



EUROPEAN COMMISSION
DG FOR CIVIL PROTECTION AND HUMANITARIAN AID OPERATIONS

ECHO IS SUPPORT TEAM

Online Single Form

Quick Start Guide

(10.10.2020)



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1. INTRODUCTION

The online Single Form enables ECHO Partners to work directly in APPEL (via Internet connection) on funding proposals and on the various reports. The direct online editing greatly speeds up drafting the documents for ECHO and eliminates the necessity of handling the XML files (which for some users might be a challenging task).

The online Single Form adapts itself automatically to your work context – so when editing proposals for the Partnership 2014, it will have a slightly different format (content and structure) compared to the situations where you work on proposals for the Partnership 2021. Functional differences between these two Single Form editions are very marginal, one difference worth mentioning here is that projects for Partnership 2014 could be drafted in one of the three variants of the Single Form (normal Single Form, simplified Single Form for emergency actions / urgent decisions and the Single Form for complementary activities) while the Partnership 2021 projects will be drafted in one unique variant for all business scenarios.

This document intends to provide basic information on the Single Form to enable anyone familiar with the ECHO funding process and terminology to start using the online application without difficulties.

2. REQUIREMENTS

To work comfortably with the new online “Single Form” you will need:

- the Internet connection and access to APPEL;
- one of the modern browsers installed on your computer (Google Chrome, Mozilla Firefox and Microsoft Edge – version 84 and later are recommended. Microsoft Internet Explorer 11 is supported but you might experience some delays, specifically on low-end machines);
- a bit of previous experience with the offline “Single Form”.

3. LAYOUT OF THE ONLINE SINGLE FORM

The layout of the online Single Form does not differ much from the one of the offline Single Form. It offers a clear and intuitive interface and a simplified and user-friendly navigation.

The layout comprises four parts:

- header;
- buttons bar;
- navigation pane;
- content area.

Country	Action title	Action type:	Amount	Status	Creation	Submission
		Non-emergency action	0,00€	Draft	26/10/2020	

Delete

Submit

Upload

Annexes

Export

Print

Edit

Validate

Save

Cancel

Back to list

Buttons bar

1. General Information

2. Project Data Overview by Country: +

3. Humanitarian Organisation in the Area

4. Needs Assessment and Risks Analysis

5. Beneficiaries

6. Gender and Age Marker

7. Logic of the Intervention

7.3 Results: +

7.4 Results Context and Conditions

8. Resilience Marker

9. Monitoring and Evaluation

10. Implementation

11. Field Coordination

12. Visibility, Communication and Information Activities

13. Financial Overview of the Project

14. Requests for Alternative Approaches

15. Administrative Information

16. Conclusions and Lessons Learned

17. Logframe

18. List of ECHO Pre-defined Annexes

Navigation Pane

1. General Information

Validate this chapter

Guidelines

1.1 Humanitarian organisation

PUNTO SUD

1.2 Title of the action

Content area

1.3 Time frame of the action

0/300

Start date

Duration of the action (in months)

Start date for eligibility of expenditure

1.4 Executive summary of the action

0/2000

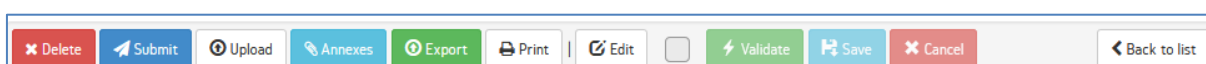
1.5 HIP / Decision (if known)

Please select

The header: contains basic details about the Single Form, such as the creation and submission date of the document, action title, status and some other specific information regarding the action.

Country	Action title	Action type:	Amount	Status	Creation	Submission
Barbados, Belize, Costa Rica, El Salvador, Grenada, Guatemala, Honduras, Nicaragua, Panama, Dominican Republic	Test Project Online Single Form 2021	Non-emergency action	1.600.000,00 €	Draft	20/10/2020	

The actions bar: It is located below the header, allowing to execute operations pertaining to the entire Single Form (such as validation, save, print, annexes, etc). It also offers the possibility to download and/or to upload project data for users who need to work offline. It displays the following buttons:




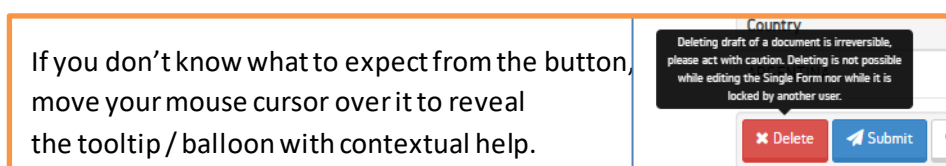
- **Delete:** this button allows deleting the current document (proposal, report etc.). It cannot be used while the online Single Form is being edited. Once this button is pressed, a warning message is displayed requesting the user to confirm the deletion of the document. **Deleting is irreversible, the deleted document is permanently lost, use it with caution.**
- **Submit:** this button allows submitting the validated document to ECHO. It cannot be used while the online Single Form is being edited. Once this button is pressed, the Single Form gets validated and if content is correct and complete, data is submitted to ECHO.
- **Upload:** this button allows uploading the project data (XML file) from the offline "Single Form". It cannot be used while the online Single Form is being edited.
- **Annexes:** this button allows uploading the mandatory and additional supporting documents. This button can be used at any time.
- **Export:** this button allows exporting project data from APPEL into an XML file for offline usage. It cannot be used while the online Single Form is being edited.
- **Print:** this button allows printing the Single Form. This button can be used at any time.
- **Edit:** this button allows editing the document. When clicked on, three other buttons are enabled: "Validate", "Save" and "Cancel".

Please note that the editing functionality is available only in not submitted documents (drafts) when no other user is editing the same document at the same time.

- **Validate:** this button validates the whole Single Form. Once pressed, the Single Form is validated against business rules. Two icons are used to indicate the state of the document:

-  project data is correct and complete thus can be submitted to ECHO;

-  Project data is invalid or incomplete, some sections might require an update.
- **Save**: this button allows saving the information in the database . It can be used only in “Edit” mode.
- **Cancel**: this button allows discarding changes without saving the information. It can be used only in “Edit” mode. **Canceling is irreversible, the unsaved content will be lost, use it with caution.**
- **Back to list**: this button allows navigating back to the “Project Details” page.



The navigation pane: an element of the interface located on the left side of the screen, giving access to all the chapters of the Single Form.

The content area: central part of the interface where the currently edited chapter of the Single Form is displayed. The content area gives you access to two additional elements:

- **“Validate this chapter” button**: allowing verifying if the current chapter is correct and complete. This button can be used only in “Edit” mode.
- **“Guidelines” toggle**: allowing displaying tooltips / balloons with contextual help on the boxes belonging to the current chapter. This button can be used at any time. In long chapters (where the beginning of the chapter would not be visible on the screen), the guidelines toggle is automatically displayed at the bottom of the page to facilitate showing/hiding the guidelines.

4. DRAFTING A PROPOSAL WITH THE ONLINE “SINGLE FORM”

Thanks to the online editing capabilities, users with access to APPEL are able to create, edit and submit proposals and reports directly in APPEL.

To start creating a proposal for editing it online, follow the guidelines described below (almost the same steps apply for creating other documents such as MR, IR, FR and for working on new versions of these documents):

1. Log into APPEL by clicking the following link:
<https://webgate.ec.europa.eu/appel/welcome/>
 and navigate to the “Search Projects” section, as indicated below:

- In the “Search Projects” section, press on the “Actions” button and create a new proposal based on the type of action:

Search Projects

Advanced
Search
Clear

Actions

Filters

Search Projects

Advanced
Search
Clear

Actions

Filters

PARTNER

PUNTO SUD

COUNTRIES

All Countries

AGREEMENT No.

Agreement No.

FILE	AGREEMENT No.
[140111]	Test
[140077]	
[140026]	
[140020]	
[140011]	

New RQ - Partnership 2021

Export to Excel

Confirmation
✕

Confirm the creation of a new e-Request

Close
Continue

- Once the proposal is created, you will be redirected to the new interface of the online “Single Form”. This interface enables you to:
 - edit project data directly online;
 - export and import project data for the offline use;
 - upload annexes and submit project data;
 - print etc.

Ref. no.: [140332]		FPA: 2021	Partner id.: PUNTO SUD		Partner HQ: ITALY	
Country	Action title	Action type:	Amount	Status	Creation	Submission
		Non-emergency action	0,00€	Draft	27/10/2020	

✕ Delete
➔ Submit
⬇ Upload
📎 Annexes
📄 Export
🖨 Print
✎ Edit
⚠ Validate
💾 Save
✕ Cancel

⬅ Back to list

- To access the editing mode, press the “Edit” button. This allows you to start editing the required sections of the proposal. This also enables the following buttons: “Validate”, “Save”, “Cancel”.
- To navigate to the desired chapter, click the respective row in the **navigation pane** on the left-hand side. The **content area** will display and let you edit the selected chapter.

The screenshot displays the application interface. On the left is the **Navigation pane**, which contains a list of chapters: 1. General Information, 2. Project Data Overview by Country, 3. Humanitarian Organisation in the Area (highlighted in blue), 4. Needs Assessment and Risks Analysis, 5. Beneficiaries, and 6. Gender and Age Marker. The main **Content area** shows the selected chapter, '3. Humanitarian Organisation in the Area', with a 'Validate this chapter' button and a 'Guidelines' toggle. Below this, there are two sections: '3.1 Presence in the area' and '3.2 Synergies, links, complementarity with your other actions', each with a red error bar and a '0/4000' character count.

- In the editing mode, you may check the correctness and completeness of the Single Form by pressing the “Validate” button in the **buttons bar**.

If your document is correct and complete, the following message will be displayed:

The screenshot shows a blue message box with the title 'No errors detected'. The text inside reads: 'Your Single Form document is fully valid.' At the bottom right, there is a 'Continue' button.

Additionally, the **green** icon in the buttons bar will indicate the valid state of your document.

The screenshot shows the buttons bar at the bottom of the application. It contains several buttons: Delete, Submit, Upload, Annexes, Export, Print, Edit, a green checkmark icon (highlighted with an orange box), Validate, Save, and Cancel.

If your document is not valid, the list of errors will be displayed. You will be able to locate them by navigating to sections marked in red in the **navigation pane**.

1. General Information
2. Project Data Overview by Country: +
Country [01]
3. Humanitarian Organisation in the Area
4. Needs Assessment and Risks Analysis
5. Beneficiaries
6. Gender and Age Marker
7. Logic of the Intervention

Error(s) list ×

1. General Information

- 1.2 Title of the action - cannot be empty.
- 1.3 Start date of the action - cannot be empty.
- 1.3 Start date of the eligibility of expenditure - cannot be empty.

4. Needs Assessment and Risks Analysis

- 4.1 Assessment dates and methodology - cannot be empty.

6. Gender and Age Marker

- 6.1 Please select an option for question 1 on gender and age marker.
- 6.1 Please select an option for question 2 on gender and age marker.
- 6.1 Please select an option for question 3 on gender and age marker.
- 6.1 Please select an option for question 4 on gender and age marker.

➤ Continue

Additionally, the red icon in the buttons bar will indicate the invalid state of your document.

✕ Delete
➤ Submit
⬇️ Upload
📎 Annexes
📄 Export
🖨️ Print
✎ Edit
⚠️
⚡ Validate
💾 Save
✕ Cancel

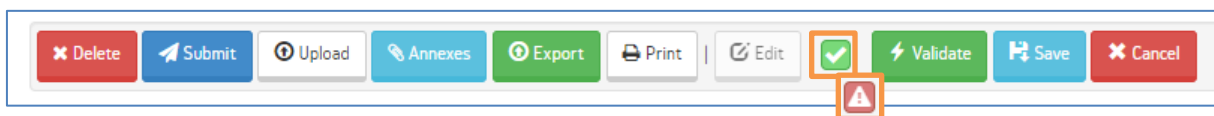
On top of the global validation, you can also use the “Validate this chapter” functionality available in the **content area** in the header of each chapter:

1. General Information

Validate this chapter
⚠️ ☐ Guidelines

- To add annexes, press the “Annexes” button. Uploading the annexes via the standard interface is possible both when you are in editing mode and when you quit the editing mode.

8. Once you have completed the editing work, press the “Save” button to save the information already encoded. Clicking the “Save” button will also validate the chapters of the Single Form. The icon in the navigation pane will indicate with **green** or **red** colour whether your document is ready for submission or not.



Please remember to **save the progress of your work regularly**. If you refresh the page or navigate away while editing the Single Form, the unsaved content will be lost.

As a safety mechanism, APPEL is saving the progress of your work in the intervals of 10 minutes. Therefore, if you accidentally lost part of your work, please contact [ECHO-IS-SUPPORT](#), we might be able to help you.

9. Once the proposal is ready (correct, complete and saved), press the “Submit” button to submit it to ECHO.

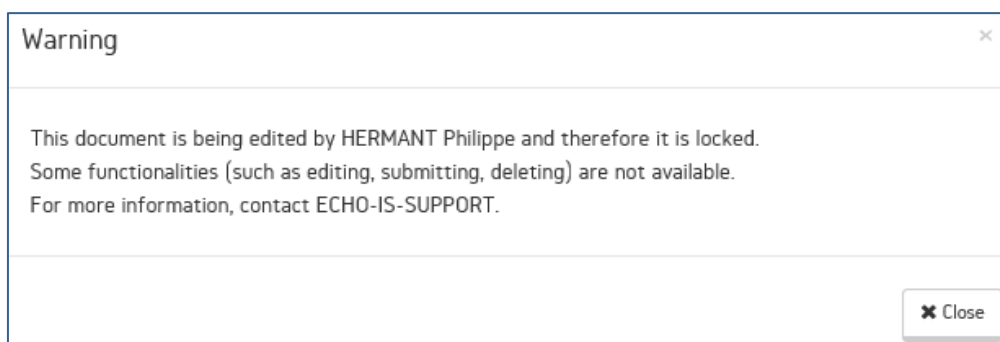
5. LOCKING MECHANISM

The possibility to edit the project data directly in APPEL has multiple consequences on teamwork. It increases substantially the likelihood of situations where two or more users from the same organisation would attempt editing the project data at the same time.

To reduce the risk of data loss (one user overwriting the content introduced by his/her colleague), a new locking mechanism was introduced in APPEL.

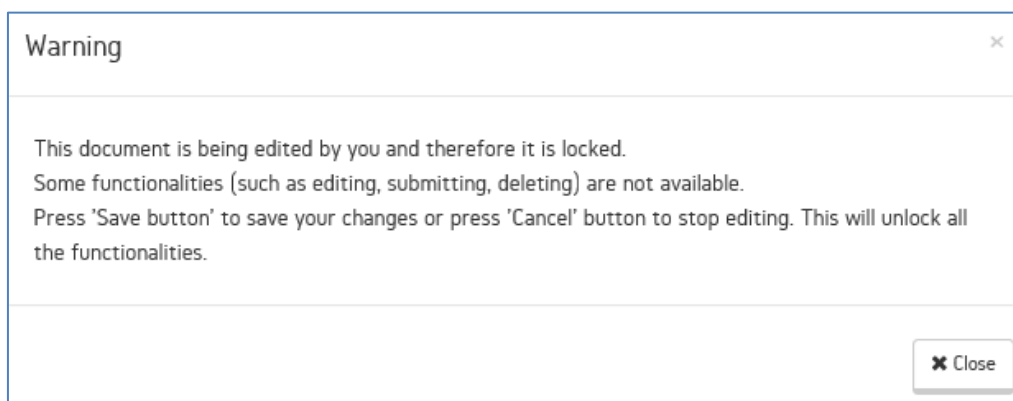
The locking mechanism is applied at the level of the documents (proposal, modification request, interim report and final report). This means that only one user can edit a given document at a time. If, however, the project comprises more documents (for instance MR and IR), the editing work can take place in both documents by two different users.

Whenever a user starts editing the project data, by pressing the “Edit” button in APPEL, a lock for this user and the respective document is established in the database. If another **concurrent user** tries to edit the same document while the lock exists, he/she will be notified about the lock, as shown below:



The locking mechanism not only prevents the **concurrent users** from pressing on the “Edit” button but it also protects all remaining functionalities. This means that, while one user is editing the project data, other concurrent users will not be able to use the functionalities such as import and export XML, delete, submit.

The locking mechanism affects also the **current user** during his/her editing work. It blocks all the operations that could have consequences on data integrity. Therefore, the owner of the lock (the user editing project data in APPEL) will not be able to use the functionalities such as import and export XML, delete, submit. Whenever he/she tries to use one of the disallowed functionalities, APPEL will display the following message:



The following table summarises the spectrum of available functionalities depending on the locked state of the document:

User type	Document is locked	Document is unlocked
Lock owner (editor)	<ul style="list-style-type: none"> - Edit - Unlock (on "Project Details" page) - Save (while editing) - Cancel (while editing) - Validate (while editing) - Print - Manage annexes - Toggle guidelines 	<ul style="list-style-type: none"> - Edit - Delete - Submit (if validated) - Export (for offline use) - Upload (offline data) - Print - Manage annexes - Toggle guidelines
Concurrent user (reader)	<ul style="list-style-type: none"> - Print - Manage annexes - Toggle guidelines 	

The lock is removed from the document as soon as the owner of the lock (user editing the document in APPEL) presses on the "Save" button or on the "Cancel" button.

If the owner of the lock navigates away from the online "Single Form" without pressing on the "Save" or on the "Cancel" button, the document will remain locked and the unsaved changes will be lost. To unlock the document, the "lock owner" will need to either:

- navigate to the locked document to start editing it again but this time finishing with proper saving or cancelling of the process;
- navigate from the "Search Projects" to the "Project Details" page listing all the submitted documents for the given project, and press on the "Unlock document" button as shown below:

#	Type	Reference Number	-	Vn	Creation	Submission	Status
1	REQUEST	2020/00736/RQ/01/01	Check (?)	1	06/10/2020	06/10/2020	Submitted
2	REQUEST	2020/00736/RQ/01/02	Check (?) Unlock (?)	2	20/10/2020		Draft

- If the "lock owner" is absent, please contact [ECHO-IS-SUPPORT](#) for assistance.
- Locks are also **automatically removed after 12h** of inactivity of the "lock owner".

6. CHANGES IN THE UPLOAD INTERFACE FOR OFFLINE DATA

The introduction of online editing capabilities triggered the necessity for improving the offline data upload process to boost users' awareness about the risks of overwriting information in APPEL.

The process of uploading the XML data has been simplified. The notion of partial and full upload has been removed and now the XML data is always uploaded via a single interface giving the user the possibility either to select specific chapters, either to select all chapters for the upload.

Thanks to this approach, APPEL is now able to detect the "age" of uploaded data to warn users about the risk of uploading the offline information that is less recent than the existing information in APPEL.

The upload of the XML data in APPEL involves several steps and is possible only when the document (proposal or report) is not locked:

1. To start uploading the XML data, press on the "Upload" **(1)** button located in the action bar:

The screenshot shows the APPEL interface with a header bar containing project details: Ref. no.: 2020/00736/RQ/01/02, FPA: 2021, Partner id.: PUNTO SUD, and Partner HQ: ITALY. Below the header is a table with columns: Country, Action title, Action type, Amount, Status, and Creation. The table contains one row with data: Country (Barbados, Belize, Costa Rica, El Salvador, Grenada, Guatemala, Honduras, Nicaragua, Panama, Dominican Republic), Action title (Test Project Online Single Form 2021), Action type (Non-emergency action), Amount (1.600.000,00 €), Status (Draft), and Creation (20/10/2020). At the bottom is an action bar with buttons: Delete, Submit, Upload (highlighted with a red box and the number 1), Annexes, Export, Print, Edit, Validate, Save, and Cancel.

2. Press the "Browse" button to select the XML file from your computer **(2.)** and press the "Proceed" button **(3.)**:

The screenshot shows a light blue informational box with the following text: "Press the 'Browse' button to select the XML file exported from the Single Form (offline).", "Press the 'Proceed' button to be taken to the interface allowing the selection of the Single Form chapters for data upload.", and "Attention: the upload of the XML files produced by the PDF Single Form is no longer supported. If you have such a file contact ECHO-IS-SUPPORT for the assistance." Below the box is a file selection area with a "Browse" button (highlighted with a red box and the number 2) and the text "No file selected.". To the right is a "Proceed" button (highlighted with a red box and the number 3).

At this point, the standard interface for selecting chapters will appear.

If the XML data was retrieved earlier than the last modification of project data in APPEL, the following warning will be displayed:

Please select the chapters you want to upload and press the "Upload" button.

Date of the last save in database: 28/10/2020 11:44
 XML export date: 27/10/2020 18:03

The data of this project might have been changed in APPEL since you exported it for offline work.
 Please make sure that the information to be uploaded will not overwrite important existing data in APPEL.

☐ Select all


☐ Unselect all

Chapter	Offline Status (from file being uploaded)	Online Status (from APPEL)
<input type="checkbox"/> 1	V (?)	V (?)
<input type="checkbox"/> 2	V (?)	V (?)
<input type="checkbox"/> 3	V (?)	V (?)
<input type="checkbox"/> 4	V (?)	V (?)
<input type="checkbox"/> 5	V (?)	V (?)
<input type="checkbox"/> 6	V (?)	V (?)
<input type="checkbox"/> 7	V (?)	V (?)
<input type="checkbox"/> 8	V (?)	V (?)
<input type="checkbox"/> 9	V (?)	V (?)
<input type="checkbox"/> 10	V (?)	V (?)
<input type="checkbox"/> 11	V (?)	V (?)
<input type="checkbox"/> 12	V (?)	V (?)
<input type="checkbox"/> 13	V (?)	V (?)
<input type="checkbox"/> 14	V (?)	V (?)
<input type="checkbox"/> 15	V (?)	V (?)
<input type="checkbox"/> 16	V (?)	V (?)

Moreover, next to each chapter, an indicative letter will be shown to inform you on whether specific chapters in APPEL are valid **(V)** or not **(D)**.

(V) = Based on APPEL information, this chapter is already VALID. If you tick it to upload the data from the offline application to APPEL, you might be overwriting some already existing information.

(D) = Based on APPEL information, this chapter is INVALID. Ticking it to upload data from the offline application to APPEL poses no risk.

3. Select the chapters you wish to upload and click on the  button.
4. Once the XML data upload process is over, the following message is displayed:

Action data was successfully uploaded to APPEL. Please close this window now.

8. CONSIDERATIONS FOR COLABORATION

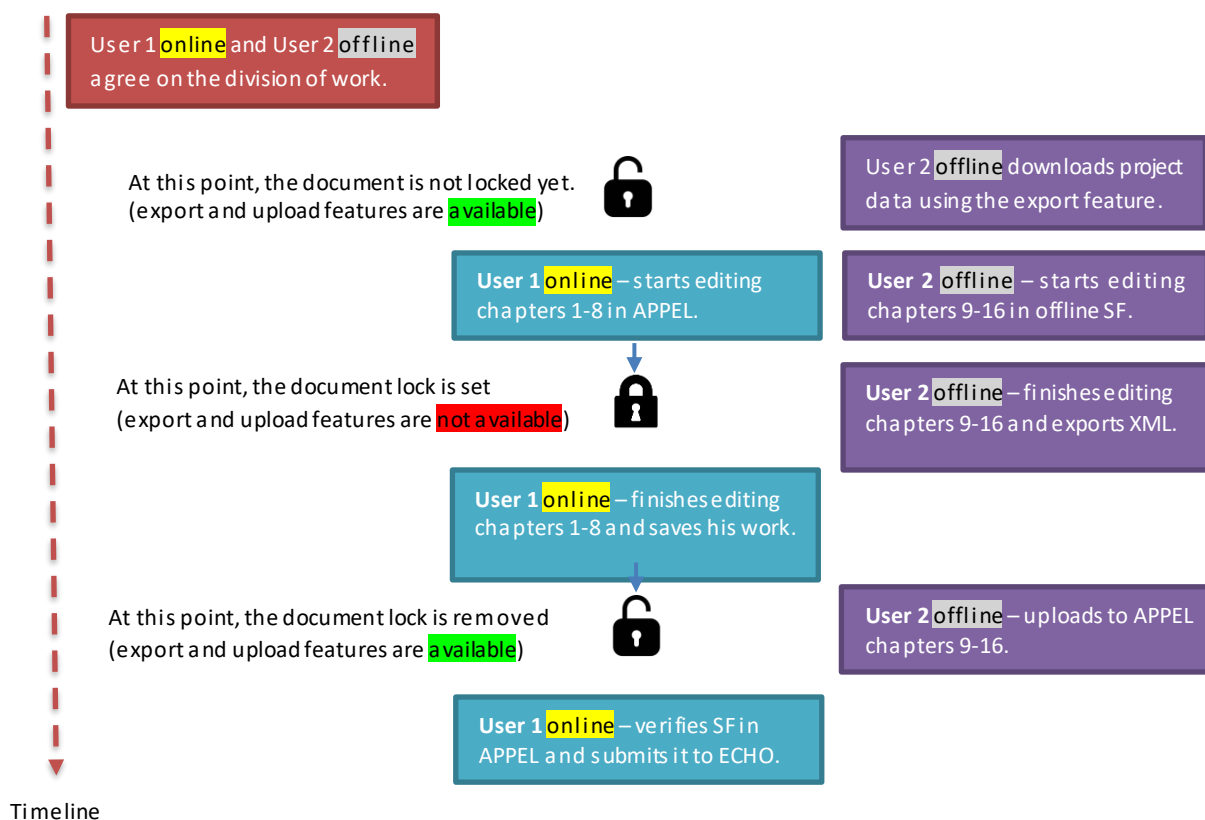
The possibility to edit the Single Form online extends the existing collaboration modalities (sequential and asynchronous offline collaboration - see the video in the additional resources section down below) by introducing the **mixed online and offline collaboration** modality.

In this modality, part of the editing work is done online, directly in APPEL by one user, and the remaining part of work is done in the offline "Single Form" by another user.

Like in any other collaboration modalities for the "Single Form", an upfront agreement on "who edits what" is essential. It is also important to follow the steps described below in the correct order to avoid the challenges related to the locking mechanism.

1. Online and offline users agree on the division of work (for instance the first one decides to focus on chapters 1-8 and the second one is in charge of chapters 9-16).
2. Before the online user starts editing the proposal directly in APPEL, the offline user needs to obtain the offline application and project data in the XML format. Exporting project data is not possible during the editing work in APPEL due to the locking mechanism.
3. Both users can start working on their respective chapters in online and offline applications.
4. Uploading of the offline data is only possible once the editing work online is finished. This means that if the offline user has completed his work earlier than his online colleague, he will need to wait with the upload of the data until editing work online is completed (and the document lock is lifted).
5. Once the online editing is completed and offline data is uploaded to APPEL, one of the users will be able to do the final verification of the Single Form and submit it to ECHO.

The mixed online and offline collaboration model is presented in the diagram below:



9. ADDITIONAL RESOURCES

- Quick start guide for **offline** Single Form:
<https://www.dgecho-partners-helpdesk.eu/download/referencedocumentfile/47>
- Detailed manual for **offline** Single Form:
<https://www.dgecho-partners-helpdesk.eu/download/referencedocumentfile/74>
- Quick start guide for **online** Single Form (this document):
<https://www.dgecho-partners-helpdesk.eu/download/referencedocumentfile/50>
- What has changed – document comparing Single Form 2018 and 2021
<https://www.dgecho-partners-helpdesk.eu/download/referencedocumentfile/147>
- Instructional video for **offline** Single Form 2018 - editing by single user:
<http://bit.ly/2HFMaAf>
- Instructional video for **offline** Single Form 2018 - multiple users collaboration:
<http://bit.ly/2WfxBrQ>
- Instructional video for **online** Single Form 2018 - creating/submitting a proposal online:
<http://bit.ly/2IM05vY>