wideraexperts.eu portal

User guide

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Introduction to Wideraexperts.eu

This Guide has been prepared to present a step-by step manual for NCPs who will use wideraexperts.eu portal in order to organize pre-screening service delivered by experts registered in the database for applicants who will submit their applications to the portal.

For this reason, the Guide contains three sets of instructions for the relevant user:

- National Contact Point – a representative of the NCP hosting organisation, which is the relevant NCP for the selected parts of the Horizon Europe. The NCP will receive the information about the applications from their country, related to the NCP's field of expertise which will be submitted to the portal. **The choice of the right specialisations of the NCP, as well as the fact that the whole spectrum of Horizon Europe must be covered for each country, is crucial to provide a seamless pre-screening service to applicants.**
- Applicant – a representative of an institution/company who creates an account in Wideraexperts.eu portal and submits an application in order to receive an information (provided by an expert selected through the portal) in case a modification of the documents is needed to increase the probability of success of the proposal for the Horizon Europe call.
- Expert – a person who registers in the portal and provides evidence of knowledge and experience sufficient to provide valuable expertise to the proposal submitted by the applicant to the portal.

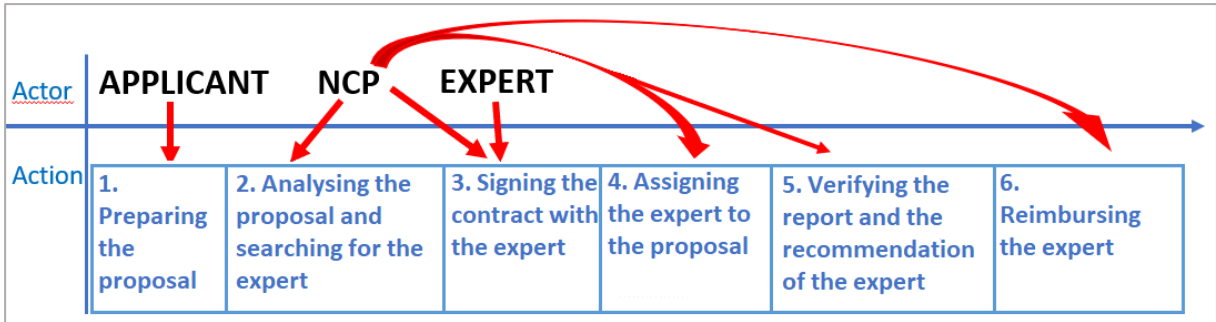The timeline for the pre-screening service is shown in the figure below.

Fig. 1. Pre-screenings service timeline.

In the following sections of this guide, the step-by-step user guide and description of the actions of each user (an applicant, an NCP and an expert) will be presented according to the timeline mentioned above. However, the timeline only presents the general actions carried out within the portal or crucial to the service while the detailed instructions will also include information on the less crucial actions of each user and those carried out in a way that is not by this digital tool.

Applicant

As mentioned above, the applicant's main action directly related to the pre-screening service is the **preparation of the proposal**. However, in order to do this, the proposer must have access to the portal. The applicant should therefore:

1. Register in the wideraexperts.eu portal.
2. Prepare the proposal.
3. Receive the pre-screening service from the expert.
4. Accepts the recommendation.
5. Complete the service questionnaire, which enables the NCP to assess the compatibility of the expert's service in accordance with the contract agreed between the expert and the NCP overseeing the ongoing pre-screening process.
6. Evaluate the expert so that the NCP can assess whether the expert's profile on the portal adequately reflects the level of the expert's services.

Registering in the wideraexperts.eu portal

When first visiting the wideraexperts.eu portal, the applicant will see the welcome screen with the number of options to choose from. On the first visit the applicant must register by clicking "Applicant" button located on the right-hand side of the screen. This will take them to the first registration screen, where they will be asked to enter their email address and password. In the next screen, the applicant must fill in the personal information.

On the next screen, the applicant will be asked to fill in the personal details.

Fig. 2. Candidates' first registration screen (personal data).

The next screen requires the applicant to provide information about the company/organisation they represent.

Fig. 3. Applicant's second registration screen (organisation details).

The information entered in this screen is crucial, as the country selected by the applicant will be one of the decisive elements in the selection of the appropriate NCP (who will be responsible for selecting the expert for the pre-screening service) by the portal system.

In the next screen, shown below, the applicant must enter the basic information on the proposal. By selecting the part of the Horizon Europe programme to which the proposal relates, the applicant provides the system with information on the basis of which it will select the appropriate NCP from the applicant's country. The keywords included in the proposal are crucial for the selection of the right expert by the NCP as the system will limit the list of the experts authorised to carry out the pre-screening service to those who have used the relevant keywords when creating their account in the portal.

As the expert will have access to the data after signing the contract with NCP, this information is important for the expert.

The expert can only be selected by the NCP to evaluate the proposal after the contract that includes the non-disclosure agreement with the NCP has been signed. After the signature of the contract the expert receives the access to the proposal and is obliged to keep all information regarding the content of the application confidential, according to the non-disclosure agreement.

Fig. 4. Applicant's third registration screen (proposal data).

After clicking on "Create account", the applicant will receive an email entitled "Please confirm your registration to the NCP_WIDERA.NET Expert Database" (it is advised to check the SPAM folder). Clicking on the "Activate account" link in the email will allow the applicant to log into their account, where the first submission created during registration will be visible with the status "Waiting for expert".

Preparing the proposal

Once the account has been created, the applicant can create a new submission by clicking on the button in the top right-hand corner of the panel (the purple button in the figure below) and filling in the same table as shown in Figure 4.

Fig. 5. Applicant's panel after registration and the first submission.

Once the NCP has contracted and assigned the appropriate expert to the submission, the status of the application will change to 'Ongoing'.

The expert will then contact the applicant and agree how the pre-screening service will be provided. After delivering the service, the expert uploads the service report and the recommendation to the proposal. At this stage of the process, the status of the submission in the applicant's panel is changed to "Verification needed" and the NCP must approve or reject both (the report and the recommendation) in consultation with the applicant. If a document is rejected, the expert is required to complete the revised report or upload the revised recommendation in consultation with the applicant (if necessary, additional time must be spent on the pre-screening service). The status of the submission is now described as "Completed".
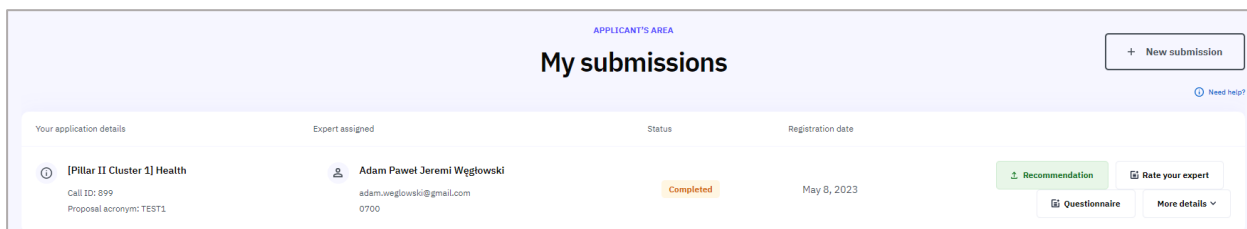

Fig. 6. Applicant's panel after the pre-check service has been verified by the NCP.

Post-service actions

When the applicant receives notification that the submission has been completed, the applicant can:

- Download the recommendation provided by the expert as a PDF document.
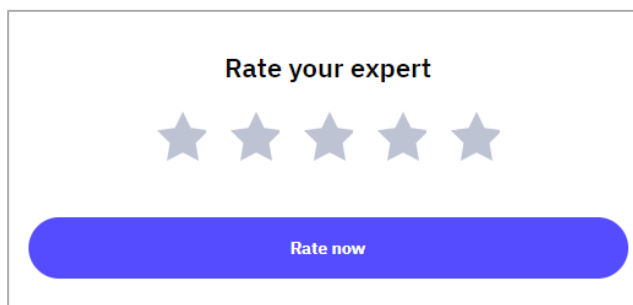- Rate the expert based on the interaction with the expert and the delivered service.

Fig. 7. Rating an expert.

- Fill in the questionnaire and write a short note about the service provided.

Fig. 8. Questionnaire regarding the pre-check service provided.

Thanks to these documents, the NCP will be able to modify the conditions of cooperation with the expert as appropriate.

Expert

Registering in the wideraexperts.eu portal

When visiting the wideraexperts.eu portal for the first time, the expert will see the welcome screen with the number of options to choose from. When visiting the portal for the first time the expert must register by clicking the "Expert" button located on the right-hand side of the screen. This will take the applicant to the first registration screen where they will be asked to enter their email address and password.

Similarly to the applicant, the expert will need to provide the email and password.

In the next screens the expert is required to complete:

- personal details
- contact details
- preferences for the pre-proposal check (the area of the Horizon Europe is crucial to select the keywords based on which the system will allow the expert to be on the list of experts able to provide the pre-check service of a given proposal)
- CV
- Additional information regarding the skills.

Fig. 10. Expert's registration screen.

Pre-check service

The role of the expert starts when the NCP contacts the expert and preliminarily describes the possibility of providing the applicant with the pre-examination service of the application. The expert may be a person from a different country than the NCP and the applicant. After the preliminary consultation concerning the availability of the expert, the general description of the proposal and the conditions of cooperation, both sides (NCP and the expert) sign the agreement concerning the provision of the pre-check service to the applicant.
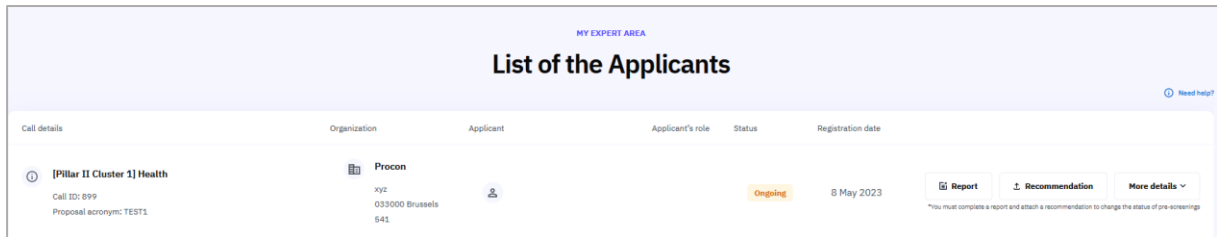

Fig. 11. Expert's panel after assigning the expert to the submission by NCP.

> ⚠ **After signing the contract (which includes an NDA) the expert logs into the expert's panel and is notified that the pre-check process is ongoing.**

At this point, the expert must contact the applicant, agree the details of how the pre-check service will be provided and deliver the service to the applicant. After delivery, the expert must complete the details of the pre-check service provided:
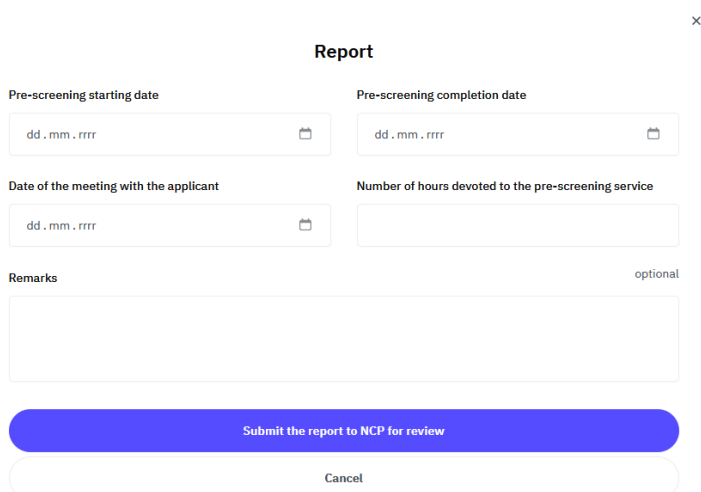

Fig. 12. Expert's pre-check service report.

The information typed in the report must be factual, as the NCP is obliged to confirm the report with the applicant in order to continue the process and remunerate the expert.

The expert should also upload the pdf file containing the recommendation which has been provided to the applicant. The document should be in the form previously agreed with the applicant.

After clicking on "Create account" the expert will receive an email entitled "Please confirm your registration to the NCP_WIDERA.NET Expert Database" (it is advised to check the SPAM folder). Clicking on the "Activate account" link in the email will allow the expert to log into their account.

Once logged in to the expert panel, the expert will be able to see the applications assigned to them by the NCP.
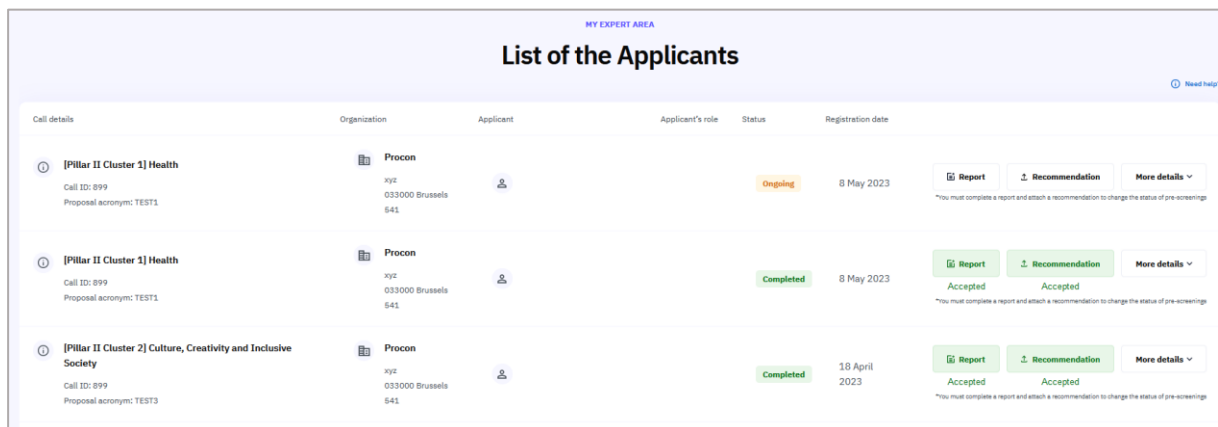

Fig. 13. Expert's panel.

The application at the top of the screen above is the "Ongoing" application.

The expert is required to contact the applicant and agree how the pre-screening service will be provided. After delivering the service, the expert uploads the service report and the recommendation to the proposal. At this stage of the process, the status of the submission in the expert's panel changes to "Verification needed" and the NCP is obliged to approve or reject both (the report and the recommendation) in consultation with the applicant. If a document is rejected, the expert must complete the revised report or upload the revised recommendation in consultation with the applicant (if necessary, additional time must be spent on the pre-screening service). The status of the submission is now described as "Completed".

Post-service actions

Once the service has been provided and approved by the NCP, the expert shall be remunerated by the NCP which signed the contract with the expert.

NCP

Registering in the wideraexperts.eu portal

The registration process of the NCP in wideraexperts.eu is generally the same as in both previous cases. First, the NCP is required to provide an email address and password.

! **It should be noted that an email address can only be used once in the portal.**

Next, the NCP is required to provide:

- personal details
- contact details
- Horizon Europe expertise area

! **The system will automatically assign submissions to the NCP according to the Horizon Europe area selected by the NCP when creating the account. As in the case of experts, it is possible to modify the account and expertise area later, but if at the time of submitting the application to the portal there is no NCP responsible for the HE area of the application in the country concerned, it will not be assigned to any NCP.**

Fig. 14. NCP's Horizon Europe expertise areas selection panel.

It is possible to assign all HE areas to one person. However, the system of diversifying the assignment of submission according to the HE areas has been implemented in order **to limit to a minimum the persons who will have access to the data related to proposals submitted in the portal.**

! **If a particular NCP representative is unable to carry out their duties, a colleague may temporarily take over the NCP's HE expertise areas by making changes to the account setting.**

Fig. 15. NCP's account Settings panel, accessible by clicking Settings in the drop-down list in the top right corner.

Once the administrator has verified and accepted the NCP's account, the NCP can log in to the portal.

Analysis of the proposal and search for the expert & signing the contract with the expert

An applicant creates the application that is visible to the NCP in their panel in the Applications tab (application no. 4 in the figure below, marked with the red rectangle).

Fig. 15. NCP's Applications panel.

By clicking on the "glasses" button, the NCP will be able to examine the submission and, in the Application details panel, click on the "Assign the pre-screening" button at the top centre of the screen (red rectangle at the top of Figure 16).
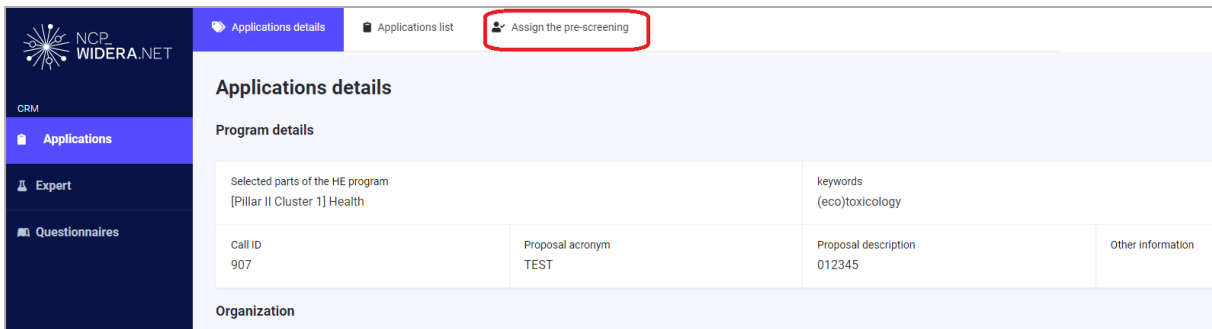
Fig. 16. NCP's Applications details panel.

The same can be done by clicking on the "Group" button marked with a green circle in the lower right corner of Figure 15.

After that, the portal automatically prepares the list of the experts who can provide the pre-screening service to the applicant. The system links the appropriate expert to the application **by combining the keywords included in the submission with the keywords found in the expert's account**.
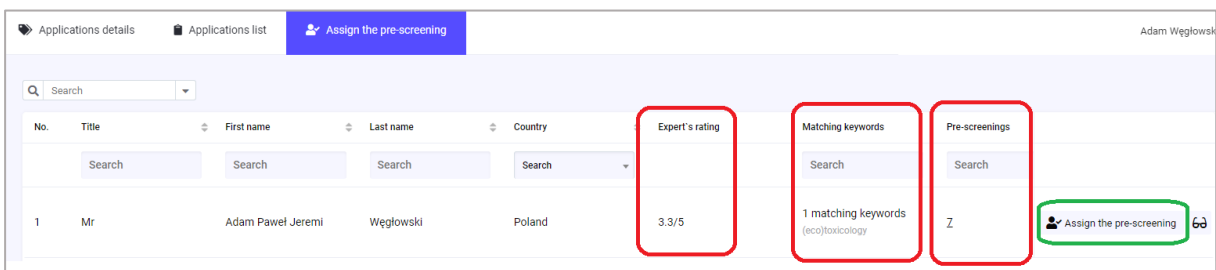

Fig. 17. List of the experts suitable to carry out the pre-screening service of the application after clicking on the "Assign the pre-screening" button

At this point, the NCP should:

1. Select the most appropriate experts to perform the pre-check service, taking into account: Expert's rating, number of matching keywords and pre-screenings performed (red rectangles in Figure 17). By clicking on the Questionnaires tab in the panel, the NCP can also view the questionnaires related to the pre-check services provided by the experts.
2. Prepare the preliminary assumptions of the pre-screening service by contacting the applicant and defining the main requirements.
3. Present the assumptions to the selected group of experts and obtain confirmation of their willingness to provide the service.
4. Select the most appropriate expert.
5. Prepare a contract with the expert.
6. Sign the contract for the provision of the pre-check service with the expert.
7. **Assign the expert to the pre-screening of the application to the expert by clicking on the green rectangle button on the panel shown in Figure 17; or by clicking on the "eye" icon**

on the list of experts suitable for the pre-screening service located next to the expert (Fig.18) and on the green "Assign expert" button at the bottom of the Expert details panel.

Fig. 18. List of the experts suitable to provide the pre-screening service of the application after clicking on the "Group" button

❗ It is important to note that the NCP should prepare the agreement in consultation with the applicant in order to establish the most appropriate service rules for both parties.

Verifying the report and the recommendation of the expert

Once the service has been delivered by the Expert outside the Portal, the NPC will see the 'Report' and 'Recommendation' buttons on the right-hand side of the application list (Fig. 19).

Fig. 19. Application list after the expert has uploaded the report and the recommendation.

By clicking on the "Report" button, the NCP will be able to view the report from the pre-check service and, after consulting with the applicant or verifying that the service has been provided in accordance with the report, the NCP can reject it or approve the report (Figure 20).

Fig. 20. Report verification panel.

By clicking on the "Recommendation" button, the NCP can download the recommendation, check whether the pdf document is adequate to the service provided on the basis of the contract signed with the expert, and reject it or approve it (Figure 21).
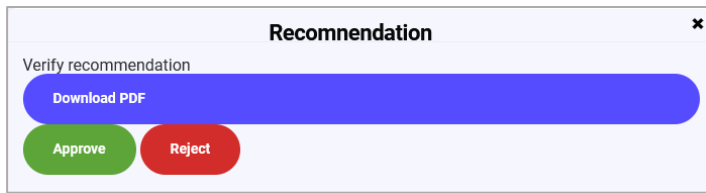
Fig. 21. Recommendation verification panel.

If the report or recommendation is rejected, the NCP should contact the expert and determine what steps should be taken to approve the entire service. The solution may vary according to the solutions developed by the NCP, the applicant and the expert.

Post-service actions

After the service has been provided by the Expert and fully approved by the NCP in the Portal, the NCP shall remunerate the expert in accordance with the contract signed by both parties before assigning the submission to the expert.

The NCP should pay attention to the questionnaires and changes in the expert's evaluation. If the applicant doesn't provide this information to the portal, the NCP should encourage the applicant to do so, as these indicators are crucial for the further development of the wideraexperts.eu portal.