



Research and Innovation Participant Portal

**How to prepare
the explanation on the use
of resources?**

eFP7 Communication Office



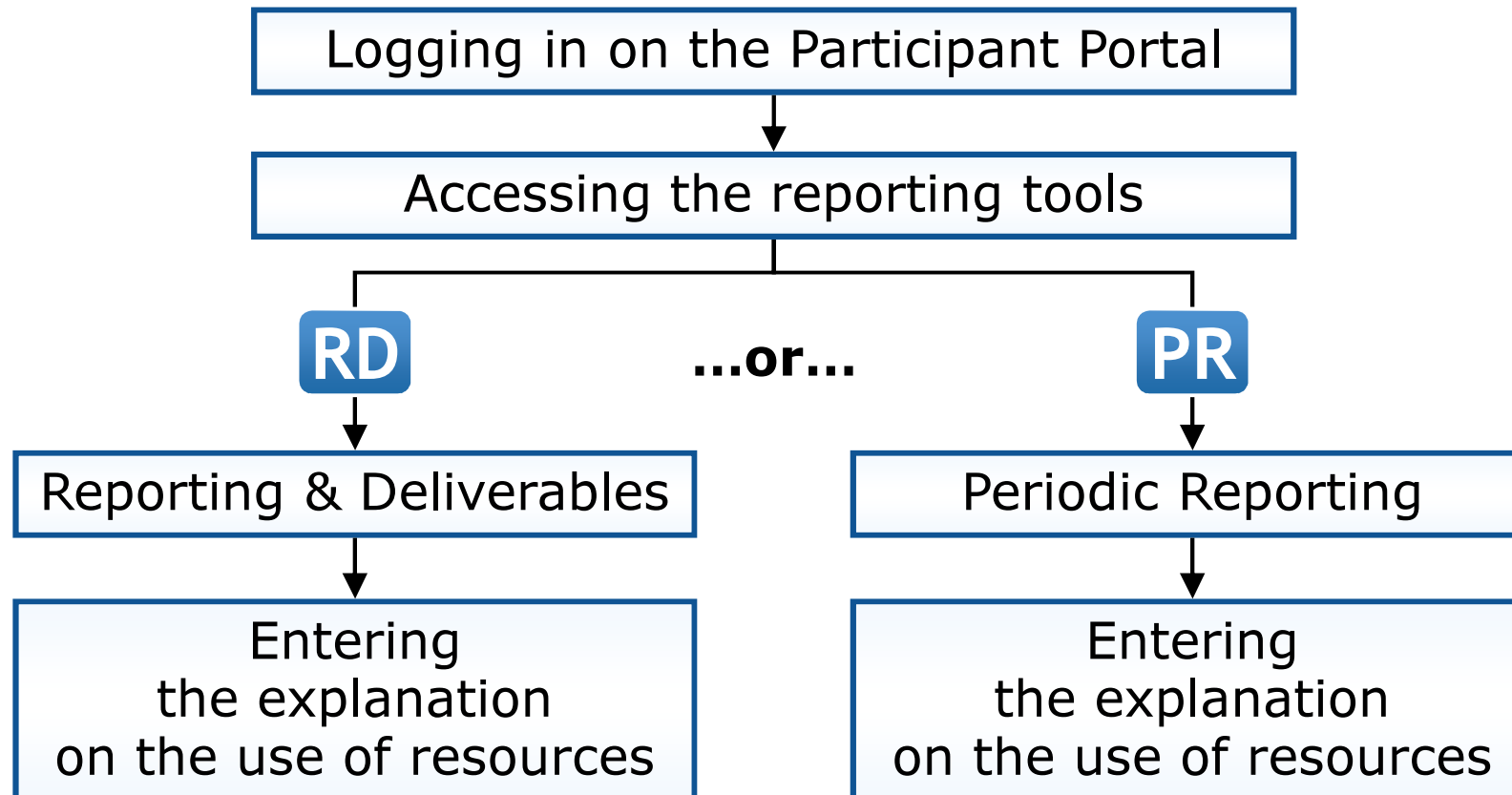
Explanation on the use of resources: What is it?

The following information is requested per beneficiary:

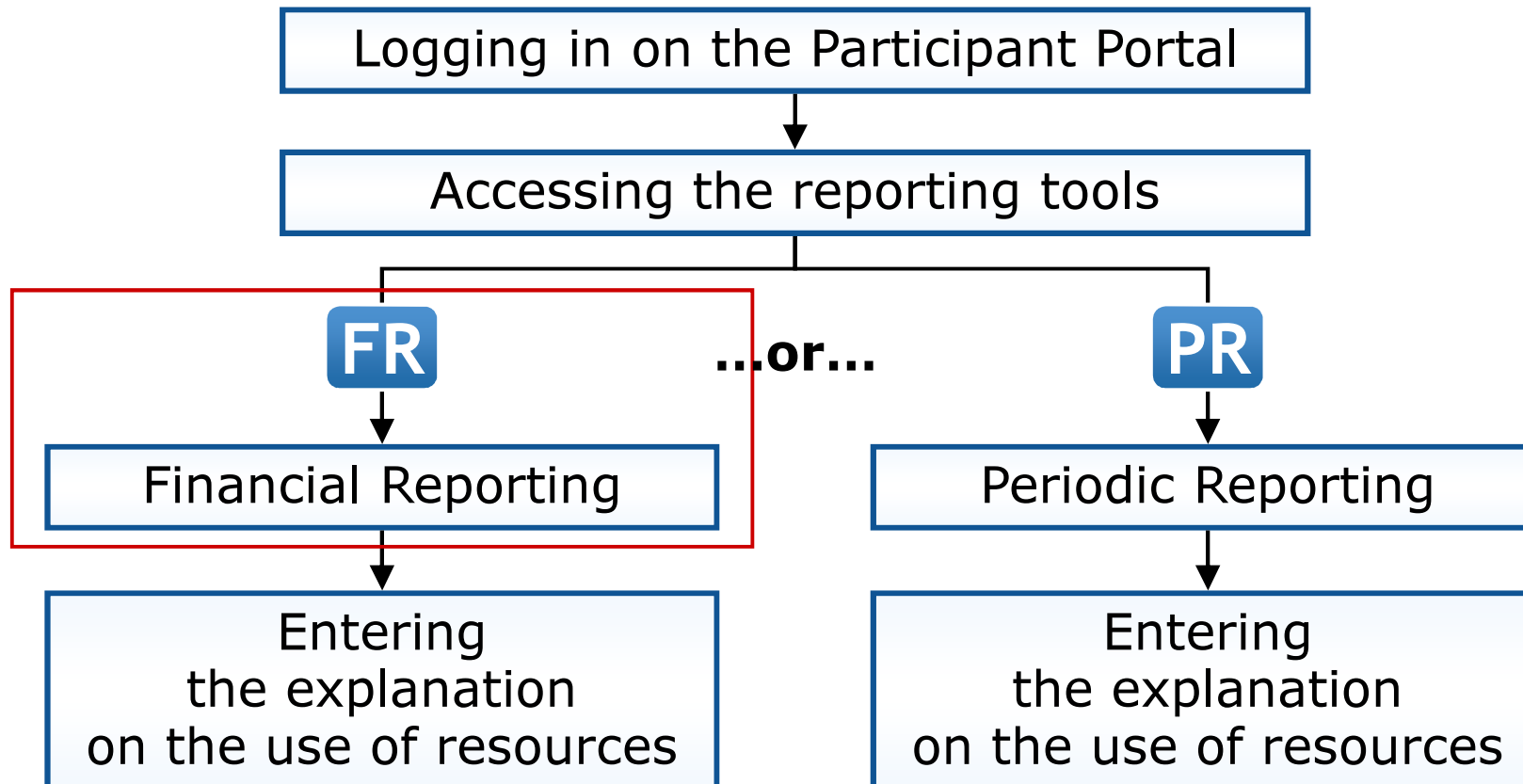
- Major cost items
- Explanation related to the use of resources
- Work packages information



Explanation on the use of resources: The old procedure



Explanation on the use of resources: The new procedure



The old procedure and the new procedure

The **same data** will have to be provided, but in
the **financial reporting tool**

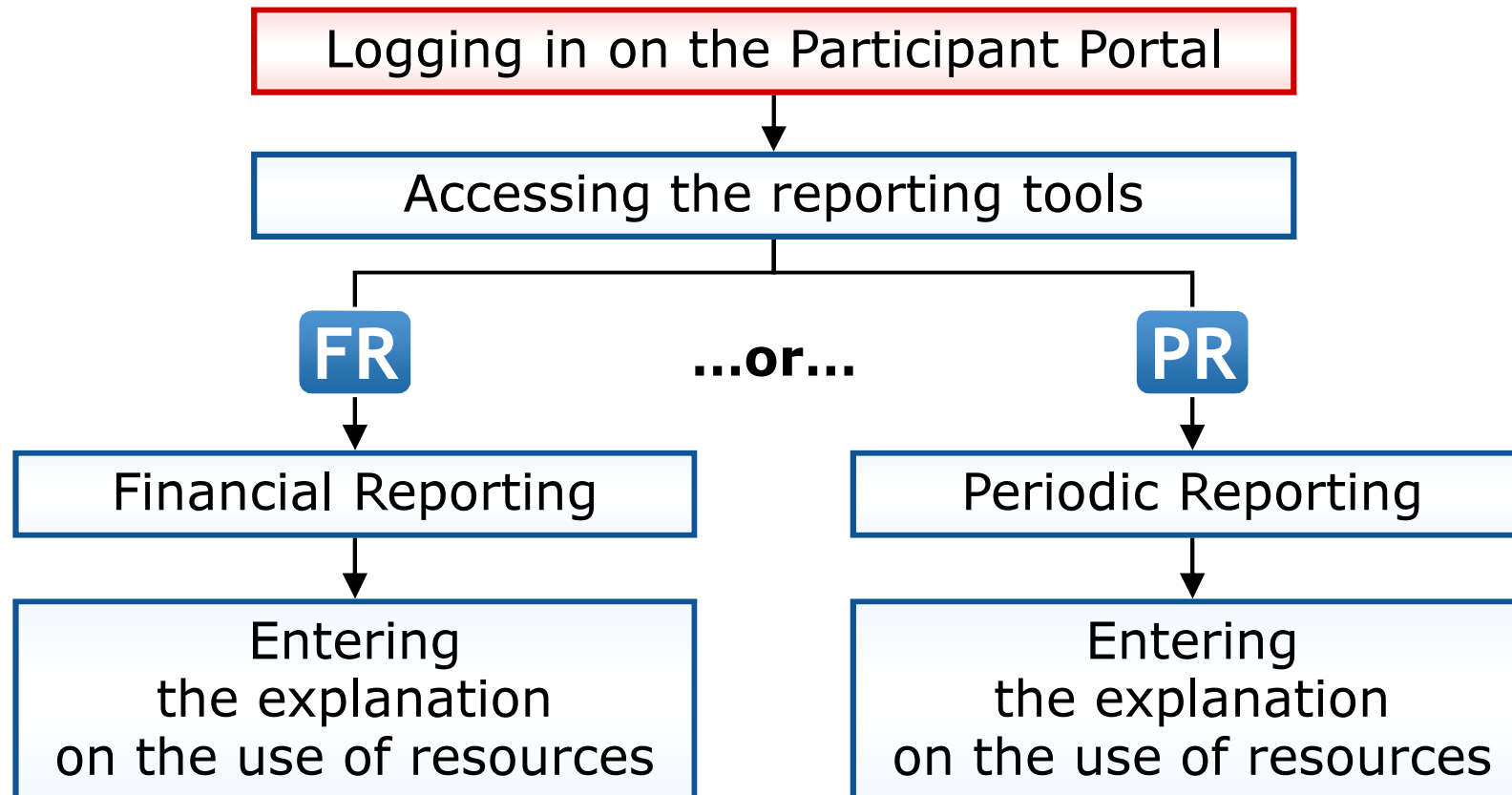


no longer in
the scientific reporting tool
(Reporting & Deliverables).



This is a **technical change only**, not a change in the concept!

Explanation on the use of resources: The new procedure, step by step





RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > Home

Home | **FP7 Calls** | FP7 Doc | My Organisations | Experts

LOGIN



Login

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NEED HELP?

- ▶ [Frequently Asked Questions](#)
- ▶ [User manual](#)
- ▶ [Presentations](#)
- ▶ [Contact the Helpdesk](#)

WHAT'S NEW

Participant Portal V3.2
(02/2012)

- Revised Role Management (allowing for more flexibility in assigning roles for negotiation and reporting in projects).
- New functions related to the organisation registration (list of FP7 proposals for LEARS or Account Administrators, new self-registrant role).
- Availability of FP7 documents (legal documents, work programmes, guidance notes, etc.).
- New advanced search functions (for FP7 Calls and FP7 Documents).

[read more](#) ▾

QUICK LINKS

[Research on Europa](#)

WELCOME

Welcome to the Participant Portal

The Participant Portal is your entry point for electronic administration of EU-funded research and innovation projects, and hosts the services for managing your proposals and projects throughout their lifecycle. Currently the portal covers mainly actions under the 7th EU-Framework Programme for Research and Technological Development (FP7). In the future, its coverage will be extended to other programmes in the area of research and innovation.



What does it offer today?

- You can search for FP7 calls for proposals and submit your proposals.
 - Depending on your role in projects and organisation, you can view information on projects, negotiate your grant agreement, manage amendments, submit financial and scientific reports or review projects.
- You can search for the unique identifier of your organisation, register your organisation or provide updates of your organisation's data.
 - Depending on your roles in projects and organisations, you can assign or revoke access rights to organisation and project data for other persons.

Forthcoming functionalities

- Expert evaluators will be able to manage the administrative details related to their work as peer reviewers.
- The currently separate electronic proposal submission system will be replaced by a new system integrated in the portal.
- Direct access to FP7 related information and documentation.

How does it work?

Are you a new user? +

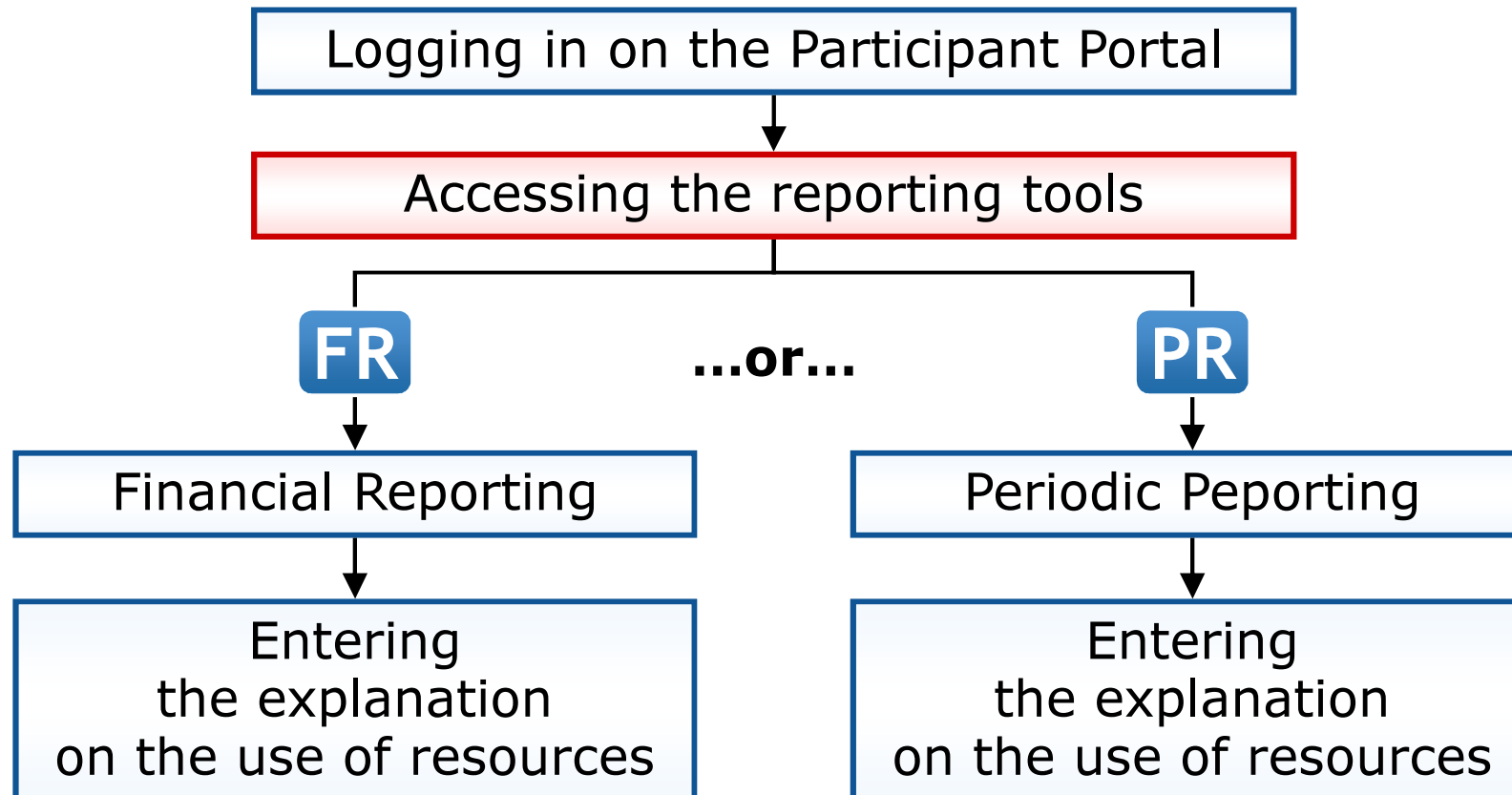
- 1 While some basic functions are available for anonymous users, the core functions of project management are only available to registered users. If you are a registered user you can use the login button.
- 2 After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.
- 3 On that new page, the blue arrows are the processes that are authorised for your profile and they will give you access to several lists, like the list of organisations, projects, roles of your project etc...
- 4 When you go into the details of an organisation, project, role etc... a new contextual menu will guide you through the additional actions.

Login with your ECAS account

Research Site



Explanation on the use of resources: The new procedure, step by step





RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > Home

- Home
- FP7 Calls
- FP7 Doc
- My Organisations
- My Proposals
- My Projects**
- My Roles
- Notifications
- Experts

LOGIN

Logout

Demo ACCOUNT

In addition to logging out, you must close all your browser windows to avoid any unauthorised access

NEED HELP?

- [Frequently Asked Questions](#)
- [User manual](#)
- [Presentations](#)
- [Contact the Helpdesk](#)

WHAT'S NEW

Participant Portal V3.2 (02/2012)

- Revised Role Management (allowing for more flexibility in assigning roles for negotiation and reporting in projects).
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[read more](#)

PROCESSES

Manage Organisations

- Search an organisation
- Register an organisation
- Manage organisation data

Identify Opportunities

- Search for a call

Proposals

- Browse and/or manage proposals
- Browse Proposals of your organisation

Negotiations

- Browse and/or manage negotiations

Others

- Manage roles and delegations
- Expert Area
- Support

- Browse and/or access grants
- Manage amendments
- Periodic reporting

Click on the "My Projects" tab



PROJECT LIST FOR DEMO ACCOUNT

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. A LEAR can only view projects their organisation is linked with. Granting access to projects is done separately.

Please visit the [user manual](#) for roles nominations details

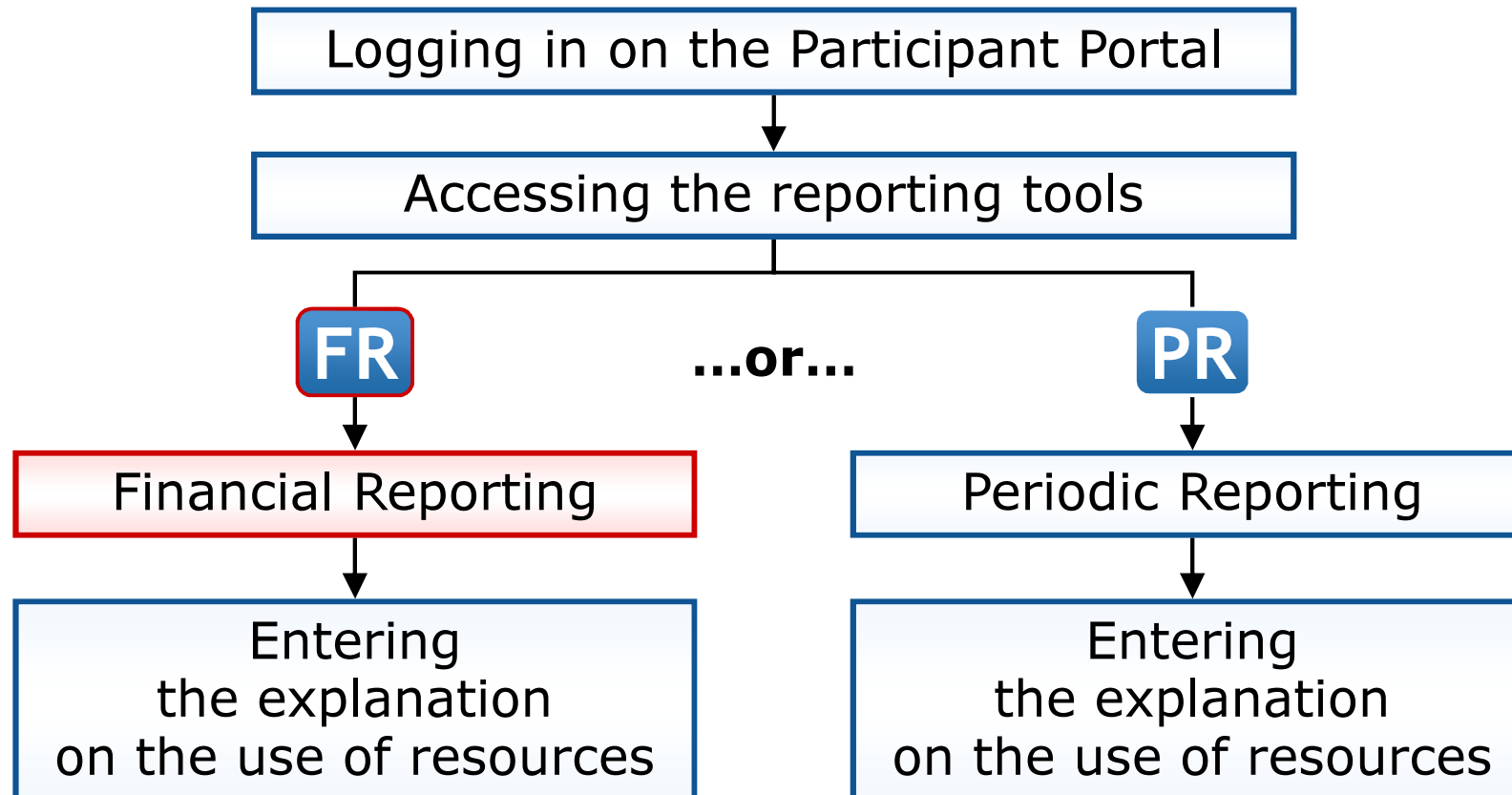
Show entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase			
TEST PROJECT1	FP7-INFRASTRUCTURES-2007-2	FP7	999991		Active	PR		
TEST PROJECT2	FP7-ICT-2007-1	FP7	999992		Active	PR		AA
TEST PROJECT3	FP7-KBBE-2007-1	FP7	999993		Active	RD	FR	AA
TEST PROJECT4	FP7-INFRASTRUCTURES-2007-1	FP7	999994		Active	RD	FR	
TEST PROJECT5	FP7-INFRASTRUCTURES-2007-1	FP7	999995		Active	RD	FR	

Showing 1 to 5 of 5 entries First Previous 1 Next Last

Check the list of projects in "Active" phase

Explanation on the use of resources: The new procedure, step by step



PROJECT LIST FOR DEMO ACCOUNT

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. A LEAR can only view projects their organisation is linked with. Granting access to projects is done separately.

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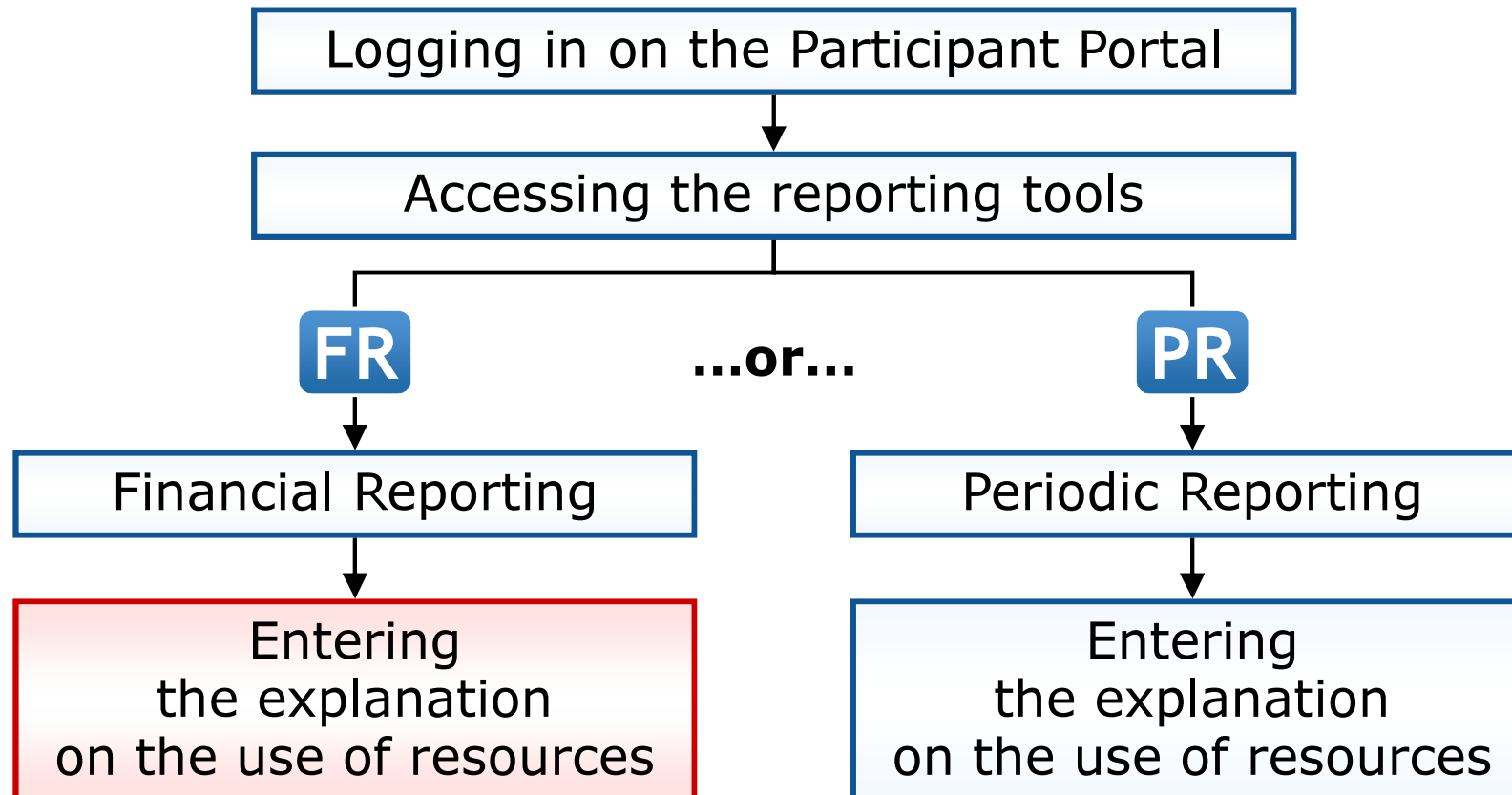
Show entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase			
TEST PROJECT1	FP7-INFRASTRUCTURES-2007-2	FP7	999991		Active	PR		
TEST PROJECT2	FP7-ICT-2007-1	FP7	999992		Active	PR		AA
TEST PROJECT3	FP7-KBBE-2007-1	FP7	999993		Active	RD	FR	AA
TEST PROJECT4	FP7-INFRASTRUCTURES	FP7	999994		Active	RD	FR	
TEST PROJECT5	FP7-INFRASTRUCTURES	FP7	999995		Active	RD	FR	

Showing 1 of 5 entries First Previous 1 Next Last


- AA** = Access Amendment
- FR** = **Financial Reporting**
- PR** = Periodic Reporting
- RD** = Reporting & Deliverables

Explanation on the use of resources: The new procedure, step by step



Entering the explanations on the use of resources

Upon clicking on a cell of a cost table, the following pop-up is shown:

Eligible costs (in €)	Type of activities				Total (E)=(A)+(B)+(C)+(D)
	RTD (A)	Demonstration (B)	Management (C)	Other (D)	
Personnel costs					0.00
Transaction with the RTD performer					
Subcontracting 					
Other direct costs					
Indirect costs					
Lump sums / flat-rate / scale of unit declared					
Total					
Maximum EU Contribution	0.00	0.00	0.00	0.00	0.00
Requested EU contribution					0.00

RTD/Personnel costs

Cost	Explanation	Work Package
0.00		
0.00		TOTAL

Entering the explanations on the use of resources

RTD Personnel costs		
Cost	Explanation	Work Package
0.00		
0.00	TOTAL	

Clear All Done

Type of activity
of the selected cell

Cost type
of the selected cell

Entering the explanations on the use of resources

RTD/Personnel costs		
Cost	Explanation	Work Package
1000.00	various	1
1000.00	TOTAL	

Clear All Done

You must fill in at least one major "Cost" item

The "Total" cost is automatically calculated on the basis of the individual cost items.

Entering the explanations on the use of resources

RTD/Personnel costs		
Cost	Explanation	Work Package
1000.00	various	1
1000.00	TOTAL	

Clear All Done



“Explanation”
for this cost item



Mandatory part of the reports
but not checked by the IT tool

“Work package”
for this cost item

More work packages can be
linked to one cost item

Entering the explanations on the use of resources

RTD/Personnel costs		
Cost	Explanation	Work Package
 1000.00	various	1
 0.00		
1000.00	TOTAL	

Delete a cost item

Add a cost item



Entering the explanations on the use of resources: best practices

Sufficient level of detail should be provided in the field "Explanation" with clear link to the Description of Work (Annex I)

Examples:

RTD/personnel costs: 6 man-months for Prof. NN senior researcher, 2 post-doctoral researcher for 18 man-months, 1 lab technician for 4 man-months

Management/subcontracting: web-site development and maintenance

RTD/other direct costs: Purchase of server as indicated in the DoW

Management/other direct: travel to annual meeting (date, city) including tickets, hotel and subsistence


Entering the explanations on the use of resources



RTD/Personnel costs		
Cost	Explanation	Work Package
<input type="text" value="1000.00"/>	<input type="text" value="various"/>	<input type="text" value="1"/>
<input type="text" value="500.00"/>	<input type="text" value="personnel expenses"/>	<input type="text" value="2"/>
<input type="text" value="1500.00"/>	TOTAL	


Delete all cost details for this cell of the Form C

Entering the explanations on the use of resources

Upon clicking the "Done" button, the total sum is copied to the corresponding field of the form C.

Eligible costs (in €)	Type of activities				Total (E)=(A)+(B)+(C)+(D)
	RTD (A)	Demonstration (B)	Management (C)	Other (D)	
Personnel costs	1500.00				1500.00
Transaction with the RTD performer					
Subcontracting 					
Other direct costs					
Indirect costs	11111.00				
Lump sums / flat-rate / scale of unit declared					
Total	12611.00				
Maximum EU Contribution	0.00	0.00			
Requested EU contribution					0.00

RTD/Personnel costs		
Cost	Explanation	Work Package
 1000.00	various	1
 500.00	personnel expenses	2
1500.00	TOTAL	

Eligible costs (in €)	Type of activities				
	RTD (A)	Dem			
Personnel costs	1500.00				
Transaction with the RTD performer					
Subcontracting 					
Other direct costs					
Indirect costs	11111.00				11111.00
Lump sums / flat-rate / scale of unit declared					0.00
Total	12611.00				12611.00
Maximum EU Contribution	0.00	0.00	0.00	0.00	0.00
Requested EU contribution					0.00

RTD/Personnel costs		
Cost	Explanation	Work Package
1000.00	various	1
500.00	personnel expenses	2
1500.00	TOTAL	

Actual indirect costs are directly editable (without details).



Timing

For all **newly created reports** the explanation on the use of resources will be **editable in the financial reporting** and no longer available in the scientific reporting function.

For a **temporary period, draft reports** can still be edited in the scientific reporting tool with the option that the user fills in this information either in the scientific reporting or in the financial reporting function.



What about existing forms C?

The existing financial forms (forms C) **do not change automatically**.

But they **can be converted** in order to use this new detailed explanation on the use of resources by clicking on the button:



A confirmation pop up window will then be shown before the form C is converted. **The conversion cannot be undone.**

Do you want to add details in this Form C?

You are about to convert an **old-style** Form C to a **new-style** Form C that contains details.

If you select **'Yes'** then a pop up window will be available for each cell of the new Form C where you can provide cost details. During this conversion the page will be redirected to the list of Beneficiaries.

If you select **'No'** then the Form C remains as before without supporting cost details.

Before proceeding to a new-style Form C make sure that you have saved all unsaved values.

PDF summary reports

The Coordinator can create a **“Use of Resources” report** (in PDF), either categorized **per Activity** or **per Cost Type**.

Summary reports can be accessed through the  icon in the Form C screen





Use of Resources Activity Report

Project no. 123456

Period: 01/09/2011 - 31/08/2012

PIC: 999999999 Participant No. 9

Acronym: TESTPROJECT

TEST ORGANISATION

RTD/INNOVATION			
Cost Type	Work Package	Explanation	Cost
OTHER DIRECT	1	OTHER: Brussels, Sept 2011 - final conference - Assistant, Principle Investigator Moscow Sept 2011 - Conference Researcher, Principle Investigator Geneva Sept. 2011 - ESA Conference - Team leader, Researcher, Turku June 2011 - Conference - Researcher Trnava June 2011 - Regional Workshop - Team leader, Researcher, Assistant Riga/Latvia, May 2011 - Regional Workshop, Team leader, Researcher, Assistants, Member of Advisory Board New York, Washington April 2011, LA - Conferences, Team leader, Researcher, Assistant	€ 17,638.22
OTHER DIRECT	2	TRAVELING: Travel cost; 7 Dec 2009 - Paris - Work Package Meeting, 24 Nov 2009 - Poznan/Salzgitter - Project Meeting IN M13-M15 FOR WP2.1; 7 Dec 2009 - Paris - Work Package Meeting, . 24 Nov 2009 - Poznan/Salzgitter - Project Meeting IN M16-M18 FOR WP2.1; Travel cost; Travel cost; 5 Aug 2010 - Neufahrn - Service visit	€ 4,890.93
OTHER DIRECT	1	TRAVELING: Travel costs to Trnava, Slovakia to a dissemination meeting in June, 2011 for the team leader and a researcher	€ 333.58
PERSONNEL	1	2,45 fte months Team leader, 4,68 fte months Assistant	€ 31,002.21
PERSONNEL	1,2	1,03 fte months Team leader, 5,2 fte months Researcher	€ 35,401.65
PERSONNEL	1,2,3	Salaries of researchers: 600 € # 1 person # 6 fte months = 3600 € 600 € # 1 person # 6 fte months = 3600 € 265,8 € # 1 person # 6 fte months = 1595 € 265,8 € # 1 person # 6 fte months = 1595 €	€ 10,390.00
SUBCONTRACTING	1	Workshop: Lithuanian Social Research Centre and the Foundation Baltic Institute of Social Sciences for carrying out organizational works of the ENRI-EAST regional workshop in Riga (Latvia), 26-27 May, 2011	€ 3,500.00
Subtotal (€)			103,156.59
DEMONSTRATION			
Cost Type	Work Package	Explanation	Cost
PERSONNEL	1		€ 100,000.00
Subtotal (€)			100,000.00
MANAGEMENT			
Cost Type	Work Package	Explanation	Cost
PERSONNEL	1	0.3 fte month in total Salary of the Team Leader: €900.- x 0.3 month x 1 person = €270	€ 270.00
Subtotal (€)			270.00
OTHER			
Cost Type	Work Package	Explanation	Cost
PERSONNEL	1	Payroll salaries in FTE months for project experts (1,5 month)	€ 3,500.00
Subtotal (€)			3,500.00
TOTAL(€)			206,926.59



Use of Resources Costs Report

Project no. **123456** Period: **01/09/2011 - 31/08/2012**
 PIC: **999999999** Participant No.9 Acronym: **TESTPROJECT**

TEST ORGANISATION

SUBCONTRACTING			
Activity Type	Work Package	Explanation	Cost
RTD/INNOVATION	1	Workshop: Lithuanian Social Research Centre and the Foundation Baltic Institute of Social Sciences for carrying out organizational works of the ENRI-EAST regional workshop in Riga (Latvia), 26-27 May, 2011	€ 3,500.00
Subtotal (€)			3,500.00

PERSONNEL			
Activity Type	Work Package	Explanation	Cost
DEMONSTRATION	1		€ 100,000.00
MANAGEMENT	1	0.3 fte month in total Salary of the Team Leader: €900,- x 0.3 month x 1 person = €270	€ 270.00
OTHER	1	Payroll salaries in FTE months for project experts (1,5 month)	€ 3,500.00
RTD/INNOVATION	1	2,45 fte months Team leader, 4,68 fte months Assistant	€ 31,002.21
RTD/INNOVATION	1,2	1,03 fte months Team leader, 5,2 fte months Researcher	€ 35,401.65
RTD/INNOVATION	1,2,3	Salaries of researchers: 600 € # 1 person # 6 fte months = 3600 € 600 € # 1 person # 6 fte months = 3600 € 265,8 € # 1 person # 6 fte months = 1595 € 265,8 € # 1 person # 6 fte months = 1595 €	€ 10,390.00
Subtotal (€)			180,563.86

OTHER DIRECT			
Activity Type	Work Package	Explanation	Cost
RTD/INNOVATION	1	OTHER: Brussels, Sept 2011 - final conference - Assistant, Principle Investigator Moscow Sept 2011 - Conference Researcher, Principle Investigator Geneva Sept. 2011 - ESA Conference - Team leader, Researcher, Turku June 2011 - Conference - Researcher Trnava June 2011 - Regional Workshop - Team leader, Researcher, Assistant Riga/Latvia, May 2011 - Regional Workshop, Team leader, Researcher, Assistants, Member of Advisor Board New York.	€ 17,638.22
RTD/INNOVATION	2	TRAVELING: Travel cost; 7 Dec 2009 - Paris - Work Package Meeting, 24 Nov 2009 - Poznan/Salzgitter - Project Meeting IN M13-M15 FOR WP2.1; 7 Dec 2009 - Paris - Work Package Meeting, , 24 Nov 2009 - Poznan/Salzgitter - Project Meeting IN M16-M18 FOR WP2.1; Travel cost; Travel cost; 5 Aug 2010 - Neufahrn - Service visit	€ 4,890.93
RTD/INNOVATION	1	TRAVELING: Travel costs to Trnava, Slovakia to a dissemination meeting in June, 2011 for the team leader and a researcher	€ 333.58
Subtotal (€)			22,862.73

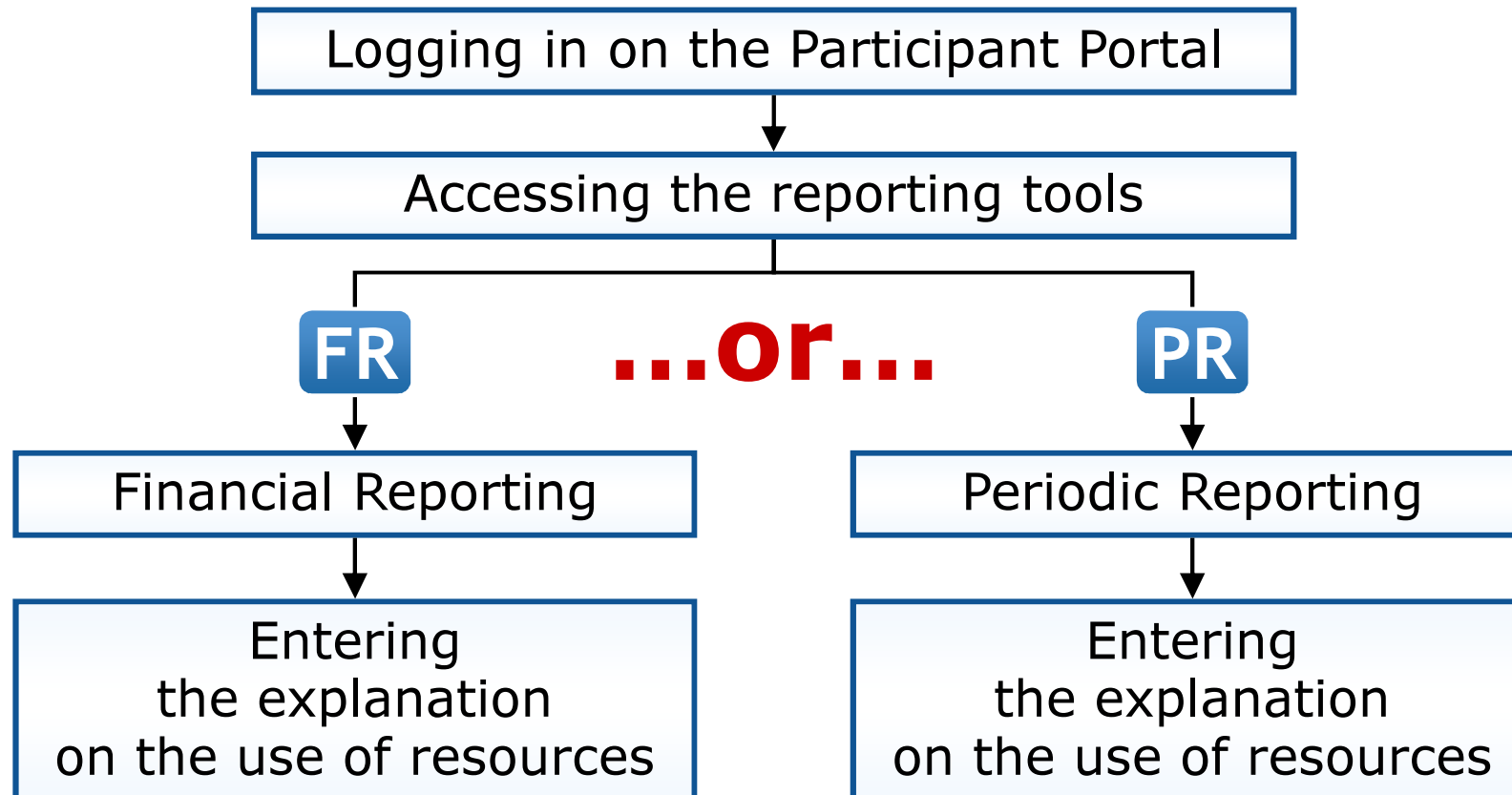
TOTAL (€)			206,926.59
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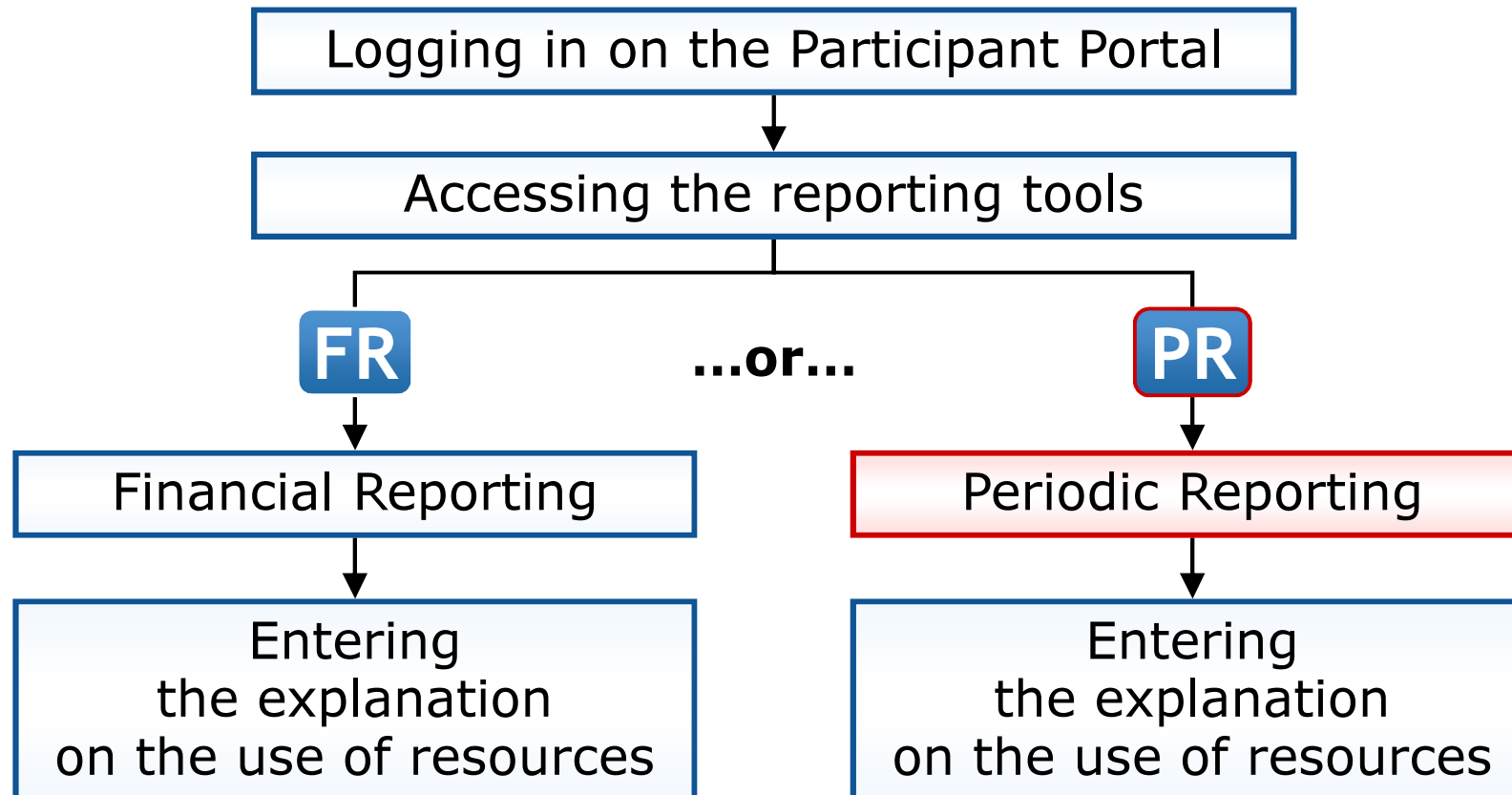
Explanation on the use of resources in the Periodic Reporting



Explanation on the use of resources: The new procedure, step by step



Explanation on the use of resources: The new procedure, step by step



PROJECT LIST FOR DEMO ACCOUNT

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. A LEAR can only view projects their organisation is linked with. Granting access to projects is done separately.

Please visit the [user manual](#) for roles nominations details

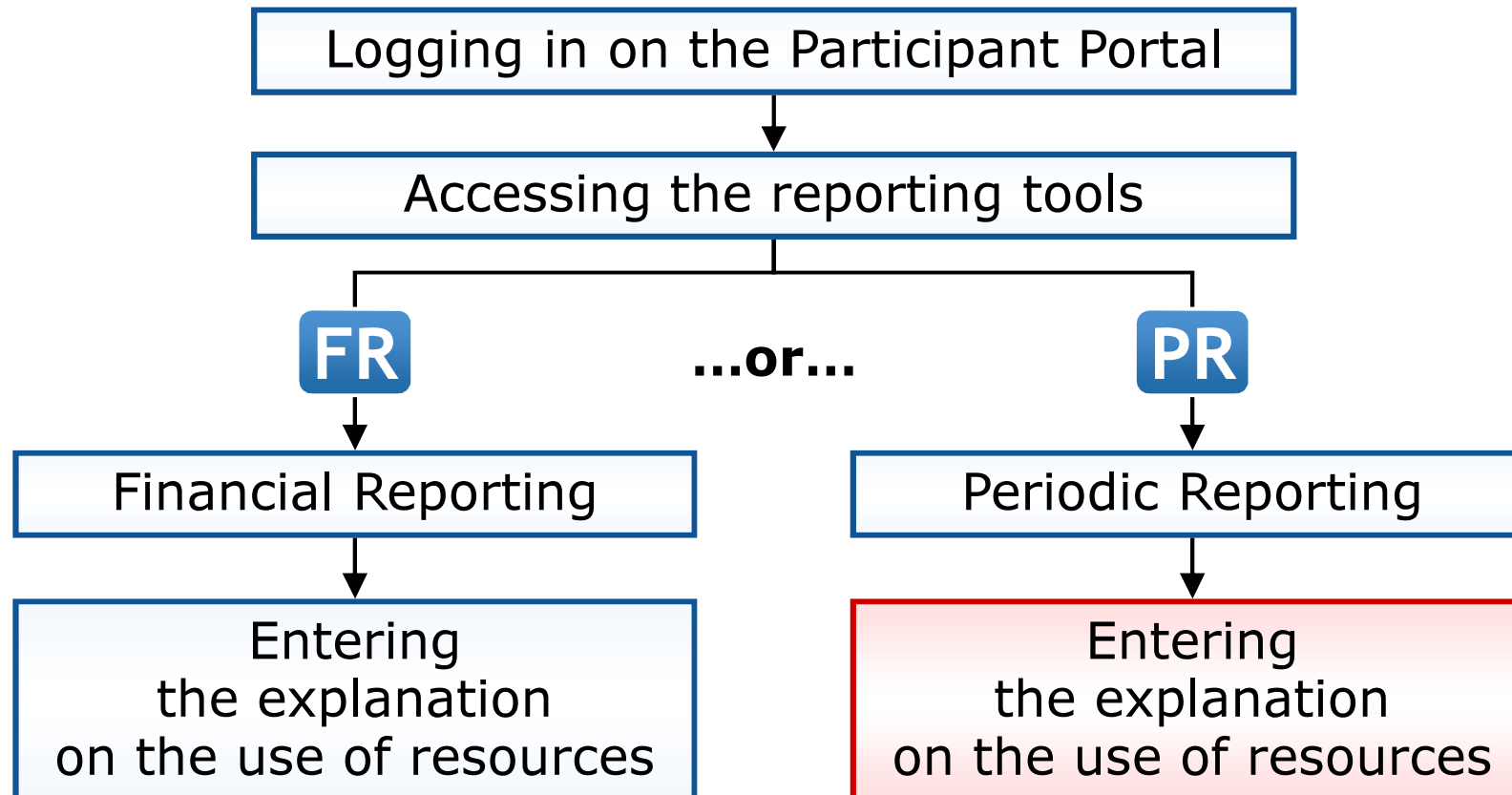
Show entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase			
TEST PROJECT1	FP7-INFRASTRUCTURES-2007-2	FP7	999991		Active	PR		
TEST PROJECT2	FP7-ICT-2007-1	FP7	999992		Active	PR	AA	
TEST PROJECT3	FP7-KBBE-2007-1	FP7	999993		Active	RD	FR	AA
TEST PROJECT4	FP7-INFRASTRUCTURES	FP7			Active	RD	FR	
TEST PROJECT5					Active	RD	FR	

Showing 1 to 5 of 5 entries Previous 1 Next Last

- AA** = Access Amendment
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Explanation on the use of resources: The new procedure, step by step





Click on "Form Cs" to access
the financial form for reporting purposes




Project

- [General information](#)
- [Budget Overview](#)
- [Work packages](#)
- [LFV](#)
- [Upload cost claim documents](#)
- [Reporting periods](#)
- [Project reviews](#)

Participants

Display the terminated participants [Show all menus](#) - [Hide all menus](#)

#	Form C Status	Legal Name	Short Name	Role	PIC	Part. Status	Date of entry	Date of termination
1		TEST ORGANISATION 1 (BE)	TO1	PA	999999999	active	1/9/2008	
		→ Legal data	→ Authorised representatives	→ Eligible costs	→ Form Cs			
		→ Organisation status	→ Contact persons	→ Bank account				
2		TEST ORGANISATION 2 (UK)	TO2	PA	999999998	active	1/9/2008	

 |  |  | [Top](#) | [Help Desk](#) | [Documentation](#) | 1.29.2-CR5

Access online documentation and a video on:

<http://212.68.215.215/display/iKnowextern/2.+Declaring+Costs%2C+Uploading+a+CFS+and+Uploading+a+Periodic+Report+in+NEF>

Form Cs

This participant is the coordinator for the proposal.

[→ Legal data](#) → [→ Organisation status](#) → [→ Authorised representatives](#) → [→ Contact persons](#) → [→ Eligible costs](#) → [→ Bank account](#) → [→ Form Cs](#)

[← Return to Summary](#)

You are currently working on period 2

Form C

Select the required period for editing the form C (in **"PENDING"** state)

	Period 1 (1 - 12) (01-09-2008 - 31-08-2009)	Period 2 (13 - 15) (01-09-2009 - 30-11-2009)
Submitted in period 1	Form C already submitted	
Submitted in period 2		→ Form C PENDING

Attached files

File type	Description	File
-----------	-------------	------

No files attached

Click on a "cost" field to edit the detailed explanation on the use of resources

[Return to Summary](#)
[Save Changes](#)
[Finalize](#)
[Unfinalize](#)

Please correct the following issues

- Name of the person(s) authorised to sign this Financial Statement - Please fill this field

Cost model: Special transitional flat rate, % for indirect costs : 20 (CSA is a funding scheme without RTD activities - see Art.II.15.2.c)

My legal entity is established in an ICPC and I shall use the lump sum funding method Yes No

[Costs](#)
[Other](#)
[Signature](#)
[Comment](#)

1. Costs Table [Use of resources](#)

	Coordination / Support (A)	Management (B)	Other (C)	Total (A+B+C)
Personnel costs	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Subcontracting	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Other direct costs	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Indirect costs	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	0
Maximum indirect costs	0	0	0	0
Maximum reimbursement indirect costs	0	0	0	0
Total costs	0	0	0	0
Maximum allowable EU contribution	0	0	0	0
Requested EU contribution				<input type="text" value="0"/>

[Return to Summary](#)
[Save Changes](#)
[Finalize](#)
[Unfinalize](#)

Document saved successfully!

Please correct the following issues

1. [1]The

Maximum fund

Cost model: S

My legal entity is established in an ICPC and I shall use the lump sum funding method Yes No

Costs Other Signature Comment

1. Costs Table

Demonstration/Personnel costs

Cost	Explanation	Work Package	Free Text	
<input checked="" type="checkbox"/>	3000	mandatory field - eg. PhD stude	WP2	<input type="checkbox"/>
TOTAL	3,000			Done

Use of resources

Indirect costs 44212 0 10270 0 54,482

44,212 0 10,270 120 54,482

117,900 0 37,388 200 155,288

88,425 0 37,388 200 125,813

Requested EU contribution

125813

Warning

Return to Summary

Save Changes

Finalize

Unfinalize

Document saved successfully!

Fill in the "Explanation" by cost item

Add free text information (optional)

Delete cost items

Add cost items