

SANI2 User Guide

0.1 version : SANI2 User Guide

Date: 15-09-2023

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INTRODUCTION

SANI2 (State Aid Notification Interactive) is the official system for sending **state aid notifications** as required by Regulation (EU) 794/2004.

SANI2 combines two main functions:

- It allows users to fill in the relevant notification forms directly in the electronic form. 1.
- 2. The whole validation process is possible within a single application.



The application is available in all EU languages.

Once your account has been activated, you can access SANI2 here: https://webgate.ec.europa.eu/competition/sani2

Helpdesk

Any questions or possible errors can be reported to SANI2 EC Administrator using this address: comp-sani@ec.europa.eu

WHO MANAGES SANI2

Access to SANI2 is restricted to users who have registered and been granted access rights at national level.

For national authorities, there are 2 user profiles responsible for managing users:

- **central coordinator** (*mandatory*)
- **local administrator** (optional useful especially in EU countries with a large decentralisation of State aid decision and control.

Central coordinators

The main SANI2 contact point in each EU country. They are responsible for creating and managing all SANI2 users in their country. All requests for access to SANI2 should be sent directly to the central coordinator.

For detailed descriptions of the functionalities for user and group management, see the first part of the **Administrator Guide**.

The only accounts the Commission administrator creates in SANI2 are those for central coordinators and validators (after it receives the official request from the central coordinator).

Local administrators

Where useful, the central coordinator can delegate user management tasks to local administrators. These have the same rights and functions for user management as central coordinators, but only within their department called "Office1".

USER PROFILES

National authorities

Users can access SANI2 under different roles, defined in 10 different user profiles (see <u>Annex 1</u>). Each user can have one or more profiles.

In EU countries that use the <u>pre-validation</u> step, there is 1 additional 'pre-validator' profile available.

Commission

There are 2 main SANI2 user profiles:

- EC administrator
- administrator

They are mainly involved in maintaining the application and intervene in situations where issues and problems cannot be solved at national level. You can contact them by e-mail at comp-sani@ec.europa.eu

¹ An office in SANI2 incorporates a group of users distinguished by geographical location or another principle. The purpose of the offices is to delegate user management to local administrators, in particular for large and decentralised Member States. **The use of offices is not mandatory** and depends on the institutional setting and how the functions are organised within the Member State. If a Member State chooses not to use offices, the **entire country** will be considered as one national office.

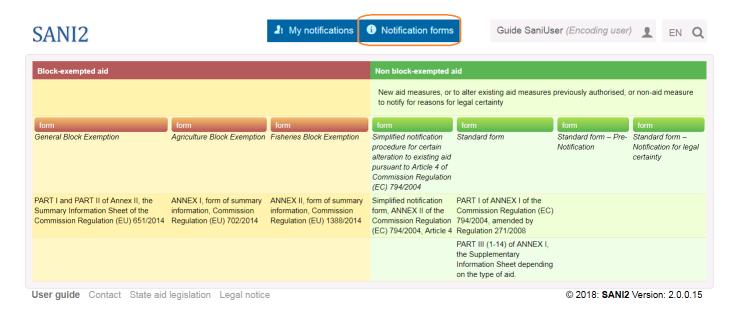
GET ACCESS TO SANI2

Access to SANI2 is managed at national level. To get access, users need to contact their Central coordinator/Local administrator, who will <u>create an account</u> for them in SANI2. They then need to fill in the following details:

Full name
E-mail address
Phone number
Name and address of the organisation they represent
Office
Required profile

1. Homepage - Notification forms

Once logged into SANI2, you will be redirected to the home screen with the Notification forms.



This page displays all notification forms and summary information forms available in SANI2.

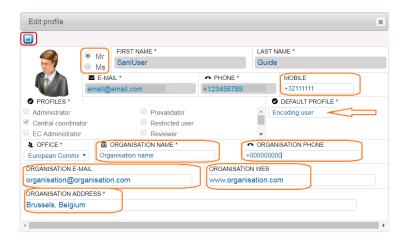
PROFILE, LANGUAGE AND SEARCH FIELDS

Block-exempted aid



This displays the **Edit profile** window, where you can edit some data for your profile (e.g. add your mobile phone number, change the default profile).

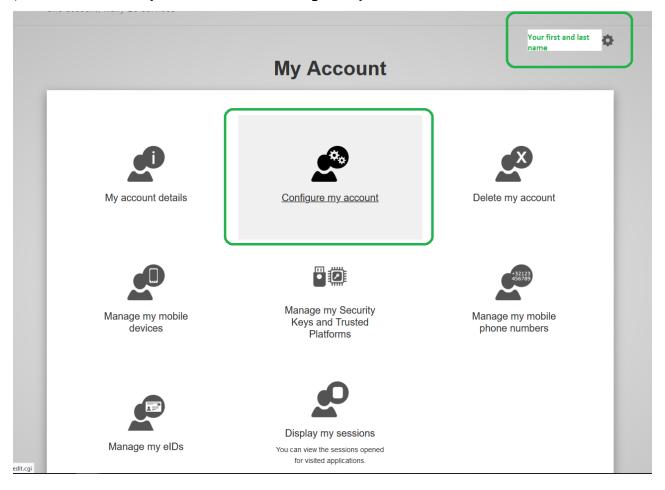
Non block-exempted aid



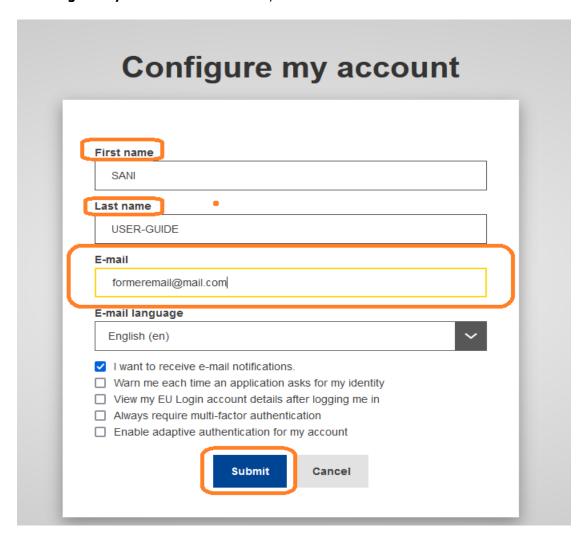
Click to save your changes, or close the window without saving.

📤 Changes to the **Default profile** will only be visible after a log out and a log in again.

⚠ You cannot edit the greyed out **fields:** first name, last name and e-mail. If you have to update these fields log out from SANI2 and sign in to your <u>EU Login account</u>. Once logged in the EU Login, click the settings wheel next to your name and click **My Account** and then **Configure my account**:



In Configure my account window modify the relevant fields and Submit:



Users' personal data is synchronised between EU Login and SANI2, thus all modifications made in EU Login will be automatically updated in SANI2 upon next connection.

2) switch profiles:

If you have more than 1 profile linked to your SANI2 account, you can switch between profiles by clicking the relevant row:



The page will refresh and the new profile will appear next to your name:



riangle Changing the profile modifies your access rights and enables or disables some actions.

3) log out:



Field: EN Q combines 2 functions:

Displays the language you are currently using.

You can change it by clicking the symbol and by selecting another language.

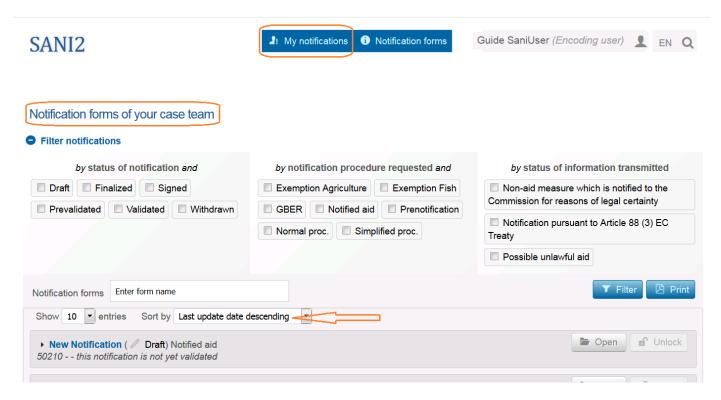
1 You will be redirected to the home page in that language



- Search field where you can search using any of the following:
- **provisional number** (automatically assigned by SANI2)
- State aid number, if the notification has already been submitted to the Commission
- **keywords** used in the title of a notification

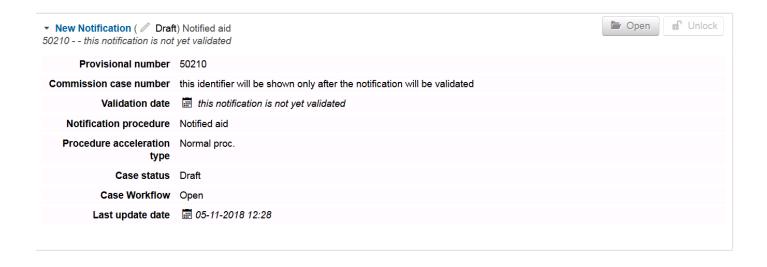
To view a list of **all the notifications you have access to**, leave the field empty and simply press the **Search** button.

2. My NOTIFICATIONS TAB



My notification screen displays all the notifications (by last modified date) that you have access to as a member of the notification team, or based on your profile.

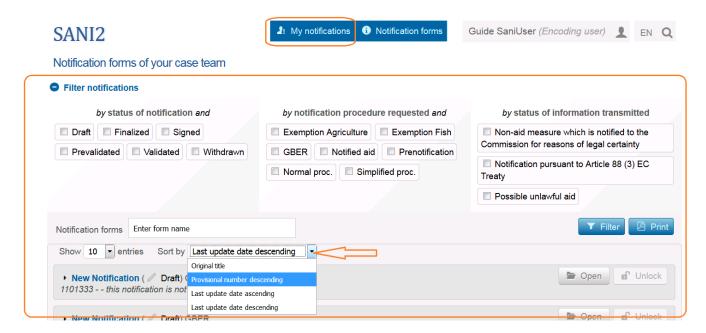
To display more information, click the arrow next to each notification:



FILTER

In the upper part of the screen you can filter and sort your notifications by various criteria (status, procedure requested and status of information transmitted, date, original title).

To apply a filter, select it from the list and click

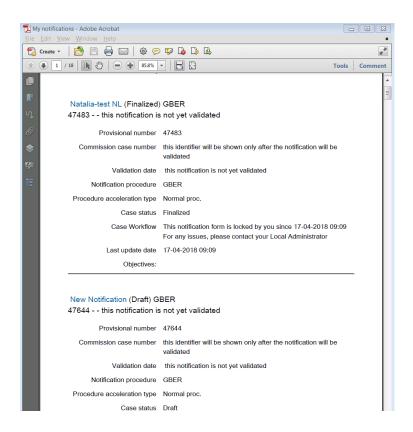


More information on how to use the **Filter** function can be found in <u>section 6</u> of this guide.

PRINT



Prints a **list of your notifications**, with detailed information on each:



If you receive several notifications, use the filter to define the list of notifications you would like to display or print.

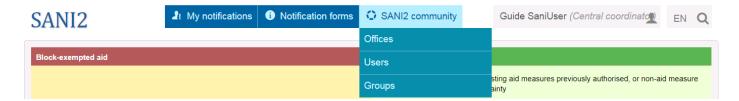
You cannot print more than 200 notifications. Above that, you will be prompted to refine your research:



If you choose **Continue with the printing**, SANI2 will only print the first 200 notifications.

3. SANI2 COMMUNITY TAB

This tab is available only to central coordinators and local administrators – see the **Users Management- tutorial** for details.

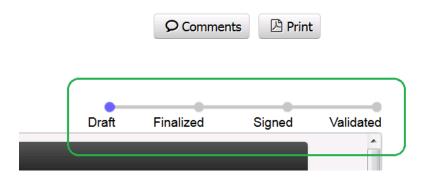


4. NOTIFICATION FORMS / INFORMATION SHEETS — WORKFLOW

All notification forms in SANI2 are identical to the <u>paper forms</u> in the annexes to relevant regulations.

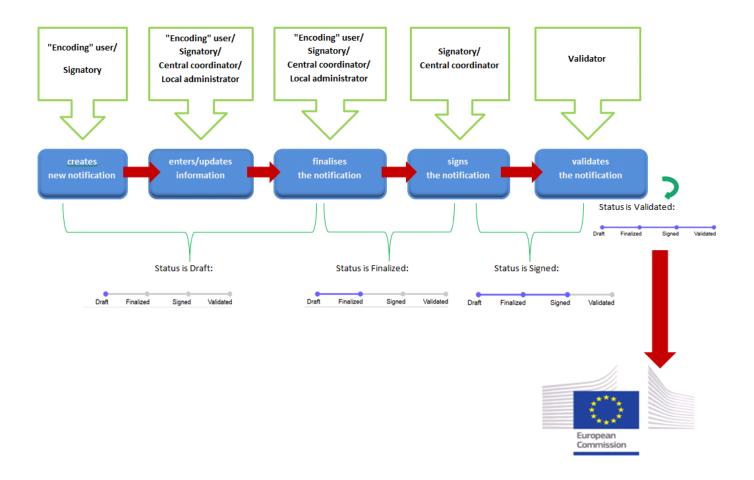
A notification / summary information sheet submitted to the Commission consists of 5 steps (or 6, in countries that include the pre-validation step for notifications).

The status bar on the right upper corner shows in purple the current status of the notification:



Each stage involves a number of players. The steps of 'drafting', 'finalising', 'signing' and 'validating' therefore influence who can do what and when in the notification form.

For users access rights details, see Annex 1.



(1) Status is DRAFT

Encoding user/signatory can modify and update a notification as long as it is in 'DRAFT' status. For notification forms and pre-notification forms, they can also switch from Pre-notification to Notification and vice versa, and request or remove the request for simplified procedure.

Once the notifications are ready for signing, encoding users finalise them in SANI2.

(2) Status is FINALIZED

Once the notification has been finalised, it goes to the signatory. This means that only those that have been assigned a SIGNATORY profile in SANI2 and have been added to the notification team can make changes to the notification (the central coordinator can also do this).

The signatory can also reject the notification. It then reverts to the previous 'DRAFT' status. The previous person can make the necessary changes/modifications before submitting it again to the signatory.

(3) Status is SIGNED

Once the signatory signs the notification in SANI2, it is considered the equivalent of an ink signature. The notification can no longer be modified. It then goes to the validator (or pre-validator, see here).

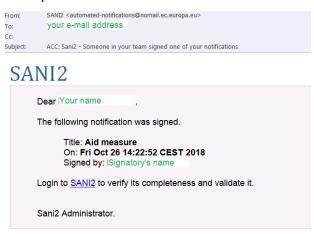
However, if modifications are still needed, the validator can reject the notification. This reverts the status to FINALIZED, and the signatory can then make modifications to it.

(4) Status is VALIDATED

Once the validator validates the notification in SANI2, no other modifications are possible. The notification is sent to the Commission, which registers it in its IT system and provides the Member State with the state aid number under which the notification has been registered and will be dealt with.

Each of formal steps in the workflow triggers an e-mail alert to inform the relevant member of the <u>notification team</u> that such step took place.

Example:

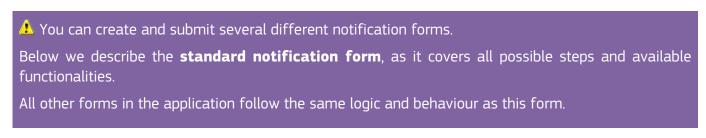


5. CREATE AND MANAGE A NOTIFICATION FORM

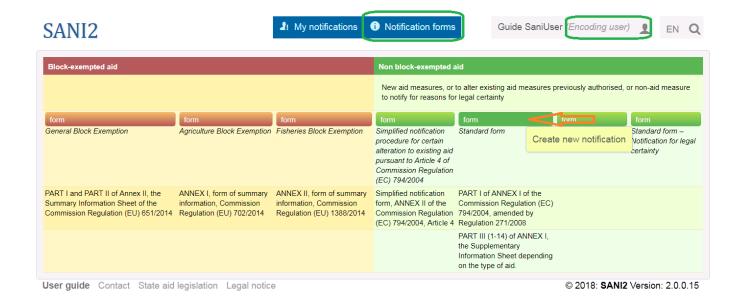
The instructions below will guide you step-by-step through the process of creating, submitting and subsequently managing a notification form.

5.1. Create a new notification

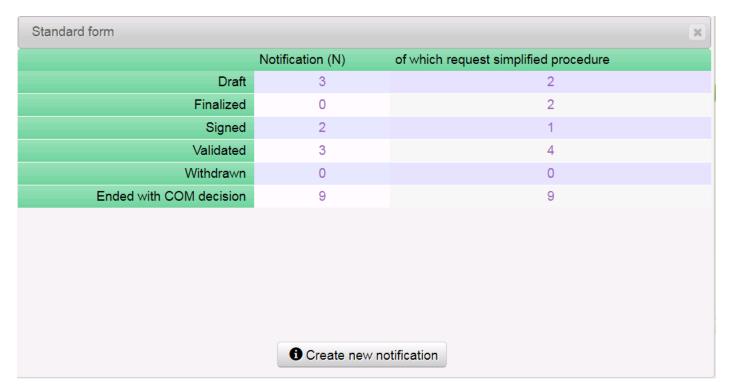
You can only create new notifications if you have an "encoding" **user** or **signatory** profile.



To create a notification, click the form button for the relevant form (e.g. click form > Create new notification)



A dialog box is displayed, providing an overview of relevant notifications linked to the form. To quickly consult the information, click the numbers:

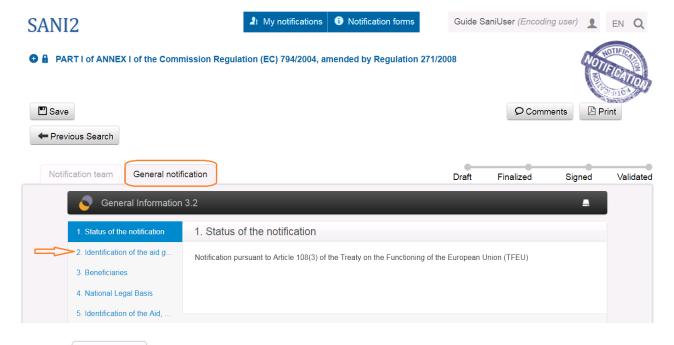


Tip: If you want to cancel and return to the homepage, close the window by clicking in the upper right-hand corner.

To create notifications, click **Create new notification**.

The relevant form will open.

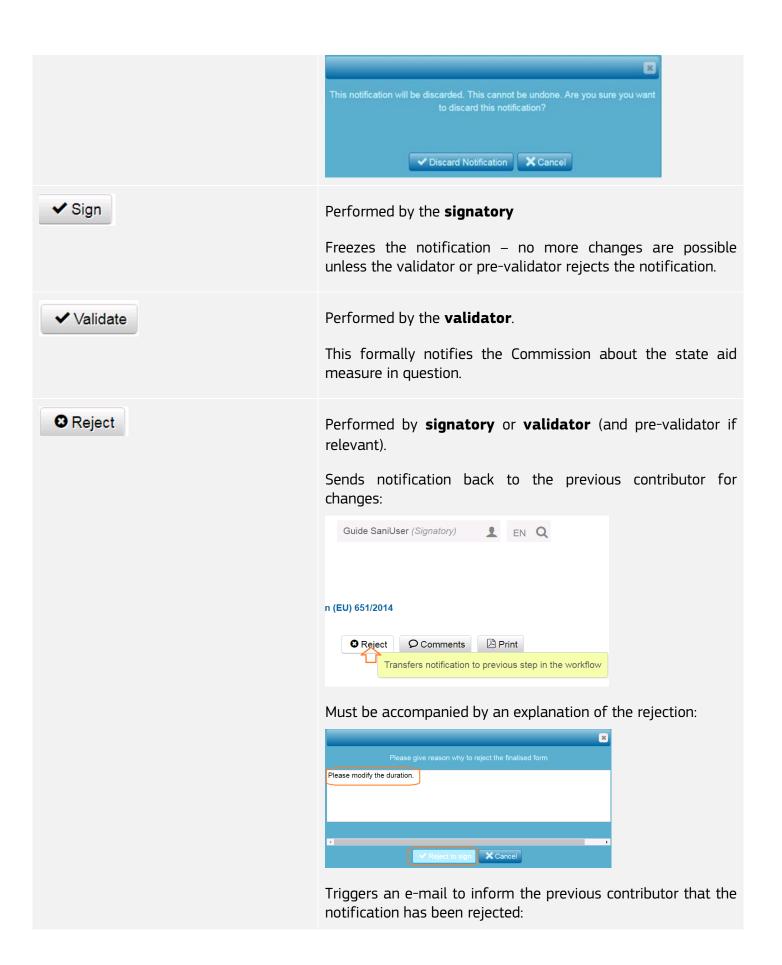
Depending on the form selected, the screen contains different sections. The standard (general notification) form looks like this:

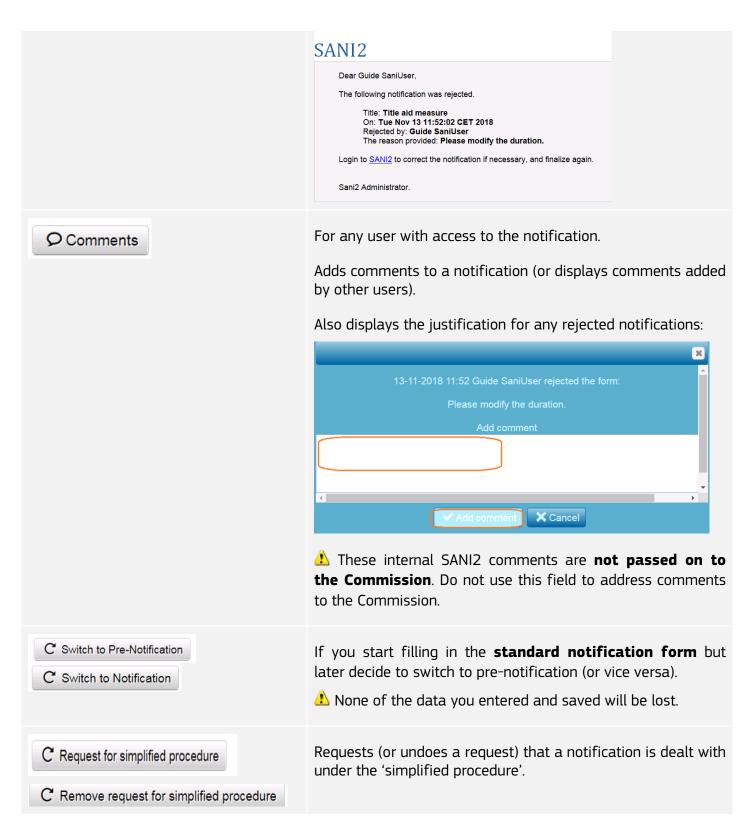


Clicking Save for the first time saves your notification as a **draft**.

A number of buttons then appear in the upper part of the screen, depending on the stage the notification is at and the rights linked to the respective user profile.

BUTTONS IN NOTIFICATION BLOCK: OVERVIEW	Description
Print	Generates a pdf version of the notification. In the My notifications tab, this button provides a list of all notifications for which you are a team member.
← Previous Search	 This button lets you: leave the notification form without saving your changes leave the notification form if you already saved your changes and releases (unlocks) it for other users.
■ Save	Saves all the changes made to the notification form.
Finalize	Changes the status of the notification from draft to finalized and submits it to the signatory.
☐ Discard	Deletes the notification. This can be performed as long as the notification is a draft or finalized status. This action cannot be undone, so you need to confirm or cancel:





Before filling in the form make sure you have set-up the notification team!

5.2. Set-up a notification team

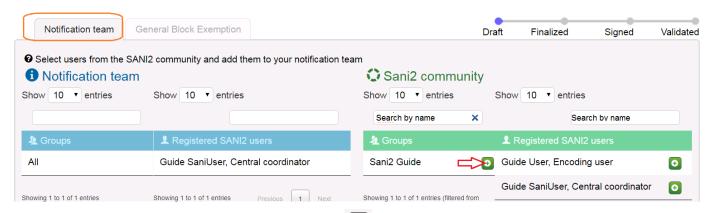
The notification team consists of persons and/or groups of persons that will be involved in handling this notification.

As a user who creates notifications, you are a member of the team by default and can add as many team members as you like.

Validators do not need to be added to the notification team. All validators in a given country have access to all signed notifications and are able to validate them. However, the notification team should contain at least one **signatory**.

To set-up a **notification team** go to the tab Notification team

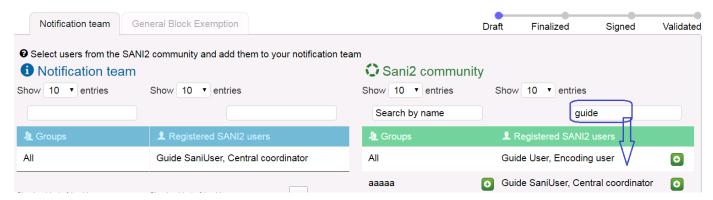
The **Notification team** tab is divided into 2 parts: the **Notification team** and the **SANI2 community**, each of which contains users and groups of users:



To add members to the notification team, press next to the name of the user. You can remove members by pressing .

Groups are added in a similar way. Groups are several users who usually work together on similar types of notifications. You can add a group, and other users that do not belong to this group, to the notification team.

Tip : To quickly add persons/groups, enter the name of the person in the relevant "**Search by name**" field:

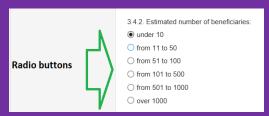


As long as the notification is in 'draft' status, you (encoding user) will be able to modify the notification team. Once **finalized**, only central coordinators have necessary rights to do so. For more details see Annex 1.

5.3. Fill in a notification form

To enter the relevant information, in the **notification/information form**, click and open each section on the left side.

- We recommend that you also follow the order of the sections when completing the form — whenever you choose a value in a list that requires extra information additional fields are displayed so you can enter the information. In addition, in the supplementary information form some fields will be compulsory depending on the fields selected.
- For questions where only <u>one option</u> from a list can be selected the form presents you with **radio buttons**:



Please note that if you want to modify your answer you can do that only by selecting another option from the list. Radio buttons do <u>not allow</u> you to simply deselect the option and leave the question unanswered.

For questions where any number of choices from a list is allowed the form presents you with **check boxes**:



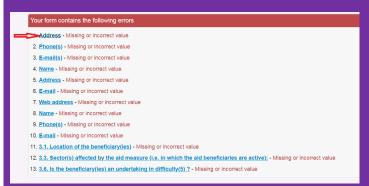
In contrast to radio buttons, checking one check box does not uncheck the other(s) and you have to uncheck the box to deselect an option.

Make sure you fill in all mandatory fields (marked with a red asterisk). The fields that are left empty or contain an error (e.g. extra space, value not allowed) will result in an error message that will prevent you from finalising the notification. Error messages are displayed below the field:

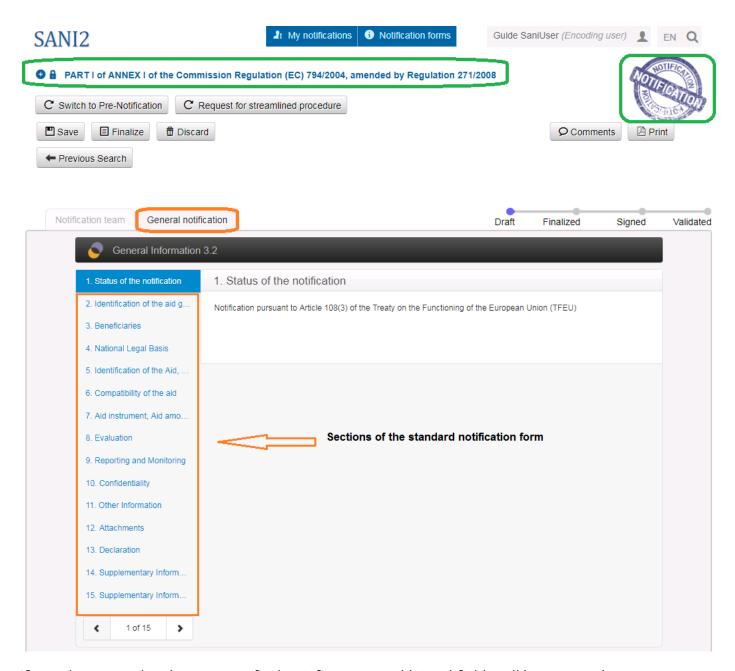
Example:

* Address	
Missing or incorrect value	

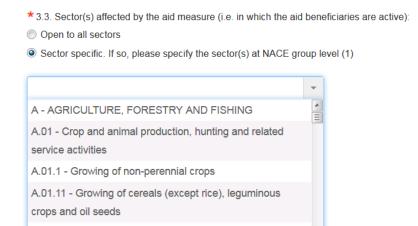
All errors are <u>also</u> displayed <u>at the bottom</u> of each screen together with info on where to find them:



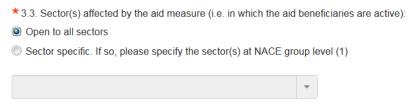
Click the link to go directly to the field and correct it.



If you choose a value that requires further information, additional fields will be activated so you can enter this information.

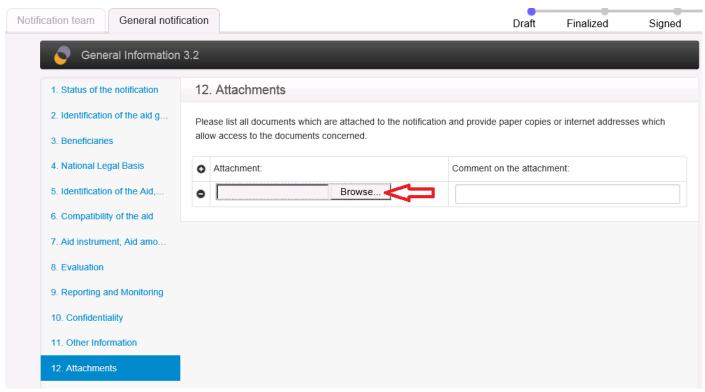


Inactive fields will still be displayed, but you will only be able to enter information in the active ones.



5.3.1. Add attachments

To add attachments to the notification in the section "Attachments" click Browse.... to choose a file to upload:



The file attached will appear like this:

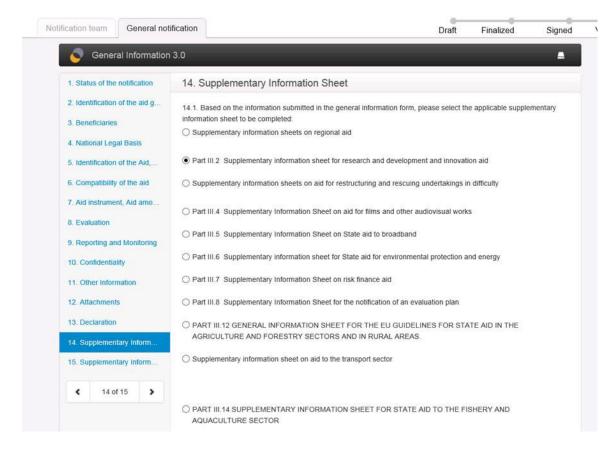


You can add one file a time. In case you need to add several attachments press Attachment to upload a new file.

To delete an attachment click the ** next to its name.

5.3.2. Add a supplementary information sheet

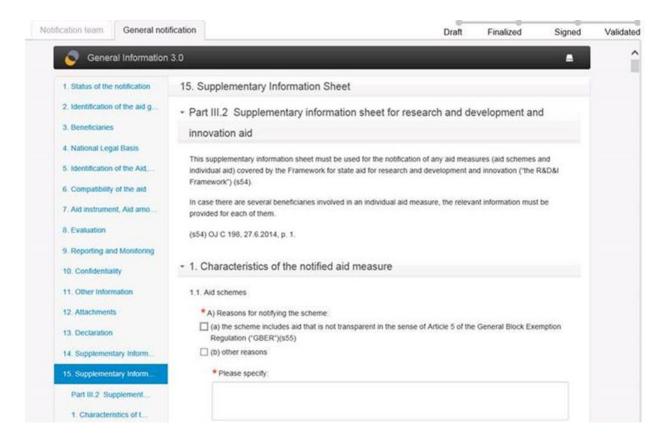
To add the required supplementary form to a (pre)notification form, select the relevant information sheet in section 14 of the general notification form:



'Loading ...' then appears in the upper-right corner:



Once it disappears, **click section 15** to access and fill in the information sheet:



5.4. Change validated and registered pre-notifications into notifications

If the pre-notification was submitted to the Commission in SANI2, it is recommended not to use an empty form to create the notification. A pre-notification team member with encoding user or signatory rights opens the pre-notification and performs the following steps:

Click this notification into a new draft notification:



The pre-notification is copied into a new draft pre-notification. Click C to Notification:



This turns the pre-notification form into a notification:



You can then modify or complete it, and it should then follow the <u>standard approval and validation</u> process in SANI2.

⚠ Information provided in section 5.1 Title of the aid measure (or name of the beneficiary of the individual aid) in this form should be the same as in pre-notification so that the Commission can easily identify the case and link it to the relevant State aid pre-notification.

5.5. Withdraw notifications

Member States can decide to withdraw notifications. To do so, those with validator or central coordinator profiles open the relevant notification in SANI2 and press "Withdraw".



The Commission is informed that the notification has been formally withdrawn. It registers the withdrawal in its application, and the notification receives the status 'withdrawn' in SANI2. If block exempted cases are involved, the information sheets published on the Commission website will be automatically removed from the website the following working day.

MANAGE A NOTIFICATION FORM - TIPS

- **Save on a regular basis** (in case you close the application by mistake or it crashes).
- Automatic logout (security reasons)

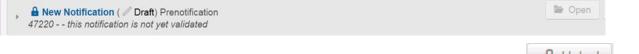
If you are still logged in to SANI2 without making any changes for around 30 minutes, you will get this warning message:



If you ignore this message, your session will expire and you will be logged out automatically, losing any unsaved changes. In addition, other users will be unable to access the form as it will be locked in SANI2.

Release (unlock) a notification/information form

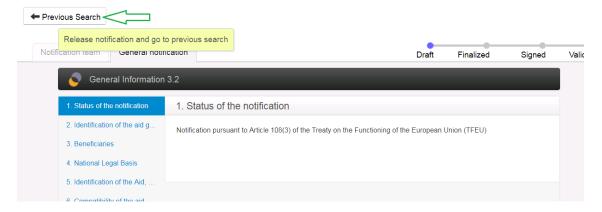
When you are working on a notification, it is automatically locked to prevent others working on it at the same time (the **Open** button next to the notification is unavailable):



You (or the central coordinator) can unlock the notification by clicking in the **My notifications** tab:



Tip: To make sure you unlocked the notification, use the **Previous search** function:



6. SEARCH FOR NOTIFICATIONS

There are several ways to search for notifications.

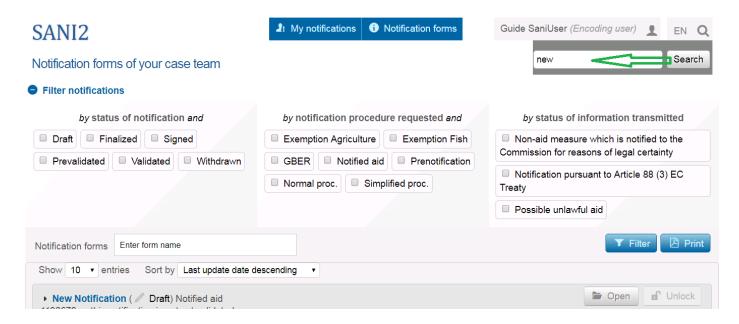
⚠You can only access notifications if you are a member of the notification team or if you have a SANI2 profile (e.g. central coordinator, validator) that lets you access all notifications for your Member State/office (local administrator).

(1) Free text search field

To search a notification using a specific word included in the title, the provisional number or the State aid number, use the Search field at the bottom of the screen:



For example, you can type a word that is part of the title to display all the notifications that contain this word:



Another example is the State aid (SA) number.

A Remember to include the dot after SA and do not leave any extra spaces e.g. between 'SA.' and the number.

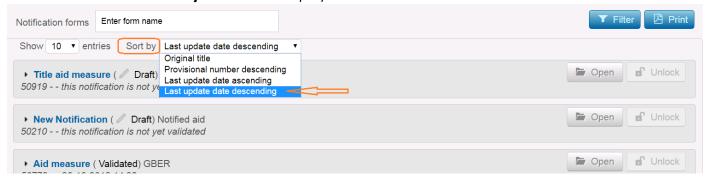
(2) Filters available in SANI2

Another way to search for notifications is to use filters. There are several types of filters available:

You can sort notifications by:

- status and/or
- procedure requested and/or
- the form used

You can also use the **Sort by** function to display results in a certain order:



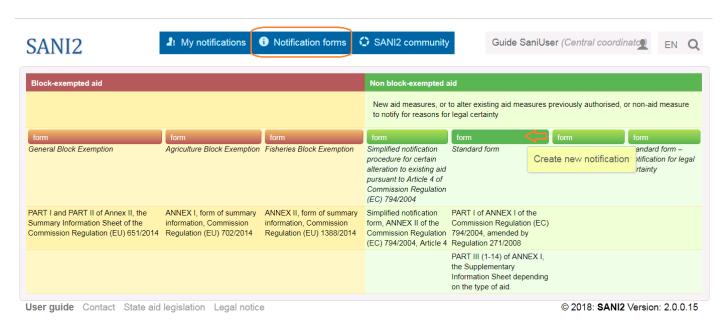
Or enter the name of the form:



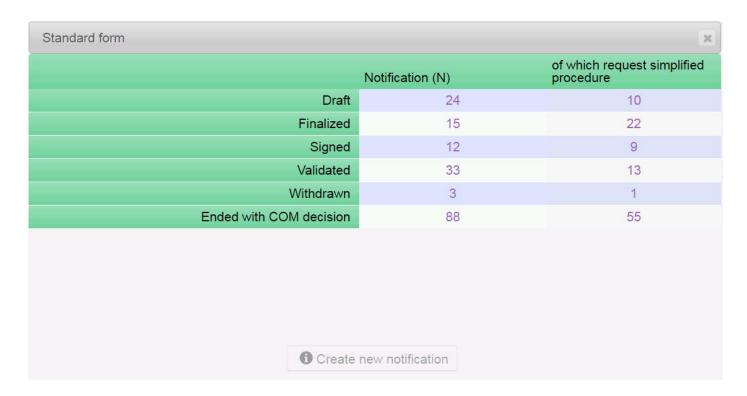
⚠ You can combine the search function with filters. This can be useful if the **Search** option on its own returns too many results.

Lifyou want to switch from one search method to another, make sure that you have cleared all the options previously selected and/or that the search field is empty.

Tip: To get a quick overview of your notifications by form type, click the form you are interested in:



An overview of all notifications created with this particular form is displayed:



You can display the results by clicking the relevant link.

ANNEX 1: USER PROFILES & ACCESS RIGHTS

Notification forms tab

	Central coordinator	Local administrator	Encoding user	Signatory	Viewer	Reviewer	Restricted user	Validator
Possible actions	any notification in own	if member of the	if member of the	if member of the	if member of the	if member of the	if member of the	any notification in own
	Member State	notification team	notification team	notification team	notification team	notification team	notification team	Member State
Create new notification	×	×	4	4	×	×	×	×
Get a quick overview of notifications	*	4	4	4	4	4	4	4

My notifications tab

	Danilla anti-	Central coordinator	Local adm	inistrator	Encoding user	Signatory	Viewer	Reviewer	Restricted user	Validator
	Possible actions	any notification in own Member State	any notification in own Member State	ahere member of the notification team	if member of the notification team	any notification in own Member State				
Filter										
	By status of notifications and by notification procedure and by status of information transmitted	4	×	4	4	4	4	4	4	4
	Notification forms	4	×	4	4	4	4	4	4	4
	Order by	4	×	4	4	4	4	4	4	4
Open a r	notification	4	×	4	4	4	4	4	4	4
Unlock a	notification	4	×	4	×	×	×	×	×	×

Notification form details

		Central coordinator	Local administrator	Encoding user	Signatory	Validator	Viewer	Reviewer	Restricted user
Possib	le actions	Any notification in	if member of the	if member of the	if member of the	Any notification in own	if member of the	if member of the	if member of the
roato now n	notification form	own Member State	notification team	notification team	notification team	Member State	notification team	notification team	notification team
				4	4				
_	notification								
(open/close t	Draft								
		4	4	4	4	4	4	4	4
Notification	Finalised	4	4	4	4	4	4	4	
status is	Signed	4	4	4	4	4	4	4	4
	Validated	4	4	✓	4	4	✓	4	4
	Withdrawn	4	4	4	4	4	4	4	4
Edit notificat	ion								
	Draft	4	4	4	4	×	×	×	4
N 1. C	Finalised	4	4	×	4	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Switch betwe	en pre-								
	and notification								
	Draft	4	4	4	4	×	×	×	4
	Finalised	1	4	×	4	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Request/rem	ove request for	•	•	•	•	•	••	•	•
simplified pro									
	Draft	4	4	4	4	×	×	×	4
NI_1:6:1:	Finalised	4	4	×	4	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Discard (dele									
notification)	-								
-	Draft	4	4	4	4	×	×	×	×
NI_AIGI	Finalised	4	4	×	4	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×

- "		Central coordinator	Local administrator	Encoding user	Signatory	Validator	Viewer	Reviewer	Restricted user
Possibl	le actions	Any notification in	if member of the	if member of the	if member of the	Any notification in own	if member of the	if member of the	if member of the
		own Member State	notification team	notification team	notification team	Member State	notification team	notification team	notification team
Finalise	•								
	Draft	4	4	4	✓	×	×	×	×
	Finalised	×	×	×	×	×	×	×	×
status is	Signed	×	×	×	×	×	×	×	×
314143 13	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Sign									
	Draft	×	×	×	×	×	×	×	×
Notification	Finalised	4	×	×	4	×	×	×	×
	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Validate	•								
	Draft	×	×	×	×	×	×	×	×
	Finalised	×	×	×	×	×	×	×	×
Notification	Signed	×	×	×	×	4	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Withdraw	•								
	Draft	×	×	×	×	×	×	×	×
	Finalised	×	×	×	×	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	4	×	×	×	4	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Reject	•								
•	Draft	×	×	×	×	×	×	×	×
	Finalised	×	×	×	4	×	×	×	×
Notification	Signed	×	×	×	×	4	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Copy validate	d notification			**			**		* *
	aft notification								
	Draft	×	×	×	×	×	×	×	×
	Finalised	×	×	×	×	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	4	4	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×

Add commen	its								
	Draft	4	4	4	4	4	4	4	4
Notification	Finalised	4	4	×	4	4	4	4	×
Notification	Signed	4	4	×	×	4	4	4	×
tatus is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
Read comme	nts								
Notification	Draft	4	4	4	4	4	4	4	4
	Finalised	4	4	4	~	4	4	4	✓
status is	Signed	4	4	4	4	4	4	4	4
status is	Validated	4	4	4	4	4	4	4	4
	Withdrawn	4	4	4	4	4	4	4	4
Add/remove	notification								
team membe	ers and groups								
	Draft	4	✓	4	4	×	×	×	×
Notification	Finalised	4	4	×	4	×	×	×	×
status is	Signed	×	×	×	×	×	×	×	×
314143 13	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
View notifica	tion team tab								
	Draft	4	✓	4	4	4	4	4	4
Notification	Finalised	4	✓	4	4	4	4	4	4
status is	Signed	4	✓	4	4	4	4	4	4
314143 13	Validated	4	✓	4	4	4	4	4	✓
	Withdrawn	4	4	4	4	4	4	4	4
View general tab	notification								
NI_+:£:+:	Draft	4	4	4	~	4	4	4	4
	Finalised	4	4	4	4	4	4	4	4
Notification	Signed	4	4	4	4	4	4	4	4
status is	Validated	4	4	4	4	4	4	4	4
	Withdrawn	4	4	4	4	4	4	4	4

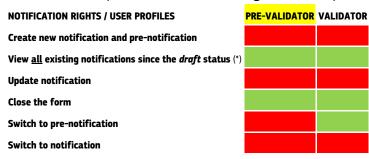
Do saile l		Central coordinator	Local administrator	Encoding user	Signatory	Validator	Viewer	Reviewer	Restricted user
Possibi	le actions	Any notification in	if member of the	if member of the	if member of the	Any notification in own	if member of the	if member of the	if member of the
		own Member State	notification team	notification team	notification team	Member State	notification team	notification team	notification team
Add supleme	ntary forms								
	Draft	4	4	4	4	×	×	×	4
NI = ±:£: ==±: =	Finalised	4	4	×	4	×	×	×	×
Notification	Signed	×	×	×	×	×	×	×	×
status is	Validated	×	×	×	×	×	×	×	×
	Withdrawn	×	×	×	×	×	×	×	×
View any sup	lementary								
forms of the i	notification								
	Draft	4	4	4	4	4	4	4	4
Niatifiaatiaa	Finalised	4	4	4	4	4	4	4	4
Notification	Signed	4	4	4	4	4	4	4	4
status is	Validated	4	4	4	4	4	4	4	4
	Withdrawn	4	4	4	4	4	4	4	4

Pre-validation

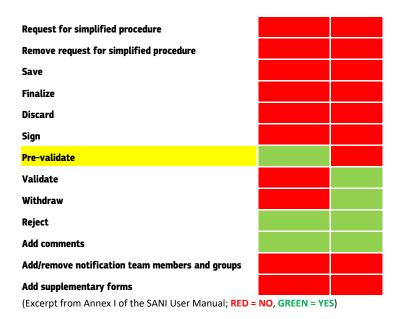
The pre-validation is an (optional) supplementary step to the validation workflow. This step is available to Member States that wish to include it in the validation workflow to allow more checks.

The pre-validation process is designed to only apply to standard notifications, notifications under the simplified procedure, and pre-notifications related to the Directorate general for Competition's field of activity. It does not apply to the block exemption Regulation's summary information sheets.

Quick overview of the pre-validator access rights as compared to the validator rights:



² See: General Block Exemption Regulation ("GBER"), Agricultural Block Exemption Regulation ("ABER"); Fishery and aquaculture Block Exemption Regulation ("FIBER")



Member States that wish to include the pre-validation step in the validation workflow should send an official request to SANI2 EC Administrator at comp-sani@ec.europa.eu. As soon as the pre-validation step is activated in SANI2, Central coordinators/Local administrators can create pre-validator profiles in their country.

As soon as the step is activated in SANI2 for a Member State, the pre-validation step is automatically added to the workflow after the notification was <u>finalized</u> and the primary objective of the aid is other than Agriculture or Fisheries.



ANNEX 2: USER' MANAGEMENT-TUTORIAL

		Central coordinator	Local administrator			
	Possible actions	Only in own Member State	Only in own Member State	Only in own office and below		
Offices				below		
	Free text search	4	4	4		
	Create new office	4	×	4		
	View office	4	4	4		
	Update office name	4	×	4		
	Update office country	×	×	×		
	Delete office	4	×	4		
sers	·					
	Free text search	4	4	4		
	Filter by profile	4	4	4		
	Create new user & update existing		^^			
	users	4	×	4		
	EC administrators	×	×	×		
	Administrators	×	×	×		
	Central coordinators	×	×	×		
	EC viewer	×	×	×		
	Local administrators	~	×	~~~~		
	Encoding users	1	×	1		
	Signatories	4	×	1		
	Viewers	1	×	1		
	Reviewers	J	×	1		
	Restricted users	J	×	1		
	Validators	×	×	×		
	View user's details	4	4	~~~~		
	Update user's details	1	×	1		
	Transfer notifications from one user to another	4	×	4		
	Change own office & profile	×	×	×		
	Disable user	^	^	~		
	EC administrators	×	×	×		
	Administrators	×	×	×		
	Central coordinators	×	×	×		
	Local administrators	✓	×	~ ~ ~		
	Encoding users	4	×	4		
	Signatories	4	×	4		
	Viewers	4	×	4		
	Reviewers	, A	×			
	Restricted users	4	×			
	Validators	×	×	×		
	Disable own account	×	×	×		
roups		^	^			
roups	Free text search (users)	4	4	N/A		
	Free text search (groups)	4	4	N/A N/A		
	Create new group	*	*	N/A N/A		
		4	4	N/A N/A		
	Update group Delete group	4	4	N/A N/A		
		⋖/	4	N/A		
	Drag & drop/remove users into/from group	4	✓	N/A		

0.1 version : SANI2 User Guide

Date: 15-09-2023

Get access to SANI2

Access to SANI2 is managed at the national level. To get access, users need to contact their Central coordinator/Local administrator, who will create an account for them in SANI2. They then need to fill in the following details:

Full name

E-mail address

Telephone number

Name and address of the organisation they represent

Office³

Required profile

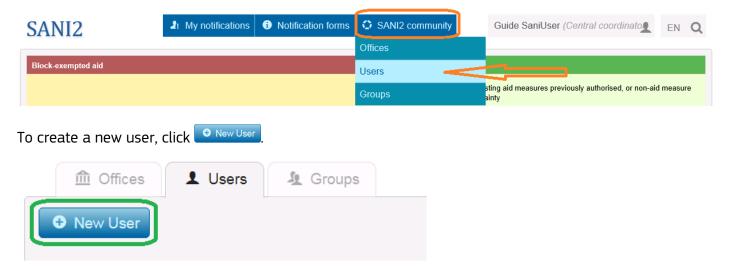
The full list of profiles and access rights available in SANI2 can be found in Annex 1.

Request central coordinator or validator profiles

To be granted access to SANI2 with the central coordinator or validator profile, users need to ask the EC administrator to create it for them in SANI2. The request should be sent by e-mail to comp-sani@ec.europa.eu. Local administrator profile is granted by central coordinator at the national level.

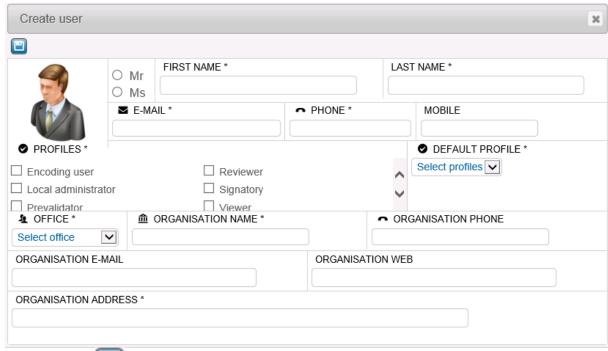
Create new users

The central coordinator or local administrator can use the SANI2 community tab to create new user profiles:



Fill in the relevant information (the fields marked with an asterisk are compulsory):

³ If a Member State chooses not to create offices, it will be considered as one national office.

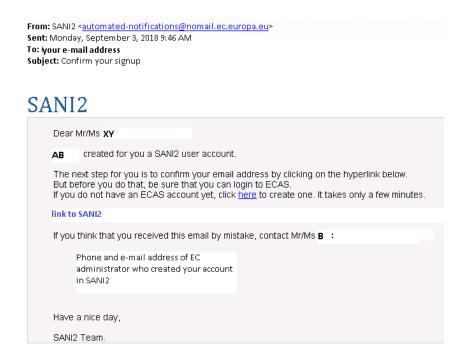


To save, click to save.

Once you have entered and saved the information, the user will receive an automatic e-mail message asking to confirm registration in SANI2.

Confirm registration in SANI2

As soon as the central coordinator/local administrator has entered and saved the user information in SANI2, the user will receive the following e-mail:



The link in the e-mail takes the user to the EU Login page (ECAS account). Users that already have an EU Login should use their user name and password to log in — they will then be redirected automatically to SANI2.

The e-mail address used for EU Login must be the same as the one used to create the account in SANI2.

Users who dο not have an EU Login can register clicking the link: for one bν If you do not have an ECAS account yet, click here to create one. It takes only a few minutes.

Once they have created a login and user name, they can then log into SANI2.

Resend the registration e-mail to users

If the user failed to confirm registration, the central coordinator/local administrator can resend a new invitation.

First, log into SANI2. In the SANI2 community tab, search for the user and click ${f \subseteq}$:



The user will need to use the most recent link to confirm registration in SANI2 as all previous links will no longer be active.

Remove/disable users

You cannot delete existing users in SANI2. You can only disable their accounts, which means that they can no longer log in.

First log into SANI2. In the SANI2 community tab, search for the user and then click



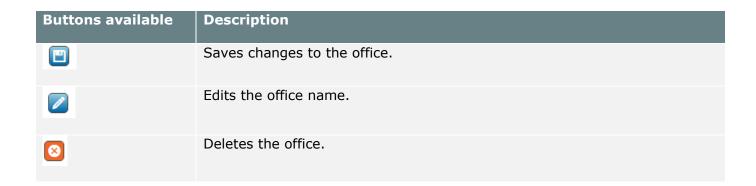
The icon will change to (2), and the user will no longer have access to SANI2. You can undo this action by clicking (2) again.

You can also disable users that did not confirm registration in SANI2.

Create offices

In SANI2, you can create offices that manage users. An office in SANI2 incorporates a group of users distinguished by geographical location or another principle. The purpose of the offices is to delegate user management to local administrators, in particular for large and decentralised Member States. The use of offices is not mandatory and depends on the institutional setting and how the functions are organised within the Member States. If a Member State chooses not to use offices, the entire country will be considered as one national office. Each new office must have a local administrator, who is responsible for user management in his/her own office.

Only central coordinators can create new offices.



To create an office, click the SANI2 community tab, then click Offices:



A small window opens where you can enter the name of the new office:



To save click 🖳 .

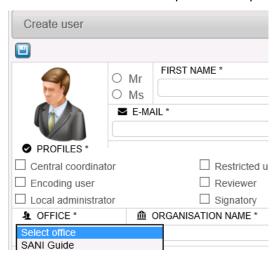
The new office is added to the list of offices:



and it is available in the 4 'Office field when creating/updating user profiles.

As soon as the office has been created, the Central coordinator can assign to it a Local administrator(s) that will be responsible for managing other users at the level of the office.

This is done via "Create/Update user profile" functionality in the Office field:



Display local administrators managing an office

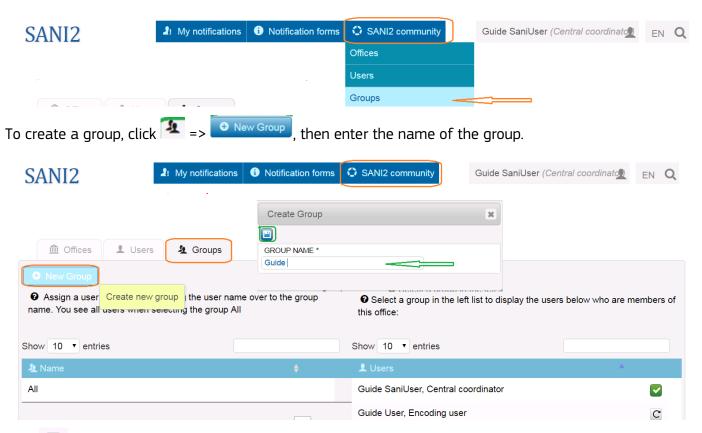
To view the users who are local administrators responsible for user management in an office, click the name of the office in the Offices tab. The users assigned as local administrators to this office are displayed in the Users column:



Create a group

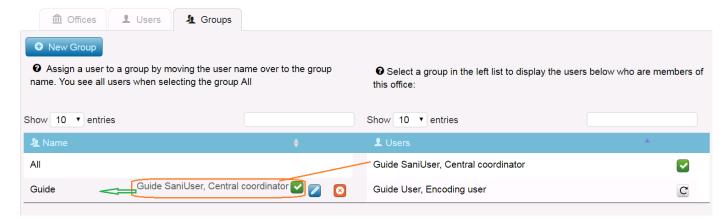
A group is a set of users. Encoding users/signatories can use it to add the same users to different notification teams in one go. Central coordinators can create groups in their Member States, while local administrators can create groups for their own office.





Click 📋

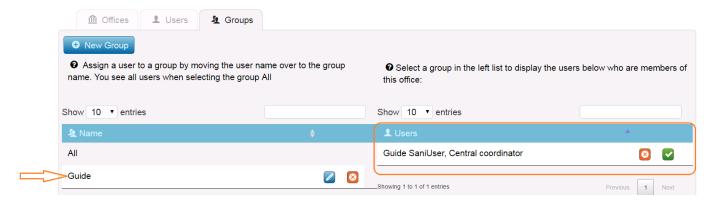
You can now assign users to groups by using the drag and drop function.



Unlike offices, one user can be assigned to several groups.

View, remove or/and add group users

To view existing groups, in the SANI2 community tab click Groups. When you click a group in the Name column, the users that are part of this group are displayed in the Users column to the right:



If no user is assigned to the group, the following message is displayed:

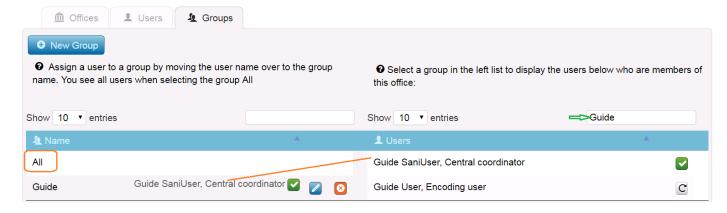


To remove users from the group, click igotimes next to the name:



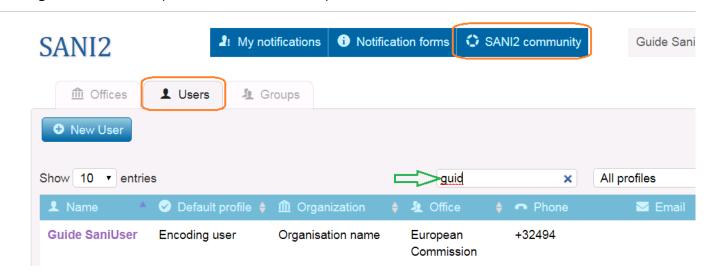
To add users to the group, first click All in the column. The names of the SANI2 users in your Member State are displayed in the column.

Tip: To find users quicker, use the Search by name option and the drag and drop function to add the user to the group:



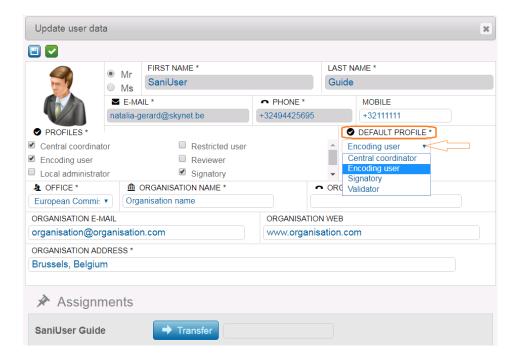
Display all profiles for a user

Central coordinators/local administrators can check the profiles of a user. To do so, search for the user by clicking SANI2 community > Users > Search by name:



Click the name of the user to display his /her SANI2 account.

In the DEFAULT PROFILE* field, click the small arrow next to the default profile to display all the profiles currently assigned to the user.



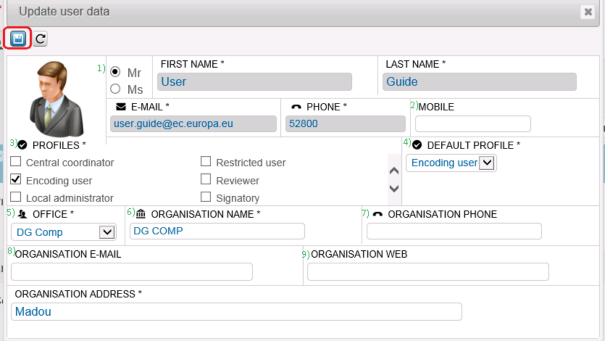
Modify/update user data

Central coordinators/Local administrators can modify and update certain user information.

To modify user data, in the SANI2 community tab, search for the user and click the name. The Update user data dialog box is displayed, where you can modify the following information:

- 1) Gender
- 2) Mobile phone
- 3) Profiles
- 4) Default profile (if more than one profile)
- 5) Office (if several offices in the Member State)
- 6) Organisation name (also modifies the organisation address)

 \triangle You can also update fields 7) — 9) (not mandatory).



Central coordinator/Local administrator cannot update the following fields: first name, last name and e-mail address. To do that, the user has to modify these data in his/her personal **EU Login account**. For details please click here.

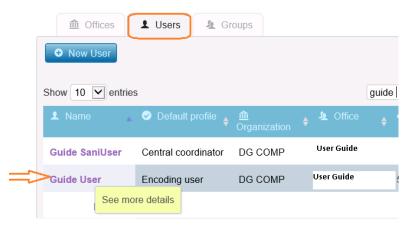
Transfer access rights (assignments) from one user to another

When colleagues working in state aid units get replaced, their access rights in SANI2 can be transferred to their replacements. This can be done by Central coordinators or Local administrators.

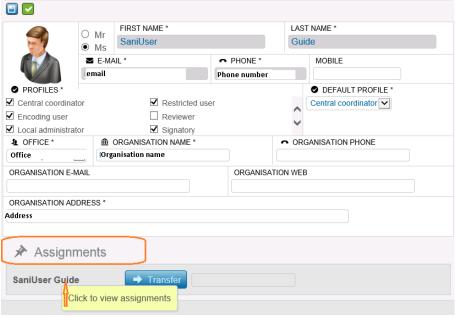
To transfer the access rights to other users open SANI2 community tab and click Users:



In the **Users** tab search for the user whose assignments need to be transferred to another user and click his/her name:



In Assignments, when you click the user name, all assignments for that person are displayed in the list:



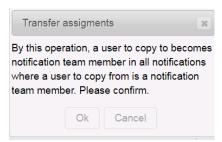
In the empty field next to Transfer, start typing the user name to whom the assignments should be transferred to.



Once the user is found, click Transfer:



In the Transfer assignments dialog box, click Ok to confirm the transfer:



Once the assignments have been transferred, the following confirmation message is displayed:

