' button to the 'Deliverables' tab. The table contains one entry: D1, D1.1, D1 - Deliverable title created at 23072021 09:00:44, AST GmbH, R, PU, 2. A 'Validate' button is located at the bottom right of the interface.

Number	Relative Number in WP	Title	Lead Beneficiary	Type	Dissemination Level	Due Date (in months)	Actions
D1	D1.1	D1 - Deliverable title created at 23072021 09:00:44	AST GmbH	R	PU	2	✕

# Grant Agreement Data Preparation and Submission

## Project Deliverables (2/2)

The **Project Deliverables** are not automatically listed after receiving the invitation letter.

- Please edit the description
- Insert also the links of the deliverables once these have been set (see following slides).



Deliverable details

Number

2

Title

D1

Lead Beneficiary

1. AST GmbH

Type

DEM – Demonstrator, pilot, prototype

Dissemination level

Due Date (in months)

Description

Links to WP

PU : Public

SEN : Sensitive

R-UE/EU-R : EU Classified

S-UE/EU-S : EU Classified

C-UE/EU-C : EU Classified

number

title

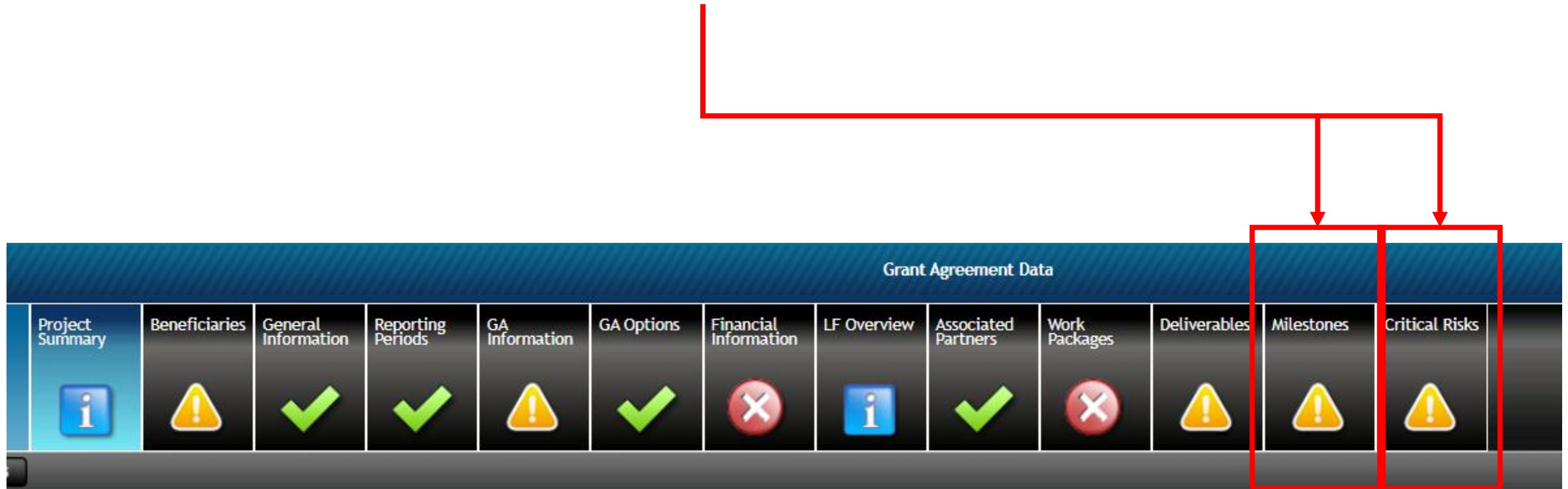
leadBeneficiary

endMonth

# Grant Agreement Data Preparation and Submission

## Project Milestones and Critical Risks

Although not Mandatory, please insert both Milestones and Risks as per your Application.



# Grant Agreement Data Preparation and Submission

## SUBMIT

Once all forms have been completed, the **Coordinator** clicks the **Submit to EU** button.

The screenshot displays the 'Participant Portal - Grant Management Services' interface. The top navigation bar includes the European Commission logo, the title 'RESEARCH & INNOVATION', a 'Help' dropdown, and the user role 'Generic DEVUSERCOORDINATOR'. The main content area is divided into a left sidebar and a central workspace.

**Left Sidebar (MY PROJECT):**

- Call: UCPM-2017-PP-AG
- Type of Action: UCPM-INT-AG
- Acronym: 925500 Patrick 9.0.9
- Current Phase: Grant preparation
- Number: 925500
- Duration: 24 months
- Start Date:
- Estimated Project Cost: €545.70
- Requested EU Contribution: €20.00
- Contact: [Camilla ELSETH](#)
- Buttons: Latest Legal Data, Active Processes, Document Library, Communication Centre, Archived Processes

**Central Workspace:**

- Proposal Management & Grant Preparation** (925500 - 925500 Patrick 9.0.9)
- Timeline:** A horizontal timeline showing stages: Submitted (01 Apr 2018), Informed, Invited, Prepared, Signed (01 Jan 2019, 10/275 days), and Paid.
- Actions:** A 'Terminate' button and a 'Submit to EU' button (highlighted with a red box).
- Documents:** A list of documents including 'Grant agreement data preparation' and 'GA Declaration - GAP-925500 - 973276467 signature'.
- Process documents**, **Process communications**, and **Process history** sections.
- New messages (0)** indicator.

**Footer:**

- H2020 ONLINE MANUAL
- HOW TO
- © European Communities - Version 1.16.3

# Some other support resources (1/2)

[Support overview  
\(europea.eu\)](https://europea.eu)

European Commission | Funding & tender opportunities  
Single Electronic Data Interchange Area (SEDIA)

SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | **SUPPORT**

Support overview

GRANTS | TENDERS

Support by type

- GUIDANCE
- FAQ
- HELPDESKS

Popular support topics

EU Login	Online manual	How can I acquire roles and access rights for proposals, projects or organisations?	FAQ
How to change the EU Login account details?	FAQ	How to update my organisation data?	FAQ
What is a LEAR (Legal Entity Appointed Representative) and what are LEAR's rights and tasks?	FAQ	Where can I find more user guidance related to proposal submission?	FAQ
How to assign PLSIGN?	FAQ	SME Self Evaluation	IT how to
How do I fill in my bank account as an expert?	FAQ	Where can I find the National Contact Points (for Horizon Europe)?	Helpdesks

# Some other support resources (2/2)

- [Walk through all the steps to get your LEAR Approved](#)
- [How to manage the roles in your project](#)