TIA Portal User Guide

TIA PORTAL ICONS

ICON	NAME	FUNCTION
	Sign in / Log out	Sign in / Log out of the Portal.
	Refresh	Refresh the screen.
	Filter	Search by selected filter.
	Expand	Expand the screen.
+	Add	Add another contact / risk / funder.
	Close	Close the window.
	Sort	Sort in alphabetical / numerical order.
	Upload	Upload a document.
Main Menu	Return Main Menu	Return to home page / main menu.

TIA PORTAL APPLICATIONS STATUSSES

Status	Description
SOI	Statement of Interest saved but not submitted to TIA.
SOI Submitted	Statement of Interest saved and submitted to TIA.
Full Application Incomplete	Full Application is avaiblable for completion.
Full Application Submitted	Full Application saved and submitted to TIA.
Under Review	Application is under review / require more information.
Not Approved	The Fund Application is not approved.
Closed	The Project is closed.

UNDERSTANDING THE FUNDING APPLICATIONS STAGES

TIA has a three-stage application process; the Submission of Statement of Interest and Basic Assessment, Full Assessment and Approval.

Stage 1 - Submission of Statement of Interest and Basic Assessment
The applicant is required in this stage to submit the Statement of Interest (SOI), via the online application system. The Statement of Interest describes the intellectual property, commercial, team, proposed technology innovation and budget. Once the SOI has fully met all the criteria, a detailed Full Application will be made available for completion and submission.

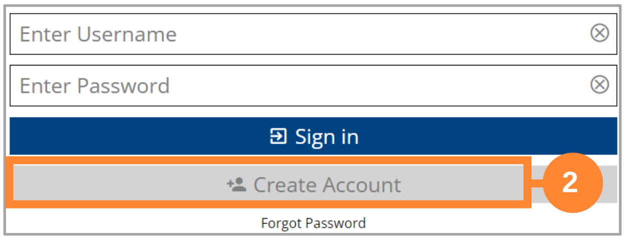
Stage 2 - Full Assessment
Once the Full Application has been submitted, there will be an assessment conducted to determine whether the Applicant has submitted all the necessary information to proceed to Full Assessment. The Full Assessment involves opportunity evaluation in commercialisation, intellectual property, technical and legal. Deal structuring and a project execution plan will be developed at this stage.

Stage 3 – Approval
Approval of Applications is always subject to availability of funding. Applications that preceded the Full Assessment stage are approved by TIA Approving Committee.

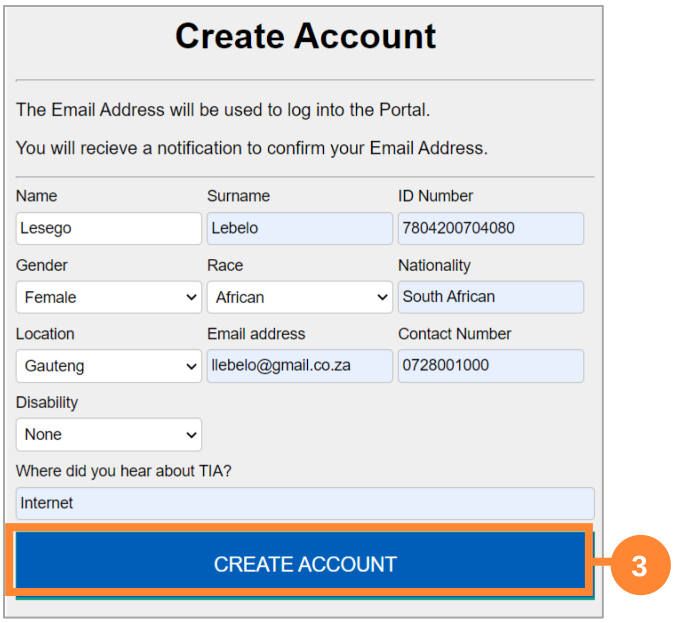
HOW DO I REGISTER AND CREATE A NEW ACCOUNT?

1. Click the **Log On/Create Account** button.

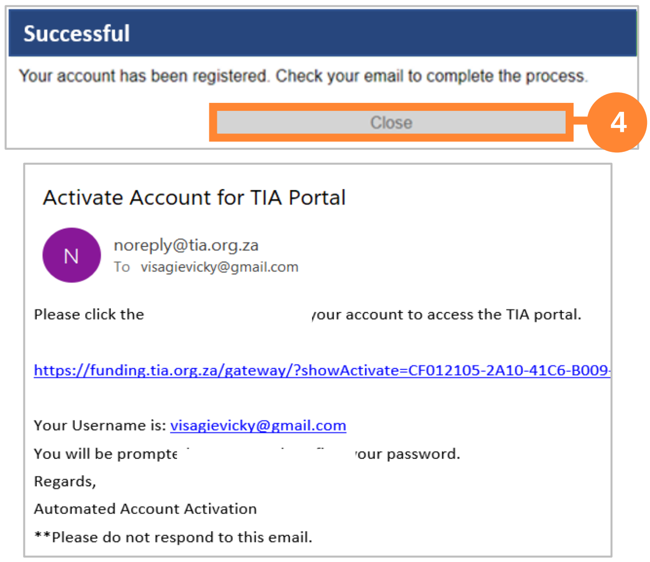
2. Click the **Create Account** button.



3. Complete the account application form and click the **Create Account** button.

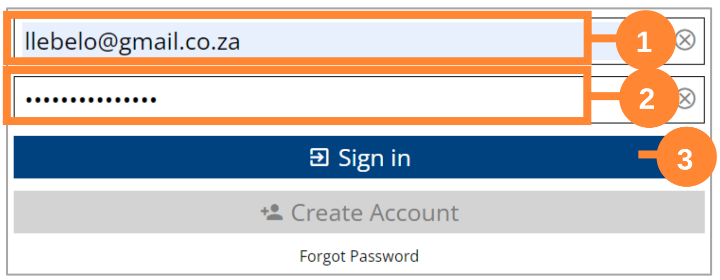


4. Your **account has been succesfully created**. Click on the **Close** button.
NOTE: You will **receive an e-mail** to **active your account, create a password and complete the registration process.**



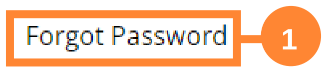
HOW DO I LOG INTO MY ACCOUNT?

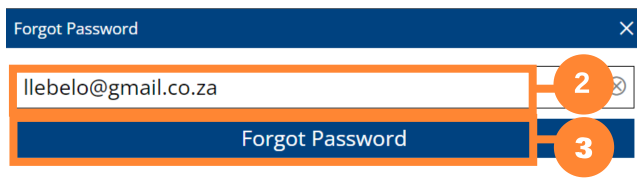
1. Type in your **User Name** (e-mail address).
2. Type in your **Password**.
3. Click on the **Sign in** button.



HOW DO I RESET MY PASSWORD?

1. Click on the **Forgot Password** button.
2. Type in your **E-mail Address**.
3. Click on the **Forgot Password** button.
NOTE: The system will **send you an e-mail** with a link to reset your password.





HOW DO I CREATE AND SUBMIT A SOI APPLICATION?

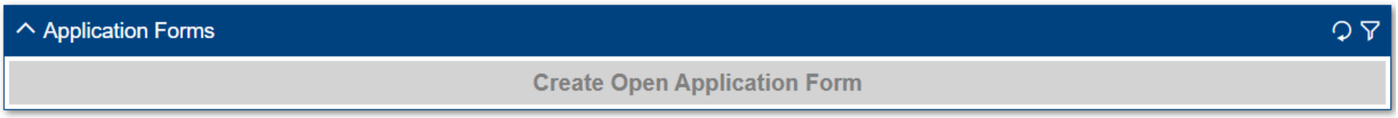
1. Click on the **New Applications** 

icon.

2. Click on the **Open Call** 

icon.

3. Click the **Create Open Application Form** button.



4. Then click 

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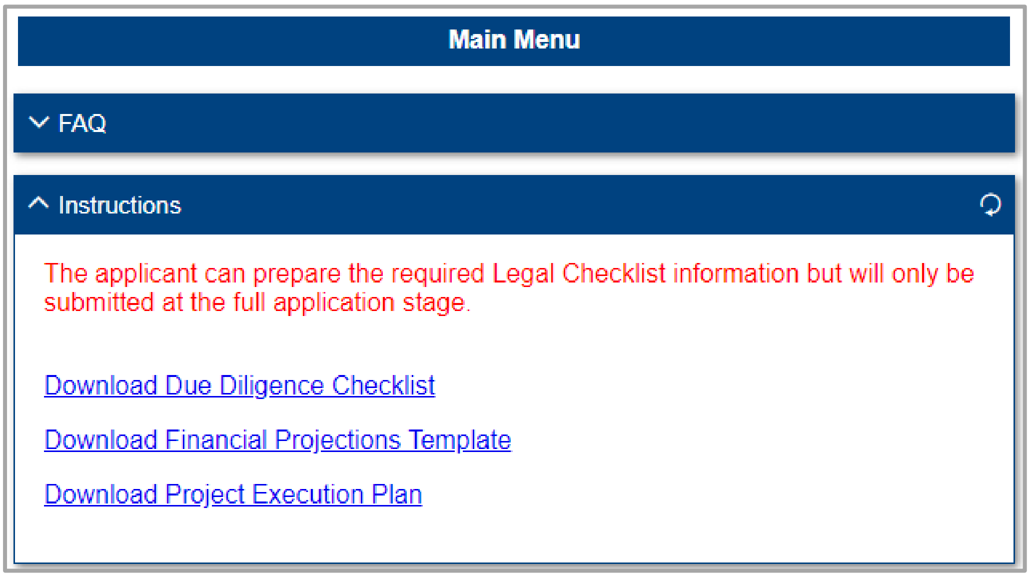
NOTE: The Application Form will open and expand.

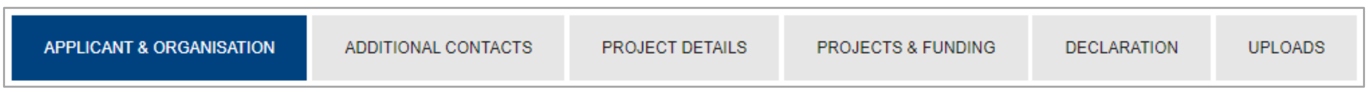
UNDERSTANDING THE NEW APPLICATION SCREEN

- **Main Menu button** – click to return to the Home Page.
- **FAQ** – Frequently Asked Questions pertaining to a specific screen.
- **Instructions** – Download documents and information required by TIA.



COMPLETING THE SOI APPLICATION FORM

- Each of the tabs must be completed in full.
- All fields marked with a red astrix * are mandatory.
- The system will not allow you to save or submit unless all mandatory fields have been completed.
- A maximum of 250 words per answer at SOI level (more information will be required at Full Application level).
- A certified copy of the applicant's ID document must be attached under the Uploads tab.



VALIDATE, SAVE & SUBMIT

- **All Application fields MUST be VALIDATED before it can be saved or submitted. Validation will ensure that all mandatory fields are completed. Incomplete mandatory fields will be marked in red – please click through all tabs and complete mandatory fields before saving / submitting.**
- The SOI Application can be saved and edited at any time. Please note that **saving the SOI Application does not submit and send it to TIA.**
- **VERY IMPORTANT** - Make sure you click the **SUBMIT BUTTON** to submit and send to TIA.
- You will receive an email confirmation of submission.
- If you have not received an email confirmation, your SOI application has not been submitted.

WHERE CAN I VIEW MY SAVED & SUBMITTED APPLICATIONS?

- All saved and submitted **SOI and Full Applications** can be accessed by clicking the **Applications in Progress** icon on the **Home Page.**

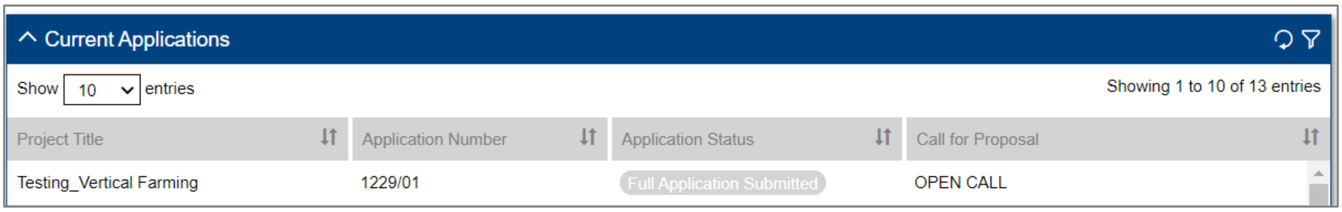
UNDERSTANDING THE APPLICATIONS IN PROGRESS SCREEN

Current Applications

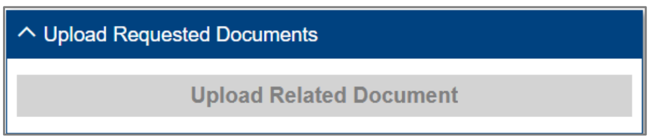
- **Project Title** – name of the project.
- **Application Number –** unique number that is generated and assigned to the application by the system.
- **Application Status** – indicates the current status/stage of the application.
- **Call for Proposal** – indicates the call type.
- Click on the required **Application to highlight and select** it.

Viewer

- The Application detail can be **viewed and edited** in the **Viewer** section of the screen.
- Click on **Expand** icon to expand the **selected Application.**



- The **Upload Requested Documents** functionality will **ONLY** be available if you click on the **Application, highlight and selected it.**



HOW DO I COMPLETE AND SUBMIT MY FULL APPLICATION?

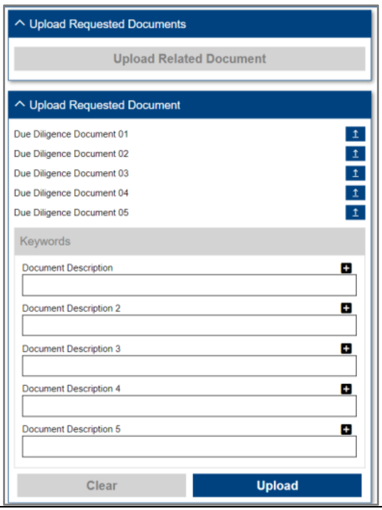
- Please note that you will **not be able to edit the already completed SOI tabs at full applicaton stage**.
- Additional tabs, requiring **additional information** will now be availble.
- Each of the tabs **must be completed** in full.
- Most fields are **mandatory** – click the **VALIDATE** button at the bottom of the screen to ensure all mandatory fields have been completed. The system will not allow you to save or submit without completing all mandatory fields**. Remember to check ALL tabs for mandatory fields.**
- The system **will not allow you to save or submit** unless all **mandatory fields have been completed**.
- A maximum of a **1000 words per answer** at Full Application level (more information will be required at Full Application level).
    - The following **mandatory documents must be downloaded**, completed and uploaded under the Uploads tab before submission: Due Diligence Checklist, Financial Projections, Project Execution Plan.

SAVE & SUBMIT

- **All Application fields MUST be VALIDATED before it can be saved or submitted. Validation will ensure that all mandatory fields are completed. Incomplete mandatory fields will be marked in red – please click through all tabs and complete mandatory fields before saving / submitting.**
- The **Full Application can be saved and edited at any time**. Please note that **saving the Full Application does not submit and send it to TIA**.
- **VERY IMPORTANT** - Make sure you click the **SUBMIT BUTTON to submit and send to TIA**.
- You will receive an **email confirmation of submission**. If you have not received an email confirmation, your full application has not been submited.

HOW DO I UPLOAD AND SUBMIT REQUESTED DOCUMENTS?

- Click on the **Applications Status** icon.
- The **Upload Documents** functionality will **ONLY** be available if the **Application is highlighted and selected.**
- **Browse and select** additional due diligence documents.
- Give each document the CORRECT D**escription in the Keywords section**.
- Click **Upload (SUBMIT – the upload button submits the documents to TIA).**



WHERE CAN I VIEW, EDIT AND SUBMIT QUARTERLY REPORTING?

- All reports can be edited, submitted and accessed under **Reporting** on the **Home Page**.
- To access reports, click on the **Reporting** 

icon.
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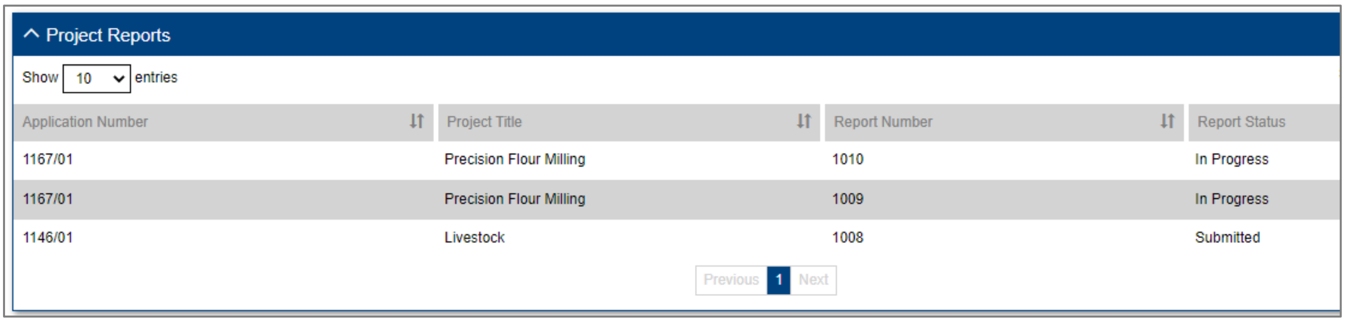
<u>Project Reports</u>
- All **Quarterly Reports** will be available on the **Project Reports** page.
- Click on the required **Report to highlight and select it**.

<u>Viewer</u>
- The **Report** detail can be **viewed and edited** in the **Viewer** section of the screen.
- Click on **Expand** icon to expand the **selected Report.**
- The **Report Due Date** can be seen in the report detail.



Project Reports

Show 10 entries

Application Number	Project Title	Report Number	Report Status
1167/01	Precision Flour Milling	1010	In Progress
1167/01	Precision Flour Milling	1009	In Progress
1146/01	Livestock	1008	Submitted

Previous 1 Next

HOW DO I COMPLETE AND SUBMIT MY QUARTERLY REPORT?

- Each of the tabs **must be completed** in full. All fields marked with a red **astrix * are mandatory**.

<u>Technology Readiness</u>
- Click **Edit** and select the **Technology Readiness Level.**
- Type in the **Description**.

<u>Progress</u>
- Click **Edit** and complete the **Milestones Achieved.**
- Complete the **Intellectual Property.**

<u>Market and Industry Readiness</u>
- Complete the **Market Trends and Risks**.

<u>Uploads</u>
- Upload the **Financial Statement and Technical Report**.
- Click **Validate** to ensure that all required information has been completed in full.
- **VERY IMPORTANT** - Make sure you click the **SUBMIT BUTTON** to submit and send to TIA.
- You will **receive an email confirmation of submission**. If you have not received an email confirmation, your Quarterly Report has not been submited.