

Idealist7FP Project

Partner Search Manual for Proposers **045059**

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Appendix 1 – Guidelines to Fill the PS Form out

1. The Partner Search Publication Procedure.

The whole process for launching and managing Partner Searches will be centralized through the main Ideal-ist web site: www.ideal-ist.net. This is where we will be referring to through the rest of this document.

1.1 Registration.

Before accessing the main functionalities of the web site, any new potential proposer should register on www.ideal-ist.net. To do this, they should simply click on ‘**New Proposer?**’ on the blue box situated on the bottom right corner of the main page.

A screenshot of a web interface with a dark blue background. At the top left, the text 'Log in' is displayed in a light blue font. Below it, the label 'Login Name' is followed by a white text input field. Underneath, the label 'Password' is followed by another white text input field. A white button with a yellow key icon and the text 'Log in' is positioned below the password field. At the bottom left, there is a light blue link with an information icon and the text 'Forgot your password?'. At the bottom right, there is a light blue link with a person icon and the text 'New Proposer?'. A horizontal line separates the 'Forgot your password?' link from the 'New Proposer?' link.

To finalize the registration process, a few basic data about the new members and the organizations they are representing will be required by means of an electronic form. In addition, they will be able to choose their own ‘User Name’ and ‘Password’.

Once the registration process is completed, the new members will be able to access the system and all the services provided, through their own **Personal Home Page**. Particularly, by means of the blue **Control Panel** on the right of the page, the main features provided will be:

- Launching Partner Search Forms for any ICT Call available at the time (including Competitive Calls for running projects).
- Searching for any other published Partner Searches using the corresponding Search Engine.
- Checking and managing any own Partner Search Form through the different phases of their life (**Private/Pending/Published**), as well as the responses received for the published ones.
- Closing the published Partner Searches once the appropriate partners have been found.
- Editing their own Profile and changing their Password.

This all will be done by using the corresponding Control Panel:



1.2 Completion of the Partner Search Form.

Among all the features provided to the registered members, the most important one will be the possibility to launch their own Partner Search processes to open ICT Calls. To do this, they should simply click on 'New Partner Search' (or 'New Competitive Call') on the blue Control Panel. This will automatically open the corresponding electronic form with the following fields:

Proposal Basic Information:

Call Identifier, Challenge, Objective, Funding Scheme, Evaluation Scheme and Closure Date, all of them by means of combo boxes that are automatically filled out when only one option is possible due to previous selections.

Proposal at a Glance:

Then an **Acronym** and **Proposal Name** should be provided, and a basic description of the project is to be included in the **Subject** field.

Project Description:

Objectives of the project should be further explained in the **Proposal Outline** field, but always trying to avoid delicate or confidential information. This will be complemented with the most important **Keywords** related to the objectives of the proposal.

Partner Profile Sought:

The most important information, for partner search purposes, should be provided in the following three fields, giving an overview of the different skills and expertises required

for the realization of the project and the work they will carry out in its lifetime. Finally, the type of partner sought will be indicated for each of these Profiles Sought.

The form provides also the proposer with the possibility to search for a coordinator for this specific proposal, and ask about the previous experience of the proposer coordinating/participating in EU ICT projects.

At the end of the form, the proposer is given the possibility to indicate other email addresses of colleagues (or members of the consortium) who will be informed of all the responses generated to this specific Partner Search, in case they want to share this responsibility.

Guidelines on how to best fill this form out will be provided in Appendix 1 to this document with the aim to launch very focussed high quality searches. The best way to improve the quality of the responses starts by defining very clear and concise contents in the search form explaining what is to be done and what is needed to achieve it. Support from the Ideal-ist representatives is essential at this stage.

Finally, as this feature is only accessible for registered members, the contact data of the proposer will be inserted automatically, although it will not be public and not be shown on the form once published.

To finish the process, the proposer should accept the Confidentiality Clause and push the **'Save and Submit'** button. This will activate a **checking tool** that will highlight in yellow those fields not correctly completed. Upon successful submission of a complete form, both the National Representative and the Ideal-ist Quality Team will be informed and the validation process will be initiated. The proposer will be informed of this by means of an email.

If the proposer only clicks on **'Save'**, the form will be saved with the current contents to be completed and submitted in a future time. All these drafted Partner Search forms will be stored under the folder labelled **'Private'** and can be continued by the proposer at any time later.

Private Pending Published									
PS ID	Proposal Name	Call	Challenge	Objective	Date	Country	Num EOI	Quality Label	

It is important to mention that, in those cases where the registered member is a consultant working in another organization's proposal, the following data of the latter should be provided on the form: Name of the Organization that is the real proposer, City and Country.

1.3 Publication of the Partner Search Form.

Once the proposer clicks on **'Save and Submit'**, the Partner Search form will enter into a new phase. The first effect is that it will be moved from the folder **'Private'** to the one labelled **'Pending'**.

Private	Pending	Published	
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PS ID	Proposal Name	Call	Challenge	Objective	Date	Country	Num EOI	Quality Label
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At the same time, both the corresponding National Representative and the members of the Quality Team will be informed of this new Partner Search form inserted in the system, inviting them to check its contents and initiate the corresponding discussion to grant it the Quality Label. The proposer will not interact in this discussion, and their only participation will be to be invited to produce modifications on the form in case needed. To do this, the Ideal-ist National Representative will **‘Send back the form to the Proposer’** and will contact him by email or telephone to explain him what these changes suggested will be. This way, the proposer will be able to access again the form under discussion by means of the folder **‘Private’** in his Personal Home Page.

Finally, in the event of a positive outcome during the discussion between the National Representative and the Quality Team, the **Quality Label** will be granted and the Partner Search will be published. This will have the following effects:

- The Partner Search form will be moved from the folder **‘Pending’** to the one labelled **‘Published’**, on the Proposer’s Personal Home Page.
- The contents of the Partner Search form will be publicly available through www.ideal-ist.net, with the exception of the contact data of the proposer and the information related to their previous experience. Instead of this information, a **‘Reply’** button will be used to contact the proposer, launching a **Standard Reply Form** expressly to that Partner Search.
- The proposer will be informed of this by email.
- The basic information about the Partner Search and the link to the complete form will be distributed by email to all the members of the Ideal-ist Network.
- From this moment on, the proposer will start receiving responses to this Partner Search.

Private	Pending	Published	
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PS ID	Proposal Name	Call	Challenge	Objective	Date	Country	Num EOI	Quality Label
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In case both the National Representative and the Quality Team estimate the form doesn’t fulfil the Quality Criteria (both objective and subjective) that rule the Ideal-ist Partner Search Mechanism, the National Representative will be responsible for **‘Rejecting’** the form and informing the proposer of this fact.

2. The Replying Procedure.

The first thing to mention is that all the published Partner Search forms will be publicly available to everybody, and Interested Organizations do not have to register to www.ideal-ist.net to be able to reply to these Partner Searches.

This way, when an Interested Organization clicks on the **‘Reply’** button of an open Partner Search, the following Standard Reply Form will appear:

2.1 The Standard Reply Form.

In this **Standard Reply Form**, the interested organizations are expected to provide appropriate comments to the skills and expertises searched by the proposer, the work to be carried out, etc. from the point of view of their own experience in those areas. In addition, their previous experience and background on R&D programmes can be given and, if the proposer is looking for a coordinator, they can tick the corresponding box, offering themselves as coordinators for the potential project.

At the end of the form, their contact data are required, informing the replying organizations that this data will not be public and it will only be forwarded to that Partner Search's proposer and other members of the Core Team, in case this option is used by the proposer. In case this replying organization has been 're-directed' to Ideal-ist by another project, network or support action different to Ideal-ist (option 'How did you find out about us?'), a notification with this contact data will be sent to the responsible persons concerned with that project or network.

After accepting the Confidentiality Clause and clicking on 'Send', a **checking tool** will highlight in yellow those fields not correctly completed. Only when all the mandatory fields are completed the reply form will be sent to the proposer by email and published in the corresponding '**Responses Page**' for that Partner Search, accessible only to that proposer by means of the list of '**Published**' Partner Searches in his **Personal Home Page**.

The information provided in this e-mail will be enough for the proposer to estimate the appropriateness of the replying organization and contact them. Nevertheless, it is recommended that the Proposers use the **Responses Management Tool** provided by means of their Personal Home Page to manage, select and reply to the Interested Organizations. This Responses Management Tool gives the following two options when contacting the replying organizations:

- **Accept**
- **Reject**

In both cases, it will include a standard approval/dismissal text that the proposer will be able to personalize in each case.

In parallel to this process, an acknowledge of receipt will automatically be sent by the Ideal-ist server to the Interested Organization, informing them of the correct delivery of their reply and providing them with the reply itself for their own records.

3. The Management of the Process by the Proposer: Personal Home Page

We have seen before that the registered members can use their Personal Home Page to keep track of the status of each of their Partner Searches through the complete validation process of the form:

- **Private:** The Partner Search form is considered a draft, and hence is only accessible to the corresponding proposer who can 'Save' it as many times as wished before submitting it.
- **Pending:** The proposer already submitted a complete version of the Partner Search form that will be accessible to the corresponding National Representative and the Quality Team for validation. In this process, the proposer can be invited by his National Representative to produce modifications on the form and re-submit it with the aim of better focussing it to the objectives of the call, or improve its contents. In the worst event, the form will be discarded.
- **Published:** The Partner Search form was positively evaluated by the National Representative and the Quality Team and was published and distributed. The proposer will be able to view the contents of the form and the corresponding responses generated.

This way, only those Partner Search forms under the folder '**Published**' will be publicly accessible through www.ideal-ist.net and will generate responses and further actions. Hence the following features only refer to them:

3.1 The Responses Management Tool.

All the responses generated to a given Partner Search form will be stored and accessible to the proposer by means of his Personal Home Page. To view these responses, the Proposer will only have to:

- 1) Log-in to the system using his own login and password.
- 2) Go to the corresponding list of published Partner Searches (notice that there are two different lists for ICT regular Calls and for Competitive Calls).
- 3) Access the 'EoI Section' of the corresponding Partner Search by clicking on the link EoI shown on the list.
- 4) The whole list of responses received to that Partner Search will appear on a separate page, and all the individual responses (contents and contact details of the replying organization) will be accessible.

Once the Proposer has checked out the received responses, this Responses Management Tool gives him the possibility to contact the replying organizations in an easy and fast way. The following two options are provided when contacting the replying organizations:

- **Accept:** It will include a standard approval text that the proposer will be able to personalize and the personal contact details of the proposer. The sender of this email will be the proposer's own email address. The aim of this is to establish further contacts between the two parties with the objective to work together in the proposal.
- **Reject:** It will include a standard dismissal text that the proposer will be able to personalize. The contact details of the proposer will not be disclosed and the sender of this email will be the email address of the idealist server. The aim of this is to thank the replying organization even when they will not be included in the consortium or contacted again.

It is of high importance to make use of this tool to contact the replying organizations and make them aware of the proposer's interest to collaborate with them or not. In any case we recommend the proposers to decrease the frustration of those organizations not finally included in the consortium by sending a 'thank you' message and inviting them to contact again for a future collaboration.

3.2 Amendment and Closure of the Partner Searches.

By means of the list of Partner Searches under the folder '**Published**', the proposer can access their own published forms and check their actual contents. In case the proposer wishes to modify the contents of the form (for instance, because the actual profiles have already been covered but they have identified another potential partner needed with a different profile), they should contact their **National Representative**, who will have to options:

- 1) '**Unpublish**' the Partner Search (this will move the Partner Search form from the folder '**Published**' to the folder '**Pending**' and then '**Edit**' the contents of the form, or
- 2) '**Unpublish**' the Partner Search and '**Send Back to the Proposer**'. This will allow the proposer to access the Partner Search form again by his '**Private**' folder and '**Edit**' the corresponding changes himself before re-submitting it. It is important to highlight that a phone or email contact between the National Representative and the Proposer will be needed to make the latter aware of this possibility.

In any case, once the changes are saved and the Partner Search form is reinserted in the system, the Quality Team will re-check the form and re-assign the **Quality Label** under request from the National Representative before re-publishing (and re-distributing it if needed) the Partner Search form and make it publicly accessible again.

In the event of receiving enough appropriate responses to the Partner Search and completing the consortium, it is recommended to close the Search without delay, to avoid further responses and save time both to the proposer and the replying organizations. To do this, the proposer can simply click on the button '**Close**' placed both at the top and the bottom of the form. This will automatically mark the Partner Search as closed on www.ideal-ist.net and will delete the 'Reply' button that allows interested organizations to reply. The reasons provided for closing a Partner Search form will be either:

- A consortium is being formed, or
- The proposer decided not to go ahead

depending on the final status as estimated by the proposer.

In case the proposer wants to re-open the Partner Search at a later stage (for instance, because one of the partners dropped out at the last minute), they can contact their National Representative, who will be allowed to re-open the Partner Search form and distribute it for a second time.

3.3 The Electronic Feedback Form.

To be updated.

APPENDIX 1 – Guidelines to Fill the PS Form Out

Basic Information:

- **Call Identifier:** Options provided by a combo box to all the Calls currently open.
- **Challenge:** Only valid options for the chosen Call are given.
- **Objective:** Only valid options for the chosen Call and Challenge are given.
- **Funding Schemes:** Automatically assigned if only one option for the Objective chosen, otherwise only valid options for that Objective are provided according to the ICT Workprogram.
- **Evaluation Scheme:** Automatically assigned if only one option for the Objective and Funding Scheme chosen, otherwise only valid options are provided.
- **Closure Date:** Automatically assigned when Call, Objective and Evaluation Scheme are chosen.

Proposal at a Glance:

- **Proposal Name:** The best option to fill this field out should be an Acronym followed by its corresponding explanation, giving a first impression of the aims and objectives of the project.
- **Subject:** Short description of the project (3-4 lines).

Project Description:

- **Proposal Outline:** Detailed description of the aims and objectives that the project wants to achieve, always avoiding delicate or confidential information (3-4 short paragraphs might be enough).
- **Keywords:** Most representative terms related to the project.

Partner Profile Sought:

- **Required Skills and Expertise:** Short description of the profile(s) needed to develop the project, or general description and experience of the possible partner(s) wanted. The more specific these profiles are, the more accurate the responses will be.
- **Description of the Work to be Carried Out by the Partner(s) Sought:** Short description of the work to be assumed by each one of those profiles once they are involved in the project.
- **Type of Partner(s) Sought:** To be used when specific needs about the type of partners are fundamental for the consortium: Hospitals, Libraries, specific types of SME, etc.
- **Please, tick the box if you are looking for a Coordinator, who would coordinate your proposal:** In case the proposing organization needs another organization to carry out the coordination of the project once funded.

Your Experience in ICT Project Management:

These data will be used for internal statistical purposes only, and will not be public on the finally published form:

- **Have you ever coordinated an ICT Project before?** Yes/No

- **Have you ever participated in an ICT Project before?** Yes/No

Expression of Interest (EoI):

Inform a Colleague about received Expression of Interests (EoI): As all the responses to the published Partner Search will be managed and stored in the Ideal-ist server, and granted to the proposer by means of his own secure area, he is given the possibility to indicate the email address(es) of a colleague or colleagues to receive the email notifications of every Expression of Interest generated to that Partner Search. Nevertheless, the Personal Home Page of the proposer should be only accesible to the registered user, and he should not disclose his access data to anyone else.

Finally, the proposer is asked to expressly accept the Ideal-ist Confidentiality Clause before being able to Save and Submit the proposal.