

PROSPECT USER MANUAL

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1. Introduction

1.1 What is PROSPECT?

PROSPECT is the electronic system developed by EuropeAid to facilitate the submission of applications for call for proposals.

This manual will help you to apply on-line for a published call for proposals. It gives a functional description of the PROSPECT application, i.e. technical features and functionalities and step-by-step procedures for system access and use.

The manual contains all essential information for applicants to make full use of the PROSPECT application. Nevertheless, the information it contains is **for guidance only** and does not replace legal documents.

The Guidelines for Applicants for each specific call are the legally binding document for the corresponding call for proposals.

If you want additional information on EU contracting procedures for external aid please refer to the Practical Guide, which is available at the following link:

http://ec.europa.eu/europeaid/prag/document.do?locale=en

2. Before Starting: Tips to Help You with Your Application

Before starting

Here is some useful information to help manage your application:

- You need to have an ECAS account before applying (see the next chapter of this manual);
- Read carefully the Guidelines for Applicants that apply to the call. Every call has specific Guidelines published on EuropeAid website: https://ec.europa.eu/europeaid/about-funding-en;
- Check that you have all necessary information at hand and start your on-line application in good time.

System and browser requirements

The following system and browser features are required in order to use PROSPECT to its full potential:

- Make sure that Java script is enabled on your computer;
- PROSPECT is ready to be used with Internet Explorer (from version 9) and the current and previous versions of Firefox and Chrome.

Online Submission

- Take the time you need to complete your application properly, save it regularly and **do not forget to submit** your application before the deadline.
- Once you have submitted your application, you will <u>not</u> be able to make any changes.
- Pay attention to your application status (draft/submitted): If your application has been successfully submitted, the status of your application will change from draft to submitted and a notification message will appear in your PROSPECT profile. An e-mail message will also be sent to the e-mail address you have indicated, if you have selected the relevant option in your user settings.
- Ensure that the e-mail address you wish to link your application to is valid and will be active and accessible for the complete duration of the selection procedure.
- Fill in all mandatory fields marked with an asterisk (*).

Note that when you submit an application online via PROSPECT, it can only be accessed and updated using the same ECAS ID (login user name) and password used when first creating the application.

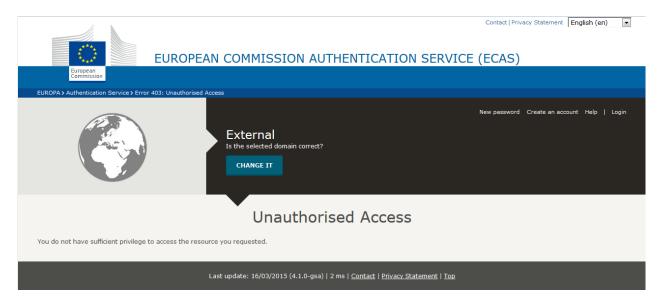
3. Accessing and Submitting an Application with PROSPECT

3.1 Log in to PROSPECT

3.1.1. New Users

If you are a **new user** and you **do not have an ECAS account:**

a) Enter the following URL address in your web browser: https://www.cc.cec/cas/register.

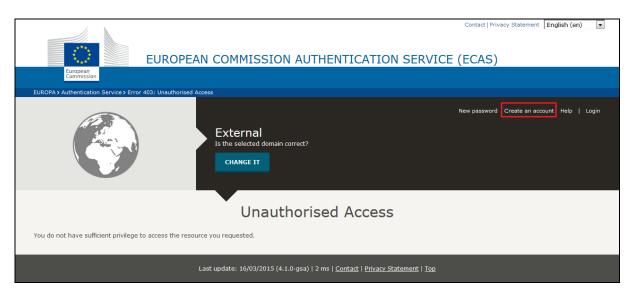


Note: If you have an account and still see the "Unauthorised Access" message, please click on "Login" on the upper part on the screen to continue.

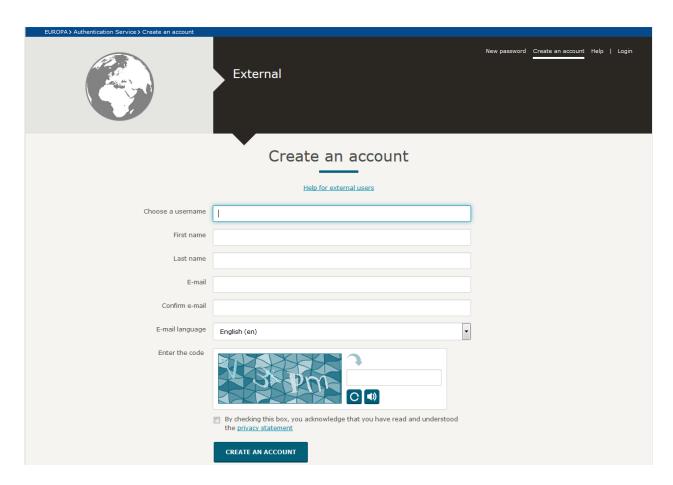
b) Please make sure that the selected domain is "External"; if this is not the case, please click on the "Change it" blue button and select "External" from the available list:



c) Then, click on the "Create an account" link in the upper part of the screen:



d) In the ECAS login screen displayed, fill in all the fields in order to create your account:

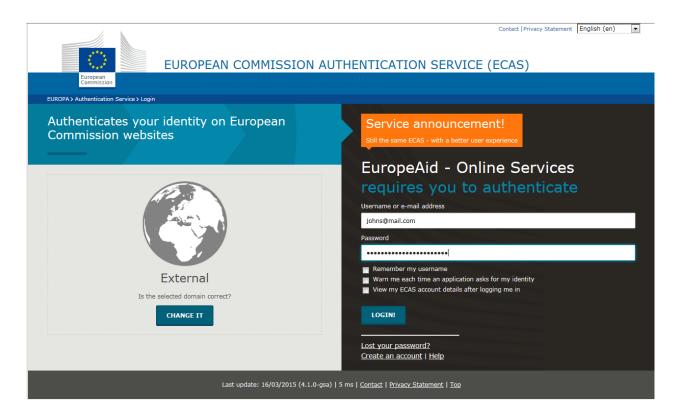


Please do not forget to tick the privacy statement acceptance box before clicking on the "Create an account" button.

If you need help, click on the 'Help' link that appears in the upper right corner of the screen.

3.1.2. Existing Users

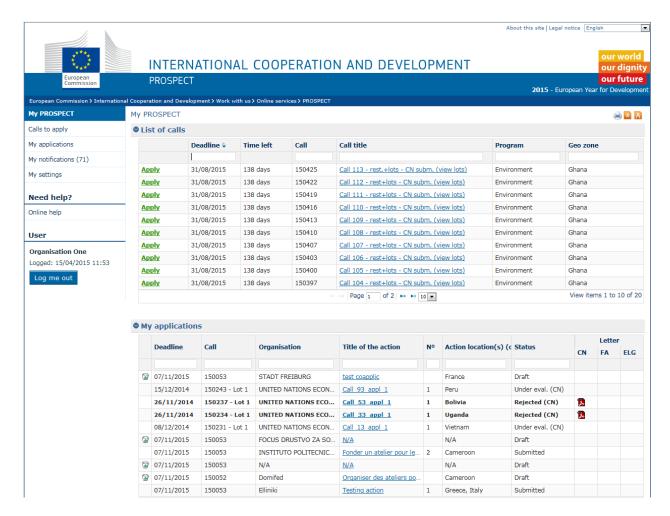
If you already have an ECAS account, provide your credentials (login and password).



You will be redirected to the PROSPECT Welcome page - https://webgate.ec.europa.eu/europeaid/prospect/.

If you have already used PROSPECT before on behalf of an organisation, the system will ask you to confirm which organisation you want to represent in the current session (you might be linked to several organisations). Tick the 'Continue with selected' button corresponding to your organisation.

Once you are logged in, the main PROSPECT page will be displayed:



PROSPECT is available in three languages: English, French, and Spanish. You can switch between these two languages by clicking on the **My settings** menu item.

To log out from the application click the Log me out button.

3.1.3. Screens and Navigation in PROSPECT

The **Main Menu** displayed on the left side of the screen is the main tool for navigation through PROSPECT.

| My PROSPECT |
|--------------------------|
| Calls to apply |
| My applications |
| My notifications (98) |
| My settings |
| Online help |
| Manuals |
| User |
| Organisation One |
| Logged: 01/10/2014 15:39 |
| Log me out |

Every Menu item is a link to a specific part of Prospect. If you click a Menu item, you are redirected to the corresponding page:

- Home
 - Calls to apply
 - My applications
 - o My notifications
 - My settings
- Online Help
 - o Manuals
 - Support form

The menu also displays the login details of the currently connected user.

My PROSPECT

The home screen is divided into three main sections:

- List of calls this section displays all published calls that the users can apply to
- **My applications** this section displays all the previous applications to calls for the currently connected user
- **List of notifications** this section displays all the notifications that the user has received; unread notifications are displayed in bold.

The **List of calls** table displays the following data:

| Column | Description |
|--------|---|
| Apply | Click on this link to start the application for the respective call. When clicking on this link, you are redirected to the Applicant tab of an application. If the call has lots, a pop up window is displayed, allowing you to select the lot for which you wish to apply. |

| Column | Description |
|-------------------|---|
| Deadline | This is the deadline for submitting a concept note / full application to the respective call / lot, in format DD/MM/YYYY. Calls are sorted in the ascending order of their deadline. |
| Time left | This column is filled in with the number of days / hours left before the call submission deadline. When the deadline approaches, the time is displayed in red: |
| | Time left |
| | |
| | 49d |
| | 362d |
| | 48d |
| | 62d |
| | 26h |
| Call ref. | This is the unique identifier of the call. |
| Call title | This column displays the call title. By clicking on this link, you are |
| | redirected to the call details on the EC website. |
| Program | This is the defined domain for the call. |
| Geographical zone | This column displays the geographical zone for the call. |

The **My applications** table displays the following data:

| Column | Description |
|---------------------|---|
| Apply (FA) | This column is displayed only for applications that are in status Accepted CN (i.e., for which the Concept Note has been accepted). By clicking on this link, a draft is created of the full application corresponding to the Concept Note. |
| Deadline | This is the deadline submitting a concept note / full application to the respective call / lot, in format DD/MM/YYYY. Calls are sorted in the ascending order of their deadline. |
| Call ref. | This column displays the call reference as well as the lot number, if the call has lots. |
| Organisation | This column displays the name of the organisation to which the application is related. This organisation is specified in the Applicant tab. |
| Title of the action | This is a link to the Overview tab of the organisation. If the action title is not yet defined, 'N/A' is displayed. |
| No. | This is the application number. It is an identifier inside a call or within the lot (if the call has lots). The number is assigned at the time of the application submission. Draft applications have no number. |
| Action location | This is the action location of the application, as defined in the project tab. |
| Status | This column displays the current status of the application. |
| Letter | At the finalisation of each step, applicants are notified that there is a new letter. A tooltip on the letter icon shows whether this is a "Concept note letter", a "Full application letter", or an "Eligibility letter". For each letter, an icon allows you to download it. An "unread letter" icon distinguishes unread letters from the read ones. |

| Column | Description |
|---|--|
| | Please note that the notification e-mail is always sent to the Contact person, and to the organisation in Cc. |
| Do not show applications for finished calls | Check this box if you wish to see only the applications for calls that are in status "Submission ongoing" and before status "Completed". When unchecked (default value), calls in status "Completed" and "Cancelled" are also displayed. |

• List of notifications

This section displays all the received notifications concerning the call you applied for. All unread notifications are displayed in bold.

In order to view a notification, click on it. Please note that there are no editable fields, you may only print or delete notifications.

My user settings



The following settings can be configured using this link:

| Component | Description |
|------------------------------|--|
| Language | Select your preferred language for working with PROSPECT. The default value is English. |
| Receive e-mail notifications | If you check this box, you will receive an e-mail for each PROSPECT notification. The default is checked. |
| E-mail address | By default, the e-mail associated to your ECAS account is displayed. If you wish to receive your notifications to a different e-mail address, you can change it. |

Online Help

This link provides access to the PROSPECT User Manual – click on the "Applicants" link.

Online support

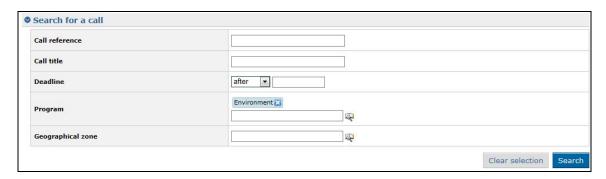
This link allows you to contact the IT support team via the PROSPECT system. Please refer to the Help section at the end of this user guide.

3.2. Submitting an Application

3.2.1. Searching for a Call

The call search mechanism is based on several search criteria.

Select the "Calls to apply" option from the left-hand menu and fill in the required criteria in order to filter your search:



| Criterion | Description |
|-------------------|---|
| Call reference | Enter the reference number of the call (without the lot |
| | number). |
| Call title | Enter the title of the required call |
| Deadline | You can use this criterion to search for calls whose Concept |
| | Note or Full Application deadline is before or after a specific |
| | date. |
| Program | Select a program from the available list. (Programs are |
| | ordered in alphabetical order) |
| Geographical zone | Select a geographical zone from the available list. (Zones are |
| | ordered in alphabetical order) |

Click on the "Search" button; the system will refresh the calls list with those that match your criteria.

Please note that if no criterion is defined, the system will display a list of all the existing calls in the system, which are currently in status "Open".

3.2.2. Creating and filling in an application

3.2.2.1. Submitting a Concept Note for a Restricted Call

You can only apply for a restricted call if its status is "Submission ongoing" (open for reviewing concept notes).



If you require viewing call details, click on the title of the respective call. The call as published on the Europa website is displayed in a separate tab:



You may use the "Apply" button to start your application.

Alternatively, in PROSPECT, click on the 'Apply' link corresponding to the call for which you wish to apply, in the list displayed according to your search criteria above. If the call has lots, select the required lot.



When you click "Apply", you will be redirected to the Application page (tabs). You may now start to fill in your application.

Note that if you have already applied for the respective call or lot (if the call has lots), the system will ask whether you wish to continue the initial application or to start a new one.

Confirm

You already have an draft application for the call 150657 - Lot 1, that you can find under 'My applications'. Do you want to create a new draft?

The application is divided in the following tabs: Contact, Project, Co-applicants, Documents, Overview, and Submit.

The tab headers also display the progress of your application:

- Tabs to be filled in are grey;
- Completed tabs are green; if some of the information provided is not correct (a warning message was displayed), an exclamation mark is displayed;
- Tabs where the some of the information is missing (a red error message was displayed) are marked in red; e.g.:



To move from one section to another, click on the relevant heading. Once you have completed a section, click on the Save and continue button.

All mandatory fields are marked with an asterisk (*).

a) 'Contact' tab

Please note that in order to be awarded a contract, you must have a EuropeAid ID (a unique identifier with the Commission). To check if your organisation has a EuropeAid ID, please go to the <u>PADOR</u> website.

You must have either a valid EuropeAid ID or a PADOR offline form.

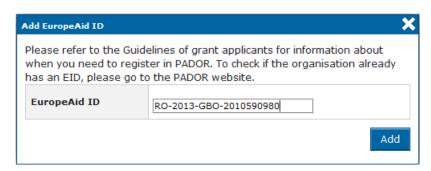
Select whether you have a EuropeAid ID by clicking on the corresponding radio button:



1. **If you HAVE an EuropeAid ID**, a button will appear, allowing you to enter it:

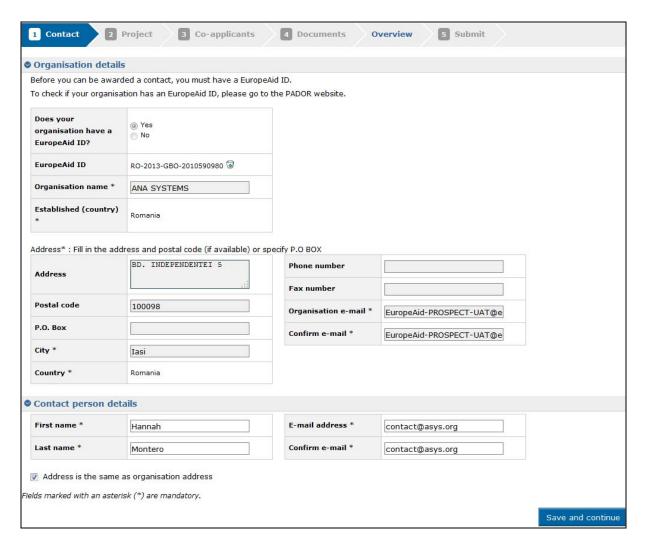


Click on the "Add EuropeAid ID" button. A dialog will pop up:

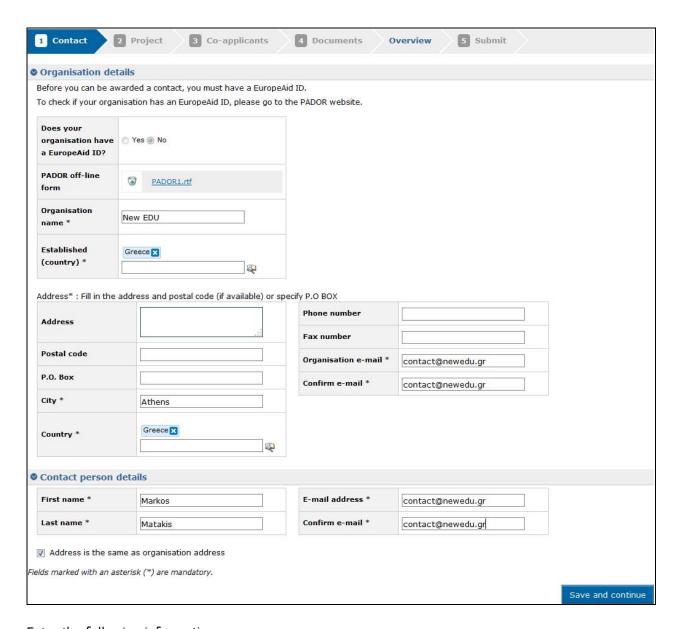


Type your EuropeAid ID and click on the "Add" button.

If the ID is valid, the system will automatically display all the details of your organisation in the "Contact" tab:



2. **If you DO NOT HAVE an EuropeAid ID**, the <u>PADOR offline form</u> is compulsory. The system will allow you to upload it and enter the details of your organisation manually:

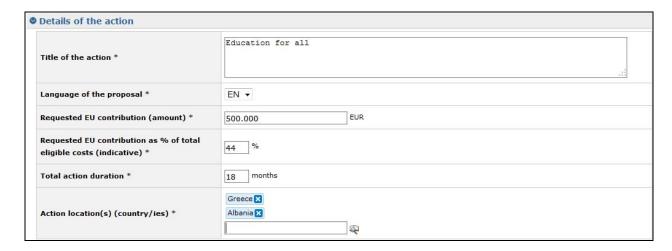


Enter the following information:

| Field | Description |
|--------------------------|--|
| Organisation name | Type the name of your organisation. |
| Established in (country) | Use the magnifying glass to select the country where your |
| | organisation is established, or start typing the country name |
| | and select it from the list that will be displayed. |
| Address | You have the option to either fill in the address or the P.O. box. |
| | If no P.O. box is specified, this field is mandatory. |
| Postal code | Specify the postal code of your organisation address if you |
| | filled in the Address field. |
| P.O. box | Fill in this field if you do not wish to use an address for your |
| | organisation. |
| City | Enter the city of your organisation |
| Country | Select the country where your organisation is based |
| Phone number | Enter the contact phone number of your organisation. |

| Field | Description |
|----------------------------|--|
| | Please note that the allowed characters are numbers, the blank |
| | space, '/' and '+'. |
| Fax number | Enter the fax number of your organisation. |
| | Please note that the allowed characters are numbers, the blank |
| | space, '/' and '+'. |
| Organisation e-mail | Enter the contact e-mail address of your organisation. |
| | Please note that the value must comply with an e-mail address |
| | format. |
| Confirm e-mail | Enter your organisation's e-mail again. |
| | Please note that this value must match the one previously |
| | entered. |
| Contact person details so | ection |
| First name | Enter the first name of the contact person of your application |
| Last name | Enter the last name of the contact person of your application |
| E-mail address | This field is filled in with the e-mail of the connected person, |
| | as known by ECAS. |
| Confirm e-mail | The e-mail address entered here must match the contact |
| | person e-mail address. |
| Address is the same as | This box is unchecked by default. |
| organisation address | If the contact address where you wish to receive |
| | communications concerning your application is the one you |
| | entered above, check it. The fields displayed below will |
| | collapse. |
| | If you wish to receive communications at a different address, |
| | leave the box unchecked and enter the required information in |
| | the empty fields below. |
| Address, Postal code, P.O. | Enter the contact address details. |
| box, City, Country, Phone | Please note that you must specify either the address or the |
| number, Fax number | P.O. box. |

b) 'Project' tab



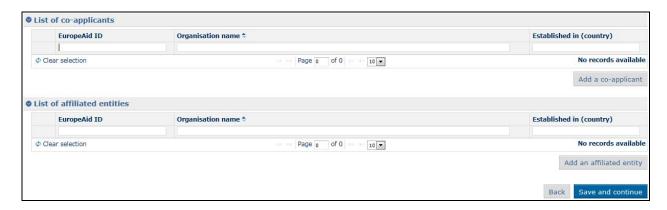
You must refer to the Guidelines for grant applicants of the specific call for information on the 'EU financing requested', 'Requested EU contribution as % of total eligible costs', 'Total action duration', and 'Action location(s) (country/ies)'.

Enter the following information:

| Field | Description |
|-----------------------------------|---|
| Title of the action | Enter the full title of the action |
| Language of the proposal | This is the language in which the call was published and in |
| | which proposals are accepted, as defined in the call. |
| | If several languages are accepted, select the language in |
| | which you are going to submit your proposal. |
| Requested EU contribution | Enter the requested EU contribution amount in positive |
| (amount) | numbers, with no decimals (maximum 17 digits are allowed). |
| Requested EU contribution as % of | Enter the percentage of the EU funding requested of the total |
| total eligible costs | budget of your project. |
| Total action duration | Enter the action duration in number of months. |
| Action location(s) (country/ies) | Select the location(s) from the alphabetically ordered list. |
| | Note that you may also delete locations after you have |
| | selected them, if required. |
| | Each selected country will be displayed on a separate line. |

c) 'Co-applicants' tab

In this tab you can enter any co-applicants or affiliated entities you have in the project.



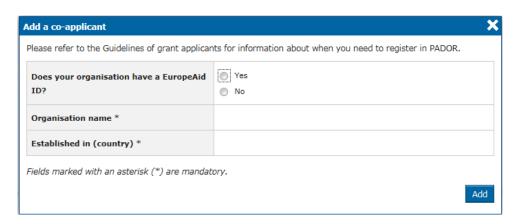
You must refer to the call Guidelines for a definition of co-applicants and affiliated entities for more information on call specific requirements regarding this section.

If the action does not involve co-applicants and affiliated entities, you may continue with the next tab of your application.

In order to add a new co-applicant / affiliated entity, click on the corresponding "Add" button.

The following information is required:

- EuropeAid ID (in order to check if the organisation already has an EuropeAid ID, please connect to the <u>PADOR</u> website), or
- Organisation name and country where it is established.



Please refer to the 'Contact' tab above for more details.

d) 'Documents' tab

Use this tab to attach the concept note or full application and the signed declarations.



When you first create your application, it is compulsory to attach the Concept Note of your project and the signed declaration or mandates, as the case may be.

Click on the "upload" arrow in order to browse for the file path and attach the documents.

The following document formats are accepted: Word (.doc & .docx), Excel (.xls and .xlsx), PowerPoint (.ppt and .pptx), PDF (.pdf), RTF (.rtf), JPEG (.jpg and .jpeg), text (.txt), TIFF (.tif and .tiff) and ZIP. ZIP files can only contain these file types, except for another ZIP; the maximum file size allowed is 10.00 MB.

You must refer to the call specific Guidelines for information about the required documents. The templates of these documents are available for downloading on the Europa website and on the PADOR website (PADOR offline form):

http://ec.europa.eu/europeaid/pador-line-form-0 en.

The Europa website can also be accessed by clicking on the title of the call in PROSPECT – the system will re-direct you to the Europa page, with the list of documents for this particular call.

e) 'Overview' tab

In this tab, you can see the overview of your application.

At this stage, information can still be modified.

f) 'Submit'

You can submit your application by clicking the 'Submit' button. Before performing this operation, do not forget to tick the box 'I have read and accepted the terms and conditions'.

```
The applicant, represented by the PROSPECT user, being the authorised electronic signatory of the applicant, and in the context of the present application, representing any co-applicant(s), affiliated entity(ies) in the proposed action, hereby declares that:

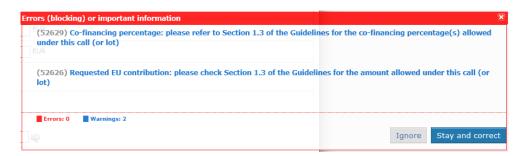
- the declaration by the applicant has been duly signed and uploaded in PROSPECT under "Documents" tab

- the application form (Annex A) has been uploaded in PROSPECT under "Documents" tab

- in case of discrepancies in the data validated in PROSPECT and indicated in the application form, the relevant provisions of the Guidelines apply.
```

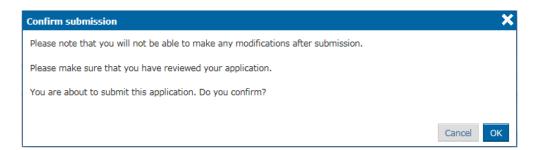
Please remember that you cannot make changes to your application after submitting it.

Please note that errors and/or warnings may be displayed in case all the mandatory information has not been provided.



You may choose to ignore the warnings or to correct them. If errors are displayed (in red), you are not allowed to go on with the submission until you have corrected them.

Once the information is verified and correct, you may confirm your submission:



You will be notified that submission is accepted:



3.2.2.2. Submitting a Full Application for a Restricted Call

If your Concept note is pre-selected you will be invited to submit a Full application. You will receive a notification in PROSPECT and an email.

In the PROSPECT home page, go to 'Ongoing Applications' and access your notification letter. Click the 'Apply' button.

Update the application form and attach the mandatory documents:

- Concept Note already attached in the previous step; it can be downloaded but not deleted, nor modified:
- Full Application The following document formats are accepted: Word (.doc & .docx), Excel (.xls and .xlsx), PowerPoint (.ppt and .pptx), PDF (.pdf), RTF (.rtf), JPEG (.jpg and .jpeg), text (.txt), TIFF (.tif and .tiff) and ZIP. ZIP files can only contain these file types, except for another ZIP; the maximum file size allowed is 10.00 MB;
- Logical Framework all document types are accepted;
- Budget document all document types are accepted;
- The PADOR offline form it is only mandatory if the applicant, the co-applicant(s) and/or the affiliated entity(ies) do not already have a EuropeAid ID or if they did not upload them when submitting the concept note.

You may also attach any other documents you consider relevant for your application.

When you are finished, click on 'Submit'.

3.2.2.3. Submitting an Application for an Open Call/Lot

You may submit an online application for an open call / lot once you have submitted a concept note and a full application for the call (see the sections above).

Select a call from the list of calls and select 'Apply'.

Fill in the details of the application and attach the mandatory documents, then click on 'Submit'.

3.2.3. Edit or delete an application which has not yet been submitted

Select "My applications" to access your application list.

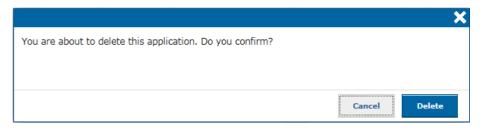
Select the application that you wish to modify by clicking on the Action title. The Overview tab of the respective application will be displayed. Select the required tab to edit the information.

Please note that you can only edit applications that are in draft. For submitted applications, the information displayed in the tabs is read-only.

In order to delete an application, click on the 'Delete' button corresponding to the application you wish to remove.



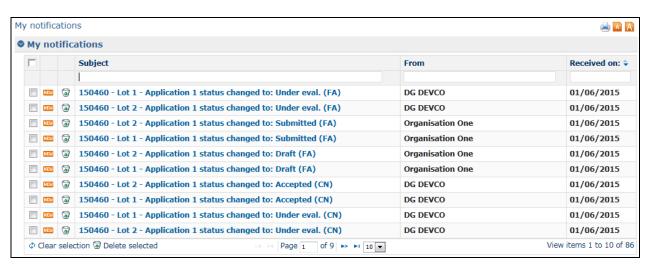
A pop-up message will prompt you to confirm the deletion.



3.3. Follow-Up an Application

You will receive all notifications concerning your application at the e-mail address you provided when you submitted the application (in the Applicant tab).

You also have access to all these notifications from the 'Notification' menu of PROSPECT. The list contains all the messages you have received. All unread notifications are displayed in bold.

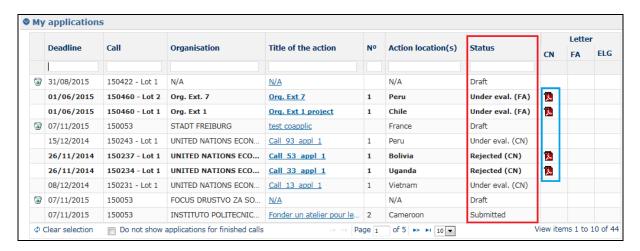


In order to view a notification, click on it. Please note that there are no editable fields, you may only print or delete notifications.



3.3.1 Follow up the status of your application and view results

- 1. Connect to the Prospect application (for details, please refer to Chapter <u>Log in to PROSPECT</u> of this manual).
- 2. Access the "My applications" screen via the menu on the left to see the list of your applications.
- 3. In the status column, you can see the status of your applications (Draft/Submitted/Under evaluation/Accepted/Rejected).
- 4. On the right side, you can access the letters notifying you of the evaluations results, by clicking on the PDF icon.



4. IN CASE OF TECHNICAL DIFFICULTIES: HOW TO SUBMIT AN OFFLINE FORM

If you encounter technical difficulties (Internet connection problems, etc.), you also have the option to submit your application form by post or hand delivery (please refer to the Guidelines of your call).

When the application is received and encoded in our system, you will receive an acknowledgement e-mail. You will be informed about the results of the evaluation in written.

5. HELP

The following options are available should you have any issues / questions regarding PROSPECT:

5.1 E-learning

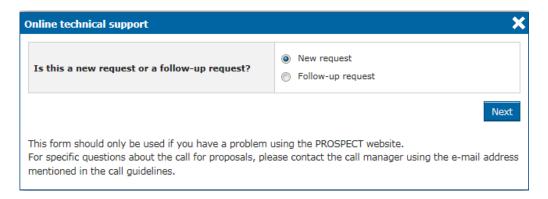
An e-learning is available in the "Online help" menu – click on the "Applicants" link to access the knowledge base. This short demo will guide you in logging in to ECAS and filling in an application form in PROSPECT.

5.2 PROSPECT Helpdesk (IT issues only)

Should you have any technical difficulties while using PROSPECT, please select the "Online Help" menu option.

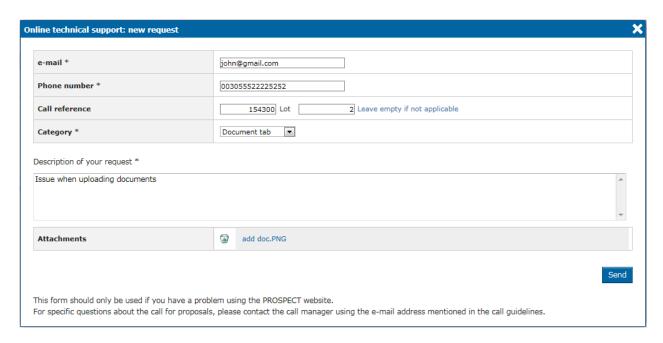
Please note that if your issue concerns the call itself and not the PROSPECT application (such as publication details, application details, requirements for applications, etc.), you must address your request to the **functional e-mail address of the specific call**.

As soon as you click on "Online Help", a pop-up will ask you if you are contacting the Support team for a new request or for updates on a previous request:



5.2.1. New requests for support

Select the "New request" option in the pop-up dialog and click on the "Next" button. A form will be displayed:



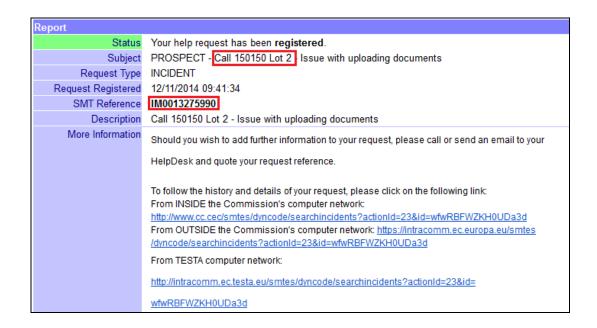
Enter the required information – note that **all** the fields marked with an asterisk (*) are mandatory:

| Field | Description |
|-----------------------------|---|
| e-mail | The e-mail displayed by default is the one associated with the ECAS account of the currently logged-in user. You can change it if you require receiving helpdesk information at a different e-mail address. |
| Phone number | Enter the phone number where the helpdesk can contact you for details concerning your request. |
| Call reference | Enter the call reference and lot that your request concerns, if applicable. |
| Category | Select the screen where you encountered the error: My applications, Contact tab, Project tab, Co-applicants tab, Document tab, or general Technical issue with the PROSPECT system. |
| Description of your request | Use this field to explain the technical difficulty that you are experiencing. |
| Attachments | Click on the blue arrow to upload a screenshot of the error / issue – this is not mandatory but can help the support team in detecting the cause of the problem. |

Click on "Send" when all the information has been filled in.

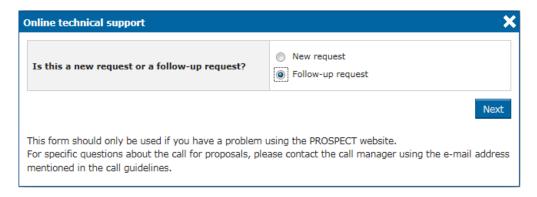
Your request will be treated at the earliest possible.

Once the IT Helpdesk registers your help request, you will receive an automatically generated email which will contain the reference of your request ('SMT Reference', highlighted in a red box in the example below). Please use this reference in any future communication with the Helpdesk regarding this same request. Do not forget to include the call number, as well as the lot for which you are applying:

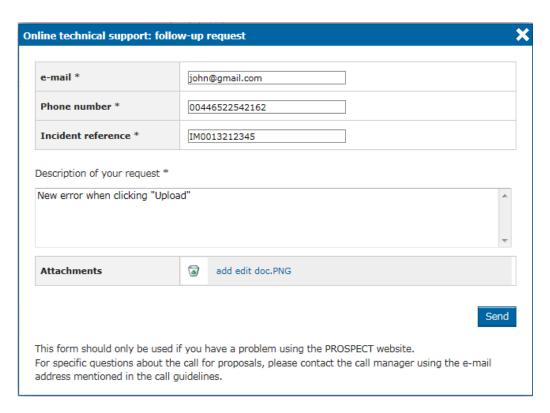


5.2.2. Follow-up on existing requests

Select the "Follow up request" radio button in the pop-up displayed once you click on "Online Help". Then, click "Next".



A form will be displayed, allowing you to enter your contact details as well as the incident reference:



Enter the required information – note that **all** the fields marked with an asterisk (*) are mandatory:

| Field | Description |
|-----------------------------|---|
| e-mail | The e-mail displayed by default is the one associated with the ECAS account of the currently logged-in user. You can change it if you require receiving helpdesk information at a different e-mail address. |
| Phone number | Enter the phone number where the helpdesk can contact you for details concerning your request. |
| Incident reference | Enter the reference you received when your initial request was recorded by the helpdesk team. |
| Description of your request | Use this field to explain the technical difficulty that you are experiencing. |
| Attachments | Click on the blue arrow to upload a screenshot of the error / issue – this is not mandatory but can help the support team in detecting the cause of the problem. |

Click on "Send" when all the information has been filled in.

5.3 PADOR

Should you have any questions concerning your PADOR information, please consult the Quick Guide, available on each PADOR screen and the **FREQUENTLY ASKED QUESTIONS** (available on the PADOR homepage).

If you still have not found an answer to your question, you can contact the PADOR HelpDesk via email (mailto:EuropeAid-IT-support@ec.europa.eu).