

# ACCESS TO THE FUNDING MANAGEMENT PLATFORM

<https://financements.sidaction.org/>

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## 1 - If you have an account in the previous version

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**For a first connection** to the new platform, you will have to create a new password and confirm your profile in order to access your account.

### 1) Access to the new plateforme

⇒ <https://financements.sidaction.org/>

### 2) Create your new password

- Click on “new password”, and enter your email address
- You will receive an email with a link, please click on the link received (if you wait too long, the link will no longer be active, you will have to start again)
- Enter your password then validate

First connection for this new portal or password forgotten  
[New password](#)

**To create your password:**  
Click on “new password”

### 3) To log in, return to the home page, indicating your email address and your new password.

<https://financements.sidaction.org/>

### 4) Accept the terms of use of the Synto platform

### 5) To confirm your profile

**Only during this first connection**, the system will lead you to your profile:

- In “affiliation”, check the main organization with which you are affiliated



	<u>Organization name</u>	<u>Laboratory</u>	<u>Team</u>	<u>is_principal</u>
▼	Sidaction APF (pour test en prod)			<input checked="" type="radio"/>
▼	SIDACTION API (pour test en prod)			<input type="radio"/>

- In “phone”, click on “Add phone” to indicate your telephone number

\* Phones

Add phone

- Click on “save”

## 2- If your email address has changed

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Please contact the dedicated support address, indicated on the home page

In the content of your request, indicate your email address, first name, organization and your telephone number

## 3- If you do not have an account in the previous version

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Please contact us at [aps@sidaction.org](mailto:aps@sidaction.org)

In the content of your request, indicate your email address, first name, organization/structure, laboratory name and team name.

Please note that for certain call for proposal, only applicants whose letters of intent have been accepted may apply for funding.

# PRESENTATION OF DIFFERENT SPACES

<https://financements.sidaction.org/>

## SUMMARY


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## 1- Home page presentation

- 1) **“My profile”**: allows you to update information related to your account. Please note that you need to fill your profile page before being able to apply for a funding.
- 2) **“Creating a financing request”**: allows you to open a new form and create a request
- 3) **“Request Tracking”**: Allows you to track open requests
- 4) **“Establishment/CRM/organization space”**: allows you to update information related to your organization

The screenshot shows the 'Applications' page. On the left, a navigation menu has 'Applications follow-up' highlighted (3). The main content area features two circular progress indicators (2) and a 'Hide graphs' button (1). Below the graphs, there is a 'Description' section with a filter input and a list of applications, including one for '20000 - CBS QA 2024-07-04 API org API' (4). A callout box points to the first application with the text 'Access link requests sent before March 2024'. Another callout box points to the second application with the text 'Access to requests submitted on new platform'. The top right corner shows a user profile dropdown with 'My profile' and 'Log Out' options.

**Ergonomics:** for better readability, you can hide  the left part the graphics or click on to hide the graphics

This screenshot shows the same 'Applications' page but with the left navigation menu collapsed. A callout box points to the hamburger menu icon in the top left corner. Another callout box points to the 'Hide graphs' button in the bottom right corner of the main content area.

## 2- Presentation of the “requests” area

This space allows you to find all the requests made by your organization.

Home > Application space > Applications follow-up > Applications

### Applications

Click [here](#) to access your applications submitted before March 2024.

**Description** **Task Deadline**  
(dd-mm-yyyy hh:mm)

Filter by application id

Description	Task Deadline
20000 - CBS QA 2024-07-04 API org API International call for projects / International call for projects 2025-2026	09-09-2024 12:00
20001 - test le 5 juin 24 France call for projects / Appel à projets France 2025	16-09-2024 12:00

By clicking on a request, the details of the request open on the right of your screen,

In progress **Request Status**

#### General Information

**ID**  
20000

**Project title**  
CBS QA 2024-07-04 API org API

**Program**  
International call for projects More

**Session**  
International call for projects 2025-2026

**Task Deadline (dd-mm-yyyy hh:mm)**  
09-09-2024 12:00

#### Applications

Task	Role	Last update (dd-mm-yyyy)	Print Pdf
Complete and submit form	Principal Investigator	05-07-2024	PDF

Documents **Documents uploaded in the application form**

### 3- Presentation of the « organization space »

This space allows you to find the organization(s) to which your account is affiliated.

Home > Institutional Space > CRM > Organization

#### Organizations

Code ↓	Name	Status	Country	
14099	Sidaction APF (pour test en prod)	Approved	FRANCE	Action
13987	SIDACTION API (pour test en prod)	Approved	UNDEFINED	Action

Items per page: 200 Page 1 Of 1

The “organization” module is divided into 4 parts, accessible in the form of a tab:

Home > Institutional Space > CRM > Organization > General information

#### Organization 13987 - SIDACTION API (pour test en prod)

General information Documents Contacts Complementary information

1 2 3 4

**1) Basic information: to be updated in the event of modification**

This is all the information related to the organization:

- Payment method: bank details must be completed
- Contact details of the organization (emails, addresses, telephone numbers, websites)

**2) Documents: Not to be completed**

- **Please note that this section is not for research team at the moment.**

**3) Contacts: read-only**

For any changes, please contact the dedicated support address.

**4) Additional information: Not to be completed**

- **Please note that this section is not for research team at the moment.**