Creating a user account in SAGe – step-by-step instructions

Trans-Atlantic-Platform Democracy, Governance and Trust Call (DGT)

This guide provides simplified step-by-step instructions to create a user account in SAGe, FAPESP's grants and fellowships application portal, for the purpose of submitting proposals to the Trans-Atlantic Platform DGT call. These instructions are directed to DGT applicants who are not Brazilian citizens or permanent residents in Brazil.

If you already have a user account in SAGe, please disregard these instructions.

To submit proposals via SAGe, you must create a user account. <u>This is a two-step process</u>. First (steps 1 through 5), you register your chosen login and password. In the second step, you will receive an activation code by email, so that you can fill in compulsory information in your account (steps 6 through 21). Only then will you be able to submit proposals. When providing your login and password, please avoid characters with accents, since this is keyboard-and-language sensitive.

Please notice that SAGe fully supports Internet Explorer 7 or higher, Firefox 14 or higher, Chrome 20 or higher. It may also work in other web browsers, depending on how your computer is configured.

<u>Make sure you regularly save the information you enter by using the button "Save". All unsaved data will be lost if an external problem occurs</u>.

1. Access https://sage.fapesp.br
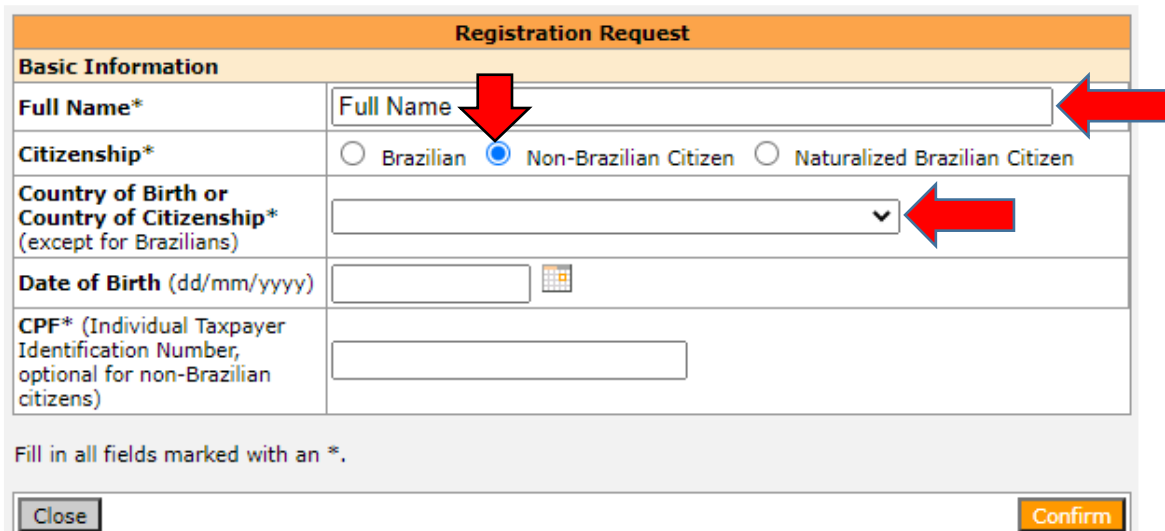2. Click on the UK flag:

3. Click on "Not registered?"

4. Fill in the field "Full Name", then select "Non-Brazilian Citizen" in the "Citizenship" field. Select a country of birth or citizenship. You do not need to fill in the remaining fields. Click on "Confirm":
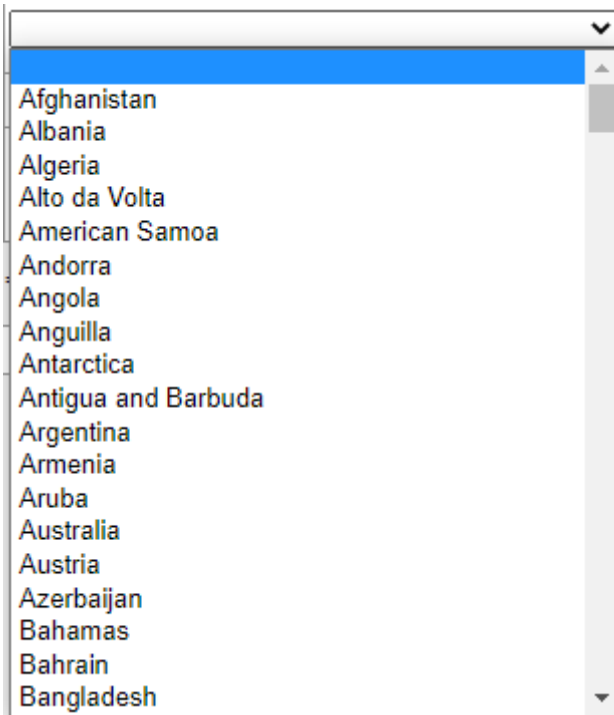
Country of Birth or Country of Citizenship*

5. Fill in your email and choose a username and a password (<u>the username will also be required when you sign in to SAGe to finalize your registration, so write both down</u>). Please do not use letters with accents, since they are keyboard-sensitive. The username should have 5 to 10 characters and the password 8 to 15 characters. Confirm the password, then click on "Save":

Add User	
Basic Information	
Full name	Full Name
Citizenship	Non-Brazilian Citizen
Country	Albania
Date of birth	
Identification Information	
E-mail*	
Username*	
Password*	
Confirm password*	

Fill in all fields marked with an *.

Back   Save

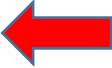You will then see the following

Success

Registration completed successfully. The system sent to your registered e-mail address a message with the activation code to be used in your first-time access to SAGe.

6. **Your registration is not yet complete and needs activation**. By clicking on "Save", an email will be sent to your email address containing an Activation Code. Please copy the activation code, then access SAGe again (the link is provided in the email). If you do not receive a message within 5 minutes, please check your spam box.

Welcome to SAGe!
Your e-mail address was used to register your username in the SAGe System.
In your first-time access, use the username and password provided during your registration, along with the activation code below:

Full Name: <Full Name>

Username: <Username>

Activation code: <activation code>
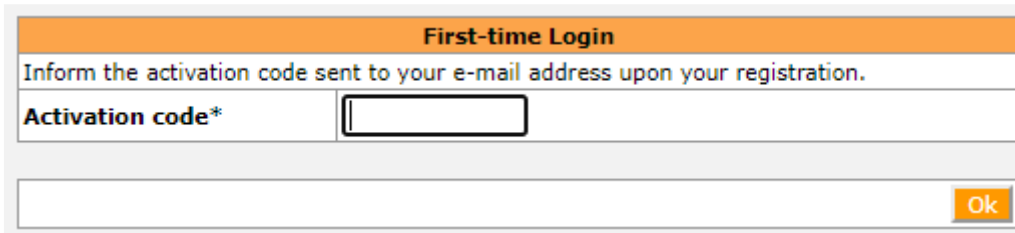----------------------------
If you do not remember your password, click on the link "Forgot your password or your username?".
In your first-time access, you need to complete your registration with some required information before any action. Please select:
Personal Information -> Update Personal Information
and update at least the Mandatory Fields (marked with *).
For accessing the SAGe System, click on the link http://www.fapesp.br/sage/

7. In the SAGe sign-in screen, do not forget to select the UK flag. Then, please fill in the Username and Password you chose previously and click "OK":

8. Fill in or paste the activation code that you received by email (your registration is not yet complete – please follow steps 9 through 21 for additional required steps):

First-time Login	
Inform the activation code sent to your e-mail address upon your registration.	
Activation code*	
	Ok

9. Select the option "Update Personal Information" in the menu "Personal Information":
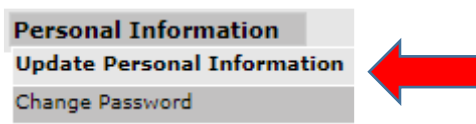
To register as a SAGe user, you are required to provide some information on the Identification, Addresses, Institutional Affiliation, and Academic Background tabs.

10. In the "Update Personal Information" screen, <u>you may choose to leave both "Marital Status" and "Gender" fields blank if you prefer not to provide this information</u>. **All** the other fields in the Identification tab are **optional**. Make sure that "Preferred Language" is set to "English" :

Update Personal Information

| Identification | Addresses | Institutional Affiliation | Academic Background | Areas of Expertise | Additional Information | Comments |

To register as a SAGe user, you are required to provide some information on the "Identification", "Addresses", "Institutional Affiliation" and "Academic Background" tabs (all fields marked with an * are required).
WARNING! Make sure to periodically save typed in information by using the button "Save". All unsaved data will be lost if an external problem occurs.

Full Name*

Full Name
(as it appears on your official records)

Citizenship*
⦿ Non-Brazilian Citizen ◯ Naturalized Brazilian Citizen

Date of Birth (dd/mm/yyyy)

Country of Birth or Country of Citizenship* (except for Brazilians)

CPF* (optional for non-Brazilian citizens)

Identity Document Number* (except for non-Brazilian citizens)

Issued by* (except for non-Brazilian citizens)

State* (except for non-Brazilian citizens)

Passport Number

RNE (Federal Police Registration)

Marital Status   **Gender**

Gender Identity

E-mail Address*
e-mail@domain.country

Preferred Language*
English

Official Identification Document

Document Type	File Attachment	File Attachment Date	Converted File Attachment	Operation
Copy of official identification document Please attach copy of officially recognized id, with photo and signature. This includes, among others, Brazilian RG, RNE or RNM, CNH (new model), passport or membership in professional associations officially recognized in Brazil (e.g., CREA and others). The document must be within the expiration date (if any). [PDF up to 1MB]				Attach

Marital Status:

Married
Common-law marriage
Divorced
Separated
Single
Widowed

Gender:

Female
Male

11. Click on the "Addresses" tab and there click on "Add":

12. The "Address Information" window will open. Make sure that "Foreign Address" is selected. You do not need to fill in the postal/zip code field. Fill in your postal address in the "Foreign Address" field and your work phone number, area code and country code in the appropriate fields. This information will only be used in case if we cannot contact you by email. Then click on "Confirm":

Further Information

Care of		

Telephone Number

Country Code		Area Code*	99
Number*	9999999	Extension	

FAX

Country Code		Area Code	
Number		Extension	

E-mail Address	e-mail@domain.country
Home Page	

Fill in all fields marked with an *.

For Addresses in Brazil: you are required to fill in either the Address line 1 or the Post Office Box fields.

[Cancel]   [Confirm]

13. Click on the "Institutional Affiliation" tab to provide your Primary Institutional Affiliation. Click on "YES", and "Add". Choose "No" for "Other Income"

Update Personal Information

| Identification | Addresses | **Institutional Affiliation** | Academic Background | Areas of Expertise | Additional Information | Comments |

To register as a SAGe user, you are required to provide some information on the "Identification", "Addresses", "Institutional Affiliation" and "Academic Background" tabs (all fields marked with an * are required).
WARNING! Make sure to periodically save typed in information by using the button "Save". All unsaved data will be lost if an external problem occurs.
For Investigators working in Brazil: if you are retired and affiliated to any research institution/company, we kindly ask you to state so in the "Institutional Affiliation" field.

Institutional Affiliation

Do you have any institutional affiliation? ●Yes ○No

Add ⊞   Delete ⊟

Research Institution/Company	Primary Institutional Affiliation	Position / Title	

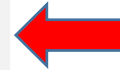No Institutional Affiliation.

Other income

Do you have any other income? ○Yes ●No

☐ Pension ☐ Fellowship / Scholarship ☐ Other

14. Click on the magnifier lens to check if your primary institution is already registered in SAGE. This will open a search window (see next step).
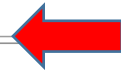
15. In the search window, enter your institution's acronym or name, and additional information (e.g., country) if needed. Click on "Both" in fields "Type" and "Level" for faster checking.

16. If your institution is already registered in SAGe, select it. If it has several departments/units registered, you may need to navigate through the menu until you find the appropriate unit. In the example, the "unicamp" institution has many units registered, so you have to click on the "+" sign to refine the options.

The refinement of clicking on the "+" sign above is as follows. Click on your department/unit, and click on "Select".

17. Once you have confirmed your institution by clicking on Select, you must provide the type of employment from a pulldown menu (compulsory in SAGe) and click on "Confirm"

18. <u>IF your institution is not registered in SAGe, you will need to request its registration</u>. **Until your institution is registered in SAGe, you cannot proceed with your registration.** Registration of your institution is a separate process, described at the end of these instructions, after step 21. Please request this registration as soon as possible.

19. After inserting your Institutional details, click on the "Academic Background" tab and select **No** in the "Academic Background" section. <u>Then click on "Save"</u>.
(You can select **Yes** if you want to provide details about your academic background, but this is time consuming and not required for your registration for this call.)

20. Your registration is now complete. The following message should appear:

Success

Operation completed successfully!

21. If any of the required fields mentioned previously are not filled in, an error message will pop up. **You will need to restart the registration process from the beginning.** The figure shows that Institutional Affiliation needs to be provided.

Warning

Attention! No data were saved.
Identification

Attention: if you leave the Gender field blank, FAPESP understands that you would rather not provide this information.

Attention: if you leave the Marital Status field blank, FAPESP understands that you would rather not provide this information.

Error

Institutional Affiliation

Enter at least one Institutional Affiliation.

STEP BY STEP INSTRUCTIONS ON HOW TO REGISTER A NEW INSTITUTION INTO SAGE

If your institution is not already registered in SAGE, you will first need to request registration of your institution, then proceed with your own registration (steps from 9 to 21 above).

You realize your institution is not registered when you search for it (see step 15) and you receive the following message

There are two different ways to request registration of your institution. One of them is using the "Contact FAPESP" service, as in the message above, and the other is to do it within SAGE. It is up to you to choose the option you find the most convenient.

FIRST OPTION - the "Contact FAPESP" SERVICE

1. In your browser, outside SAGe, click on www.fapesp.br/en and click on "Contact FAPESP"

2. An email form will appear. Fill it in as follows, and click on "Send" (You must provide your institution name or acronym, the country, and say that it is a research institution.) Then, click on Submit.

   For speedy processing, use the exact wording as in the figure, namely "Please register the following institution for the Transatlantic Platform DGT call: Name or Acronym (provide the name or acronym of your institution); Country (provide country name)." It is advisable to omit accents.

Contact FAPESP

Name	E-mail
your name	xxx@yyyy

Phone

(19) 11111-111

City	Country
Campinas	Brazil

Message

Please register the following institution for the Transatlantic Platform DGT call
Name/Acronym (please write name or acronym of institution). Country - please provide institution country

Submit

Please use this wording to speed up registration of your institution

3. After the institution is registered in SAGe, you will receive a message that you can proceed with your registration. Log in to SAGe, go back to step 9 and follow instructions from steps 9 through 21 to finish your registration.

SECOND OPTION TO REGISTER YOUR INSTITUTION – WITHIN SAGE

You do not need to use the "Contact FAPESP" service. Instead, inside SAGe, go back to the multi-tab menu where you tried to enter your Institutional Affiliation. Click on "Requests" at the top

Sistema de Apoio a Gestão do Fomento

| Proposals | Processes | Personal Information | Requests |

Update Personal Information

| Identification | Addresses | **Institutional Affiliation** | Academic Background | Areas of Expertise | Additional Information | Comments |

To register as a SAGe user, you are required to provide some information on the "Identification", "Addresses", "Institutional Affiliation" and "Academic Background" tabs (all fields marked with an * are required).
WARNING! Make sure to periodically save typed in information by using the button "Save". All unsaved data will be lost if an external problem occurs.
For Investigators working in Brazil: if you are retired and affiliated to any research institution/company, we kindly ask you to state so in the "Institutional Affiliation" field.

Institutional Affiliation

Do you have any institutional affiliation? ●Yes ○No

Add ⊞   Delete ⊟

Research Institution/Company	Primary Institutional Affiliation	Position / Title	

No Institutional Affiliation.

Other income

Do you have any other income? ○Yes ●No

☐ Pension ☐ Fellowship / Scholarship ☐ Other

1. Select "Registration of non-Brazilian Research Institution/Company"

2. In the template that will appear, fill in the Name/Acronym field, and click on "Search".

3. Next, click on "Include Research Institution/Company"

4. Fill in the compulsory Basic Information and click on "Save"

Request for Registration of non-Brazilian Research Institution

Basic Information   Address

Type*	● Research Institution ○ Company
Name*	
Acronym	

Fill in all fields marked with an *.

Back   Save

5. Next, provide the compulsory information of the "Address" tab and click on "Save"

Request for Registration of non-Brazilian Research Institution

Basic Information   **Address**

Address			
Country*			
State/Province			
City*			
Telephone Number		**Extension**	
Fax		**E-mail Address**	
Home Page			

Fill in all fields marked with an *.

Back   Save

6. A "Comments" screen will appear. Please type in the text as shown, to speed up institution registration, and click "Submit"

4. After the institution is registered in SAGE, you will receive a message that you can proceed with your registration. Log into SAGE, go back to step 9 and follow instructions from step 9 through 21 to finish your registration.