ESF Transnational Platform

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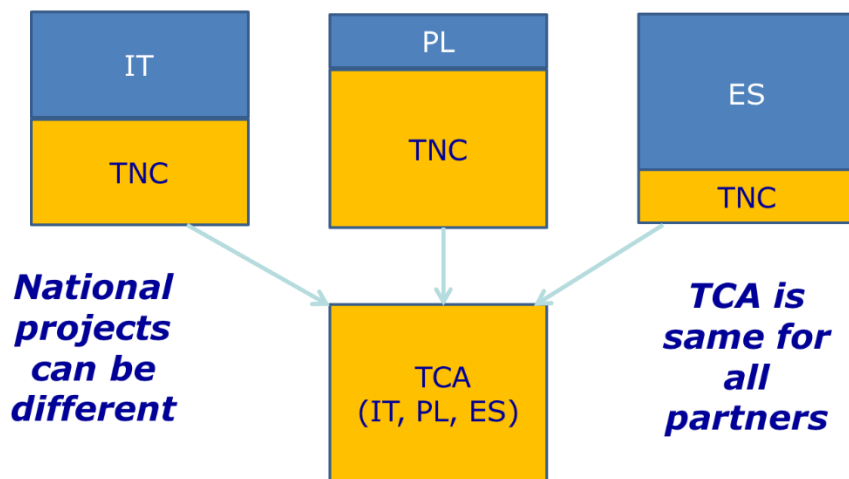# Short TCA* User Guide
(*Transnational Cooperation Agreement)

Version 6 – 3 November 2016
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1   Where and how to access TCA information


Function of the TCA

- TCAs are published on the ESF Transnational Platform once they have been approved by the respective Managing Authorities (MAs) or Intermediate Bodies (IBs) by clicking on the square related to the TCAs in the statistics section at the bottom of the page https://ec.europa.eu/esf/transnationality/
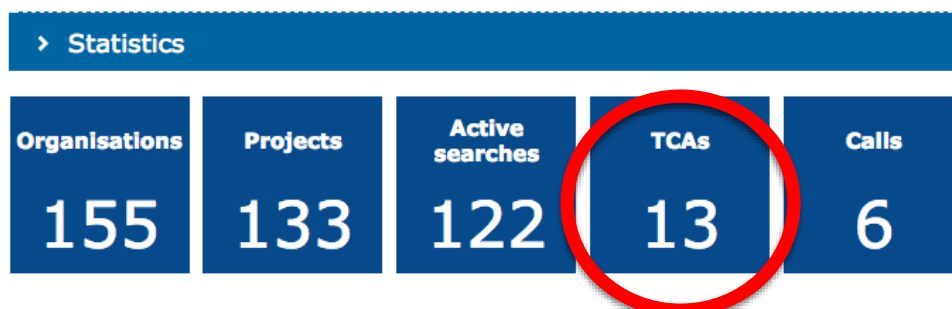
- After accessing the list of all active TCAs, you can further search the TCAs by using the various filters proposed in the left-hand column of the web page (faceted search).

2 The TCA online process in short
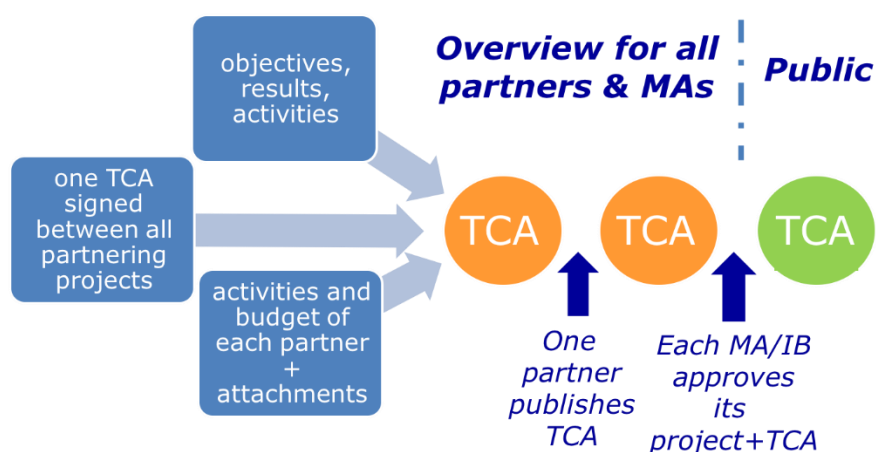
- **TCAs are created/input on the ESF Transnational Platform (ESF-TP):**
  - o The members of a transnational partnership (the representatives of national projects involved) have to create the TCA online on the ESF-TP.
  - o These members each need to have a user account on the ESF-TP: see the user guide to the ESF partner search database: https://ec.europa.eu/esf/transnationality/content/quick-database-user-guide
  - o One member of the transnational partnership needs to log in to the ESF-TP, go to the "myTNC" section and create the TCA record in the database (see details below).
  - o The other partner organisations in the TCA should then each add their projects to the TCA. The system notifies all partners each time this is done.
  - o After all the partner organisations have added their projects, any representative of any of the partner organisations can then decide to submit that TCA-under-creation to all the corresponding national Managing Authorities/Intermediate Bodies in one click.

- **Approval of TCAs:**
    - ○ Before a TCA is submitted for approval to the MAs/IBs, it is only visible to the representatives of the partner projects of the TCA. Remark: all mandatory data of involved organisations and projects have to be added before the related TCA can be submitted.
    - ○ After the TCA is submitted to the MAs/IBs concerned and before it is approved, only the representatives of the partner projects of the TCA plus the involved MAs/IBs can access the data.
    - ○ When the members of a TCA decide to submit their TCA for approval, the system notifies all the MAs/IBs concerned by e-mail. From this point on, the MAs/IBs can each approve (or ask for details, or reject) the partner project in the call they are in charge of. The actions they take affect both 'their' project and the TCA it is part of.
    - ○ When all MAs/IBs involved have given their approval, the TCA becomes an approved TCA (green status) and is then published on the ESF-TP.
    - ○ Only the representatives of the projects in a TCA (plus system administrators) can modify the content of the related projects and of the TCA. The MAs/IBs cannot modify the content of a project or a TCA; they can only modify statuses/decisions on projects, TCAs and related organisations.

- **Modification of a TCA and related information**
    - ○ TCAs, projects and organisations can evolve over time. If the representatives of the projects in a TCA update sensitive[1] data of an organisation or project involved in a TCA, then the status of a TCA will come back to "Orange" and the modified TCA will have to be resubmitted for approval to the MAs/IBs concerned. This "Orange" status does not reflect a problem in the TCA and it can be dealt with quickly online by the relevant MAs/IBs.
    - ○ If a new partner project is added to a TCA (or replaces a previous partner project), the process is the same, but the approval may take a little more time as the MAs/IBs concerned may have to reconsider the TCA in more detail.
    - ○ At any time, an MA/IB may modify the status of 'its' project in a TCA and even Block it (Red status). The TCA will then also be Blocked. The system then notifies all the members of a TCA and all the other MAs/IBs involved:
        - ○ If an MA/IB Blocks a TCA because important information is missing, it can revert the Red status later once the data have been provided;
        - ○ If an MA/IB blocks a TCA because it totally rejects 'its' project, the partners can amend the TCA's structure to remove the Blocked project from the TCA.

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[1] Sensitive data leading to a change of status of approved TCA in case of modification:
- For a related organisation: Name in national language, Country;
- For a related project: Country of submission, Call for proposals, Project lead organisation.

3 How to create a TCA record

- Log to the ESF-TP using your ECAS account (see https://ec.europa.eu/esf/transnationality/content/quick-database-user-guide)
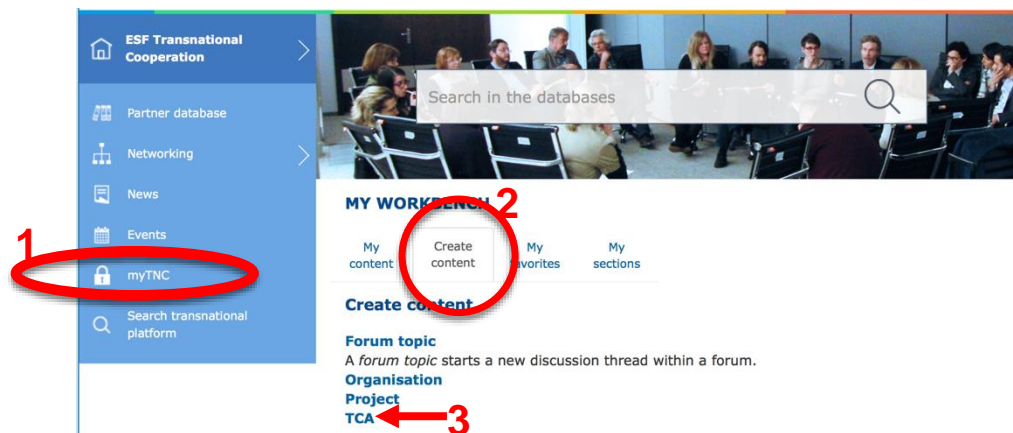
1. Go to "myTNC".

2. Click on the "Create content" tab.

3. Click on "TCA" and fill in the data (don't forget to save your data!). Use the 'Create' function only once for your TCA. After that go to the "My content" tab to find and edit your already existing TCA).

- Start to fill in data of your TCA (see §5 below: "Guidance on the TCA content").

- Don't forget to "save" at least in draft mode by clicking on the "Save as draft" button at the bottom of the screen.

- Make sure you also update the content of the partner projects and related organisations in the partner search database (titles, country info, call info, addresses). Ensure that the contact persons involved in the projects and organisations involved have all: (1) validated their ECAS accounts; (2) registered on the ESF Transnational Platform; and (3) a signed scanned version (pdf…) or the final Word version of the TCA which has been signed.[2]

- Only a few data items are mandatory for the input (they are indicated by a red star *). But we recommend you to be as detailed as you can so that the Managing Authorities can find all the information they need and are convinced by the value of your project and transnational activities.

- Once you are ready with all the data of your TCA and of the related projects and organisations, you may click on the "Publish" button. The system will then launch the workflow process and notify your partner organisations and the Managing Authorities involved.

- If you make an error and enter the same TCA several times between you and your partners, you can ask the system administrator to delete a record (TCA, project or organisation).

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[2] You will find further guidance on connecting a user account to an organisation in the database user guide (chapter 3) https://ec.europa.eu/esf/transnationality/sites/esf/files/esf-database-guide.pdf available in the "Technical support" forum at https://ec.europa.eu/esf/transnationality/content/quick-database-user-guide

4 How to update a TCA

- As in point §3 "How to create a TCA record", log and go to "myTNC"

- The "My Workbench" page is displayed

- Click on the "My Content" tab. You will see the lists of your edits. If you have made a lot of contributions (organisations, projects, TCAs…) and do not immediately see the item you are looking for, click on the "View All" link located below the "My Edits" table.

- Then click on the title of the item you want to edit. It will be displayed. You simply need to click on the "Edit" tab located above the title.

- During the drafting phase and before you ask to publish your TCA, you can make as many updates as you want by always clicking on the "Save as a draft" button.

- Warning: if you update a TCA (or 'sensitive' information related to a partner project) after you have published it, then the status of your TCA will move back from "Green" to "Orange". This means that you will need to "publish" your TCA again, and also that the Managing Authorities involved will need to revalidate the TCA online.

  o So, only "Publish" your TCA when you are sure all the information is in.

  o Avoid updating the TCA or key information of partner projects in a TCA after a TCA has been published.

MY WORKBENCH

My content	Create content	Comments	ESF content	My favorites	Broken links	My sections	Moderate All

My Edits	All Recent Content

My Profile

John Smith
edit my profile

My Edits

Five of the most recently updated pieces of content.

Title	Section	Type	Published	Last updated ▼
Towards an effective and sustainable mentoring model for the integration of refugees into the European labour market		TCA	Yes	16 min 44 sec ago
EFFECTIVE MENTORING		TCA	No	3 days 2 hours ago
Presentations of the 'Transnationality in progress' seminar		News	Yes	1 week 2 days ago
The Swedish National Association for Social and Mental Health		Organisation	Yes	2 weeks 1 day ago
The Centre of Vocational Training and Adult Education no 1 in Warsaw		Organisation	Yes	2 months 2 weeks ago

view all

All Recent Content

Title	Section	Type	Author	Last updated ▼	Actions
Towards an effective and sustainable mentoring model for the integration of refugees into the European labour market		TCA	John Smith	16 min 44 sec ago	edit

5 Guidance on the TCA content

5.1 Detailed guidance on the Editor functions

Some guidance is already available online in the "Technical Support" forum[3] in the "Networking" section at:

- "Quick user database guide":
  https://ec.europa.eu/esf/transnationality/content/quick-database-user-guide

- "WYSIWYG editing tool":
  https://ec.europa.eu/esf/transnationality/content/wysiwyg-editing-tool

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[3] https://ec.europa.eu/esf/transnationality/forums/technical-support

Hereafter, the guidance is mainly related to technical issues. Please refer to the Terms of Reference of the calls and to the proposed templates[4] for the general details on the content of a TCA, or ask your Managing Authority regarding any specific questions related to the content of a call.
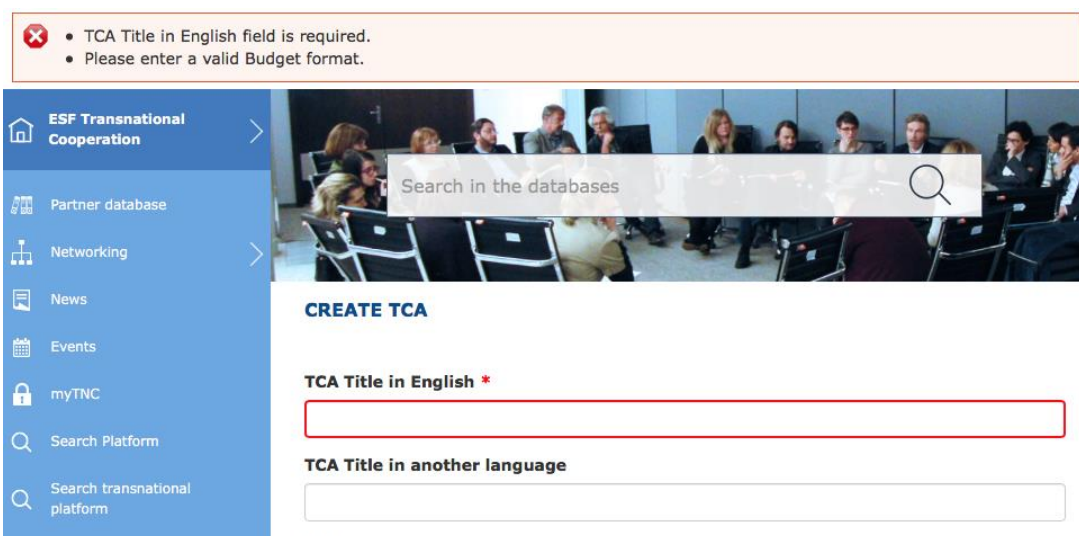
5.2 Draft and Published versions

When your TCA is saved as a draft version, in appears on your screen in view mode with a pale orange box around as shown to the right.

Don't worry, this colour is not displayed later on when you publish your TCA.

To publish your TCA, some checks are made on the mandatory fields (and also on some mandatory data of the involved projects).
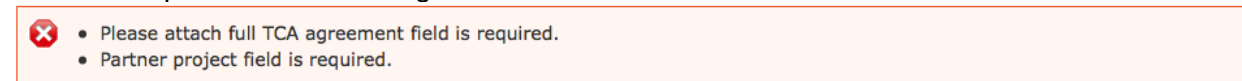
For instance, if you forget to input a title for your TCA, you will see an error message like:

The error message is displayed in a pink box as shown above and indicates the problems. You can also see that the input box of the missing field is highlighted in red.

Other examples of error messages can be:

5.3 Main contact organisation

This is not a mandatory field. However, we recommend you to identify a central point of reference for your TCA. This information does not imply any legal responsibility.

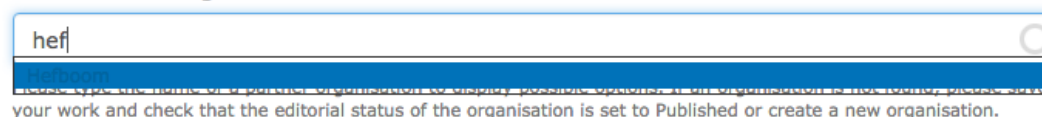[4] https://ec.europa.eu/esf/transnationality/content/template-transnational-cooperation-agreement-tca

It is an "auto-fill" field. Simply start typing the name of the organisation, and a list will be proposed to you. That list is refined on the fly as you type to become more and more focussed.
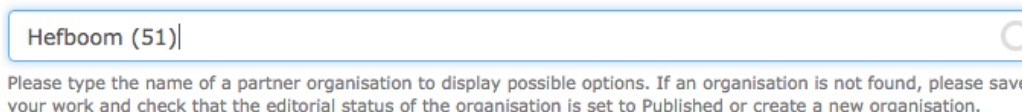
Main contact organisation

hef|
Hefboom

your work and check that the editorial status of the organisation is set to Published or create a new organisation.

Once you see the organisation you want in the list, select it with the arrows and press return or the tab key. Don't click on it or you will open the page of the organisation details. (If you clicked on the organisation link instead of using the arrow keys, then simply go back within your browser, and you will be brought back into the input page without losing your previous input.)

Main contact organisation

hef|
Hefboom

your work and check that the editorial status of the organisation is set to Published or create a new organisation.

After selection, the organisation and its identifying number appears in the field.
After you save your input, we recommend you to check that you selected the right organisation.

Main contact organisation

Hefboom (51)|

Please type the name of a partner organisation to display possible options. If an organisation is not found, please save your work and check that the editorial status of the organisation is set to Published or create a new organisation.

5.4 Description fields and the WYSIWYG editor

You have a WYSIWYG editing function for the fields:
- Rationale & objectives
- Work programme and working methodology
- Organisation & decision-making
- Other notes.

Copy-and-Paste is enabled so that you can very quickly input the data if you used the proposed templates to build your TCA.

However, if you do a copy-paste directly from Word, Open Office etc. you will input a lot of unwanted formatting code which may make your TCA illegible.

Please click on the "Paste from Word" icon located in the icon bar of each editing text box:
- A pop-up window appears.
- Then "paste" (Ctrl-C keys) from your Word document into the pop-up window
- And click on OK. The text from your Word document will be copied in the text box together with its formatting.

NB: more on the WYSIWYG editor at: https://ec.europa.eu/esf/transnationality/content/wysiwyg-editing-tool

5.5 Adding a partner project

You must indicate at least one partner project (at least yours!). Usually there should be more than one partner project indicated in a TCA, but the system does not check the number of partners beyond insisting that there must be at least one project.

For instance, for a TCA which already contains two projects, we want to add a third one.

Click on the button "Add another item". A third input box appears:

The new empty field "Partner project" is an auto-fill field. You can type in the project ID number (TPI) or start to type the name of the project:

The TPI or Transnational Project Identifier is the number given automatically to a project when it is created into the ESF partner search database.[5]

In the example, we typed in the TPI number 286, and it directly displays the corresponding project: TPI number, project title and country of the project.

Then you can simply select the right project in the list with the arrows or with your mouse (you may have a list of projects if you started to type in the name of the project).

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[5] https://ec.europa.eu/esf/transnationality/partners-search/?f[0]=bundle%3Aesf_tnc_project

The final result looks like this:

5.6 Total budget format

Total budget in euro *

Budget for the transnational work (Ex: 12 345.69)

You simply need to enter the total number with no space or no thousands delimiter. It accepts 2 decimals using the dot as a decimal separator.

The budget should be indicated euro (but without the euro symbol).

5.7 Upload of the full TCA agreement and TCA budget

The upload of a signed scanned version (pdf…) or of the final Word version of the TCA which has been signed, is mandatory. You cannot publish your TCA – i.e. submit it to your Managing Authorities – without this document.

The Budget document is not mandatory if the budget information is already included in your TCA document. But you are still recommended to add this document as a central piece of information which all the stakeholders of the TCA can access easily. As a reminder an Excel template[6] for the budget table has been provided.

- Click on the button "Choisir le fichier" (or "Select file" in English, it may depends on your language interface). You can select files with the extension pdf, xls, xlsx, doc, docx, odt, ods, odp, zip or tar as indicated above.
- Select the file on your computer
- Then click on the "Upload" button.

Please attach full TCA agreement *

Choisir le fichier   aucun fichier sél.   Upload

Files must be less than **200 MB**.
Allowed file types: **pdf xls xlsx doc docx odt ods odp zip tar.**

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[6] https://ec.europa.eu/esf/transnationality/content/template-transnational-cooperation-agreement-tca

Once uploaded, the field appears as follows:

Please attach full TCA agreement *

📄 6282_02_ondertekende_tca_memoresist.pdf (4.09 MB) [Remove]

Description

| signed MeMoRe TCA |

The description may be used as the label of the link to the file.

You are recommended to indicate a description of the file as above. This description will be displayed in your TCA page with a link on it to download the file.

You can also remove the file and then upload a new version.

The procedure is the same for the Budget document upload.

5.8 Date of signature

This is not a mandatory piece of information. However, if you input a date, at present you also need to input a time indication!

This time indication will be suppressed in the near future. For now, you can input any time – it doesn't matter.

5.9 Save your data!

Once more: don't forget to save your input. You can "Save as a draft" as many time as you want during your drafting phase. Don't wait to finish your full input before you save your data!

NB: Do not worry if your project does not appear immediately. The indexing process may take up to one hour.

6 Notification and workflow system

Currently project promotors can prepare and publish TCAs on the ESF Transnational Platform.

- Project promotors are advised to communicate clearly amongst themselves within a TCA to ensure the correct input of the TCA.
- When a TCA is ready, one of the partner's representatives must publish the TCA online (by clicking on the "Publish" button).
- Then the legal representatives of each partner project have to inform their respective MAs.

Date of signature of TCA

Date	Time
30/09/2016	12:00
E.g., 16/10/2016	E.g., 15:15

By December 2016, the MAs will also be able to validate their respective TCAs and projects online using the full workflow and notification system.

This section will be revised when the notification and workflow system is made available.

Editing rights for additional contacts

Several users can be added to organisations or to projects to provide them editing rights:

- contacts added to a project can edit the data of the project (and related TCAs)

- contacts added to an organisation can edit the data of the organisation and of the related projects and TCAs.

This is to enable Organisations and Projects to manage access rights flexibly.

The supplementary contacts should be operational people to whom you want to grant editorial rights.

If you wish to make details of contacts available to the general public, it is best to include them in the project description or via web links you can add within the text fields of the organisation or project profile.

Avoiding spamming the various contact persons

To avoid spamming all the contacts at the same time and to help you manage the notification e-mails that are sent when the database is updated, only the **Legal contact** (and in some cases the Project manager) is informed. The legal contact should arrange for the distribution of such notifications within your organisation.

Functional ECAS accounts

We recommend you to create a "functional" ECAS account for the Legal contact. This can help you to separate your private ECAS account usage from the project/organisation usage (especially when the Legal contact is "out of the office" for a long period).

You can thus create a functional e-mail address – for instance using the acronym of your organisation – and set your own e-mail system up to forward messages to the right individuals (distribution list). In this way, you can distribute the notifications among the people who need to take action on these notifications, without disturbing other staff members.