

CaixaResearch

Grants "la Caixa" *online system*

Manual For Submission

Validate

2022



"la Caixa" Foundation

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1

User registration

Grants "la Caixa" can be accessed through the link ["la Caixa" Foundation \(fundacionlacaixa.org\)](https://fundacionlacaixa.org). Once on the webpage, please click on register (Figure 1.1)

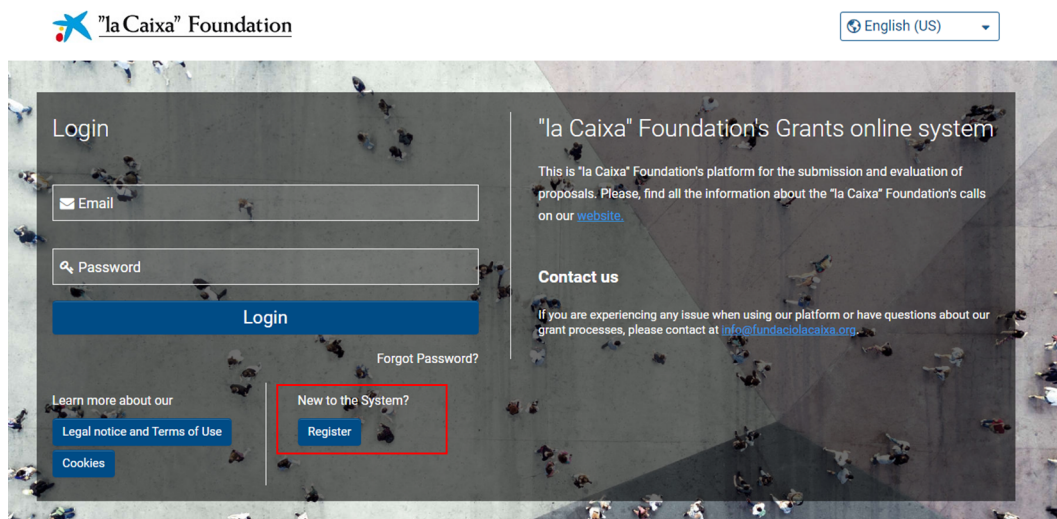


Figure 1.1. Grants "la Caixa" webpage.

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

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

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

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

2

Project Leader - Creating an application

2.1 First Step: Creating an application pre-draft.

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

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

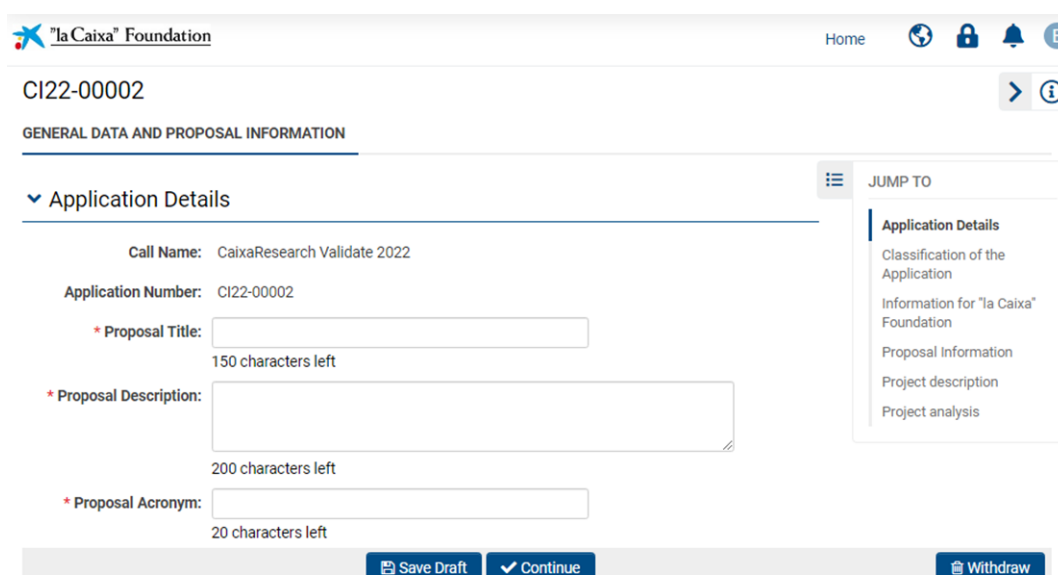
After choosing the CaixaResearch Validate 2022 call by clicking the [GO TO CALL](#) button, initiate an application by clicking the [APPLY NOW](#) button.

Open Calls

1-4 of 4 < >			
#	Call Name	Submission Start Date	Submission End Date
1	Go to Call CaixaResearch Validate 2022	19/11/2021 00:00	25/11/2021 00:00

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

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



The screenshot shows the 'GENERAL DATA AND PROPOSAL INFORMATION' tab of the application form. The header includes the 'la Caixa' Foundation logo, a 'Home' link, and icons for a globe, lock, bell, and user profile. The application ID 'CI22-00002' is displayed with a right arrow and information icon. The main section is titled 'Application Details' and contains the following fields:

- Call Name: CaixaResearch Validate 2022
- Application Number: CI22-00002
- * Proposal Title: [Text input field] (150 characters left)
- * Proposal Description: [Text input field] (200 characters left)
- * Proposal Acronym: [Text input field] (20 characters left)

On the right, a 'JUMP TO' sidebar lists: Application Details, Classification of the Application, Information for "la Caixa" Foundation, Proposal Information, Project description, and Project analysis. At the bottom, there are three buttons: 'Save Draft', 'Continue', and 'Withdraw'.

Figure 2.2 General Data and proposal information tab

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

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



Figure 2.3 Table to add publications

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

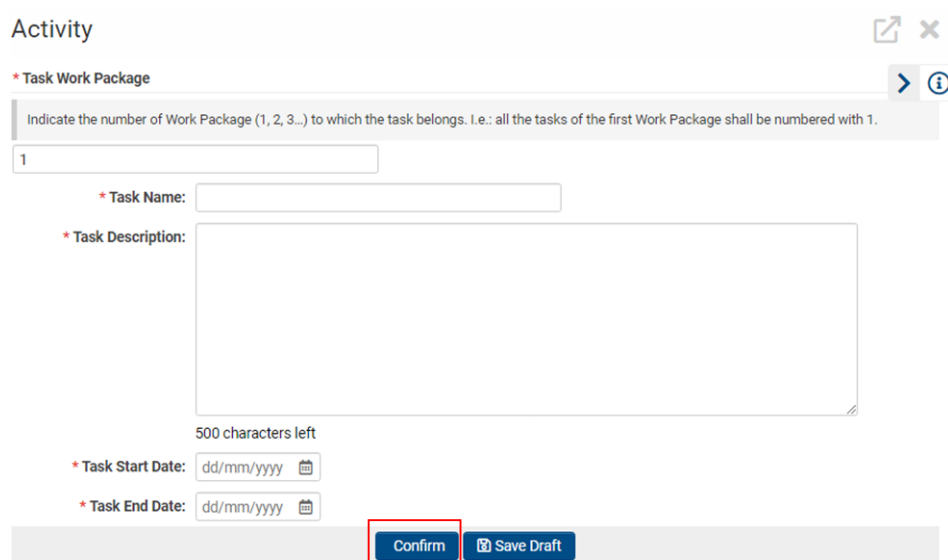


Figure 2.4 Fields required to add an activity to the Gantt chart

The activities included on your Work plan will appear in the Gantt Chart below, as it is shown in Figure 2.5.

Work Plan (Gantt Chart)

Please indicate the proposal workplan in a Gantt Diagram. Use the + button below to add Tasks. They will be displayed in the Gantt Chart below, after doing save draft.



Figure 2.5 Gantt Chart showing the tasks included in the project

2.2 Second Step: Moving the application into draft stage

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

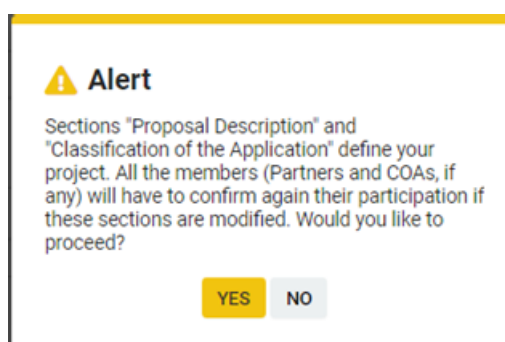


Figure 2.6 Warning message before moving into the draft stage.

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

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

"la Caixa" Foundation advises you to invite all members of this proposal at once (accounting these contacts will need to approve their participation in the proposal), as

changes to this table (removal of members) will require the re-approval of all other members in the proposal.

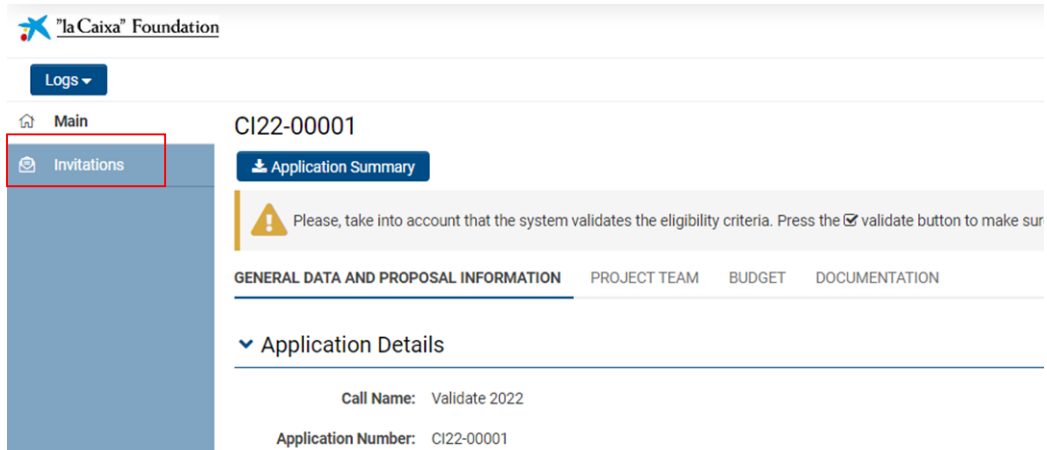


Figure 2.7 Invitations tab on the left column of the draft application.

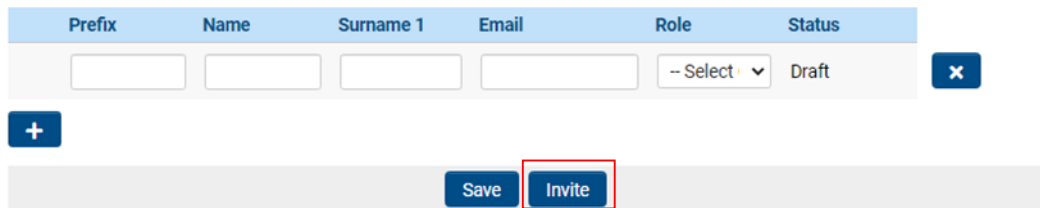


Figure 2.8 Table to invite partners and/or CoAs to the project

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

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

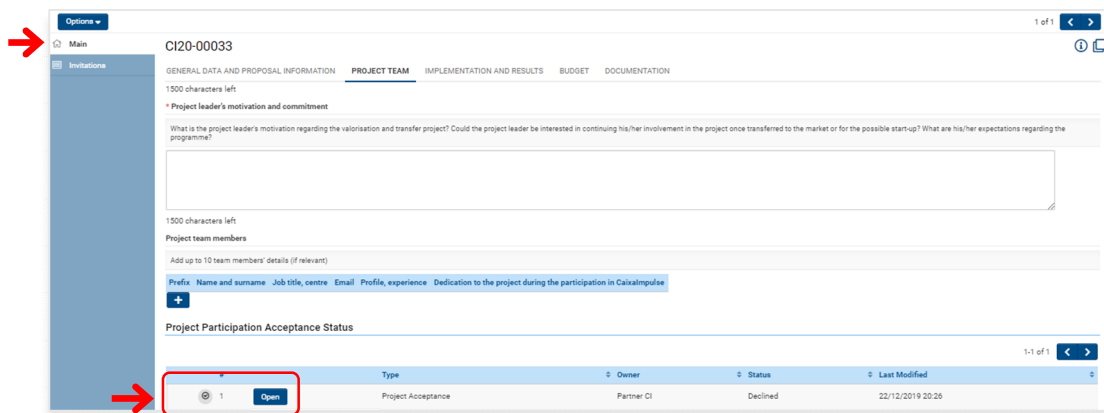
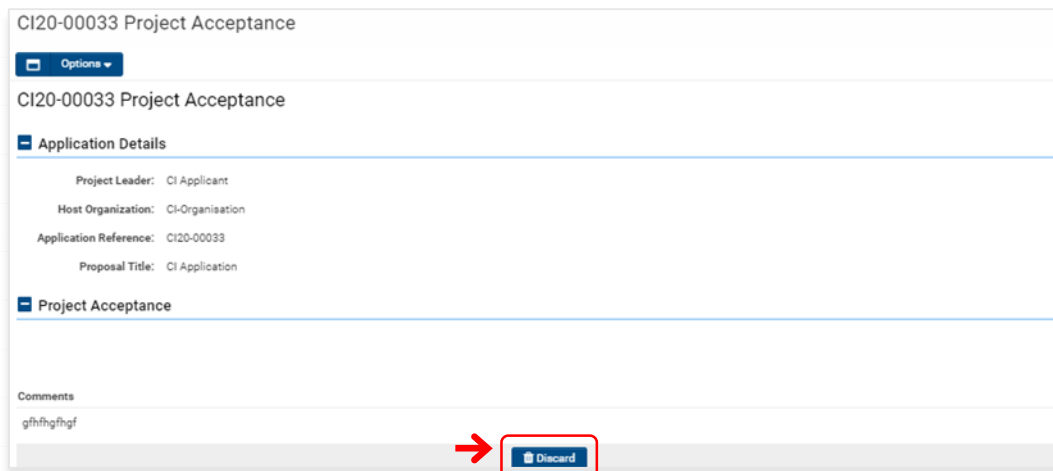


Figure 2.9 Location of the project participation acceptance status table on the project team tab

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



CI20-00033 Project Acceptance

Options ▼

CI20-00033 Project Acceptance

Application Details

Project Leader: CI Applicant

Host Organization: CI-Organisation

Application Reference: CI20-00033

Proposal Title: CI Application

Project Acceptance

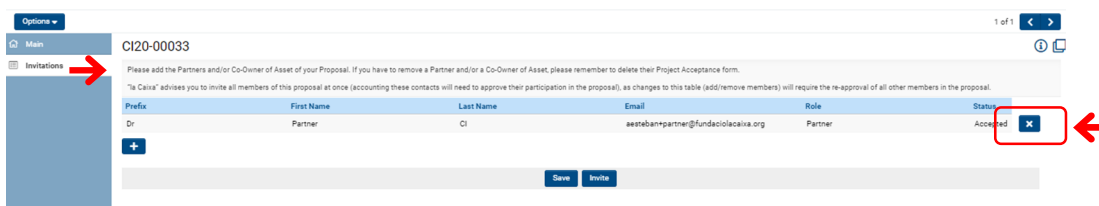
Comments

ghfthgfhgf

Discard

Figure 2.10. Discarding a project acceptance.

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



Options ▼

CI20-00033

1 of 1

Invitations

Please add the Partners and/or Co-Owner of Asset of your Proposal. If you have to remove a Partner and/or a Co-Owner of Asset, please remember to delete their Project Acceptance form.

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

Prefix	First Name	Last Name	Email	Role	Status
Dr	Partner	CI	seesteban+partner@fundaciolaixa.org	Partner	Accepted

Save Invite

Figure 2.11 Deleting an invitation at the invitation table.

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

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

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

2.4 Fourth step: Completing your application

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

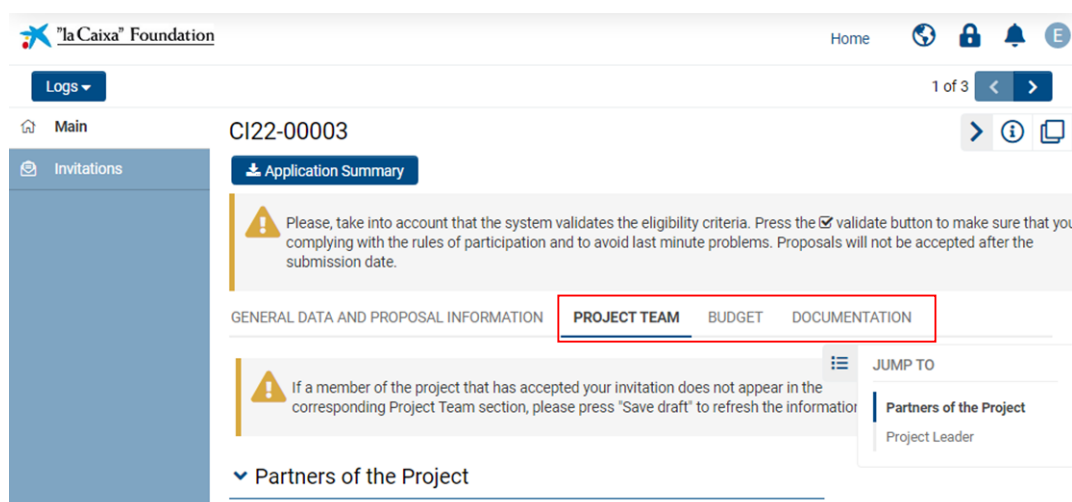


Figure 2.12 New tabs available at the draft stage.

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

Project team members' details (if relevant)

Scientific, technical and management profiles from the organizations involved in the development of project.

Prefix	Name and surname	Job title, centre	Profile, experience	Dedication to the project during the participation in CaixaResearch
+				

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

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

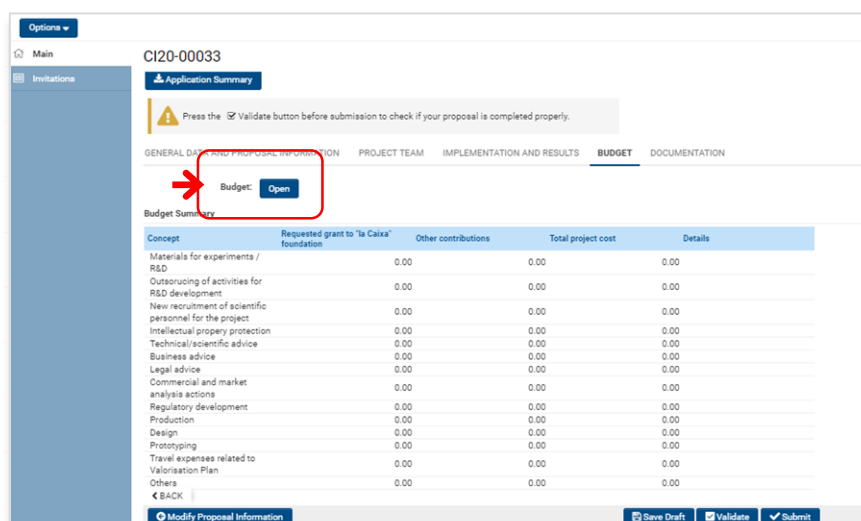


Figure 2.14. Open button to upload the budget.

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

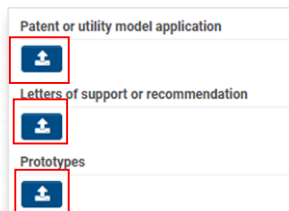


Figure 2.15 Upload of supplementary documents.

2.5 Fifth step: Submitting your application

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

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

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

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

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

3

Organization Manager – Endorsing the proposal

3.1 Registration and accreditation

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

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

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

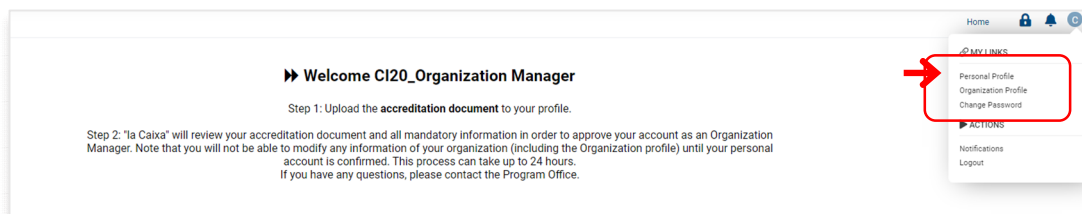


Figure 3.1 Personal profile access at the Organisation Manager home page

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

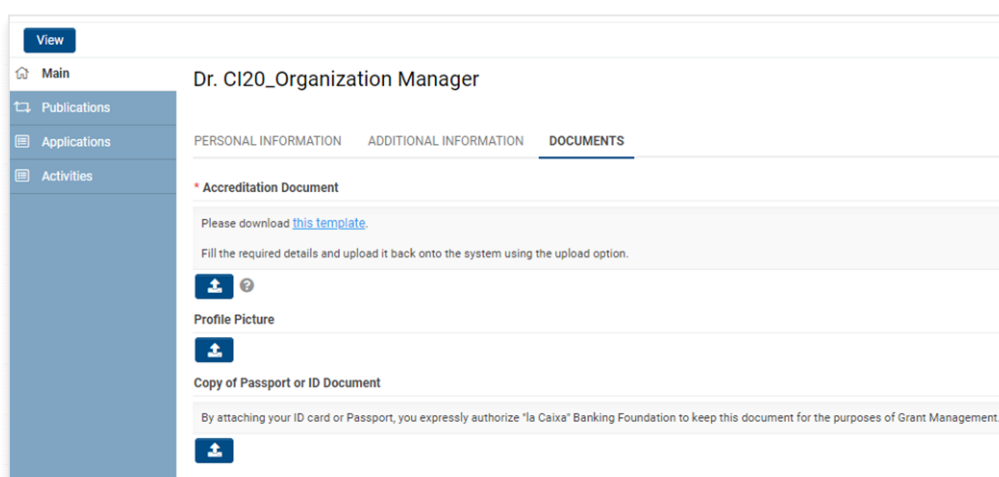


Figure 3.2 Documents tab

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

3.2 Introducing your organisation's information

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

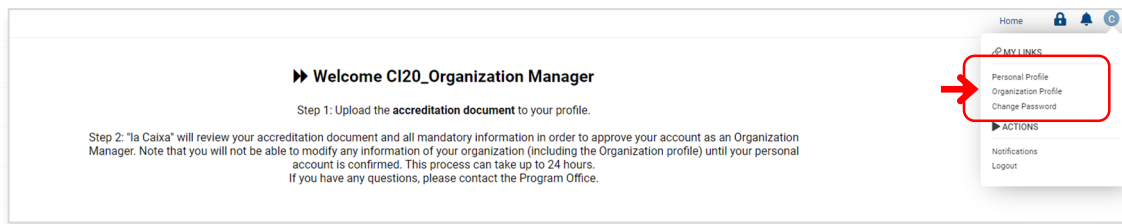


Figure 3.3 Location of the Organization Profile at the OM home page.

3.3 Endorsing the proposal

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

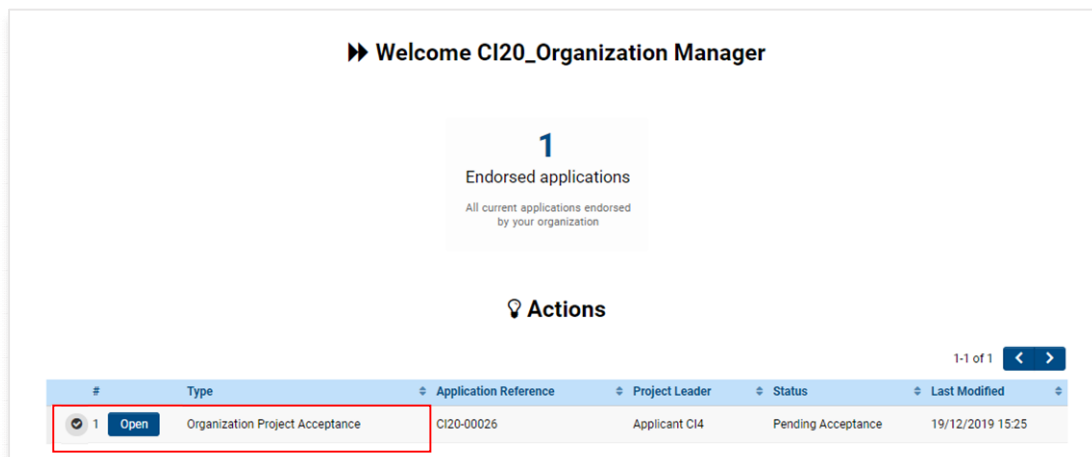
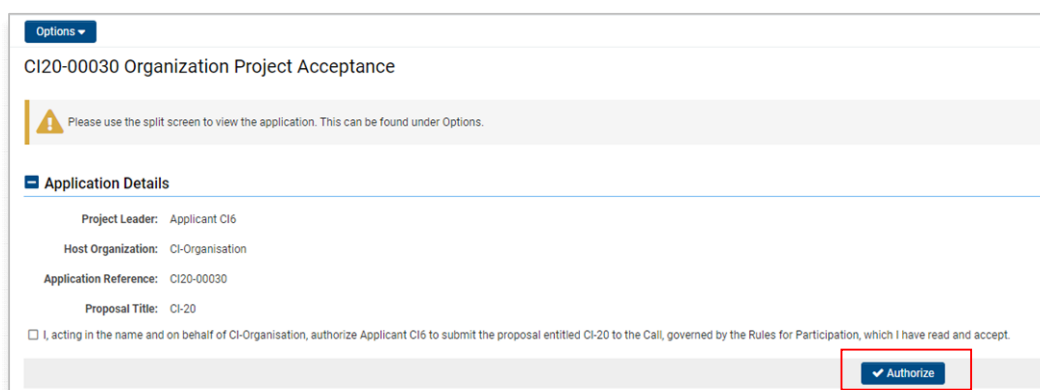



Figure 3.4 Access to the project in the OM home page.

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



Options ▾

CI20-00030 Organization Project Acceptance

 Please use the split screen to view the application. This can be found under Options.

Application Details

Project Leader: Applicant CI6

Host Organization: CI-Organisation

Application Reference: CI20-00030

Proposal Title: CI-20

☐ I, acting in the name and on behalf of CI-Organisation, authorize Applicant CI6 to submit the proposal entitled CI-20 to the Call, governed by the Rules for Participation, which I have read and accept.

[✓ Authorize](#)

Figure 3.5 OM window to endorse a proposal.

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

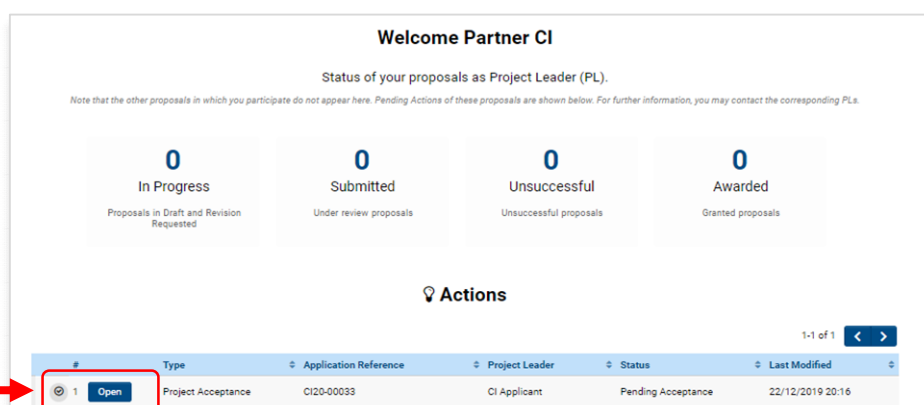
4

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

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

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

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



Welcome Partner CI

Status of your proposals as Project Leader (PL).

Note that the other proposals in which you participate do not appear here. Pending Actions of these proposals are shown below. For further information, you may contact the corresponding PLs.

0	0	0	0
In Progress	Submitted	Unsuccessful	Awarded
Proposals in Draft and Revision Requested	Under review proposals	Unsuccessful proposals	Granted proposals

Actions

1-1 of 1

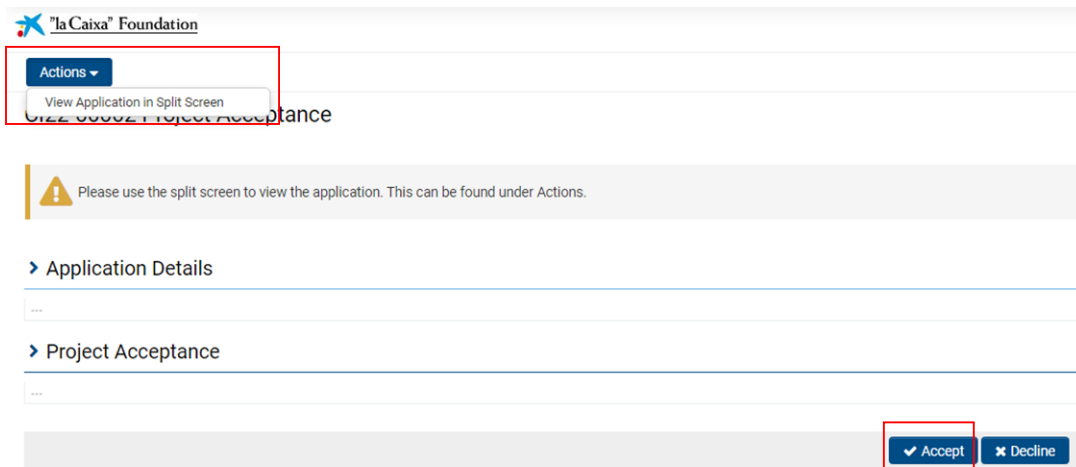
#	Type	Application Reference	Project Leader	Status	Last Modified
1	Project Acceptance	CI20-00033	CI Applicant	Pending Acceptance	22/12/2019 20:16

[Open](#)

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

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

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



The screenshot displays the 'la Caixa' Foundation application interface. At the top, there is a header with the foundation's logo and name. Below this, a red box highlights the 'Actions' dropdown menu, which includes the option 'View Application in Split Screen'. The main content area is divided into two sections: 'Application Details' and 'Project Acceptance'. The 'Project Acceptance' section contains a form with a red box around the 'Accept' button, which is labeled '✓ Accept'. A 'Decline' button, labeled '✗ Decline', is also visible. A warning message at the top of the 'Project Acceptance' section states: 'Please use the split screen to view the application. This can be found under Actions.'

Figure 4.2 Partner participation acceptance.

5

Text and illustrations

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

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

