ISAAC manual

Applicants
Referees
Committee members
Project managers
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1. General information

1.1 The basic functions of ISAAC
ISAAC is a web application, so there are two key considerations:

⚠️ Never use your browser’s navigation buttons! Only use the navigation options in ISAAC windows.

⚠️ Save changes regularly (while you work)! If the application is open but not being actively used, then the session will expire after half an hour. If your data has not been saved it will be lost when you close or refresh the browser.

1.1.1 Required fields
- fields with a red * are required when saving data;
- fields with a black outline are not required when saving, but they are required to complete / finish the part;
- fields with a ? offer you help when filling in that field.

1.1.2 Use of the keyboard versus the mouse
You can reduce the use of the mouse by:
- using the ENTER key with most brown buttons, for example the button. You can click on the button, but the ENTER key will work in the same way;
- use the TAB key to navigate to the next field in the window.

1.1.3 Date fields
You can type in a date, but you can also select it from the calendar. The calendar displays two months at a time.

The date format for Dutch language settings is dd-mm-yyyy and for English dd/mm/yyyy. The Dutch format is always used for numbers, i.e. a full stop for thousands (e.g. one thousand = 1.000) and a comma for decimals (e.g. one and a half = 1,5).
1.2 Logging in to ISAAC and welcome screen

Open the web browser.

1. Address bar with the URL to ISAAC (https://isaac.nwo.nl).
2. Type your name into the *Username* text box and type your password into the *Password* text box.
3. Then click on the *Login* button.
4. By clicking on *Request username/password* you can request an e-mail with your username and a new password.

External users (applicants, referees, committee members and project managers) can log in with their existing account details. Applicants and project managers that do not have an account can create a new account. See 2.2 *Create an account* for further details.

For referees and committee members a new account will be created (if they do not have one yet).

**Welcome screen**

ISAAC's welcome screen is set up as follows:

1. Use the *Sign Out* button (top right) to log out of ISAAC. Prior to this option you will see the name of the account with which you are logged in.
2. The ISAAC menu consists of several items: *My ISAAC, Applications, Review, Projects, Committee, Help*. Which items are displayed depends on your role in ISAAC. *My ISAAC* is always displayed.
3. Clicking on your *full profile here* enables you to access and submit changes to your account.
Sometimes notifications will appear about the use of ISAAC or about maintenance. The Show and Hide buttons on the right can be used to show and hide the full text of the notification.

Users can have several different occupations. To receive e-mails and letters it is important that you indicate where you would like to receive the correspondence.

1.3 Navigating in ISAAC

ISAAC is a web application and has several navigation options.

*Just like other web applications it is not recommended to use your browser buttons to return to a previous page, for example.*

The navigation options in ISAAC are as follows:

1. The menu bar.
2. The main and sub tab structure. When the required fields are filled a green checkmark appears next to the name of the tab.
3. Buttons drop down and/or can be found to the right above your window. The buttons at the top right remain visible as you scroll down in the window.

The meaning of the buttons is explained below:

- **Save**: the changes and additions will be saved. Changes and additions made in other tabs will be saved as well. You stay on the same page.
- **Save and close**: the changes and additions will be saved. You leave the page and return to the previous screen / a higher level appears.
- **Cancel**: the changes and additions will not be saved. You leave the page and return to the previous screen / a higher level appears.
- **Close**: the changes and additions will not be saved. You leave the page and return to the previous screen / a higher level appears.
- **Next**: you go to the next page. The data in the window that has been changed or added on the page will not be saved. As long as you do not leave the part (e.g. a round) and do not log out, the data will be stored and displayed again when you return to the page.
• Back: you go to the previous page. The data in the window that has been changed or added on the page will not be saved. As long as you do not leave the part (e.g. a round) and do not log out, the data will be stored and displayed again when you return to the page.

Navigation tiles

This overview is also referred to as the landing page for a round. At the top of the landing page there are large buttons, also called ‘tiles’. Clicking on one of these tiles will take you to a specific part of the round where you can perform certain actions.

Navigation menu on left

In some cases (e.g. in a person’s or organisation’s profile page or in the referee form) a navigation menu will appear on the left in the window when it concerns a long page. It is used when there is a great deal of information on the page that requires the user to scroll down to get to the right part. When opening the page, the navigation menu will always be open if there is sufficient space for it and collapsed if there is insufficient space.

1 Put the cursor on the grey area or the pin on the left side of your screen to expand the navigation. Clicking on one of the parts in this navigation takes you directly to the part in question on the page.

2 When the background of the pin turns light grey (Standard Setting), then the navigation disappears when the cursor is no longer in the window in question. Clicking on the pin changes the setting and colours the background. If the background of the pin is dark grey, then the navigation remains on screen.

1.4 Statuses

Several kinds of statuses have been defined in ISAAC for different roles. Following is an overview with a brief description of the potential statuses:

1.4.1 Applications

Registered The application has been (partly or fully) created.
Submitted The application has been submitted.
Admissible The application has been declared admissible by the person handling it.
Not admissible The application has been declared not admissible.
In review  The application can be reviewed by a committee. It is possible for an application to have been through the refereeing process prior to this stage.

Decision taken  A decision has been taken regarding the application by a board, possibly after the refereeing process and/or having been reviewed by a committee. If the application is granted, it immediately becomes a project.

Withdrawn  The applicant has withdrawn the application. The applicant can do this up to the point that a decision has been taken.

Legal procedure  The applicant can set a legal procedure into motion regarding a decision by submitting a complaint or appeal in writing, for example if the application was declared not admissible or was not granted. This status can be reinstated to an earlier status following the legal procedure (depending on the outcome).

1.4.2  Projects

Initial  After an application has been granted, a project is immediately created. It receives the status Initial.

Running  The project receives the status of Running once the actual start date has been entered, after carrying out a number of (procedurally required) steps.

Closed  The project is manually given the status Closed after a number of (procedurally required) steps have been carried out. This status is given if a project has been completed or interrupted.

1.4.3  Committee members

Open  The application can be looked at by the committee member.

1.4.4  Referee

Admissible  The application can be reviewed by the referee.

1.5  Filter and sort

If the list consists of more than 10 items, then it is possible to indicate how many items you would like displayed per page, to filter for a specific term, to sort by column name and to browse through the different pages.

1  Show number of Items per page (when there are more than 10 items): standard number is 10 items. You can change this to 25, 50 or 100.

2  Filter: type a term in the filter field. You can choose text or numbers from one of the columns on display. As a result, only filtered items will be displayed. You will see a number of items at the bottom. While typing in the filter field, the list will automatically adapt itself, so you will immediately see which lines meet your filter’s requirements. The term ‘ronde’ was used as a filter in this example.

*Depending on the filter’s setting, for example filter for overview of applications, you can only use a term from the Title or File number columns.

Filename  Handleiding_Externen_EN_202005.pdf
Version  1.5
Date  May 2020
Sort by column name: if there are arrows/triangles at the top of the column, then you will be able to sort. By clicking on the column name, you will sort in ascending order. By clicking on the same column name again, you will sort in descending order.

Browsing through the results: if you want to browse through the different pages, then click on the red numbers to go to a specific page, use Previous / Next to move one page at a time or First / Last to go to the first or last page.

1.6 Search for an organisation
An extensive search option is available to search for organisations. It is possible to only use the Name field by entering (part or parts of) the full name of the organisation. In addition, you can also search by using one or more of the other fields. For example, the kind of organisation, an acronym or one or more keywords.

If you go to Search organisation, then you will end up at the following screen:

1. Enter the search criteria into one or several fields.
2. Click on the Search button.

Searching with search items in only the fields Name and Town/city works best. The more fields are filled, the less organisations will be found.

The search result with the organisations that meet the search criteria will be displayed:
The results are sorted alphabetically in ascending order according to Full name.

Click on the line of the desired organisation and click on Select in the menu on the right to select an organisation.

The following notification may also appear under search results:

```
If your organisation is not on the list of search results, send an e-mail to Central Relationship Management (relations@nwo.nl) to add your organisation to the list.
```
2. Information for applicants

2.1 Applying for grants
The application process for research grants may differ per round in terms of whether a letter of intent, pre-application, application or a presentation will have to be prepared and submitted. The admissibility of submissions will be determined after receipt and you will be send a confirmation of receipt.

2.2 Create an account
If you do not have an account in ISAAC yet, follow these steps to create one yourself. An account enables you to submit and monitor your application and manage your project if your application has been granted (projects). This process begins on ISAAC’s login page:

1. Enter your e-mail address under Create account.
2. Click on the Continue button.

The following screen will appear:

1. Enter the required information.
   - The username is the name you use to log in to ISAAC.
   - The e-mail address field is copied from the previous screen.
2. Click on the Create button.
Your account has been created:

1. Your password is automatically generated and is sent to you by e-mail.
2. Username will be copied from the previous screen, if Username is empty enter your Username and then enter your Password.
3. Click on the Login button.

2.3 Changing data in your profile
As an applicant, you have access to several parts in your own profile and can submit changes. These changes will be looked at and then actually processed in ISAAC’s Relationship Management, after which you will see the requested changes appear in your profile.

Navigate to the My ISAAC tab:

1. Click on the your full profile here link.

This will take you to your profile:
1. All parts of your Profile are displayed in the menu on the left. You can use these links to navigate through the profile.

2. Click on the icon in the left menu to fix the menu.

It is also possible to scroll through the entire profile.

### 2.3.1 Basic personal details
This part of the profile shows which of your basic personal details are known.

Click on Pass on changes in basic details:

1. Describe the changes you would like to pass on.

2. Click on the Send button.

### 2.3.2 Works at organisation(s)
This part of the profile shows which of your occupations are known:

1. Select an occupation.

2. Click on View details to see the occupation.

3. Click on Pass on changes occupations.

The following screen will appear:

1. Enter your request for changes.

2. Click on the Send button.

### 2.3.3 Private addresses
Here you will see which private address and correspondence address are known:
Click on the Pass on changes private addresses button.

*The correspondence address of the organisation you work for should be added to your occupations and not to your private correspondence address. If this is where you want to receive your general correspondence you can make the selection of the organisation on the Welcome page.*

The following screen will appear:

1. Enter the changes.
2. Click on the Send button.

### 2.3.4 Contact moments

This part shows all incoming and outgoing contact moments (except for letters).

1. Select a contact moment using the grey arrow on the right. The details of the contact moment are then ready to be viewed.

Attachments included in a contact moment can also be accessed here. For example, below are the details from an e-mail:
Clicking on the link to General attachments opens the PDF so the content can be read.

No other actions are possible here.

### 2.4 Preparing and submitting a letter of intent

Certain rounds require you to first submit a letter of intent. As an applicant, you use this letter to indicate your intention to submit an application. A letter of intent is registered for the sole purpose of analysis. It will not be reviewed nor will any decisions be taken based on it. The first steps towards preparing a letter of intent are similar to preparing an application.

You can save your work as you go by clicking on the ‘Save’ button. This allows you to continue your work on the letter of intent at a later time.

Go to the Applications part in ISAAC. The Applications screen shows the already submitted Letters of intent/pre-applications and applications as shown below.

If you haven’t registered or submitted any applications, the following message appears:

No applications

Click on the New application link. Then choose the specific round. In the case of a letter of intent, you will be taken to the following screen:
The Contact, General and Confirmation tabs are visible when preparing a letter of intent. The details of the contact person for this funding instrument can be found under Contact.

Enter a Title and Abstract in the General tab in the Letter of intent part.

Click on the Add button to add the Organisation of application.

Enter one or several search criteria. You can also perform a search based on part of a search criterion.

Click on the Search button.

Select the correct organisation from the search results.

See for more information 1.6 Search for an organisation.

The organisation has been entered:
Click on the Next button to go to the Confirmation tab, where you can submit your letter of intent.

You may submit your letter of intent once you have filled it in completely and truthfully. To do so, go to the Confirmation tab:

1. Check the box to indicate that you have truthfully and completely filled in the form.
2. Click on the Submit button.

You will receive a notification that the letter of intent has been submitted:

1. Click on the Next button.

You will return to Applications. This is where you will find the letter of intent you just submitted:

1. The letter of intent has been given a File number and an Application date.
2. The status of the application has changed to Submitted.

2.5 Preparing and submitting a pre-application

Preparing and submitting a pre-application is essentially the same as preparing and submitting an application. You must submit a pre-application, however, if you eventually intend to submit an application as well. If you have not submitted a pre-application for a round, then you cannot submit an application for the same round at a later date. A pre-application can be changed into an application following the review process. All the details that were filled in for the pre-application will be available for further use for the application.

If a letter of intent has been submitted for this round this can be converted to a pre-application if the round is open for submitting pre-applications

Open the submitted letter of intent. The following screen appears:
Click on the Convert to pre-application button.

A confirmation screen will appear:

Once again click on the Convert to pre-application button to confirm the conversion.

The pre-application can then be completed and submitted.

A pre-application has the following characteristics:

1. **Pre-application template**: Download this form, fill it in and upload the filled and signed form at 2.

2. **Pre-application form**: You can upload the filled and signed pre-application template here. Pre-applications and applications have separate templates. When you converted your pre-application to an application please use the application template for the application.
By the names of the headers ("Pre-application" at ① and "Pre-application form" at ②) you can see if it concerns a pre-application or an application. The types of fields are the same, however. Pre-application is used instead of application, so the title and abstract of a pre-application, etc.

2.6 Preparing and submitting an application

To start the application process, click on Applications in the menu bar. The Applications window will show you a list containing applications that have been previously created or submitted.

If a pre-application (or letter of intent) has been submitted for this round, this can be converted to an application if the round is open for submitting applications. In this case you don’t need to click on the New application link. Open the submitted pre-application (or letter of intent). The following screen appears:

① Click on the Convert to application button.

A confirmation screen will appear:

① Click on the Convert to application button.

The application can then be completed and submitted.
Click on **New application** if you have not submitted a pre-application or letter of intent for this round.

Select the open round you would like to submit an application for.

Click on the **Apply electronically** button to submit your application digitally.

Depending on how the round is set up, you will see the following tabs.

The **Contact**, **General**, **Organisations** and **Confirmation** tabs are always visible. The **Budget request**, **Referees**, **Non-referees**, **Co-applicants** and **Attachments** tabs are either visible or not visible depending on the round you have chosen.

Navigate to **Page actions** and select **Documents** in the list. It contains general information about the round in question.
Click on the link to download the available documents.

Any questions about the round can be directed to the person mentioned in the contact details under the Contact tab.

The contact person’s details are listed here.

Activate the General tab.

General information reveals the funding instrument, the year and round you are applying for. The file number and the status become visible once the application has been submitted or if the application originates from a pre-application.

Click on the link to download the application template.

In the Application category, fill in the Title, the Abstract and the Planned start date and end date if applicable.

Add at least one Research field and add Key words if applicable.

At the Application form category, click on the Upload button to add the application form (the scientific content part of the application) in PDF format. This concerns the completed Application template that you downloaded at the top of this page.

Click on the Next button.

Until you submit the form you can fill in, change and save the information in the different tabs. So you do not have to fill in all the information in one go, just make sure that all required fields have been filled in when submitting the application.
If applicable, the Budget request tab will be activated, in which case please fill in the requested budget. If it concerns a programme, then the Programme tab will be displayed instead of the Budget request tab.

1. If applicable, check the box if you agree to use the standard rate list.

2. For each type of cost, click on the + to add a line to the budget. Depending on the round, you need to indicate the costs for each type of personnel for the entire duration of the project or split up the costs in years for the type of personnel.

3. Fill in all other cost items as accurately as possible with a clear description.

4. Click on the Next button.

If it concerns a programme, you can add a programme part in the budget request of the general programme.

1. Click on the + button to add a programme part.

For more information about how to fill the budget request see 2.7 Budget request.

If it is mandatory to add one or more attachments to the application then the Attachments tab will be visible. Activate the Attachments tab and add the required documents.
Click on the **Upload** button to add an attachment.

Click on the **Next** button.

The **Organisations** tab will be activated.

You are required to indicate the organisation that is responsible for your application.

Click on the **Add** button to add the organisation responsible for the application.

Enter one or several search criteria. You can also perform a search based on part of a search criterion.

Click on the **Search** button.

Select the correct organisation from the search results.

See for more information 1.6 Search for an organisation.

The window will display the application with the active **Organisations** tab again.
Click on the `Add` button to add one or more organisations where the research is being conducted (not mandatory).

Follow the same steps as when searching for an organisation that is responsible for the application.

If applicable to the round, then the **Referees** and **Non-referees** tabs will be visible.

Activate the **Referees** tab.

A maximum of 5 suggestions can be entered in the **Suggested referees** category. Click on the `Add` button and fill in the details of the potential referee as completely as possible in the available text field.

If you are not adding any referees, check the box marked **No referee suggestions**.

Click on the Next button.

The **Non-referees** tab will be activated.

A maximum of 5 suggestions can be entered in the **Non-referees** category. Click on the `Add` button and fill in the details of the non-referee as completely as possible.

If you are not adding any non-referees, check the box marked **No non-referees**.

Click on the Next button.

If co-applicants are allowed or mandatory, then the **Co-applicants** tab will be visible after you click on the Next button.
1. If you are not adding co-applicants, then check the No co-applicants box.

2. Click on the Add button in the Co-applicants category.

   ![Add Co-applicants](image1.png)

1. Fill in the required details.

2. Click on the Search button in the Organisation of the co-applicant category to add the organisation that the co-applicant belongs to. Search the organisation and select it.

3. Click on the Next button.

The Confirmation tab will be activated. Once the application has been filled in completely and truthfully, then the application can be submitted.

1. Activate the check box.

2. Click on Submit.

The application has been submitted. Click on Next to return to your applications. The application has now been given a file number and application date.
The status of the application has also been changed from Registered to Submitted.

After submitting the application, you will receive confirmation of receipt by e-mail. One of our policy officers will review your application. Once the policy officer has confirmed that the application is complete, you will receive a confirmation by e-mail.

2.7 Budget request

When an application is submitted, you are sometimes also asked to fill in a budget request. If you want to prepare a budget request, click on Applications in the menu bar. The Applications window shows you the list of applications that you have previously created. Select an application and activate the Budget request tab and fill in the requested budget.

2.7.1 Standard rate list

A text will be displayed at the top of budget request window: ‘I agree with the standard rate list that is being used.’

Check the box if you want to use the standard rate list.

Depending on how the round is set up, you will be obliged to agree with the rate list. The rate list is defined in more detail in the round’s Brochure.

If the round is setup that it is obliged to agree with the rate list, then the box will already have been activated, and this cannot be changed. The rates will then be filled in automatically.

If it is not mandatory to use the standard rate list for the round, you can nevertheless agree with the standard rate list by checking the box. If you agree, then the rate for type of personnel will be automatically entered in the Total column when entering the budget. If it is not mandatory and you do not agree, then you have to enter the amounts yourself in the Total column.
For each type of cost you can click on the button to add a line to the budget.

Select a type of personnel from the list when filling in personnel costs. Depending on how the round is set up, you will need to indicate the costs for each type of personnel for the entire duration of the project or you need to split up the costs in years for the type of personnel.

Fill in all other cost items as accurately as possible with a name (if known), a clear description and, if applicable, the amount in the Total column. Depending on how the round is set up, you will need to indicate the costs for the entire duration of the project or you need to split up the costs in years.

If you do not agree with the standard rates (if the round permits it), then you have to fill in the costs for a type of personnel yourself in the Total column. Depending on how the round is set up, you will need to indicate the costs for each type of personnel for the entire duration of the project or you will need to split up the costs in years for the type of personnel.

If you fill in the costs yourself and they deviate significantly from the standard rate, then this could have consequences for the application.

Depending on how the round is set up, there may be an indication of whether it concerns an application or a programme. A programme consists of several programme parts. The programme parts each have their own budget request. If the programme and its parts are granted, then a separate project will be created for the programme and each programme part. You can indicate in the General tab of the application whether or not it concerns a programme.
1. **Activate the General tab.**

2. **Check Yes next to Programme.**

If it concerns a programme, then the Programme tab will be displayed instead of the Budget request tab.

If it concerns a programme, you can add a programme part in the Budget request of the general programme.

1. Click on the + button to add a programme part.

1. Fill in a clear title for the programme part in the **Title** field in the opened screen in the General tab.

2. **Click on the Next button.**

If you activate the Budget request tab, then that will open the budget request part of the programme. This is a separate budget request that belongs to this programme part. This budget request is unrelated to the budget request that belongs to the programme. The total application amount, however, consists of the budget request of the programme plus the budget request(s) of the programme part(s).
Activate the Budget request tab.

For each type of cost, you can click on the button to add a line to the budget. See the above description for instructions on how to fill in personnel costs.

Fill in all other cost items as accurately as possible with a name, a clear description and the amount in the Total column. Depending on how the round is set up, you will need to indicate the costs for the entire duration of the project or split up the costs in years.

Click on the Next button.

**If you discover that you would rather submit an application for a project instead of a programme after all, and you have already added programme parts, then you first have to delete the programme parts that you have already added before you can change the programme to an application again.**

### 2.7.2 Co-financing

Depending on whether the round permits it, you can enter co-financing for the research. In this case, you have the option of entering the co-financing as 'in kind' and/or as 'in cash'.

Click on the button to add a line for each party that is providing you with co-financing.

Fill in a name and a description.

Fill in the amount in the Total column.

When you click on Next, you will then return to the Programme tab of the application.
There are two fields in the Total category at the bottom of this page.
- **Total excluding co-financing**: This is the total of the budget requests that have been filled in.
- **Total budget request**: This is the total of the budget requests that have been filled in minus the amount that has been entered as co-financing in cash.

2.8 **Adapting your pre-application or application**

You have received an e-mail asking you to adapt and re-submit your pre-application/application. Click on **Applications** in the menu bar. Select the pre-application/application that you would like to adapt (with the status Registered). The General tab will be activated.

There is an explanation below the **Provisionally inadmissible** category stating why the pre-application/application has been declared currently not admissible.

Adapt the pre-application/application where necessary. Click on the **Confirmation** tab and re-submit the pre-application/application. The status of the application will change to **Submitted**.

2.9 **Withdrawing an application, pre-application or letter of intent**

An applicant can withdraw his or her letter of intent, pre-application or application during the entire process (until it is granted). You have to provide a reason for the withdrawal before it can be registered.

The withdrawal process is identical for applications, pre-applications and letters of intent. This example deals with the withdrawal process for an application.

⚠️ **Applications with the status 'Registered' (without a file number) and 'Declared not admissible' cannot be withdrawn.**
If you would like to withdraw an application, pre-application or letter of intent, please click on Applications in the menu bar. Your list, which consists of all applications that you have previously created or submitted, will appear in the Applications window.

1. Select the application that you would like to withdraw.

The window will display the application details.

1. Click on Page actions at the top right and select Withdraw.

The Withdraw window will appear. You can indicate in this window that you would like to withdraw your application and your reasons for withdrawing it.

1. Check the box marked Are you sure you want to withdraw this intent statement/pre-application/application?
2. Fill in the Reason for withdrawal text box.
3. Click on the Save button.

A window will appear confirming the application withdrawal.

2.10 Preparing and submitting rebuttals

Applicants are given the opportunity to respond to referee reports by means of a rebuttal. The ‘Call for proposals’ brochure specifies how this should be done. The rebuttal and the referee reports are added to the material that will be reviewed by the committee. Rebuttals are a legal right in the Netherlands.
Applicants receive an e-mail indicating that they can begin a rebuttal on the referees’ reports.

### 2.10.1 Preparing the rebuttal

The referees have reviewed the application. The referee reports are now visible and you can submit a rebuttal on them. Click on Applications in the menu bar and select the application that requires a rebuttal.

![Application interface with options to submit a rebuttal]

1. The deadline for submitting the rebuttal is shown below the Progress information application category.

2. Navigate to Page actions and select Rebuttal in the list or click on the Rebuttal tab.

### 2.10.2 Downloading a referee report in PDF format

If you prefer to have a hard copy of the referee reports, you can download them in PDF format.

1. Click on the PDF button at the top right of the screen. Click on the Open or Save button.

Depending on how it is set up in the round, a rebuttal can be prepared in the following ways:

- **Per report**: The referee reports are shown below each other on the page, there is a field for the rebuttal beneath every single referee report.
- **Per question**: The referee reports of all referees are sorted by question, there is a field for the rebuttal beneath every question.
- **Over all reports**: The referee reports are shown below each other on the page, there is a field for the rebuttal at the bottom of the rebuttal page. The overall rebuttal can be prepared over all referee reports at once.
• *Per report per question;* The referee reports are shown below each other on the page, there is a field for the rebuttal beneath every report and beneath every question.

### 2.10.3 Preparing the rebuttal per report, per question

You can navigate through the questions by means of the grey navigation bar on the left-hand side.

1. In this example a rebuttal can be made per referee report, per question. The applicant can respond to the questions/remarks of the referee report of referee 1.
2. Enter your rebuttal to the comments on question 1a of referee 1 in this field.

1. The referee report of referee 2 can be found on the same page as well (following the referee report of referee 1).
2. You can enter your rebuttal to the comments on question 1a of referee 2 in this field.
If you do not want to submit a rebuttal, then check the box marked *Waive rebuttal*.

### 2.10.4 Preparing the rebuttal per question

You can navigate through the questions by means of the grey navigation bar on the left-hand side. All of the referees’ answers are arranged consecutively beneath the question. A rebuttal can be made on all referee comments belonging to that question (question 1a in this example). You can prepare your overall rebuttal in this field. If you do not want to submit a rebuttal, check the box marked *Waive rebuttal*.

### 2.10.5 Opening a rebuttal to fill in or submit it

A rebuttal can be opened so it is ready to be filled in or submitted.

**Filling in rebuttal**

If a rebuttal has been opened to be filled in, you will have the option to fill in (part of) the rebuttal and already save it. It is not yet possible, however, to submit a rebuttal because more referee reports are perhaps expected regarding the application. When the rebuttal is eventually opened for submission, then you will be notified by e-mail so you can finalize and submit the rebuttal.
The screen tells you that you cannot submit the rebuttal yet because more referee reports could still potentially come in.

**Submitting rebuttal**

If the rebuttal is open for submission, then the rebuttal can be filled in completely and immediately submitted.

1. Fill in the Overall rebuttal field once you have completed the rebuttal.

2. Click on the Submit button to submit the rebuttal.

You are being asked for an additional confirmation because once the rebuttal has been submitted you cannot make changes to it anymore.

2. Click again on the Submit button at the bottom of the page.
The rebuttal has been submitted.

Double click on Close to return to the applications overview page.

The applications overview page will confirm that the submittal has been submitted:

The application now has the status Rebuttal submitted.

If you select the application in question and go to referees, you will see there that the rebuttal has been submitted as well.

The notification Your rebuttal is submitted will appear.
3. Information for referees

3.1 Review and decision
During the research funding process, research proposals are examined and compared before a decision is made. This process of prioritization is important to determine which proposals are the highest in quality and suitability within a specific type of funding and which can be granted. The process essentially consists of reviewing and deciding on the following elements:

1. the refereeing process (optional): applications are sent to external experts (referees), and the applicant will be given the opportunity to respond to the referee (the rebuttal);
2. the rounds of reviewing: applications are sent to an advisory committee which, based on the referee reports and the rebuttal on them, reviews the application using fixed criteria;
3. the decision: based on the advice given by the committee, the board will make a decision.

3.2 The refereeing process
Referees – external experts who specialise in the area of the submitted application – are used for most instruments. The applications are first submitted to them for an assessment. The assessment of the referees is collated in a referee report. The applicant is given the opportunity to submit a rebuttal on the referees’ assessment. If no referees were used, then the application goes straight to the advisory committee.

NWO will send a potential referee an e-mail with the question if they are willing to assess a research proposal. If the referee responds positive, they will receive an e-mail with the request to review the proposal:

```
1. The referee can login with the account details mentioned in the mail. If the referee already has an ISAAC-account (and previously defined a password for this account), the password will not be visible in the login details in the mail for safety reasons.
If it is a new account, a temporary password will be generated by ISAAC. This password will be visible in the request mail. After logging in the referee has to reset this temporary password to a user defined password.

2. In the review request mail there can be a personal link to the research proposal. This link is unique for the referee. When the referee clicks on the link and logs in to ISAAC, the referee will be asked to declare if there is a personal interest.

   If when logging in a new password had to be requested, the proposal will not be opened directly and instead the home page of ISAAC will be opened. In that case the referee can click on the link in the request mail once more to go to the proposal.
```
The proposal and referee report can be opened (without the use of the direct link) as follows:

1. Click on Review in the menu bar.

2. A list of applications is shown for which you have been asked to prepare a referee report for. Select the application in question.

If you have not indicated your personal interest yet, then a window will open to record your statement. The review will open after you have submitted your statement.

When you access the review at a later point in time the review will open directly.

3.3 Indicating a personal interest

NWO uses a code for dealing with personal interest for referees as well. A referee must declare him/herself ‘not involved’, but does not have to submit a signed form, unlike members of an advisory body (e.g. committee or jury).

See also Code for Dealing with Personal Interests: https://www.nwo.nl/en/common/subsidies/funding-process-explained/code-for-dealing-with-personal-interests

1. Click “yes” or “no” to indicate whether you have a personal interest in the application and check the box to indicate that you agree.

2. Click on the blue link to open the Personal Interest Code.

3. Click on the Save button to save the declaration.

3.4 Preparing and submitting a referee form

After having confirmed that there is no conflict of interest, the referee report opens directly.
1. Activate the Application information tab to access the application details.

2. Activate the Budget request tab (if applicable) to access the budget information.

3. Activate the Documents tab to access the contents of the application and possible other documents regarding the application or the grant.

1. Click on a link to download and/or access the document in question.
   - You can access the contents of the application in the document next to Application form. The application overview document corresponds with the information in the Application information tab. If applicable, this is also where you will find documents such as a curriculum vitae, letter of recommendation, institutional guarantee and other information available about the applicant.
   - Supplementary information regarding the round can be found in the Grant documents category, such as the ‘Call for proposals’/brochure.

2. Activate the Review tab.

You can record your comments for each question about the application here.

1. Fill in the referee comments.
Click on the **Save** button to save the report as you work on it. Please note: saving regularly is important to prevent loss of data!

### 3.4.1 Navigating the referee form

You can view the entire referee form and enter your responses everywhere by scrolling through it. You can also use the navigation menu on the left-hand side of the window, however. If you put the cursor on the grey area or the pin on the left-hand side of your screen, then the navigation for the referee form will appear. Clicking on one of the questions in this navigation will take you directly to the relevant question in the referee form.

If the background of the pin is light grey ![light grey pin](image), then the navigation will disappear when the cursor is no longer in the navigation of the referee form. Clicking on the pin will change the setting and colour the background. If the background of the pin is dark grey ![dark grey pin](image), then the navigation of the referee form will remain on screen.

Click on a question in the navigation bar to navigate to this question in the review.

### 3.4.2 Downloading a referee report in PDF format

If you prefer to have a hard copy of the referee questions, you can download them in PDF format.

Click on the **PDF** button and select **Open**.
3.4.3 Submit

1. If you are absolutely certain that you do not want to make any changes to your review, then click on the **Submit** button.

Are you sure you want to submit your review report? After submitting, the report can no longer be changed.

1. Click on Yes to confirm.

A confirmation page will appear. The referee report has been submitted.

1. Click on the Next button.

You will receive a confirmation e-mail, including your review in PDF format.
4. **Information for committee members**

4.1 **Review process**
The applications and pre-applications that are being processed have to be reviewed. This review is conducted by the advisory board and must yield well-substantiated advice to inform the decision-making process. This advice is based on a set of applications, documentation from meetings, referee reports, a series of interviews, lay summaries, and so forth.
The members of the committee review the applications or pre-applications that have been assigned to them and with which there are no conflicts of interest. When all the advice has been received, a preliminary ranking of the total set is generated. Depending on how the brochure is set up, the ranking is shared with the members of the committee.
The committee discusses, evaluates and ranks pre-applications or applications during a meeting. If indicated in the funding instrument, then a round of interviews will take place during the meeting. The meeting produces advice. This advice is registered in the application/pre-application or round. Advice concerning pre-selection is registered here as well.

4.2 **Indicating a personal interest**

As a committee member you are co-responsible for the assessment of applications from a specific round. As a result, you have to indicate if there is a potential personal interest with any of the applications from this round that has been assigned to your committee. You will initially receive an e-mail inviting you to register this personal interest. If you do not have an account yet with ISAAC, then this e-mail will contain your account details.
Subsequently you will be asked to submit a preliminary advice about (part of) the applications with which there is no personal interest.
You can also access the meetings and the documents in your ISAAC account.
Click on Committee in the menu bar. Your list will appear:

1. Select the desired round.

1. Click on the Personal interests button.

The Applications window shows an overview of the applications of which you, as a committee member, are asked to indicate whether or not there is a personal interest. If you have no personal interest with any of the applications, it is not necessary to click on every single application. You can then go directly to the bottom of the page to mark and save the declaration.
Click on the icon to see all Co-applicant(s) of one application. By checking the box behind ‘Show all’ at the top of this column, the Co-applicants of all applications will be shown.

Click on the icon to access the application details.

Click on the checkbox in the Personal interest column of the application for which you have a personal interest and the following screen will open.

If there is a personal interest, then type in an explanation. This is a required field (marked by a red *)

If there is no personal interest, then uncheck the There is a personal interest box. The Explanation field is no longer required (the red * is no longer visible). Or click Cancel

If applicable, tick one or more of the checkboxes for the additional control measures.

Click on the Save button.

The Save button does not work when the personal interest checkbox is marked and the Explanation field is empty. The personal interest is not saved; the committee member is then considered not to have a personal interest with this application.

After having saved your personal interest statement you will return to the overview screen with applications. The applications whereby you stated that you do have a personal interest have a marked checkbox Personal interests in the overview.
The personal interests have been registered.

NWO will be sending the complete list of personal interests to the chairman of the committee for approval. After approval the list will be sent to the members of the committee, to inform them of the confirmed personal interests within the committee.

4.3 Conducting an assessment
You have received an email to conduct an assessment (preliminary advice) about applications. To do this, click on Committee in the menu bar after you logged in to ISAAC. Select the round for which you are asked to assess the applications.

Click on the Applications tile.
To assess: The applications that you have been asked to assess. Select an application from the Applications part for which you want to add an assessment (preliminary advice).

Other applications: All the other applications in the same round

Applications with personal interest: the applications for which you have stated to have a personal interest.

It is also possible to view the application dossiers in pdf and print them. To do this click on the button Download below the applications To assess. For further information see the next paragraph. Note: this can only be done if all applications are open for assessment.

The main tab displays the name of the applicant and the sub tabs display the content of the application. The Application information tab is activated.

Click on the Application details button to access further details of the application and, if applicable, the budget request of the application.

If there is a personal interest after all, click on Page actions, Personal interest.

If there is a referee process in this round, then activate the Referees tab to access the referee reports.
On the Referees page you can view the content of the referee’s advice and the applicant’s rebuttal.

The Documents tab contains the application documents (the scientific content of the application in PDF and any attachments such as a letter of recommendation) and documents regarding the grant: such as the ‘Call for proposals’/brochure, guidelines or FAQ’s.

Click on the link to view/save the document in question. The complete application can be found next to Application form.

If you want to carry out the assessment, activate the Review tab.

For each criterion you have to fill in a score and an explanation. The scale of the score has been determined when designing the round and can differ per round. The increment of a score is always 0,1 or 0,5.

*The value 1 can therefore be the best score in one round (e.g. excellent), but in another round the worst score (e.g. unsatisfactory).*
1. Fill in the score for each criterion by moving the block in the horizontal pane to the right of Score or entering a number behind it. **Note:** If you do not move the block in the horizontal pane (because it is at the right value) and do not enter a number, then no value is saved.

2. Enter an explanation.

3. Once all criteria have been filled in, click on the **Save** button.

The assessment has been completed but has not been submitted yet. You can see in the **Applications** window which assessments have been completed.

1. In the **Status** column below the **To assess** category you can see which applications have been completely assessed. If the application has been completely assessed, the **Status** column turns green and the application now has the status **Complete**.

2. The progress bar indicates the percentage of applications that have been assessed.

3. At the bottom of the Applications screen beneath **Applications with personal interest** you can see which applications you have indicated as having a personal interest.
If all applications are completely assessed (all applications have the status Complete), the Progress bar turns into the Submit review button. Click on the Submit review button to submit your advice.

The review has been submitted.

Click on the Next button.

In the Status column below the To assess category you can see for which applications the reviews have been submitted.

It is possible that applications will be added in the future, for which advice needs to be submitted (in which case a new e-mail will be sent). The above overview shows for which applications you still need to prepare and/or submit advice. The new applications have the status Not complete.

Confirmation that the review has been submitted will be sent by e-mail.

Until NWO closes the round for submitting pre-advice it is possible to edit the review. You can do this by opening the desired application, click on the tab Review and click on the Edit button. Then you can edit the review, save it and re-submit the review.

4.4 Generating an application dossier

It is possible in ISAAC to generate a PDF per round with the information from all the applications assigned to the committee for that round or a PDF with all the applications assigned to the committee member to assess for that round. Both documents contain the applications, the referee reports and the rebuttal. These documents can be used as an aid in meetings.
Click on Committee in the menu bar:

1. Select the round you want to generate the application dossier for.

There are two possibilities:
1. Generate a PDF with the applications assigned to the committee member to assess for that round.
2. Generate a PDF with the information from all the applications for that round.

Generate a PDF with the applications assigned to the committee member to assess for that round:

1. Click on the Applications tile

The following screen appears:

1. Click on the Download button to generate a PDF with the applications assigned to the committee member to assess

A PDF will be generated with the applications to assess, including the referee reports and the rebuttal. This document can subsequently be opened, saved and/or printed. In case of an alteration in the applications, a new PDF can be created with the current information.
Generate a PDF with the information from all the applications for that round:

Click on the Documents tile.

The Documents screen opens where documents belonging to the various applications can be consulted (See Consulting documentation from committee members meetings)

Click on the Meeting documents button.

A PDF will be generated with all the applications for that round, including the referee reports and the rebuttal. This document can subsequently be opened, saved and/or printed. In case of an alteration in the applications, a new PDF can be created with the current information.

4.5 Consulting documentation from committee members’ meetings
Meeting documentation can be registered in ISAAC. This could be preparation documentation or the minutes. Click on Committee in the toolbar:

Click on the round for which you would like to access meeting documentation.

You can now access the following sections:

1 For the diary and the minutes, click on the Meetings tile.

2 For other documents, click on the Documents tile.
4.5.1 Meetings
When you click on the Meetings tile, the following window will appear:

4.5.2 Documents
When you click on the Documents tile, the following window will appear:

1. Then click on the link of the document that you would like to consult.

1. Click on the Open button to open the document
5. Information for project managers

5.1 How project managers manage a project
After an application has been granted, it becomes visible in ISAAC as a project behind the Project tab in the welcome screen. After selecting a specific project from the overview of projects, you can maintain the information of your project(s) in the following way.

The project information we have on file can be accessed in the Project information tab. This is the tab that opens when a specific project has been selected for the overview of projects.

In order to accept the funding, you need to submit a start form. You can upload and submit the start form via the Project documents tab. The template for the start form has been sent by e-mail. It is also available behind the Project forms tab.

One or more of the project members can be registered by filling in and submitting a Personnel Information Form (PIF) for each project member. You can enter and submit a PIF by means of the Project members tab. If you have been appointed to the project as well, then you have to fill in and submit a PIF for yourself as well.

The project manager will be asked to submit project reports (e.g. interim and final reports) for the duration of the project. These reports must be submitted through ISAAC via the Reports tab. The templates for the reports have been sent by e-mail or can be found behind the Project forms tab.

You can also report project results (e.g. the publication of an article) and use via ISAAC. This can be done on the Product and the Reports tabs. The standard evaluation protocol is used to distinguish between products.

Changes are sometimes made while a project is still ongoing (e.g. the start or end date may be changed). Changes can be submitted via the Requests for change tab.

5.2 Accepting funding – submitting the start form
Your application has been granted and therefore a project has been created with the status Initial. The first step now is to upload the Start form in ISAAC.

The template for the start form that you have to fill in can be found in the Project form tab or you have been sent the form with your grant letter. You have to fill in this form completely and then save it as a PDF.

Click on Projects in the main menu and open the project for which you want to submit a project form by clicking on the project.

Go to the Project documents tab in the Projects section.

This tab consists of three categories;
Submitted project documents: shows the documents with status Submitted. These documents have not yet been approved or rejected by an NWO-employee.

Project documents to re-submit: shows the documents with status Rejected. By clicking on the document you can see the details, replace and re-submit the document. After re-submitting the status of the document changes to Submitted and the document moves to the list of Submitted project documents.

Approved project documents: shows the documents with status Approved. These documents can only be viewed Read only. They cannot be altered.

Click on the Add button beneath the category Submitted project documents to upload a new document.

Add a subject.

Click on the Upload button and select the document from your computer

Add an explanation if applicable.

Click on the Submit button

After submitting the project document a confirmation screen will appear. Click on the Yes button to submit the document.

The document has been added to the Submitted project documents category. The NWO-employee can now approve or reject the document.

The following document types can be submitted: Word, Excel, PDF
5.3 Registering an appointment

As a project manager, you can add project members yourself via ISAAC. To do this, open the project in question in the Projects tab of the main menu. Activate the Project members tab.

1. Click on the Add button.

The Project member window will appear:

1. Enter the project member’s Basic data.
2. Enter information about the appointment of the project.
3. Click on the Next button.
A screen will appear in which the involved person’s employment data can be added, as well as any attachments:

1. Click on the Search button to select an employer.

The Search organisation screen will appear in Relationship Management:

1. Enter one or more search criteria.

2. Click on Search.

1. Select the desired organisation.
Use the *Upload* button to add any attachments.

To submit the project member click on the *Submit* button. The project member has now been registered and has the status *Submitted*. The data can no longer be changed.

If you want to be able to complement or change the data click on *Safe draft and Close*. The project member will get the status *Draft* and has not been submitted to (and not visible for) NWO.

When a project member is saved as a draft, a message appears on the top of the screen. This message disappears when you leave the tab.

A project member saved as a draft will get the status *Draft* and can still be changed.

A project member with the status *Draft* can be deleted by clicking on the cross behind it.

A project member with the status *Linked* has been approved by a NWO-employee and linked to a profile in the Relationship Management part of ISAAC.

A project member with the status *Draft* has not been submitted and is therefore not visible for NWO.

### 5.4 Request for/changing a project authorization

The projects’ formal point of contact can authorize one (or more) project member(s) for uploading project documents, submitting requests for change, adding other project members, etc.

*An authorization request can only be submitted by the formal point of contact (Main applicant or project manager)*
5.4.1 Requesting authorization
To give a project member access to a project, the formal point of contact needs to fill in and submit an authorization form. This form can be found via the hyperlink on the Project access tab. The authorization form can be submitted on the Project documents tab (see 5.2). When the project document is processed by an NWO-employee and the authorization is given, the authorized representative will receive an e-mail with the authorization and log in data.

The Project access tab shows who is authorized.

5.4.2 Changing authorizations
To change an authorization, the formal point of contact again needs to fill in and submit an authorization form through the Project documents tab. When the form is handled and the authorization is changed by an NWO-employee, the authorized representative receives an e-mail with the new authorization data.

The Project access tab shows the changes in the authorization.

After processing the project document the formal point of contact will not receive an e-mail.

When the end date of the authorization has passed, the authorization will automatically end. The authorized representative will not receive a separate message at this time.

5.5 Submitting changes
As a project manager you have the option of submitting requests for change through ISAAC. It could concern changes to the appointment of project employers, for example, or changes to the duration of a project.

Open the project in question in the Projects part and activate the Requests for change tab.

1. Click on the Add button.

The Request for change screen will appear:
Enter the subject of the request for change.

Use the *Upload* button to add the request for change as an attachment.

Enter any explanation you would like to add.

Click on the *Submit* button.

The request for change has been created and can no longer be changed. The status of the request is *Submitted*. You will receive a response to your request for change by e-mail.

5.6 *Project reports and accountability*

You can submit reports for the duration of a project. These are files (only in PDF format) that can be uploaded from your own computer.

Open a project in the *Projects* part and activate the *Project forms* tab:

1. Click on the link of the *Project form* that you would like to download. You can write your report in the template you downloaded. Save this report on your own computer in PDF format.

2. Then click on the *Reports* tab.
The Reports screen will open:

1. Click on the Add button to add a report.

   ![Diagram of the Add button process]

2. Enter a subject for your report.

3. Click on the Upload button to add the actual report (in PDF format).

4. Write an explanation in the Explanation text box.

5. Click on the Submit button. The report has been submitted and can no longer be changed. The report has the status Submitted.

6. Click on the Save draft and close button if you want to adapt the report at a later point in time. Your report has not been submitted and is therefore not visible by NWO. Your report has the status Draft.

   ![Diagram of the Report status changes]

1. When a report is saved as a draft, a message appears on the top of the screen. This message disappears when you leave the tab.

2. A report with status Draft can still be altered. The columns Date of submission and Submitter are empty.

3. A report with the status Draft can be removed by clicking on the x behind it.
5.6.1 Utilisation

You can only fill in the Goal field under Utilisation if there is an approved start form and the project has the status Running. An Goal field will then appear in the Reports tab under the heading Utilisation. Click on the Save button after you have filled in the field.

1. Enter your Goal.
2. Click on the Save button.

5.7 Registering a project’s output

Different types of output (products) can be delivered and registered during a project. What type of information will be registered in ISAAC depends on the type of product. The different types are described below. Activate the Projects tab in ISAAC to register output. Choose the project for which you want to register output here:

1. Click on the desired project.
1. Activate the Product tab:

2. Click on the Add button to register a product.

By using one of the available buttons, you can add a specific type of product.

1. Click on the button next to the product that you would like to add.
Enter at least all the required fields. These are the fields marked with an *.

Click on the Submit button if you want to submit the product. The product has now been added to the project and can no longer be changed. It has the status Submitted.

Click on Save draft and close if you want to make changes to the product at a later point in time. The product has not been submitted and is therefore not visible by NWO. The product has the status Draft.

When a product is saved as a draft, a message appears on the top of the screen. The message disappears when you change tabs.

A product with the status Draft can still be changed. The columns Submitter and Date of submission are empty.

A product with the status Draft can be removed by clicking on the x behind it.

5.7.1 Types of output

Scientific article
Articles published in scientific journals that use an anonymous peer-review system independent of the editors. In addition, publications in journals that are not refereed, but which are considered important in the field. If the article is Open Acces, please type the URL to the online article in the Open Acces URL field.
**Book / monograph**
Books written for an audience of scientists and researchers who describe the results of scientific research.
**Chapter in book**
Contributions to scientific books aimed at an audience of scientists and researchers.

**PhD thesis**
Publications for which a doctorate was obtained.
Conference paper
A complete version of an article published in the context of a conference.

Professional publication
Publications intended for professionals in the public and private sectors including annotations.
**Publication intended for a wider audience**  
Popular science publications about the results of scientific research.

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