

Participant Portal

User's Guide

06/05/2010 (version 2.0.2)

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Introduction

The Participant Portal is an Internet portal for the participants to the 7th Framework Programme (FP7) and the Competitiveness and Innovation Programme (CIP). Its ultimate aim is to become over time the participants' gateway and single entry point to interact with the Research programmes of the European Commission.

It provides a consistent and coherent set of online services in order to facilitate the participants' interactions with the Research Directorates-General of the European Commission and improve operations and data quality. It will eventually host a full range of web applications **that facilitate the monitoring and the management of proposals and projects** throughout their lifecycle.

This document describes how to access and use the Participant Portal.

Participant Portal's main actors

The different types of users defined for the Participant Portal are organised by roles and described as follow:

- Public : Any person that goes to the PP URL
- Registered User:
A user that has registered himself and has received credentials for logging on.
A registered user can be a natural person or a member of a legal entity, called an organisation member.

A member of a legal entity can have one of the following roles :

- Researcher:
Person who directly or indirectly interacts with FP information
- Organisation Member : User who acts on behalf of an entity LEAR:
Legal Entity Authorised Representative,
possibly delegating updates of company information and other capabilities to other representatives of the organisation, called "Account Administrators" (AA) under the Participant Portal:
- Account Administrator (AA) Project/Proposal Participant :
Member of an organisation who participates in a project or a proposal
 - Coordinator Contact:
Coordinator of a project/proposal who is the first point of contact for the EC
 - Participant Contact:
Primary point of Contact for an organisation within a Consortium
 - Administrative and Legal Representative (ALR)
Responsible for contractual and administrative aspects of a project.
 - Financial Representative (FR)
Responsible for financial aspects of a project
 - Proposed Signatory (PS):
Represents the oversight and authority of the LEAR

- Scientific & Technical Representative (STR):
leads the research team and is responsible for technical submissions.
-

Depending on their role, users will receive different rights regarding the access to the hosted services.

Participant Portal's main services

The Participant Portal has been created to cover the whole lifecycle of the projects: proposals submission, evaluation, grant agreement negotiations and submission of periodic and final reports during project implementation, administrative support to the experts...

Currently, the Participant Portal is the gateway to access

- the **Unique Registration Facility** (URF), allowing organisations registration and data management.
- the **FP7 Negotiation Facility** (NEF), facilitating the negotiation process.
- the **reporting tools** (NEF, SESAM, FORCE) to submit the technical and financial reports
- the new **FP7 documentation** search functionality
- the new **FP7 Calls** database

Systems requirements for using the Participant Portal

The participant portal operates on-line, without saving anything on the computer.

The systems requirements are:

- a computer with a 600 MHz processor and minimal 512Kb of memory;
- an Internet connection, preferably 512 Kb/s or higher;
- a screen with a minimal resolution of 1024 x 768;
- either Internet Explorer 6.0 (or above), Firefox (3.x), other web browsers may work but have not yet been tested. Note that for security reasons your browser may request to identify the Participant Portal website and the ECAS system as "trusted". Once added as trusted, we recommend you to restart the browser session;
- either Windows (2000, XP and Vista), other operating systems may work but have not yet been tested.

Where can the participants get support ?

A Frequently Ask Questions section is available on the Participant Portal

For issues related to the registration and login using the European Commission's Authentication Service (ECAS), participants can visit this website <https://webgate.ec.europa.eu/ecas/help.jsp> or send an e-mail to DIGIT-USER-ACCESS@ec.europa.eu

The participants looking for technical help can ask the eFP7 Help Desk by sending an e-mail to DIGIT-EFP7-SUPPORT@ec.europa.eu

Their requests can also be supported by the contact form available on <http://ec.europa.eu/research/participants/portal/appmanager/participants/portal? nfpb=true& pageLabel=contactus>

For questions related to the Framework and similar RDG Programmes, the participants are invited to contact the FP7 Help Desk by sending an e-mail to EC-FP7-IT-HELPDESK@ec.europa.eu.

1 HOW TO ACCESS THE PARTICIPANT PORTAL?

Except for few services, such as the FP7 documentation, FP7 Calls or the PIC search function, access to the Portal and its underlying services requires an ECAS account.

1.1 European Commission's Authentication Service

ECAS is the European Commission's Authentication Service.

It provides a single sign-on across a large number of Commission information systems: once you have authenticated yourself to ECAS, you do not have to re-enter your credentials (username and password) within the same browser session.

Protected information systems request ECAS to supply the current user's identity – if you have already been authenticated, it does not ask you to do so again (provided that you have not disabled the use of cookies in your browser).

ECAS authentication is available only with applications that have been specifically adapted to use it. These applications request ECAS to authenticate you on their behalf and do not authenticate you directly. This means that when you use your ECAS password, it will always be on a distinctive page belonging to ECAS, even though you may have typed in the application's address, not that of ECAS. Never enter your ECAS password on any other page.

Do not divulge your ECAS password to anyone else - there is no reason for anyone else, including system administrators and support staff, to ask for it or know it.

1.2 ECAS Registration

If you are a new user please register on the ECAS. The creation of the ECAS account is free and easy.

1. To create your ECAS account, go to the Participant Portal home page:
<http://ec.europa.eu/research/participants/portal>
2. Then click on the register link in the login box (**Figure 1 : Login Box**)

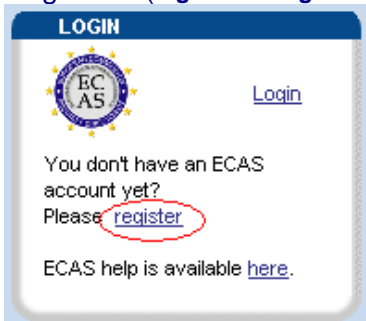


Figure 1 : Login Box

3. The ECAS User Registration Form opens: please fill it in using your individual professional e-mail address in the relevant fields (**Figure 2 : ECAS User Registration Form**). Usually, this e-mail address has

been indicated in the LEAR appointment forms and in the Grant Preparation Form. It allows the system to identify you and credit you with the right access and services.

4. Select the privacy statement acknowledgement checkbox, copy the security code into appropriate text area and submit the form for processing.

EN

European Commission
Authentication Service

Privacy Statement : Contact : ECAS Help : Registration Help

European Commission Authentication Service (ECAS): User Registration Form

Please fill in and submit the information requested below to register as a user of European Commission Information Systems. The username you choose (or the one assigned to you) may be used to log into any system using the ECAS authentication service that you are authorised to access. When you login, you will see an ECAS page with a banner similar to the one on this page.

If you are asked to specify your domain when logging in, choose "External"

Fields marked * are mandatory

Choose a username (optional):

First name: Bernard *

Last name: MAHIEU *

E-mail: a1028325@owlpic.com *

Re-enter your e-mail address: a1028325@owlpic.com| *

Privacy statement:

Privacy statement for users registered with the European Commission's Identity Management Service

1. What is the Identity Management Service?

The European Commission's Identity Management Service (IMS) provides a common way for users to register or be registered for access to a number of different Commission information systems or services (referred to hereafter as *sites*).
You are affected by this privacy statement if you use the European Commission

By checking this box, you acknowledge that you have read and understood the [privacy statement](#)

Security check:

Try a different image

Please type in the characters in the above image
(upper and lower case may be used interchangeably)

Submit

Privacy Statement : Contact : ECAS Help : Registration Help

DIGIT

This website is managed by the European Commission's Informatics DG

Figure 2 : ECAS User Registration Form

5. The confirmation screen indicates that within a few minutes you will receive an email allowing you to complete the registration process. **Note that the process must be completed within 1h30 after your original request!**
6. Go to your mail box. You will see that the European Commission Authentication Service has sent you a message to initialise your password. Open it and click on the link indicated in the e-mail: you will be redirected to the Password initialisation page of ECAS (**Figure 3: Password initialisation page of ECAS**)

>> [EUROPA](#) > [Authentication Service](#) > [Change password](#)

Change ECAS password

Username	nspedebr
Domain	External
ECAS password	<input type="password"/>
The new ECAS password	<input type="password"/>
Confirm new ECAS password	<input type="password"/>
<input type="button" value="Submit"/>	

Passwords may not include your username and must contain at least 10 characters chosen from at least three of the following four character groups (no other characters are permitted apart from the white space):

- Upper Case: A to Z
- Lower Case: a to z
- Numeric: 0 to 9
- Special Characters: !"#\$%&'()*+,-./:;<=>?@[\\]^_`{|}~

Examples: [[Generate other sample passwords](#)]

Note: Please take great care in entering your new password. Once you have created it, you will only be able to change or reset it yourself after 1 day (s).

Figure 3: Password initialisation page of ECAS

7. On the password initialisation page create and initialise your password
8. Click on the submit button. The ECAS password initialisation success page will appear: your ECAS password was successfully initialised.
9. You can return to the home page of the Participant Portal. It is now possible to log on.

Please note that your ECAS credentials are strictly confidential and should not be shared! They will allow you to access different services and data that might be critical for your organisation.

Please avoid to use your email address as Username, this could cause issue if your email address is modified.

1.3 Log on to the Participant Portal

1. Go to the Participant Portal home page: <http://ec.europa.eu/research/participants/portal>
2. In the login box click on the login link (**Figure 4 : Login Box**)

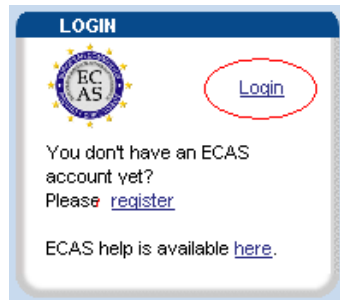


Figure 4 : Login Box

3. The login page (ECAS authentication) appears (Figure 5 : ECAS Login page):

- Whenever you login, please make sure that the selected domain is “external”. Should another domain be selected, please change it by clicking on the *use a different domain* link
- Enter your Username (if you have created one) and your password, and click on the submit button
- You are then redirected to the secured environment of the Participant Portal

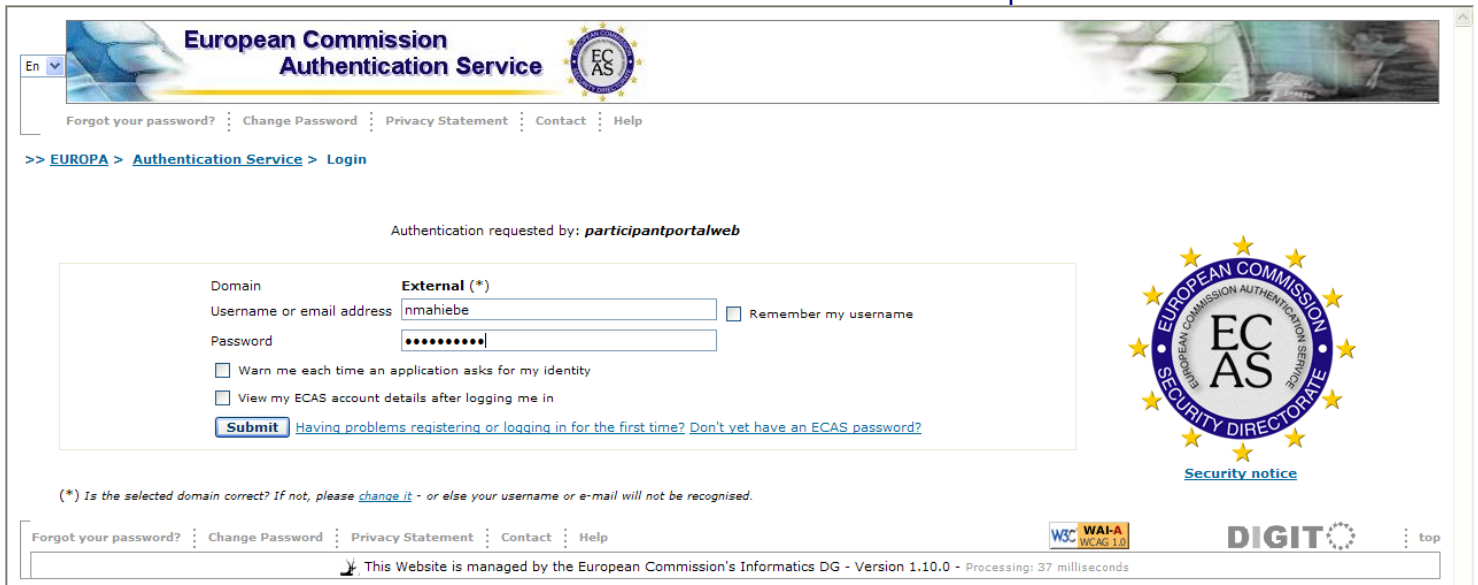


Figure 5 : ECAS Login page

4. Now you have now logged on to the Participant Portal, you are identified as a user (Figure 6 : Login box)

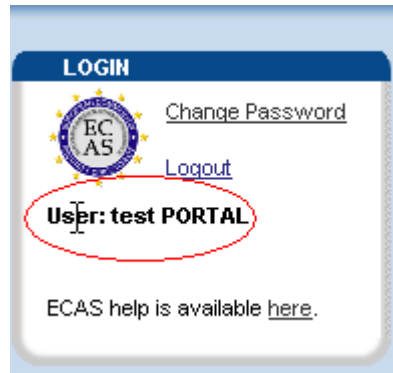


Figure 6 : Login box

Depending on your role, you will be able to access different services

1.4 Log out from the Participant Portal

1. In the login box of the Participant Portal click on the logout link (Figure 7 : Login box)
2. This will end your session in the Participant Portal and **close all the applications accessed via the Participant Portal and supported by the ECAS authentication (URF ,NEF, SESAM, FORCE).**



Figure 7 : Login box

2 HOW TO USE THE PARTICIPANT PORTAL?

2.1 Roles

Every user will benefit from different rights, crediting them with access to specific information and services. Once a user has been authenticated the list of actions that can be performed in a FP7/CIP project context depending on the user's role is displayed (see **Figure 8 : Home Page after login**)

The screenshot shows the 'European Commission RESEARCH - Participants' portal. At the top, there is a navigation bar with links for 'Home', 'My Organisations', 'My Projects', 'My Roles', 'FP7 Documentation', 'FP7 Calls', and 'Support'. The main content area is divided into several sections:

- LOGIN:** Includes a 'Change Password' and 'Logout' link, and a user profile for 'Bernard MAHIEU'. Below the profile, there are links for 'ECAS help is available here' and 'Portal registration demo is available here'.
- FAQ:** A section for frequently asked questions, including links to 'The answers to the most frequent questions', 'online user manual', and 'demonstration of the Participant Portal'. It also lists 'principles of the portal' with sub-links for 'Introduction', 'For all users', 'For LEARs', 'For Coordinators', and 'Getting support'. A 'read more' link is also present.
- WHAT'S NEW:** A section for recent updates, including 'Participant Portal V2.0 patch 1 (03/2010)' and 'Introduction of user management for nomination of several roles'.
- PROCESSES:** A central section with four main categories, each containing action buttons:
 - Manage Organisations:** Search an organisation, Register an organisation, Manage organisation data.
 - Identify Opportunities:** Read FP7 related documentation, Search for a call.
 - Negotiations:** Browse and/or manage negotiations.
 - Grant Execution:** Browse and/or access grants, Manage amendments, Periodic reporting, Manage scientific deliverables.
- Others:** A section on the right side containing 'Manage roles and delegations' and 'Support'.

Figure 8 : Home Page after login

"Table 1 Processes" describes the processes indicated in this graphical representation.

The columns are:

- PROJECT LIFE CYCLE STAGE
- SERVICES related to the stage
- ROLES: The roles for which the services are available.

PROJECT LIFE CYCLE STAGE	SERVICES	ROLES
Organisation management	Search for an organisation	Any
	Register an organisation	Any
	Manage organisation data	LEAR, Account Administrator. The Account Administrator is appointed by the LEAR in order to provide support with the management of the organisation data.
Identify opportunities	Read FP7 related documentation	Any
Negotiations	Browse and/or manage Negotiations	Proposal Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Contact, Financial Contact, LEAR, account administrator
Grant execution	Browse and/or manage Grants	Proposal Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Contact, Financial Contact, LEAR, account administrator
	Manage Amendments	Proposal Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Contact, Financial Contact, LEAR, account administrator
	Manage financial periodic and final reporting	Proposal Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Contact, Financial Contact, LEAR, account administrator
	Manage deliverables and final reporting	Proposal Signatory, Participant Contact, Coordinator Contact, Scientific Contact, LEAR, account administrator
Horizontal processes		
	Manage roles and delegations	Any role
	Support	Any

Table 1 Processes

2.2 Identify the individual roles

Every user will benefit from different rights, crediting them with access to specific information and services. These rights are related to the role(s) the user plays within an organisation (as a LEAR) or a project (as a coordinator or as a participant). You can identify your role by following these instructions

1. Please log on to the Participant Portal
2. You will see the My roles tab appearing
3. Click on it. If you have an organisation role (LEAR or Account Administrator), then the name of your organisation(s) will be displayed and the **Participant Identification Code (PIC)** indicated under the Organisation Roles List (**Figure 9 : My Roles**). If you are a coordinator or a participant involved in a negotiation process, your project(s) will be displayed under the Project Roles section.

The screenshot displays the 'My Roles' section of the Participant Portal. At the top, there is a navigation bar with tabs: Home, My Organisations, My Projects, My Roles, FP7 Documentation, FP7 Calls, and Support. Below this, the 'ORGANISATION ROLES LIST' section is shown, containing a table with the following data:

PIC	Organisation Name	Role	Delegation
996719815	Test DIGIT B Mahieu test 2010 aaa	LEAR	

Below the organisation roles list is the 'PROJECT ROLES LIST' section, containing a table with the following data:


Acronym	ProjectID	Program	Role	Delegation
HPC-EUROPA++	211437	FP7	Scientific Officer	
INSTRUCT	211252	FP7	Scientific Officer	
4F CROPS	212811	FP7	Scientific Officer	

Figure 9 : My Roles

The following icon  is used to refresh the memory cache, it allows to reload the most recent data.

See below Error! Reference source not found. at § 2.8.2

2.3 Identify opportunities: find FP7 documentation

1. Go to the Participant Portal home page: <http://ec.europa.eu/research/participants/portal>
2. Select the FP7 documentation tab
3. The Browse FP7 documentation tree appears
This page gives access to all FP7 documents.
Documents are grouped by category. For each category, you will see a brief description when you move your mouse over the  icon.

To access a document:

Click on a folder and/or a list of documents.

Clicking on [EN] gives you direct access to the specific document in English
Clicking on [more] directs you to more details about the document and any available translation.

4. It is also possible to search for FP7 documentation available on the Participant Portal.
Select the "**Search FP7 documents**" tab (Figure 10 : Search FP documents and Figure 11 : Advanced Search FP documents)
Fill in the field for at least one search criterion and click on "Search".

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support

FP7 Documents Search FP7 Documents

SEARCH FP7 DOCUMENTS

Here you can search for FP7 documentation available on the Participant Portal (all the documents available on the "FP7 Documents" tab).

Search Advanced Search

Search term:

Figure 10 : Search FP documents

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support

FP7 Documents Search FP7 Documents

SEARCH FP7 DOCUMENTS

Here you can search for FP7 documentation available on the Participant Portal (all the documents available on the "FP7 Documents" tab).

Search **Advanced Search**

Fill in the field for at least one search criterion and click on "Search".
If you combine several search criteria, only documents meeting all criteria will be shown.

Note that dates should be entered in the following format: YYYY-MM-DD.

Search term:

Search in: Title Description

Publication Date: From To [Date Format: YYYY-MM-DD]

Category:

Sub-Category:

Specific Programme:

Figure 11 : Advanced Search FP documents

2.4 Search for an organisation and retrieve its Participant Identification Code

It is possible to check if an organisation has already registered by retrieving its PIC. However the search module provided on the Participant Portal will only retrieve the name and PIC of validated organisations. So if you have just registered your organisation, your PIC will not be displayed until the validation of your registration request has completed.

1. Under the My Organisation tab, select the Search tab
2. The search organisations module appears (Figure 12 : Search Organisation)
3. There you can check whether your organisation has already registered and if so, retrieve the PIC that has already been assigned. It applies only to VALIDATED organisations. It is obligatory to complete either the "legal name" field or the "VAT number" field with at least a three character string. The other search fields can be left blank (Figure 13 : Search Results)

Note: if searching for a legal name in the national language does not yield results you might try with a translation in English

Organisations Register Search

SEARCH ORGANISATIONS

Please fill in the search criteria to find the organisation

It is obligatory to complete **either** the "legal name" field or the "VAT number" field with at least a three character string. The other search fields can be left blank.
However, too unspecific queries may result in a long results list. The results list are truncated after the 200th record.
If searching for a legal name in the national language does not yield results you might try with a translation in English.

Name of the organisation : * VAT number :
Country : City :

* Mandatory fields

Search Clear

NOTE
Search PIC functionality applies only to VALIDATED Organisations

Figure 12 : Search Organisation

Note: When your search returns too many results then the first 200 are shown. You can refine your search criteria

In the result list, all columns can be sorted. After performing a first sort, the second sort works in conjunction with the first one.

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support

Organisations Register Search

SEARCH ORGANISATIONS

Please fill in the search criteria to find the organisation

It is obligatory to complete **either** the "legal name" field or the "VAT number" field with at least a three character string. The other search fields can be left blank.
 However, too unspecific queries may result in a long results list. The results list are truncated after the 200th record.
 If searching for a legal name in the national language does not yield results you might try with a translation in English.

Name of the organisation : * VAT number :

Country : City :

* Mandatory fields

NOTE

Search PIC functionality applies only to VALIDATED Organisations

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Name of the organization ↕	PIC ↕	Country ↕	City ↕	VAT number ↕
THE WALT DISNEY STUDIOS SCHWEIZ GMBH	992654060	CH	ZURICH	CH279815

Figure 13 : Search Results

This feature is also available when you are not logged in but there is an additional field for the security code.

2.5 Register an organisation

In the past, participants had to provide the Commission with their organisation legal and financial information every time they submitted a proposal or negotiated a contract. This is simplified in FP7. Participants can register their organisations data ONCE. This will generate a **Participant Identification Code (PIC)**, which defines their organisation's details and status, to be used in the process of electronic proposal submission and negotiation.

Registering an organisation will allow you to receive its Participant Identification Code (PIC). More information about PICs can be found here.
 Using a PIC for your organisation has several advantages which are fully explained in this FAQ entry.

Use the search facility to check if an organisation has already a PIC.

If you do not find a pic for your organisation you have to first register as ECAS user.

With your ECAS password you can register your organisation.

Log on to the Participant Portal ,under "My Organisations" tab click on the "Register" sub-tab (see **Figure 14 : Register steps**).

Follow the steps described below :

STEP 1. Search

Use the [search](#) facility to check whether your organisation is already registered (see chapter 2.4)..

STEP 2. Self-Register your organisation in PP

[Register](#) your organisation using your ECAS account details. After providing all the necessary details, press the [CONFIRM] button to submit your registration information to [the Central Validation Team \(CVT\)](#). If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the [Save Draft] button. You may then resume your registration at any time.

STEP 3. Modify your Self Registration

STEP 3a

If you saved your data as draft it is still possible to [modify or delete](#) your self-registration.

or

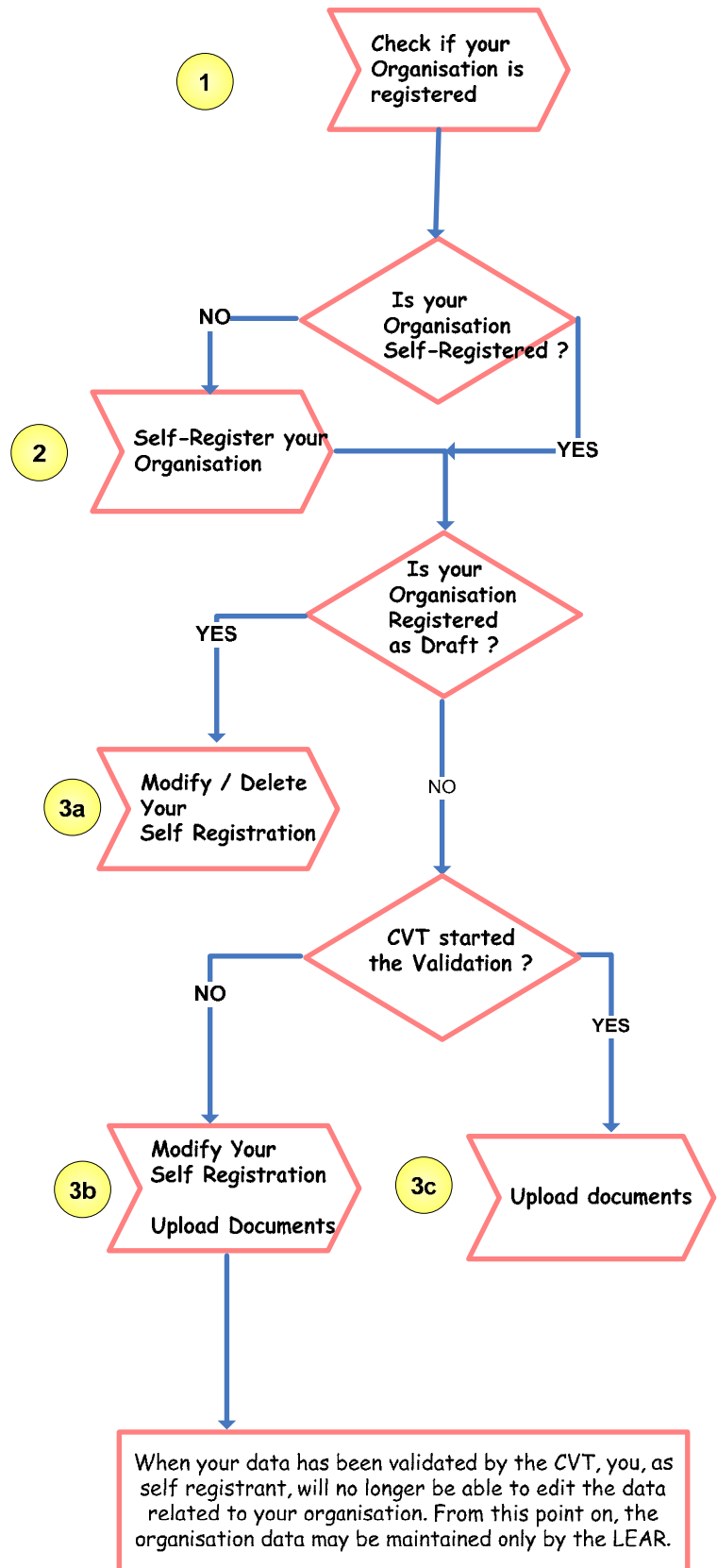
STEP 3b

If you have already submitted your registration and if CVT has not started the verification process that will eventually lead to [the appointment of a Legal Entity Appointed Representative \(LEAR\)](#), it is still possible to [modify](#) your self-registration and/or [upload](#) additional documents.

or

STEP 3c

If CVT has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload](#) additional documents



After identification, the CVT begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents.

Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

For the self-registration, you are re-directed to URF. See **Figure 15 : URF – Self Registration**.

You can find more info in the URF user's manual.

The screenshot shows the 'European Commission RESEARCH - Participants' portal. The main navigation bar includes 'Home', 'My Organisations', 'My Projects', 'My Roles', 'FP7 Documentation', 'FP7 Calls', and 'Support'. Below this, there are tabs for 'Organisations', 'Register', and 'Search'. The 'REGISTER NEW ORGANISATION' section is highlighted with a red circle. The content of this section includes:

- REGISTER NEW ORGANISATION**
- Registering an organisation will allow you to receive its Participant Identification Code (PIC).
- More information about PICs can be found here. Using a PIC for your organisation has several advantages which are fully explained in this [FAQ entry](#).
- Use the search facility to check if an organisation has already a PIC. You can check if an organisation has already a PIC [here](#) if you do not find a pic for your organisation you have to first register as ECAS user here.
- With your ECAS password you can register your organisation here.
- The steps to register your organisation are:**
 - STEP 1. Search**
Use the [search](#) facility to check whether your organisation is already registered.
 - STEP 2: Self-Register your organisation in PP**
[Register](#) your organisation using your ECAS account details. After providing all the necessary details, press the **[CONFIRM]** button to submit your registration information to the Central Validation Team (CVT). If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the **[Save Draft]** button. You may then resume your registration at any time.
 - STEP 3: Modify your self Registration**
 - STEP 3a**
If you saved your data as draft, it is still possible to [modify or delete](#) your self-registration.
 - or
 - STEP 3b.**
If you have already submitted your registration and if CVT has not started the verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR), it is still possible to [modify your self-registration](#) and/or [upload additional documents](#).
 - or
 - STEP 3c.**
If CVT has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload additional documents](#).

After identification, the CVT begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents. Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

- More info**
Upon registering your organisation, you will receive a Participant Identification Code (PIC). Using a PIC for your organisation has several advantages which are fully explained in this [FAQ entry](#).

The left sidebar contains sections for 'LOGIN' (with user Bernard MAHIEU and options for Change Password, Logout, ECAS help, and Portal registration demo), 'FAQ' (with links to online user manual, introduction, and support), and 'WHAT'S NEW' (with details on Participant Portal V2.0.0.1 updates).

Figure 14 : Register steps

Please enter your data here:

1. Organisation data 2. Legal address 3. My contact information 4. Status of organisation 5. Summary of your data

Organisation data of the participant

Participant legal name *

Business name

Official language * --Please Select

2nd Language --None

Name in 2nd Language

Legal form * ⓘ

VAT number * ⓘ

Registration number * ⓘ

Registration authority * ⓘ

Nace code * --Please Select ⓘ

Establishment/Registration country * --Please Select

Registration date * ⓘ (dd-mm-yyyy)

* Mandatory Fields

Next Step Save Draft Cancel

User Manual

Figure 15 : URF – Self Registration

2.5.1 Legal Entity Appointed Representatives

The Legal Entity Appointed Representative (LEAR) is the person chosen by the organisation to ease the communication with the E.C. and avoid double registrations. Only the LEAR may do a change request of his/her organisation's data and submit legal documents through URF.

LEARs can submit requests for update for

- Legal Data (Name, address, registration number etc)
- FP7 account legal type (SME, Public private, educational etc...) and indirect cost method (ICM)
- Balance sheet data (if requested)

And they can upload supporting documents in URF to back their requests.

More information on the LEAR is available in the FAQ section of the Participant Portal:

<http://ec.europa.eu/research/participants/portal/appmanager/participants/portal? nfpb=true& pageLabel=fag #LEAR>

The documents to appoint a LEAR (LEAR appointment form and role and task definition) are available on <ftp://ftp.cordis.europa.eu/pub/fp7/docs/appointment-lear.pdf> and <ftp://ftp.cordis.europa.eu/pub/fp7/docs/lear-role-tasks.pdf>. Both documents must be signed and stamped, and then sent to the Central Validation Team (CVT) by regular letter.

Note that this guide describes only the access to the URF services. URF does offer a user-friendly environment and its use is very straightforward. Nevertheless, a user manual provides a detailed description of the URF services and how to use them:

<https://ec.europa.eu/research/participants/urf/secure/menu/help.do#>

This is how the Participant Portal supports the LEARs' action. They can

- **View the information** stored in the account of their legal entity and to **introduce change requests**.
- **Access the list of projects** that their organisations are currently working on.
- **View the roles** of people in their organisation on the projects.

All these services are protected so you must first log on to the Participant Portal.

The process to follow is described under the "Log on the Participant Portal" chapter of this guide.

2.6 Manage the organisation data

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select the "My Organisations" tab, then click on "Organisations". You can also click on the "Manage Organisation Data" icon in the home page displayed after login.
3. The data of the legal entity are displayed (**Figure 16 : My Organisations**). The section contains a synopsis of the information contained in URF.

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European Commission

RESEARCH - Participants

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LOGIN

 [Change Password](#)

[Logout](#)

Johan MILIO

- ECAS help is available [here](#)
- Portal registration demo is available [here](#)

FAQ

- The answers to the most frequent questions that are submitted to the [eFP7 service desk](#)
- See the [online user manual](#)
- Watch the demonstration of the Participant Portal:
- Watch the demonstration of the Participant Portal:
 - [Introduction](#)
 - [For all users](#)

MY ORGANISATIONS

Organisation(s) as LEAR or Account Administrator.

Chicken Company

<p>PIC : 991355812</p> <p>VAT : BE124578</p> <p>NACE : 85.2</p>	<p>Contact Information</p> <p>Email :</p> <p>Phone : 027545684</p> <p>Fax :</p> <p>Web :</p> <p>Postal Address</p> <p>Street : Egg Street Number : 23</p> <p>Post Code : 1000 City : Brussels</p> <p>Country : BE</p>
--------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

[Organisation's Data](#)

[View Projects](#)

[Roles](#)

Figure 16 : My Organisations

4. There are three links at the right of the screen: [Organisation's Data](#) / [View Projects](#) / [Roles](#). By selecting one of these 3 links you can open a new portlet below the "Organisations" sub-tab.

2.6.1 Status of my organisation

By clicking on the [Organisation's Data](#) link in the *My Organisation* tab (see **Figure 16 : My Organisations**) you can


Check if your request has been validated or is in validation.

European Commission > Research > Participant Portal

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Organisations Register Search

LOGIN



[Change Password](#)

[Logout](#)

Johan MILIO

- ECAS help is available [here](#)
- Portal registration demo is available [here](#)

FAQ

- The answers to the most frequent questions that are submitted to the [eFP7 service desk](#)
- See the [online user manual](#)
- Watch the demonstration of the Participant Portal:
- Watch the demonstration of the Participant Portal:
 - [Introduction](#)
 - [For all users](#)
 - [For LEARs](#)
 - [For Coordinators](#)
 - [Getting support](#)
- You can consult [FAQS](#)

[read more](#)

WHAT'S NEW

Participant Portal V2.0 (11/2009) containing

- The support of the role management
- A reviewed layout of the home page
- A reviewed layout of the My Project tab
- A reviewed layout of the My Roles tab
- A new support tab

[read more](#)

MY ORGANISATIONS

Organisation(s) as LEAR or Account Administrator.

Chicken Company

PIC : 991355812	Contact Information	Organisation's Data
VAT : BE124578	Email :	View Projects
NACE : 85.2	Phone : 027545684	Roles
	Fax :	
	Web :	
	Postal Address	
	Street : Egg Street Number : 23	
	Post Code : 1000 City : Brussels	
	Country : BE	

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company	Organisation Legal Address	Active LEAR	View
PIC : 991355812	Street : Egg Street Number : 23	Title : Mr	Update
Status :	Post Code : 1000 City : Brussels	First : Johan	
	Country : BE	Name	
		Last : MILIO	
		Name	
		Phone :	
		0257798324	
		Email : johan.milio@ext.ec.europa.eu	
		Fax :	

Request History

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Date	Organisation Name	Type	Status	Action
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View

Figure 17 : Status of the Organisation

View organisation or change request (history)

You get redirected to URF. No extra authentication will be requested. In URF you will be able to view or modify your organisation data, or verify the status of your registration request (if it has been validated or not). See Figure 17 : Status of the Organisation.

Create a change request

If you need to change the data of your organisation through URF, you have to click on the [Update](#) link. See **Figure 17 : Status of the Organisation**.


You are then redirected to URF where you can modify your data.

European Commission > Research > Participant Portal

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support

Organisations Register Search

LOGIN

 [Change Password](#)

[Logout](#)

Johan MILIO

- ECAS help is available [here](#)
- Portal registration demo is available [here](#)

FAQ

- The answers to the most frequent questions that are submitted to the [eFP7 service desk](#)
- See the [online user manual](#)
- Watch the demonstration of the Participant Portal:
- Watch the demonstration of the Participant Portal:
 - [Introduction](#)
 - [For all users](#)
 - [For LEARs](#)
 - [For Coordinators](#)
 - [Getting support](#)
- You can consult [FAQS](#)

[read more](#)

WHAT'S NEW

Participant Portal V2.0 (11/2009) containing

- The support of the role management
- A reviewed layout of the home page
- A reviewed layout of the My Project tab
- A reviewed layout of the My Roles tab
- A new support tab

[read more](#)

MY ORGANISATIONS

Organisation(s) as LEAR or Account Administrator.

Chicken Company

PIC : 991355812	Contact Information	Organisation's Data
VAT : BE124578	Email :	View Projects
NACE : 85.2	Phone : 027545684	Roles
	Fax :	
	Web :	
	Postal Address	
	Street : Egg Street Number : 23	
	Post Code : 1000 City : Brussels	
	Country : BE	

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company	Organisation Legal Address	Active LEAR	View Update
PIC : 991355812	Street : Egg Street Number : 23	Title : Mr	
Status :	Post Code : 1000 City : Brussels	First : Johan Name	
	Country : BE	Last : MILIO Name	
		Phone :	
		0257798324	
		Email : johan.milio@ext.ec.europa.eu	
		Fax :	

Request History

Date	Organisation Name	Type	Status	Action
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View

Figure 18 : Status of the Organisation - Update request

Please note that when CVT is validating your change request, you are no longer able to modify your data. Only the [View](#) display is available.

Two types of change request can be managed from this tab :

- normal change requests defined as "LEAR UPDATE" under the TYPE column of the "*Request History*" area – **financial info as balance sheet cannot be created/modified.**
- "FINANCIAL" change requests : this changed request as to be done "on demand" from NEF. The message below appears:
You are requested to provide additional financial information in order to complete the negotiation of your grant for proposal #proposal_id#".
For this new request type, you can only Create/Modify balance sheets and upload documents (mandatory).

You can find more info in the URF, user manual , at :

<https://ec.europa.eu/research/participants/urf/secure/menu/help.do#>

Delete change request

You can delete your change request while CVT has not yet started the validation of your request.

The *Delete* link is displayed in the request history part .See **Figure 19 : Status of my Organisation - Request not yet validated.**

A message asks you to confirm your deletion.

Update change request

You can also modify your change request while CVT has not yet started the validation of your request.

The *Update* link is displayed in the request history part. See **Figure 19 : Status of my Organisation - Request not yet validated.**

You are directed to URF and your data can be modified.

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company

PIC : 991355812
 Status :

Organisation Legal Address
 Street : Egg Street Number : 23
 Post Code : 1000 City : Brussels
 Country : BE

Active LEAR
 Title : Mr
 First : Johan
 Name
 Last : MILIO
 Name
 Phone :
 0257798324
 Email : johan.milio@ext.ec.europa.eu
 Fax :

[View](#)

Request History

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Date ↕	Organisation Name ↕	Type ↕	Status ↕	Action ↕
18/02/2010	Chicken Company	LEAR UPDATE	CREATED	View Update Delete
18/02/2010	Chicken Company	LEAR UPDATE	DELETED	View
18/02/2010	Chicken Company	LEAR UPDATE	VALIDATED	View
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View

Figure 19 : Status of my Organisation - Request not yet validated

2.6.2 View Projects of my Organisation

By clicking on the [View Project](#) link, you can have a view of all the Projects your organisation is involved, see **Figure 20 : Project list of my Organisation**

MY ORGANISATIONS

COMMISSION OF THE EUROPEAN COMMUNITIES - DIRECTORATE GENERAL JOINT RESEARCH CENTRE - JRC
JRC

PIC : 999992304 **Contact Information** Status
 VAT : N/A Email : NPAWHYVP@DNRBMEEY.UVR [View Projects](#)
 NACE : 92 Phone : 02546589 [Roles](#)
 Fax :
 Web : http://www.jrc.ec.europa.eu

Postal Address
 Street : Rue de la Loi Number : 200
 Post Code : 1049 City : BRUSSELS
 Country : BE

PROJECT LIST FOR COMMISSION OF THE EUROPEAN COMMUNITIES - DIRECTORATE GENERAL JOINT RESEARCH CENTRE - JRC

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.
 If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

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Acronym	CallID	Prog.	Project ID	Roles
GENESI-DR	FP7-INFRASTRUCTURES-2007-1	FP7	212073	
GENESIS	FP7-ICT-2007-2	FP7	223996	
ICTNET	FP7-ICT-2009-4	FP7	248809	
CROSSROAD	FP7-ICT-2009-4	FP7	248484	
UncertWeb	FP7-ICT-2009-4	FP7	248488	
TATOO	FP7-ICT-2009-4	FP7	247893	
MOSARIM	FP7-ICT-2009-4	FP7	248231	

Figure 20 : Project list of my Organisation

Roles in a project organisation organisation

Click on the "Roles" icon () of a project to see the roles of the people in your organisation in this project (see **Figure 21 : Roles of the Project**)

The following icon is used to refresh the memory cache, it allows to reload the most recent data.






ROLES OF THE PROJECT: SHELTER (223115) OF THE SELECTED ORGANISATION					
PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST					
Select	Role 	Name 	Email 	Organisation 	PIC 
<input type="checkbox"/>	Participant Contact		mm.telkamp@vumc.nl	VUA	999989103
		Add +		Revoke Selected	

Figure 21 : Roles of the Project

Project details

Click on the underlined Acronym of a Project (left columns) (see **Figure 20 : Project list of my Organisation**)- to see the details of this project (see **Figure 22 : Details of a project**).

Acronym ↕	CallID ↕	Prog. ↕	Project ID ↕	Roles
ENERGY	FP7-HEALTH-2007-B	FP7	223254	
SHELTER	FP7-HEALTH-2007-B	FP7	223115	
EURIPIDES	FP7-HEALTH-2007-A	FP7	201380	
ADAMANT	FP7-HEALTH-2007-A	FP7	201342	
PRISMA	FP7-HEALTH-2007-A	FP7	201655	
NOVSEC-TB	FP7-HEALTH-2007-A	FP7	201762	
LipiDiDiet	FP7-KBBE-2007-1	FP7	211696	
INEX	FP7-SEC-2007-1	FP7	218265	
Ecosh	FP7-HEALTH-2007-A	FP7	200549	
BACSIN	FP7-KBBE-2007-1	FP7	211684	

PROJECT DETAILS OF PRISMA (201655)

Acronym : PRISMA Programme : FP7 RDG : RTD Starting Date : 2008/05/01 Duration : 36

Call ID : FP7-HEALTH-2007-A Title : Reflecting the Positive diveRsities of European priorities for reSearch and Measurement in end of life cAre

Roles

Abstract :

There is little coordination in undertaking research in end of life care. This is due to lack of agreement on what constitutes "end of life" cancer care, no information on public or clinical priorities for achieving a "good death" in a culturally diverse Europe, few appropriate measures of quality, and a lack of established best practice. "PRISMA" aims to deliver an integrated programme to coordinate research

Participants :

UNIVERSITEIT ANTWERPEN (999902870)
 HOSPITAL SANTA MARIA (999876777)
 FEDERATIE PALLIATIEVE ZORG VLAANDEREN (998767873)
 DEUTSCHE GESELLSCHAFT FUER PALLIATIVMEDIZIN (998429537)
 ISTITUTO DI RICERCA IN MEDICINA PALLIATIVA LINO MAESTRONI- Fondazione onlus (998768455)

Activity Codes :
 HEALTH-2007-2.4.1-5

Keywords :

Figure 22 : Details of a project

2.6.3 Roles of my Organisation

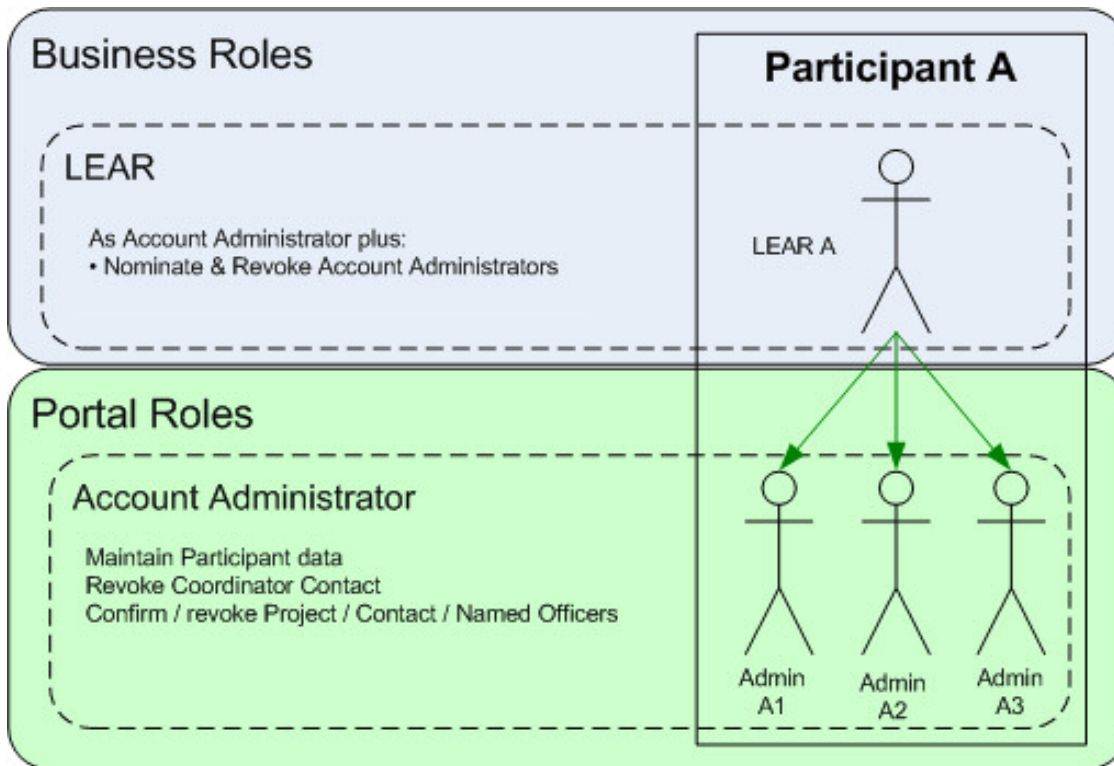


Figure 23: Participant User Account Management

By clicking on the [Roles](#) link, in the **My Organisation** tab you can display all the roles of the people in your organisation and by Project. See [Figure 24 : Roles of the Organisation](#).

ROLES OF THE ORGANISATION: COMMISSION OF THE EUROPEAN COMMUNITIES - DIRECTORATE GENERAL JOINT RESEARCH CENTRE - JRC

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Select	Role ↓	Name ↕	Email ↕	Project ↕
<input type="checkbox"/>	LEAR	BERURIER Alexandre	berurier4@hotmail.com	
<input type="checkbox"/>	Account Admin.	BERNARD MAHIEU	bernard.mahieu@gmail.com	
<input type="checkbox"/>	Participant Contact	VAN PELT Wim	wim.van-pelt@ext.ec.europa.eu	223996
<input type="checkbox"/>	Participant Contact	WELLENS Marc	marc.wellens@ec.europa.eu	219081
<input type="checkbox"/>	Participant Contact	HIRVONEN Juha-Pekka	juha-pekka.hirvonen@ec.europa.eu	219123
<input type="checkbox"/>	Participant Contact	MACHADO FERNANDES Arminda	arminda.machado@ec.europa.eu	211307
<input type="checkbox"/>	Participant Contact	MACHADO FERNANDES Arminda	arminda.machado@ec.europa.eu	211386
<input type="checkbox"/>	Participant Contact		giovanni.bidoglio@jrc.it	211392
<input type="checkbox"/>	Participant Contact	MACHADO FERNANDES Arminda	arminda.machado@ec.europa.eu	211578
<input type="checkbox"/>	Participant Contact	MACHADO FERNANDES Arminda	arminda.machado@ec.europa.eu	211732

Figure 24 : Roles of the Organisation

Add a role to an organisation

As LEAR, you can add an Account Administrator role. Just click on the **[Add+]** button. Just enter the email address of the person that will get the Account Administrator. He will receive a mail announcing him his nomination. If not already done, he will be asked to register in ECAS. See Figure 25 : Add an Account Administrator role.

ADD ROLE

* EMAIL ADDRESS (used to register in the Portal):

** ROLE GIVEN is ACCOUNT ADMINISTRATOR for:

* Mandatory field
** A LEAR can delegate his responsibility to maintain the Participant's legal and financial data, to one or more account administrator(s).

Figure 25 : Add an Account Administrator role

Revoke a role from an organisation

Account Administrators can also be revoked by the LEAR. Select the check box on the left of the role to be revoked. Click on the **[Revoke Selected]** button and confirm the revocation.

2.7 Manage projects

Note that all the services described below are protected so you must first log on to the Participant Portal. The process to follow is described under the "Log on to the Participant Portal" chapter of this guide.

2.7.1 Access to the list of projects and project details

Coordinators and participants involved in projects can access the list of their projects

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select the "My Projects" tab
3. By default the "In Negotiation" tab is opened.

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support

In Negotiation Active Closed

PROJECT LIST FOR PARTICIPANT TWO PORTAL

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.

If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Acronym	CallID	Prog.	Project ID	Roles	
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807		Periodic Reporting

Figure 26 : My Projects

4. The interface will display a list of Projects (see **Figure 26 : My Projects**), originally sorted by the Project Acronym for which the user has a relevant role (for example, he is a participant or a coordinator) for each project shown in the list.

The following fields will be displayed for each project listed:

- The Acronym of the project.
- The Title of the project.
Note that this field will be displayed as a tooltip when the user hovers above the Acronym with the pointer.
- The Call identifier of the Project
- The programme of the Project (Belongs to the Project Identifier)
- The "Roles" Icons
- A link to the Negotiation Facility tool (NEF) see § 2.7.3 **Access to the negotiations activities (Negotiation Facility tool -NEF)**

When you click on a project acronym (see **Figure 27 : Project details**) then the details of this project are displayed below the list of projects.

PROJECT LIST FOR PARTICIPANT TWO PORTAL

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.

If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

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Acronym	CallID	Prog.	Project ID	Roles
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807	Periodic Reporting

PROJECT DETAILS OF BALTICGRID-II (223807)

Acronym : BalticGrid-II Programme : FP7 RDG : INF SO Starting Date : 2008/05/01 Duration : 24

Call ID : FP7-INFRASTRUCTURES-2007-2 Title : Baltic Grid Second Phase

Roles

Abstract :

The Baltic Grid Second Phase (BalticGrid-II) project is designed to increase the impact, adoption and reach, and to further improve the support of services and users of the recently created e-Infrastructure in the Baltic States. This will be achieved by an extension of the BalticGrid infrastructure to Belarus; interoperation of the gLite-based infrastructure with UNICORE and ARC based Grid

Participants :

ESTONIAN EDUCATIONAL AND RESEARCH NETWORK (999614004)
 UNITED INSTITUTE OF INFORMATICS PROBLEMS OF NATIONAL ACADEMY OF SCIENCES OF BELARUS (99966211)
 LATVIJAS UNIVERSITATES MATEMATIKAS UN INFORMATIKAS INSTITUTS (999645723)
 KEEMILISE JA BIOLOOGILISE FUUSIKA INSTITUUT (999605856)
 KUNGLIGA TEKNISKA HOGSKOLAN (999990946)

Activity Codes :

Keywords :

Figure 27 : Project details

2.7.2 Roles of My Projects

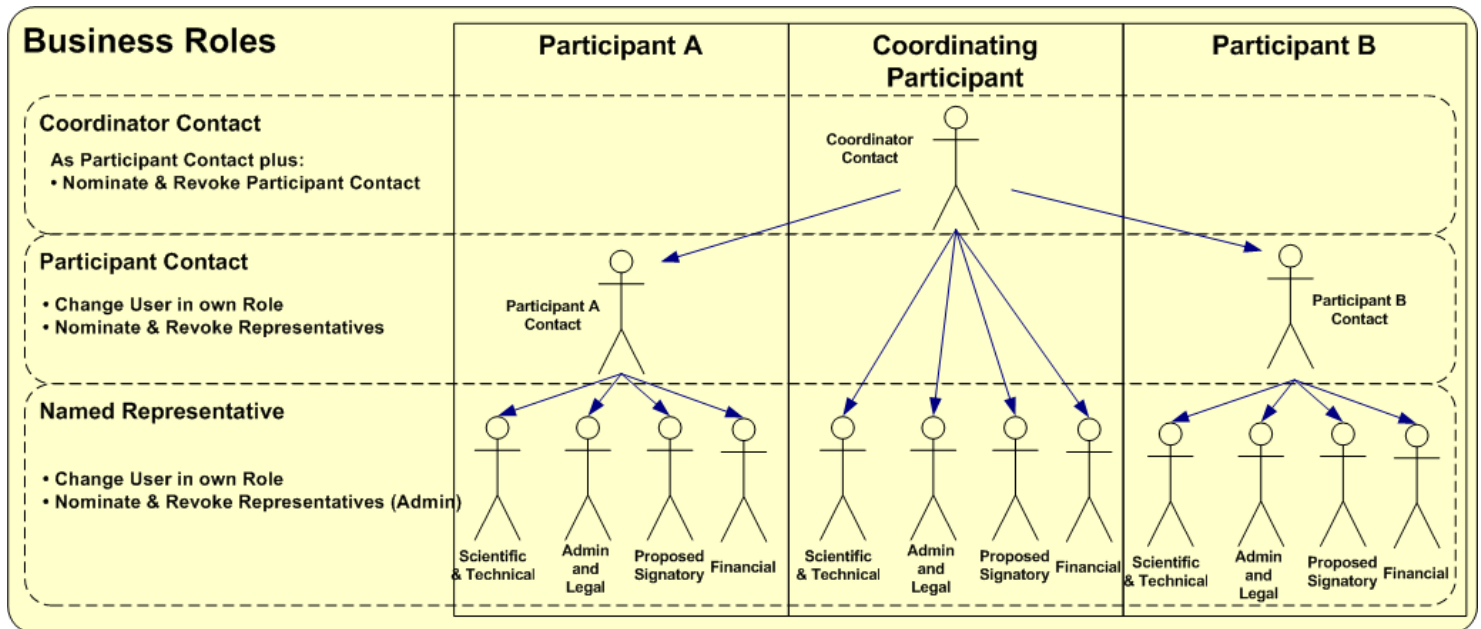


Figure 28: Business roles in a project

The figure below shows the roles and dependencies inside a project .

Below you will find an excerpt from the document : "*Participant Portal Identity and Access Management (IAM) in a nutshell*"

First level : Coordinator Contact

At the top of the pyramid, there is the Coordinator Contact, who is the main contact person for the Commission at the coordinating beneficiary.

Nomination of only one person per project is possible in this role. By default, this role is provisioned with the respective name and contact details given in the proposal (under A2. 'Contact point').

The Coordinator Contact has the right to grant and revoke the roles of the Participant Contacts.

In addition, he/she has, for the coordinating beneficiary, the same rights as the Participant Contacts (see second level below).

During negotiation, the Coordinator Contact and the negotiating project officer have to make sure that the contact details are set properly in NEF and match one of the contact person's details given in GPF A 2.4. of the coordinating beneficiary.

Specific responsibility of the Coordinator Contact:

- Assure that the assignments of Participant Contacts are up to date and reflect the reality (including removal of obsolete access rights).
- Inform the Commission on time when the Coordinator Contact has to be changed.

Second level : Participants Contacts

At the second level of the pyramid, there are the Participant Contacts, who are the main contact persons for the coordinator at the participating beneficiaries. Nomination of only one person per beneficiary and project is possible in this role.

By default, these roles are provisioned with the respective names and contact details given in the proposal.

These persons can be changed by the Coordinator Contact (without approval by the Commission).

The Participant Contacts have the right to grant and revoke roles to scientific, administrative, financial, legal contacts (third level) within their organisation.

At the third level, several persons can be nominated in the same role, and the same person can be nominated in several roles.

Specific responsibility of the Participant Contact:

- Assure that the assignments of third level roles within the own organisation are up to date and reflect the reality (including removal of obsolete access rights).
- Inform the Coordinator Contact when the Participant Contact has to be changed.

Third level : Named representatives

At the third level of the pyramid, there are the persons in each participating organisation, who are able to work on functions related to scientific, administrative, legal and financial negotiation, amendment handling and reporting.

These persons can be changed by the Participant Contacts of their organisations. They cannot themselves nominate other persons.


Display Roles

When you click on the  icon that is on the line of a project, then the roles of this project are displayed below the project list.

PROJECT LIST FOR PARTICIPANT TWO PORTAL

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.
 If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Acronym	CallID	Prog.	Project ID	Roles
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807	 Periodic Reporting

ROLES OF THE PROJECT: BALTICGRID-II (223807)

PAGE 1 OF 4 FIRST / PREVIOUS NEXT / LAST

Select	Role	Name	Email	Organisation	PIC
<input type="checkbox"/>	Participant Contact	MAHIEU Bernard	bernard.mahieu@ext.ec.europa....	ITPA	999583740
<input type="checkbox"/>	Scientific	VAN PELT Wim	wim.van-pelt@ext.ec.europa.eu	ITPA	999583740
<input type="checkbox"/>	Participant Contact	MAHIEU Bernard	bernard.mahieu@ext.ec.europa....		999586359
<input type="checkbox"/>	Scientific	VAN PELT Wim	wim.van-pelt@ext.ec.europa.eu		999586359
<input type="checkbox"/>	Financial	ARMSTRONG Lance	participantportal999@gmail.com	KBFI	999605856
<input type="checkbox"/>	Participant Contact	MAHIEU Bernard	bernard.mahieu@ext.ec.europa....	KBFI	999605856
<input type="checkbox"/>	Administrative and Legal	ARMSTRONG Lance	participantportal999@gmail.com	KBFI	999605856
<input type="checkbox"/>	Scientific	VAN PELT Wim	wim.van-pelt@ext.ec.europa.eu	KBFI	999605856
<input type="checkbox"/>	Financial	LEPERE Jean-Jacques	jean-jacques.lepere@ext.ec.eu...	IFJ PAN	999611579
<input type="checkbox"/>	Participant Contact	MAHIEU Bernard	bernard.mahieu@ext.ec.europa....	IFJ PAN	999611579

Figure 29 : The roles of my project

Depending on your role in the project (see Error! Reference source not found.) you are able to revoke or add new roles,(see Figure 28: Business roles in a project).

Add a new role in your project

When you click on the **[Add]** button (Figure 29 : The roles of my project), you have to enter the email address of the user you grant in the "Add role" area (.Figure 30: Add a role to your project). This user will receive a mail announcing him his nomination. If not already done, he will be asked to register in ECAS. Then, depending on your own role, you have to choose the role given (see Error! Reference source not found.)

PROJECT LIST FOR PARTICIPANT TWO PORTAL

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.
If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Acronym ↕	CallID ↕	Prog. ↕	Project ID ↕	Roles
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807	Periodic Reporting

ADD ROLE

* EMAIL ADDRESS (used to register in the Portal):

* ORGANISATION:

* ROLE GIVEN:

OK

Proposed Signatory

Proposed Signatory

Scientific

Financial

Administrative and Legal

* Mandatory field

Figure 30: Add a role to your project

Then, depending on your own role, you have to choose the role given (see Error! Reference source not found. and Figure 28: Business roles in a project). In the Figure 30: Add a role to your project above, you can see that the following roles can be added by a Participant Contact or a Coordinator Contact : Scientific and Technical Reresentative, Administrative and Legal representative, Proposed Signatory or Scientific Representative (see defintions above).

Add / Modify a Participant Contact to your project

As Coordinator Contact, you can add/modify Participant Contact to your project.

When you click on the  , the following screen is displayed (see Figure 31: Roles of the Project (seen by a Coordinator Contact)).




Home My Organisations **My Projects** My Roles FP7 Documentation FP7 Calls Support

In Negotiation **Active** Closed

PROJECT LIST FOR JOHN LETERME

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation. If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

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Acronym	CallID	Prog.	Project ID	Roles
Select-and-act	FP7-HEALTH-2007-A	FP7	201716	 Reporting & Deliverables Financial Reporting
CATHERINE	FP7-ICT-2007-1	FP7	216215	 Periodic Reporting
NORDERA	FP7-ERANET-2008-RTD	FP7	234854	 Reporting & Deliverables Financial Reporting

ROLES OF THE PROJECT: CATHERINE (216215)

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Select	Role	Name	Email	Organisation	PIC
<input type="checkbox"/>	Participant Contact	DINESCU Adrian	adriand@imt.ro	IMT	999617690
<input type="checkbox"/>	Coord. Contact	LETERME John	vt6138866@base.be	CSI	999624771
<input type="checkbox"/>	Participant Contact	LETERME John	vt6138866@base.be	CSI	999624771
<input type="checkbox"/>	Participant Contact	SJOLIN Annika	annika.sjolin@foi.se	FOI	999627875
<input type="checkbox"/>	Participant Contact	DE TROOSTEMBERGH Antoine	antoine.de-troostembergh@ext...	SMOLTEK	999707803
<input type="checkbox"/>	Participant Contact	IBANEZ Michèle	sesaic@adm.ups-tlse.fr	UPS	999851169
<input type="checkbox"/>	Participant Contact		jozepa@cfi.lu.lv	LU CFI	999852139
<input type="checkbox"/>	Participant Contact	PASSEGGIATO Luigi	lpassegg@unisa.it		999899184
<input type="checkbox"/>	Participant Contact	DRIESSEN Henry	h.e.driessen@tudelft.nl	TU Delft	999977366
<input type="checkbox"/>	Participant Contact	SARTO Maria Sabrina	mariasabrina.sarto@uniroma1.it		999987745

Add + **Consortium Contacts** Revoke Selected

Figure 31: Roles of the Project (seen by a Coordinator Contact)

Click the [**Consortium Contact**] button. In the next screen (see Figure 32: Create - Modify Participant Contact), you can see the Participant Contact for each organisation participating to the project. You can add new Participant Contact in empty fields or modify existing one by entering their email address.

FAQ

- The answers to the most frequent questions that are submitted to the [eFP7 service desk](#)
 - See the [online user manual](#)
 - Watch the demonstration of the Participant Portal:
 - Watch the demonstration of the Participant Portal:
 - [Introduction](#)
 - [For all users](#)
 - [For LEARs](#)
 - [For Coordinators](#)
 - [Getting support](#)
 - You can consult [FAQs](#)
- [read more](#) ▾

WHAT'S NEW

Participant Portal V2.0 patch 1 (03/2010)

- Introduction of user management for nomination of several roles;
 - Redesign of the My Organisation tab;
 - Enhancement of the contact form
 - Bug fixes
- [read more](#) ▾

QUICK LINKS

-  [FP7 homepage](#)
-  [Research site of the EC](#)

ADD ROLE

Coordinator

CONSORZIO SAPIENZA INNOVAZIONE (999624771)

Name: LETERME John

Participant Contacts

CONSORZIO SAPIENZA INNOVAZIONE (999624771)

Name: LETERME John

UNIVERSITA DEGLI STUDI DI ROMA LA SAPIENZA (999987745)

Name: SARTO Maria Sabrina

TECHNISCHE UNIVERSITEIT DELFT (999977366)

Name: DRIESSEN Henry

UNIVERSITE PAUL SABATIER TOULOUSE III (999851169)

Name: IBANEZ Michèle

UNIVERSITA DEGLI STUDI DI SALERNO (999899184)

Name: PASSEGGIATO luigi

LATVIJAS UNIVERSITATES CIETVIELU FIZIKAS INSTITUTS (999852139)

Name:

INSTITUTUL NATIONAL DE CERCETAREDEZVOLTARE PENTRU MICROTehnologie (999617690)

Name: DINESCU Adrian

TOTALFORSVARETS FORSKNINGSINSTITUT (999627875)

Name: SJOLIN Annika

ISTITUTO NAZIONALE DI FISICA NUCLEARE (999992789)

Name:

PHILIPS ELECTRONICS NEDERLAND B.V. (999991625)

Name: VIJGHEN Philippe

SMOLTEK AB (999707803)

Name: DE TROOSTEMBERGH Antoine

CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE (CNRS) (999997930)

Name:

Figure 32: Create - Modify Participant Contact

Click **[OK]**, in order to save your data.

In the confirmation message, click **[OK]**, in order to save your data or **[Cancel]** . (Figure 33 : Confirmation of creation-modification of a Participant Contact)

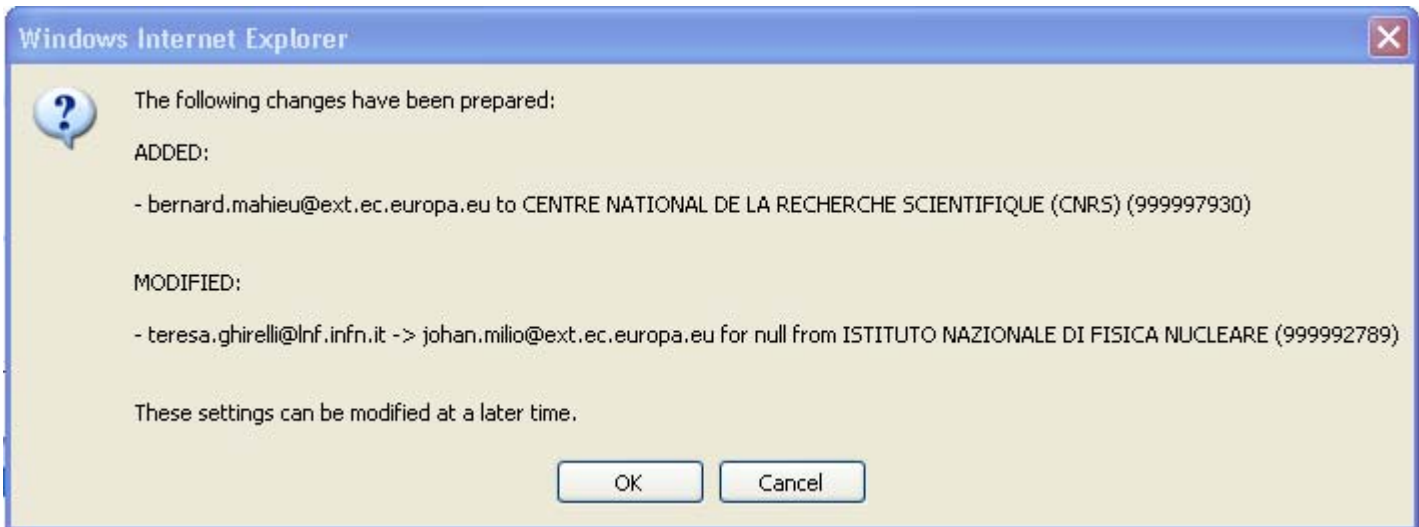


Figure 33 : Confirmation of creation-modification of a Participant Contact

Revoke a role from your project

Depending on your role, you can also revoke some roles(see Error! Reference source not found.). Select the check box on the left of the role to be revoked. Click on the **[Revoke Selected]** button and confirm the revocation(see Figure 34: Confirmation of the revocation)

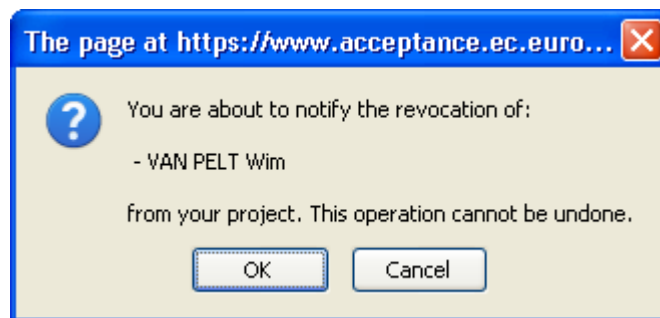


Figure 34: Confirmation of the revocation

2.7.3 Access to the negotiations activities (Negotiation Facility tool -NEF)

Your project has been selected for the negotiation. Once the negotiations are open by the Commission, you will then receive an e-mail (see Figure 35 : Invitation from NEF)inviting you to connect to the Participant

PROJECT LIST FOR JEAN-JACQUES LEPERE

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.

If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

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Acronym	CallID	Prog.	Project ID	Roles	
MARE	FP7-ICT-2007-2	FP7	224482		Access Negotiation
CommonWell	CIP-ICT-PSP-2007-1	CIP	225005		Access Negotiation
BRICS	FP7-ICT-2007-3	FP7	231940		Access Negotiation

Figure 36 : Projects list - Access Negotiation

- You will be automatically redirected to the project page of NEF, with no further authentication requirements (see **Figure 38 : NEF**). Depending on your role, you will be able to perform different tasks on NEF. In case of multiple partners projects, the participants can also access NEF in a more limited way – mainly to enter data to be submitted by the coordinator. The validation of the data you might enter in NEF is the sole responsibility of the coordinator of the project.

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support Admin

In Negotiation Active Closed

PROJECT LIST FOR JEAN-JACQUES LEPERE

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.

If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

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Acronym	CallID	Prog.	Project ID	Roles		
Ecosh	FP7-HEALTH-2007-A	FP7	200549		Reporting & Deliverables	Financial Reporting
EFIPSANS	FP7-ICT-2007-1	FP7	215549		Periodic Reporting	Access Amendment
BONE	FP7-ICT-2007-1	FP7	216863		Periodic Reporting	Access Amendment
HIP	FP7-ICT-2007-C	FP7	221889			Access Amendment
ARASCOM	FP7-ICT-2007-2	FP7	222620			
IMPACT	FP7-ICT-2007-2	FP7	223877		Periodic Reporting	
CESSDA-PPP	FP7-INFRASTRUCTURES-2007-1	FP7	212214		Reporting & Deliverables	Financial Reporting
SEREN	FP7-SEC-2007-1	FP7	217937		Reporting & Deliverables	Financial Reporting
Odyssey	FP7-SEC-2007-1	FP7	218237		Reporting & Deliverables	Financial Reporting
DaC of BreF	FP7-PEOPLE-2007-4-2-IIF	FP7	219146		Reporting & Deliverables	Financial Reporting

Figure 37 My active Projects - Links to NEF for amendments

FP7 Applications - Windows Internet Explorer

http://prod-uf.fp6.cc.cec.eu.int:19001/nef/frontoffice/project/6073/view

File Edit View Favorites Tools Help

FP7 Applications

Important Legal Notice

2007 - 2013

Help | Logout

My projects / 999999 - TEST STIFF 2 /

999999 - TEST STIFF 2

NEGOTIATION

Parameters

CONTACTS

Scientific/Project: [David](#)

Legal/Financial: [David](#)

Registration: [David](#)

LIFECYCLE

Opening date: 31/07/08

Expected end date: 04/09/08

DEADLINES

GFPs: 04/09/08

Technical annexes: 04/09/08

Legal documents: 04/09/08

PROPOSITIONS

Duration: 24 months

Contribution: 145,698 euro

Current session

Not yet submitted by the coordinator

Opened on 05/05/09 at 14:32

Created on 11/02/09 at 16:15

Submit

PDF preview

Project

→ [General information](#)

→ [Reporting periods](#)

Coordinator "DEUTSCHES ZENTRUM FUER LUFT - UND RAUMFAHRT EV" (DLR) (999999736)

→ [Legal data](#) → [Authorised representatives](#) → [Eligible costs](#)

→ [Organisation status](#) → [Contact persons](#) → [Bank account](#)

Participants

Legal Name	Short Name	Role	PIC	Status	Date of entry	Date of withdrawal	Reorder
DEUTSCHES ZENTRUM FUER LUFT - UND RAUMFAHRT EV	DLR	CO	999981731	active			
TECHNISCHE UNIVERSITEIT DELFT	TUDD	PA	999977366	active			↓
THE UNIVERSITY OF EDINBURGH	UE	PA	999974941	active			↑ ↓
UNIVERSITE PARIS DESCARTES	IIPD	PA	999869793	active			↑ ↓

Figure 38 : NEF

More information on how to use NEF can be found in the NEF user guide:
http://ftp.cordis.europa.eu/pub/fp7/docs/nef-userguide-coordinators-participants_en.pdf

Please note that the Participant Portal is the single gateway to NEF for both coordinators and other participants involved in negotiations, replacing the old way of accessing NEF – the access key mechanism.

2.7.4 Access to the reporting activities

In order for a user to have access to the Reporting functionality, s/he must have

- the role of scientific representative (either of the project coordinator or of another beneficiary in the grant) for the technical reporting
- the role of financial representative (either of the project coordinator or of another beneficiary in the grant) for the financial reporting

The information on the persons with this role comes from the grant agreement preparation forms that were completed in the negotiation tool NEF.

Accessing the reporting functions

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select "My Projects" tab
3. The list of the projects you are involved will be displayed. In order to access the reporting activities, click on the tab "Active"
4. There, you can access both the technical reporting (deliverables) as the financial one (Form C). Once you have clicked on the link, you will be redirected to the right supporting application (see figure 30).

PROJECT LIST FOR JEAN-JACQUES LEPERE

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation. If you are a LEAR of your organisation, please visit the tab My Organisations and follow the link "View projects" to have the list of projects linked to your organisation.

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Acronym ↕	CallID ↕	Prog. ↕	Project ID ↕	Roles		
Ecosh	FP7-HEALTH-2007-A	FP7	200549	 Reporting & Deliverables	Financial Reporting	
EFIPSANS	FP7-ICT-2007-1	FP7	215549	 Periodic Reporting		Access Amendment
BONE	FP7-ICT-2007-1	FP7	216863	 Periodic Reporting		Access Amendment
HIP	FP7-ICT-2007-C	FP7	221889			Access Amendment
ARASCOM	FP7-ICT-2007-2	FP7	222620			
IMPACT	FP7-ICT-2007-2	FP7	223877	 Periodic Reporting		
CESSDA-PPP	FP7-INFRASTRUCTURES-2007-1	FP7	212214	 Reporting & Deliverables	Financial Reporting	
SEREN	FP7-SEC-2007-1	FP7	217937	 Reporting & Deliverables	Financial Reporting	
Odyssey	FP7-SEC-2007-1	FP7	218237	 Reporting & Deliverables	Financial Reporting	
DaC of BreF	FP7-PEOPLE-2007-4-2-IIF	FP7	219146	 Reporting & Deliverables	Financial Reporting	

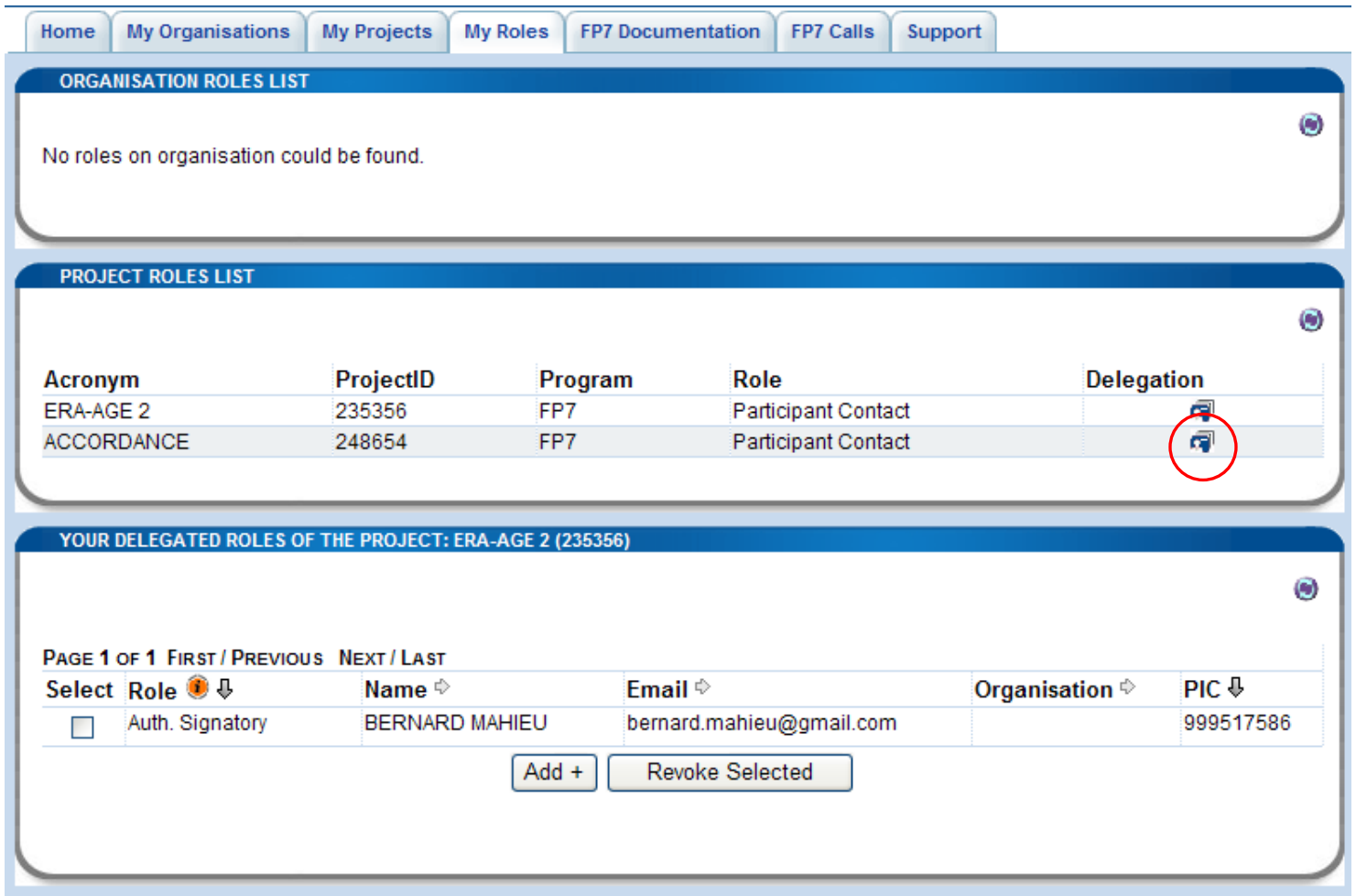
Figure 39 : Access to Reporting applications



2.8 Manage roles

2.8.1 Access to the list of roles

In the "My Roles" tab, you can see your roles for the organisations and the projects you are involved.

When you click on a  icon, you will display a new area showing the role you delegated and to whom. In this new area you can add or revoke roles in your organisation or in your projects, as it has been already described above.




Acronym	ProjectID	Program	Role	Delegation
ERA-AGE 2	235356	FP7	Participant Contact	
ACCORDANCE	248654	FP7	Participant Contact	

Select	Role	Name	Email	Organisation	PIC
<input type="checkbox"/>	Auth. Signatory	BERNARD MAHIEU	bernard.mahieu@gmail.com		999517586

Buttons: Add +, Revoke Selected

Figure 40: My Roles tab

Reminder : The following icon  is used to refresh the memory cache, it allows to reload the most recent data.


Add a Participant Contact to your project

As Coordinator Contact, you can also add or modify a Participant Contact to a Project.








When you click on the , the following screen is displayed

Home My Organisations My Projects **My Roles** FP7 Documentation FP7 Calls Support

ORGANISATION ROLES LIST


PIC	Organisation Name	Role	Delegation
995510031	EUROPEAN COMMUNITY SHIPOWNERS ASSOCIATIONS	Account Admin.	

PROJECT ROLES

Acronym	ProjectID	Program	Role	Delegation
Select-and-act	201716	FP7	Scientific Representative	
NORDERA	234854	FP7	Coord. Contact	
NORDERA	234854	FP7	Participant Contact	
CATHERINE	216215	FP7	Coord. Contact	
CATHERINE	216215	FP7	Participant Contact	
MEMSPACK	223882	FP7	Coord. Contact	
MEMSPACK	223882	FP7	Participant Contact	

YOUR DELEGATED ROLES OF THE PROJECT: CATHERINE (216215)

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Select	Role  ↓	Name ↕	Email ↕	Organisation ↕	PIC ↓
<input type="checkbox"/>	Participant Contact	MILIO Johan	johan.milio@ext.ec.europa.eu	INFN	999992789
<input type="checkbox"/>	Participant Contact	MAHIEU Bernard	bernard.mahieu@ext.ec.europa.eu	CNRS	999997930

Add + Consortium Contacts Revoke Selected

Figure 41 : Delegated Roles for a Coordinator Contact

The Participant Contact nomination is the same as explained in the Manage Project paragraph (see Add / Modify a Participant Contact to your project above)

Revoke a role

From the "My Roles" tab, you can also revoke roles (depending on your own role). Just select the role(s) to be revoked and click on the button [Revoke Selected]. See Figure 42: Revoke roles

ORGANISATION ROLES LIST

No roles on organisation could be found.

PROJECT ROLES LIST

Acronym	ProjectID	Program	Role	Delegation
ERA-AGE 2	235356	FP7	Participant Contact	
ACCORDANCE	248654	FP7	Participant Contact	

YOUR DELEGATED ROLES OF THE PROJECT: ERA-AGE 2 (235356)

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Select	Role	Name	Email	Organisation	PIC
<input type="checkbox"/>	Auth. Signatory	BERNARD MAHIEU	bernard.mahieu@gmail.com		999517586

Add + Revoke Selected

Figure 42: Revoke roles

2.8.2 List of roles and their rights

FULL ROLE NAME	SHORT ROLE NAME	Who can enrol?	Who can revoke/notify revocation
LEAR	LEAR	SYSTEM	SYSTEM
ACCOUNT ADMINISTRATOR	AA	LEAR	LEAR
REGISTRANT	REG	SYSTEM	SYSTEM
COORDINATOR CONTACT	COORDINATOR	SYSTEM	SYSTEM
PARTICIPANT CONTACT	PARTICIPANT CONTACT	COORDINATOR	COORDINATOR
ADMIN AND LEGAL REPRESENTATIVE	ALR	PARTICIPANT CONTACT	PARTICIPANT CONTACT
FINANCIAL REPRESENTATIVE	FR	PARTICIPANT CONTACT	PARTICIPANT CONTACT
SCIENTIFIC AND TECHNICAL REPRESENTATIVE	STR	PARTICIPANT CONTACT	PARTICIPANT CONTACT
PROPOSED SIGNATORY	PSR	PARTICIPANT CONTACT	PARTICIPANT CONTACT

3. GLOSSARY

Term	Definition
FP7	7 th Framework Programme of Research and Technological Development of the European Commission
CIP	Competitiveness and Innovation Programme
Coordinator	The participants' coordinator in a consortium
EC Officer	European Commission's Project/Scientific Officer or Administrative Officer representing the European Commission during the negotiations.
NEF	The negotiation process is supported by the online Negotiation Facility tool (NEF), an electronic implementation of the negotiation forms used to exchange information between the participants and the European Commission. NEF provides the main channel for interactive communication between the Consortium and the EC Project Officer as all necessary administrative and financial data about the projects and the participants is collected and agreed through NEF.
Negotiation	Concerns one stage of the procedure applicable immediately after a favourable evaluation. The negotiation is a process during which the details about the proposal are agreed between the participants and the Commission The participants of proposals that may be selected will receive a request to provide further information Negotiation covers three areas : - scientific negotiation - financial negotiation - contractual negotiation
Negotiation session	A period during which the coordinators are allowed to provide changes on their proposals
PIC (Participant Identity Code)	Participant Identity Code (The unique ID of an organisation) Unique Identifier for an organisation – obtained through URF registration & used in each step of the process to identify an organisation. The Temporary PIC received directly after URF registration and Validated PIC (CVT has validated the data & legal documents of the organisation) are the exact same number: 9 digits starting with 99...and will remain the same during the entire existence of its organisation.
URF	Unique Registration Facility: a service providing unique registration for participants in the Framework Programmes at proposal and contract stages. It encompasses a set of rules for data acquisition and validation.

LEAR	<p>A legal signatory of each legal entity will be asked by the Commission to appoint one person (the so-called LEAR - Legal Entity Appointed Representative) for being the correspondent towards the Commission on all issues related to the legal status of the entity.</p> <p>The LEAR provides the Commission with up-to-date legal and financial data (including supporting documents, where necessary) and commits to maintain the account so that it is up-to-date enabling future use for grants and other transactions between the entity and the Commission research (and other) programmes.</p> <p>This person is chosen by the organisation itself in order to ease the communication with the E.C. & avoid double registrations. Only the LEAR may do a Change request (of his organisation's data) through URF and submit legal documents through URF.</p>
Status of validation	Indication that data provided in a form have been validated by the Commission
Participant Portal	<p>The Participant Portal hosts services that facilitate the monitoring and the management of the participants' proposals and projects.</p> <p>It is a secure Internet site that ensures adequate authentication and confidentiality mechanisms, based on the European Commission Authentication Service (ECAS).</p>
Participant	<p>Any entity, legal or otherwise, that has some dealings with FP or CIP programmes. For example: Legal Entity as partner to a grant agreement, department or institute of such, person working in participating organisation and relevant to the programmes, expert. Participants are external to the Commission.</p> <p>In order to structure this participant concept into further details, a clear distinction should be made between:</p> <p>The "<i>executing participant</i>" proposing and executing an action (e.g. a department within a university or an independent expert)</p> <p>The "<i>participating legal entity</i>" endorsing the responsibility of this proposition and execution (e.g. a university or the expert as a legal natural person). "A participating legal entity is any Legal Entity that has participated, participates, or will participate in the programmes of FP and CIP, whether in Grant Agreements, contracts or proposals only" (List of Agreements PDM/URF WG, as of 14th January 2007).</p> <p>"<i>Contacts</i>" by the executing participants and participating legal entities for exchange of information (e.g. a professor within the university department, the financial officer of the university, an expert him/herself, etc.). Contacts typically play roles within participating entities and may have a specific address.</p> <p>It is worth noting that the "executing participant" and the "participating legal entity" can be the same entity (e.g. a private company) or that several legal entities could collectively endorse the responsibility for a single executing participant (case of a consortium).</p>