



EUROPEAN COMMISSION
DG FOR CIVIL PROTECTION AND HUMANITARIAN AID OPERATIONS

ECHO IS SUPPORT TEAM

Offline Single Form

Detailed Manual

(10.10.2020)



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1. INTRODUCTION

The offline Single Form enables ECHO Partners to work on funding proposals and on the various reports with the use of a computer that is not connected directly to internet.

The internet connection is not necessary for carrying out the editing work within the Single Form, however the initial steps such as creating the draft document and extracting it from APPEL for offline use require internet and APPEL access.

The offline Single Form exists now in two variants (2018 and 2021) that should be used respectively for proposals/reports under Partnerships 2014 and 2021. The functionalities of both Single Form variants are the same, their structure and labelling might differ however depending on the Partnership (2014, 2021), action type (normal, urgent, complementary), partner type (NGO, UN/IO) and action stage (RQ, MR, IR, FR).

This document details all the functionalities of the offline Single Form. It highlights also the most important differences between online and offline Single Forms and provides the recommendations and good practices for collaborative work.

This document does not cover the aspects of exporting and importing the data to / from APPEL. Please read the “Offline Single Form - Quick Start Guide” to learn more about these data manipulation aspects.

2. REQUIREMENTS

To work comfortably with the offline Single Form, you will need:

- a. **The Internet connection and access to APPEL:**
 - to obtain the project data in XML format and zipped offline Single Form application;
 - to upload the project data to APPEL.

- b. **A computer** with the following software installed:
 - **a browser:** Chrome, Firefox, Internet Explorer 11 or Edge;
 - **un-zipping software:** 7-Zip, WinRar, WinZip etc.

3. LAYOUT

The layout of the offline Single Form comprises five parts:

- the actions bar;
- the header;
- the navigation pane;
- the content area;
- the footer.

Single Form (offline) 1.0

Actions bar Global validation Print Import the XML Save the XML

Header

Document type: RQ Agreement number: ECHO/PRT/BUD/2020/91006 FPA version: 2021
 Action type: Non-emergency action Unilateral: Unilateral XML version: 1.0
 Partner type: NGO Project creation date: 25/08/2020 XML export date: 20200922 10:56:18
 Reference number: 2020/00012/RQ/01/01 Project submission date: 26/08/2020

Navigation pane

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 Action
14. Requests for Specific Derogation
15. Administrative Information
16. Conclusions and Lessons Learned
17. Logframe
18. List of ECHO pre-defined annexes

Content area Validate this chapter Guidelines

1. General Information

1.1 Humanitarian organisation
PUNTO SUD

1.2 Title of the action

1.3 Time frame of the action

Start date

Duration of the action in months

Start date for eligibility of expenditure

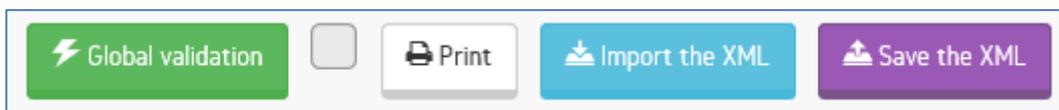
1.4 Narrative summary of the action

1.5 HIP / Decision (if known)
Please select

Comments on this chapter (not imported to APPEL and excluded from print)

Footer

- a. **The actions bar:** an element located on top of the page, allowing to execute operations pertaining to the entire Single Form (such as global validation, data import and export, printing). It contains the following buttons:



- **Global validation:** this button validates the whole Single Form. Once pressed the Single Form is validated against business and data format rules. If no errors are detected - the icon next to the button shows a sign which indicates that the Single Form is ready for exporting the data to XML format and uploading it to APPEL via the full upload option. If errors are detected - the icon next to the button shows a sign which indicates that the Single Form is not ready for full upload to APPEL.
- **Print:** this button allows printing the Single Form based on the rendering mechanism of a browser. Printing results can differ for different browsers. The printing functionality does not provide the highest possible print quality (layout wise) as much of it depends not on

the amount of text introduced by the Single Form user in various sections but also on the specific browser settings. If the printed layout is not optimal (some blank spaces or pages appear), we recommend reducing the zoom ratio to 90% or less for better quality.

- **Import the XML:** this button allows to import project data from the XML file in order to start editing a proposal or a report.
- **Save the XML:** this button exports all the data introduced to a Single Form and saves it into an XML file. The saved XML file can be used either to resume work at a later moment in time (in that case, the file needs to be imported again) or to work on a proposal in the collaborative context (in that case, the file needs to be sent to another user and imported into the offline Single Form on his/her computer).

ATTENTION:

The saved XML file can also be uploaded to APPEL for submission to ECHO or further online editing. During the upload operation, the user indicates which chapters, among the valid ones, should get uploaded to APPEL.

- b. **The header:** an element of the interface containing basic details about the document being edited in the Single Form. It shows the type of a document (RQ, MR, IR etc.), the action type (non-emergency, urgent, complementary activities), the reference number in APPEL, the Agreement number (if already signed), FPA version and some other details specific to the XML file.

Document type:	RQ	Agreement number:	ECHO/PRT/BUD/2020/91006	FPA version:	2021
Action type:	Non-emergency action	Unilateral:	Unilateral:	XML version:	1.0
Partner type:	NGO	Project creation date:	25/08/2020	XML export date:	20200922 10:56:18
Reference number:	2020/00012/RQ/01/01	Project submission date:	26/08/2020		

- c. **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.

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

To navigate to a specific chapter of the Single Form, simply click on the chapter title in the navigation pane. The respective chapter will then be shown in the content area of the interface.

Apart from navigating through the editable chapters, the navigation pane also gives you access to 2 non editable chapters (17. Logframe / 18. List of ECHO Pre-defined Annexes).

d. **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:

- a button “[validate this chapter](#)” that verifies if the current chapter is fully valid;
- a toggle “[guidelines](#)” that allows displaying tooltips / balloons with contextual help on the boxes belonging to the current chapter. In long chapters (where the beginning of the chapter would not be visible on the screen), the guidelines toggle is automatically displayed in the footer.



- in some specific chapters (such as “2. Project Data Overview by Country”, “7.3 Results”, “13. Financial Overview of Action”), an additional helping feature is available in the form of a button.



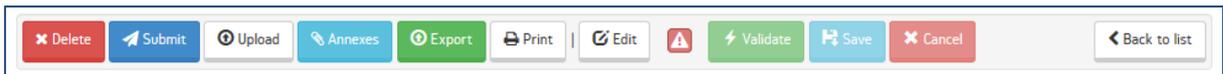
When this button is clicked, a new window is opened with information on budgets allocated to different sectors in the respective countries. This new window intends to help encoding the budgetary information in the Results and in the Financial overview of the Action and to ensure data coherence between those chapters and chapter “2. Project Data Overview by Country”

e. **The footer:** an element of the interface located on the bottom of the screen. It contains the e-mail address to [ECHO Support Team](#) to be used in case you have questions on anything related to the Single Form. The footer also displays:

- an icon  that scrolls the interface to the top of the page in case of long chapters;
- a sticker “[last saved](#)” that informs the user about the last time when the Single Form data was saved to the local memory of a browser (this feature works only for Chrome and Firefox browsers).



The action bar (explained above in point a) is one of the interface elements that differs in the offline and online Single Forms. In the offline Single Form, it enables validating data, importing and exporting the XML file and printing. In the online Single Form, the action bar provides much more functionalities:



- Delete button: allows deleting draft documents;
- Submit button: allows submitting documents that were validated;
- Upload button: opens an intermediary window for selecting chapters to be uploaded from the offline Single Form;
- Print button: creates a printable version of the current Single Form in PDF format and opens it in the PDF reader;
- Edit button: allows editing non-submitted documents (drafts) and enables three additional buttons: Validate, Save and Cancel;
- Validate button: validates all chapters of a Single Form at once;
- Save button: saves all data modified in editing mode;
- Cancel button: leaves editing mode without saving the changes.

4. BASIC FUNCTIONALITIES

The offline and online Single Form offer several interesting functionalities when it comes to the presentation, text formatting, data validation and the guidelines.

a. **Fields presentation**: different states of text fields are now visually distinguishable:

- editable and non-editable fields (related to an earlier or later action stage) are clearly differentiated (white vs. greyed out):

- mandatory fields are marked with red asterisks (no need to press the validation button to know which box is obligatory and which is optional):

- plain text fields and rich text fields (allowing the use of more advanced formatting options) are visually differentiated. Active rich text fields (those currently edited) display a new formatting bar including, among others, an icon allowing to clear/erase text. Although

plain text fields do not provide any formatting features, the eraser functionality is always visible:

The image shows two text input fields. The top field, labeled '1.2 Title of the action', is a plain text field containing the text 'This is plain text field with visible eraser icon.' and a small eraser icon in the top right corner. The bottom field, labeled '1.3 Narrative summary of the action', is a rich text field containing the text 'This is rich text field with the formatting bar including the eraser icon.' and a comprehensive formatting toolbar above it. The toolbar includes icons for erasing, undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, left-align, center-align, right-align, and justify-align. Both fields have character counts in the bottom right corner: '50/300' for the plain text field and '81/2000' for the rich text field.

ATTENTION:

Rich text fields offer the undo function which is not available for plain text fields.

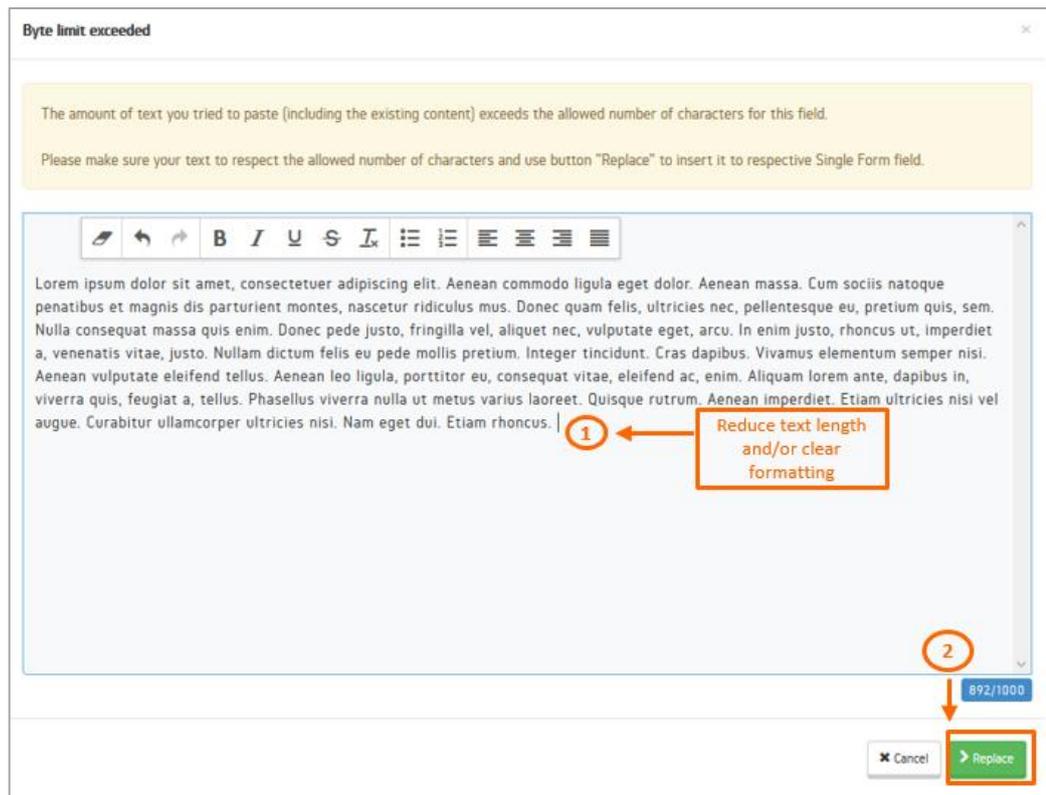
- b. **Handling the excess of text:** both rich and plain text fields accept a limited number of bytes, ranging from 100 up to 8000 bytes. These limits were decided by ECHO in the context of keeping the documents submitted by Partners at reasonable length and reflected in the design of the APPEL database. Regardless of the limits via the paste functionality, users can temporarily introduce more text to reduce it to acceptable limits later on.

The Single Form handles the excess of text in the following steps:

- the amount of text exceeding the limit is pasted to a specific field;
- the Single Form displays the intermediary window with instructions on how to proceed:

The image shows a dialog box titled 'Byte limit exceeded'. It contains a yellow warning message: 'The amount of text you tried to paste (including the existing content) exceeds the allowed number of characters for this field. Please make sure your text to respect the allowed number of characters and use button "Replace" to insert it to respective Single Form field.' Below the message is a rich text editor with a formatting toolbar and a large text area containing a block of Lorem Ipsum text. At the bottom right of the text area, a character count '1309/1000' is displayed in a blue box. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Replace'.

- user is invited to reduce the pasted text to align it with the allowed bytes limit;



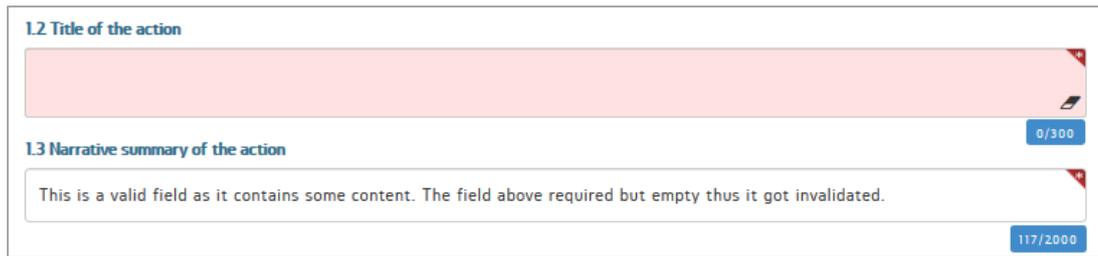
- the “Replace” button is activated when limits are respected. Clicking on the “Replace” button sends the text from the intermediary window to replace the text in the corresponding field of the Single Form.
- c. **Validation mechanism:** the validation messages are displayed in a modal window, allowing users to better understand what information is expected (missing or incorrect) in the context of the current edited chapter.

There are a few modes of the validation:

- global validation (executed when the “Global validation” button is pressed in the offline Single Form or the “Validate” button is pressed in the online Single Form) and per chapter validation (executed when the “Validate this chapter” button in the content area is pressed);
- successful validation (when no errors are detected) and unsuccessful validation (when a list of invalid fields requiring correction is presented to a user).

Whenever the validation is executed by the user, two events occur:

- The Single Form detects and highlights in red colour all the invalid fields for the specific chapter (in case of a chapter validation) or for the entire Single Form (in case of a global validation):



1.2 Title of the action

0/300

1.3 Narrative summary of the action

This is a valid field as it contains some content. The field above required but empty thus it got invalidated.

117/2000

- The Single Form shows a modal window with the list of detected errors:



Error(s) list

1. General Information

- 1.2 Title of the action - cannot be empty.

Continue

OR

- The Single Form shows a successful validation message:



No errors detected

This chapter is fully valid and can potentially be uploaded to APPEL via partial upload function.

Continue

ATTENTION:

- When working offline, the successful global validation enables you to upload all chapters of the Single Form to APPEL;
- When working offline, the unsuccessful global validation might enable you to upload some of the chapters of the Single Form to APPEL;
- When working online, the successful global validation enables you to submit your proposal or report to ECHO. The submission mechanism will verify upfront if all mandatory annexes were uploaded.

- d. **Guidelines functionality:** the Single Form includes some basic instructions users might benefit from, in case the meaning or the expectations regarding the content of specific sections/boxes require a clarification.

To view the guidelines in the Single Form - switch the grey toggle located next to the “Validate this chapter” button in the content area. After switching it, the toggle becomes blue and available guidelines for the currently selected chapter are shown:

1. General Information Validate this chapter **Guidelines**

1.1 Humanitarian organisation

1.2 Title of the action
 4/300

1.3 Narrative summary of the action
 990/2000

1.4 Area of action

#	W	C	Re	Lo
01	Africa	Ethiopia	Somali region mainly	Dolo Odo, Melkadida, Jijiga, Warder, Kebre Dehar, Gode out of Addis Ababa

20/100 72/1000

1.5 Timeframe of the action (at MR stage - including suspension periods)

Start date
 Encode the actual starting date of the activities.

Encode a different date in cases where the start date for the eligibility of expenditure is different from the start date of the action. In the case of urgent actions, the eligibility date can be the date of the crisis.

Comments on this chapter (not imported to APPEL and excluded from print)

0/4000

Indicate, in months, the duration of the implementation period from the starting date. The expected duration of the Action is mentioned in the HIP or in the financing decision. For more details on the duration according to the nature of the Action, consult the guidelines.

These comments are only for the purpose of collaborative work. Add your comments here and send the exported file to your colleague to facilitate his/her work on this chapter. These comments are never transferred to APPEL nor included in print. (Bytes limit: 4000)

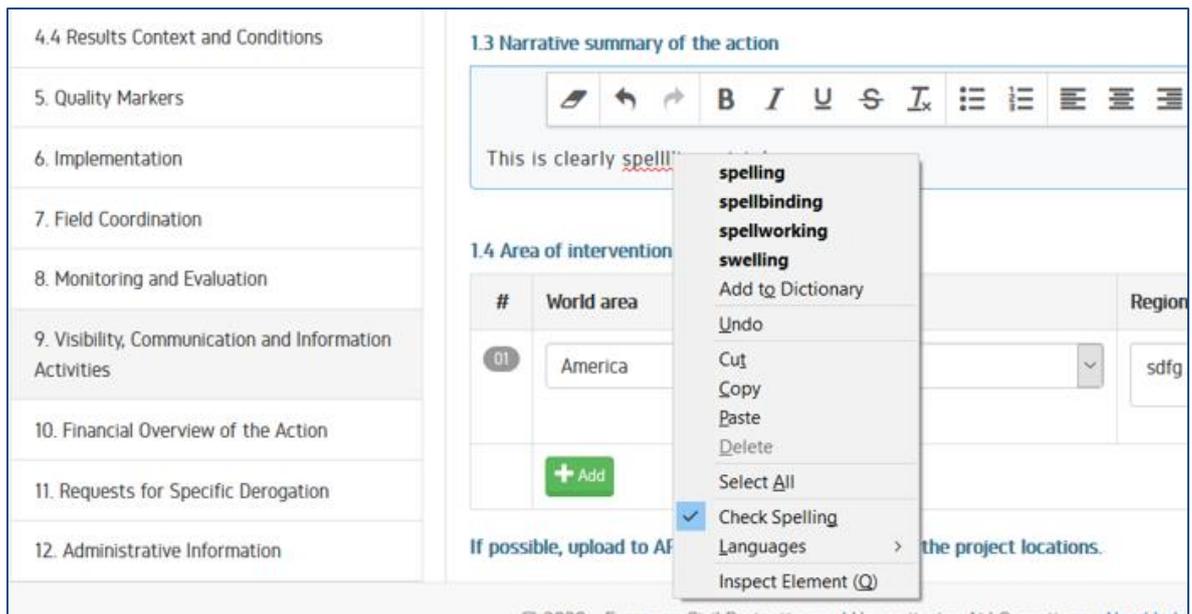
In longer chapters, the guidelines toggle jumps to the bottom of the page to enable users to activate it without need of scrolling to the top of the page.

13.16 [FIN] The organisation confirms that the co-financing has not led to a double funding of the activity

Yes
 No

Guidelines

- e. **Spellchecking capability:** the Single Form automatically enables the spellchecking capability for all richtext and plain text fields. It is important however to verify what dictionary is by default enabled in the web browser.
- When a spelling mistake is detected, the word containing the mistake is underlined with red colour (in Firefox) and the right mouse button click on that word opens a menu with suggested corrected words:



- f. **Comment fields for collaboration purposes:** in the offline Single Form, a set of fields named “Comments on this chapter” have been added at the bottom of each chapter to let you exchange comments with your colleagues if you work collaboratively on a proposal or a report. The content of this field is never uploaded to APPEL, these fields are also excluded from the print functionality of the Single Form.

Comments on this chapter (not imported to APPEL and excluded from print)

0/3800

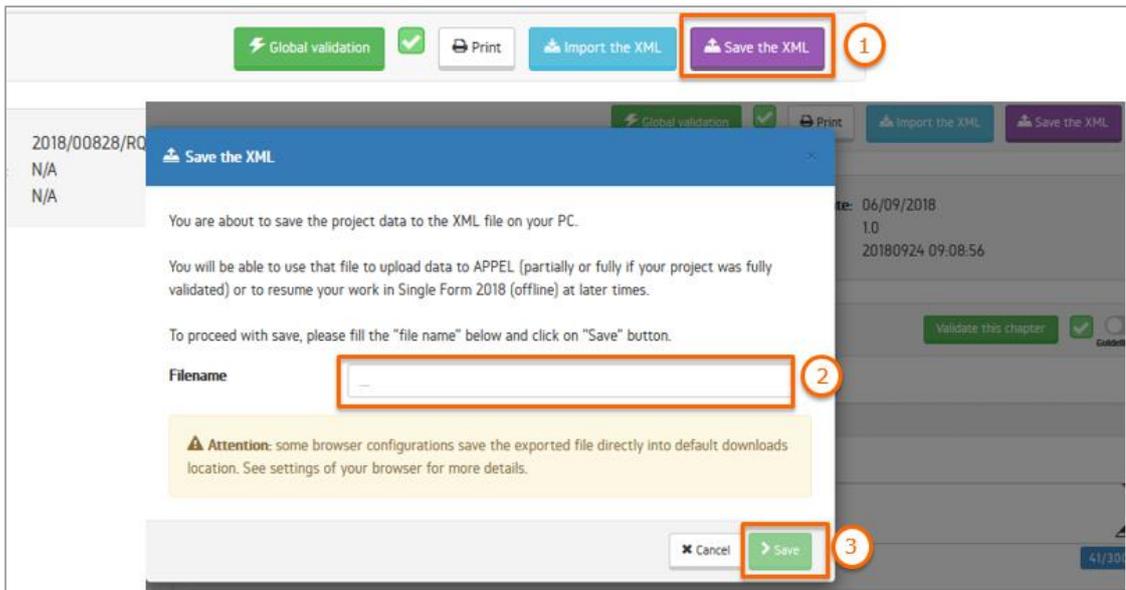
To share comments with your colleagues, simply introduce some text in one of these fields and save the XML file. You can then send the XML by e-mail to your colleagues, who will be able to read the content of the comment fields once your XML file is imported to their Single Form.

5. SAVING PROGRESS OF WORK

The offline Single Form runs in the browser while you read or edit it so you need to work with a bit of caution to avoid accidental closing of the browser or unintentional refreshing of the page.

There are two ways of saving the progress of your offline work:

- a. **Manual saving of work progress:** the safest and most reliable way of saving your work is to click on the "Save the XML" (1) button located in the application header. The application will ask you for the name of the file (2).



Clicking on the "Save" button (3) will save the data on your computer. Please note that some browser configurations might ask you for the location where the file should be saved, some other configurations will automatically save the file in the default "Download" location of the browser. To read more about the browser settings click [here](#). Once you successfully saved the file, you can close your browser.

The manual save method is a perfect solution for the collaborative drafting of the proposals or reports. As already mentioned, you can send the progress of your work (the exported XML file) to your colleague to enable him/her to continue working on your proposal or report. For more details, please click [here](#).

- b. **Automated saving of work progress** (in the local memory of the browser): the offline Single Form benefits from the local memory storage mechanism of modern browsers. It saves the progress of your work every 3 minutes. A message appears periodically, for a fraction of a second, in the top right corner of your screen indicating the save event.



Whenever work progress is saved in the local memory, the Single Form also displays a permanent notification in the footer section:

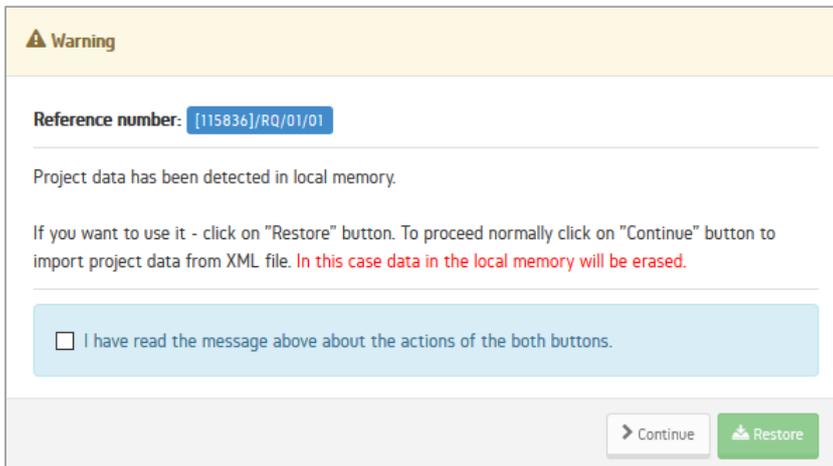


If you noticed the save event or if your Single Form footer shows the message about the last saved date/time - navigating away, refreshing the Single Form or even closing the browser will not lead to losing the progress of your work.

- If you navigated away - try to come back to the Single Form in your browser;

- If you closed your browser – launch again the Single Form by clicking on the index_en.html (or index_fr.html) file.

The following message will appear on your screen giving you a choice to either restore the project data from the memory of the browser or to erase it and proceed with normal import from the saved XML file.



The image shows a warning dialog box with a yellow header containing a warning icon and the word "Warning". Below the header, the text reads: "Reference number: [115836]/RQ/01/01". A horizontal line separates this from the next line: "Project data has been detected in local memory." Another horizontal line follows, with the text: "If you want to use it - click on 'Restore' button. To proceed normally click on 'Continue' button to import project data from XML file. In this case data in the local memory will be erased." Below this is a light blue box containing a checkbox and the text: "I have read the message above about the actions of the both buttons." At the bottom right, there are two buttons: a grey "Continue" button with a right-pointing arrow and a green "Restore" button with a trash icon.

Read carefully the content of the above message, making sure you understand the consequences of pressing on either of the buttons. The content of the local memory, once deleted, is irreversibly lost. Tick the checkbox to proceed.

ATTENTION:

- The local storage mechanism implemented by ECHO is only supported in Chrome and Firefox. For other browsers, please rely only on the manual saving of your work progress.
- We do not recommend working on two different proposals in separate tabs in the same browser. This can lead to conflicts in the local memory of the browser.

The challenges relating to saving of the information do not apply to the online Single Form, where in order to edit the proposal or a report, the user simply clicks on the “Edit” button and saving is done by clicking on “Save”button.

6. IMPORTING AND EXPORTING XML

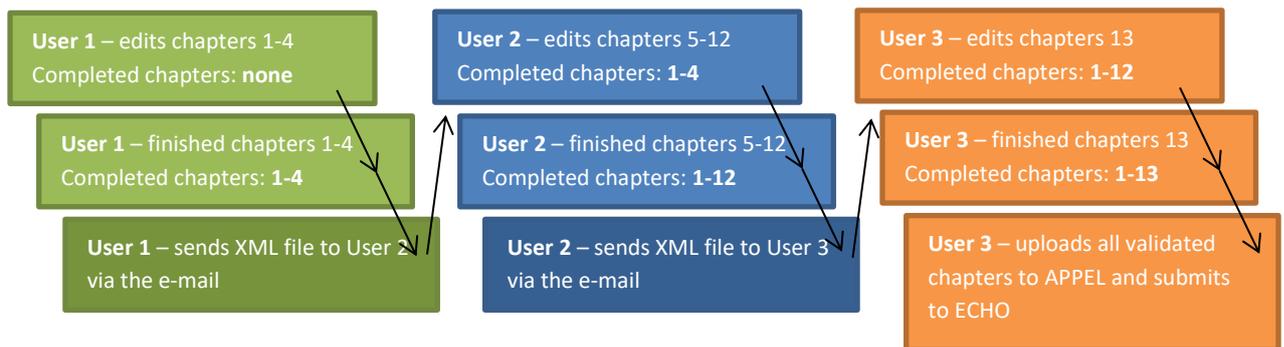
Please read the “Offline Single Form - Quick Start Guide” available [here](#), to learn the details on importing the XML (for editing offline the proposals and reports) and exporting the XML (for sharing it with other colleagues in the context of collaboration or for uploading it to APPEL).

7. COLLABORATION MODELS

The offline Single Form offers several possibilities of collaborative work by multiple users on the same proposal or report. The collaboration is not firmly embedded in the tool and **requires** some degree of **human coordination** (setting the ground rules) before efficient collaboration can be initiated. Two of the most realistic collaboration scenarios are detailed below.

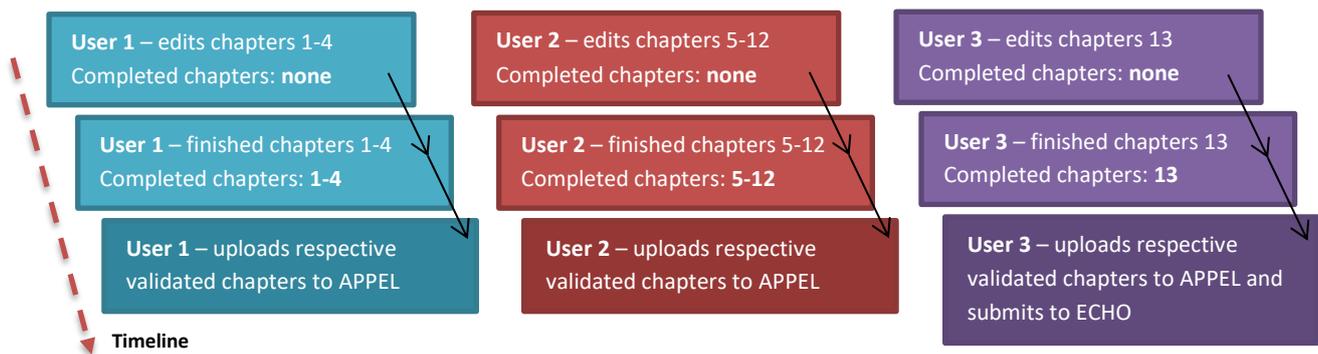
Before any form of collaboration, each participating user needs to be provided with or to download from APPEL the latest zipped offline Single Form.

- a. **Collaboration with single upload to APPEL:** is sequential and requires a clear division of responsibilities between the participating users (user 1 – edits chapters 1-4, user 2 – edits chapters 5-12, user 3 edits the remaining part, uploads data to APPEL and submits to ECHO).
- Users exchange between themselves the XML file (via **e-mail**) containing completed increments of the Single Form content.
 - Once the Single Form is complete and fully valid, it can be uploaded by the last user in the sequence to APPEL for a submission to ECHO.



This scenario normally requires a bit more time to get the proposal or report drafted but is safer as the risk of accidental tampering of the work of others is minimised thanks to coordinated, single upload to APPEL. This scenario enables the collaboration between users with different set of rights (not all the participants need to have access to APPEL).

- b. **Collaboration with multiple APPEL uploads:** is asynchronous and requires a clear division of responsibilities between the participating users (user 1 – edits chapters 1-5 and uploads them, user 2 – edits chapters 6-12 and uploads them, user 3 edits chapter 13 and uploads it, when the Single Form is ready, he/she submits it to ECHO).
- User do not exchange any files between themselves, instead they upload to APPEL the completed increments of the Single Form content.
 - Once the Single Form is complete and fully valid, a designated user can submit it in APPEL to ECHO.



This scenario normally requires less time to get the proposal or report drafted but is also less safe as the risk of accidental tampering of the work of others is bigger because of multiple data uploads to APPEL. This scenario enables the collaboration between users with exactly the same set of rights (all the participants need to have access to APPEL).

ATTENTION:

Each user participating in the collaboration needs to have its own, unzipped offline Single Form on his/her computer. Zipped offline Single Form can be:

- **sent to him/her by e-mail** (please note however that some e-mail systems or servers do not allow sending certain types of files, they intercept those files, alter the content of the zip archive, making the offline Single Form not usable);
- **uploaded to one of the cloud solutions** (OneDrive by Microsoft, Google Drive etc.) by the user having access to APPEL and downloaded by the participant of the collaboration;
- **can be directly downloaded from the APPEL server** (without need to authenticate): https://webgate.ec.europa.eu/appel/layout/single_form.zip

Please remember that annexes need to be uploaded separately to APPEL before submitting the data to ECHO. In the context of the collaboration, it might be worth designating a person in charge of ensuring that all the annexes are uploaded to APPEL.

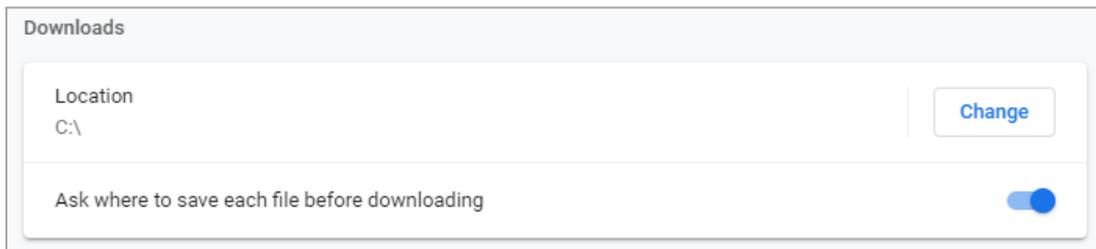
8. BROWSER SPECIFIC SETTINGS

Whenever the XML file is about to be saved by the offline Single Form, various situations may occur depending on the browser type and the configuration:

- The file is automatically saved to the default “Downloads” location as specified in the user’s browser;
- The file is automatically saved to another location (not in the “Downloads” folder), providing the user has earlier modified the default saving location in the browser settings;
- The user is prompted for the location where the file should be saved.

To verify or modify your browser settings, follow these steps:

- In **Chrome**: open Settings / Advanced / Downloads;
- Pick a location of your choice.



- In **Firefox**: open Options / Files and Applications;
- Pick a location of your choice.



- In **Internet Explorer**: you have no choice, the browser will always ask where to save the file.

