



Research and Innovation Participant Portal

Identity and Access Management (IAM)

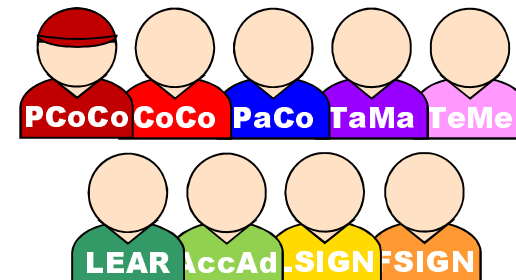
eFP7 Communication Office

RTD J3

Personalised services

The Participant Portal allows each user to have access to a personalised space, based on 3 main elements:

- Each user is supposed to have a **unique ECAS account**, which is the **unique identifier for persons** (linked to their professional email address).
- Each ECAS account is linked to one (or more) **PIC number(s)**, which are the **unique identifier for organisations**.
- Each ECAS account is linked to all the roles that the user has in projects and/or organisations through IAM. **One user can have as many roles as necessary.**





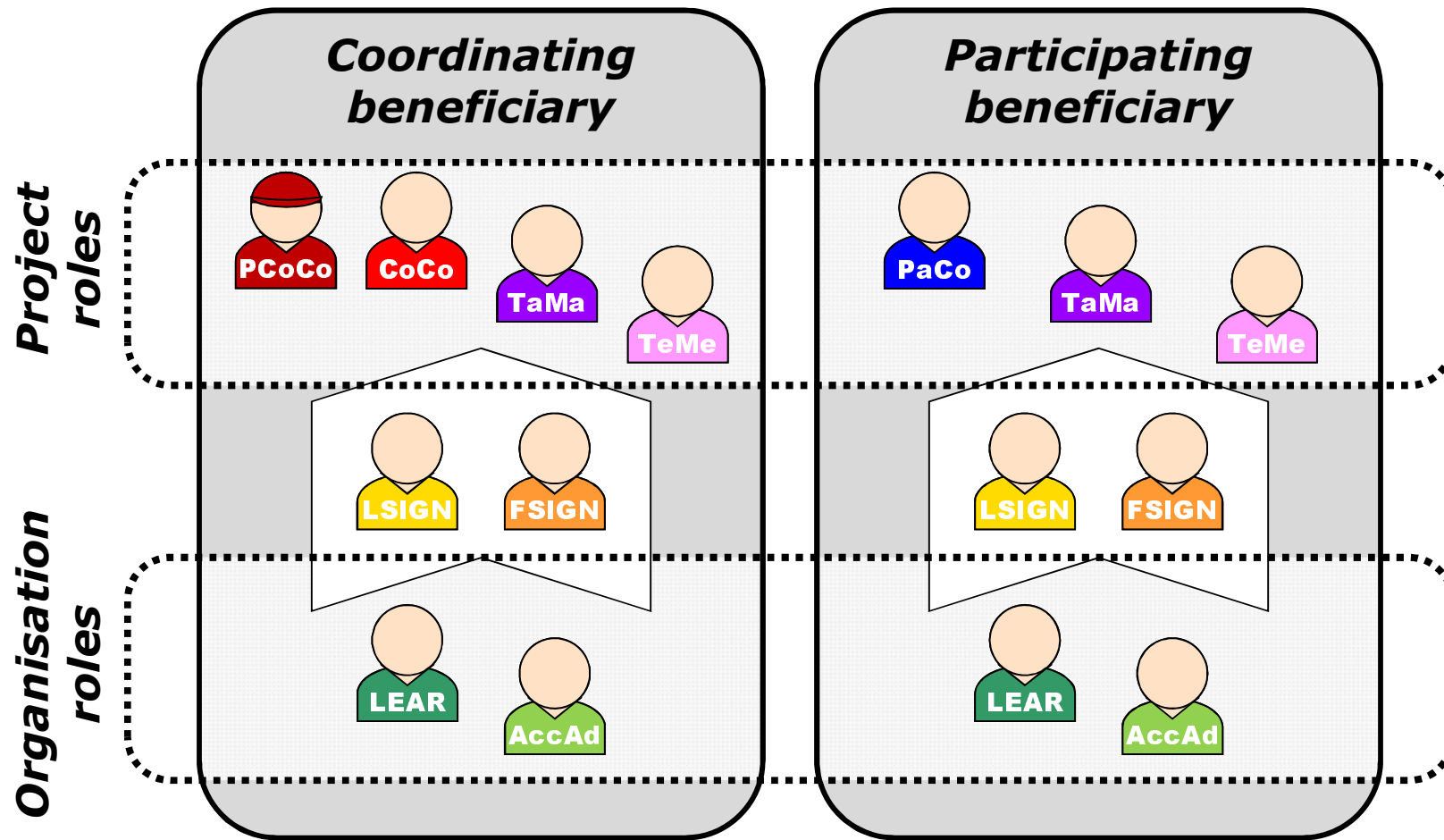
The Identity and Access Management

- The **I**ntity and **A**ccess **M**anagement allows us to define and/or manage changes of **access rights of users** of the **Participant Portal**.
- It gives a **personalised and secure access to the different services** of the Participant Portal.
- Minimum involvement by the Commission/Agency staff allowing for **flexibility in the online management of the consortium**.
- **Any change in the roles of the users is saved** to allow a monitoring & tracking service.



The new version of IAM (January 2014)

European
Commission



Nomenclature

Organisation roles



Legal Entity
Appointed
Representative



Account
Administrator



Legal
Signatory



Financial
Signatory



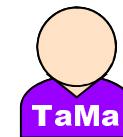
Primary
Coordinator
Contact



Coordinator
Contact



Participant
Contact



Task
Manager

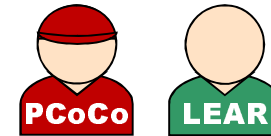


Team
Member

Project roles

Important remarks

- Only the key roles of the **LEAR** and **Primary Coordinator Contact** are defined/modified by the Commission.

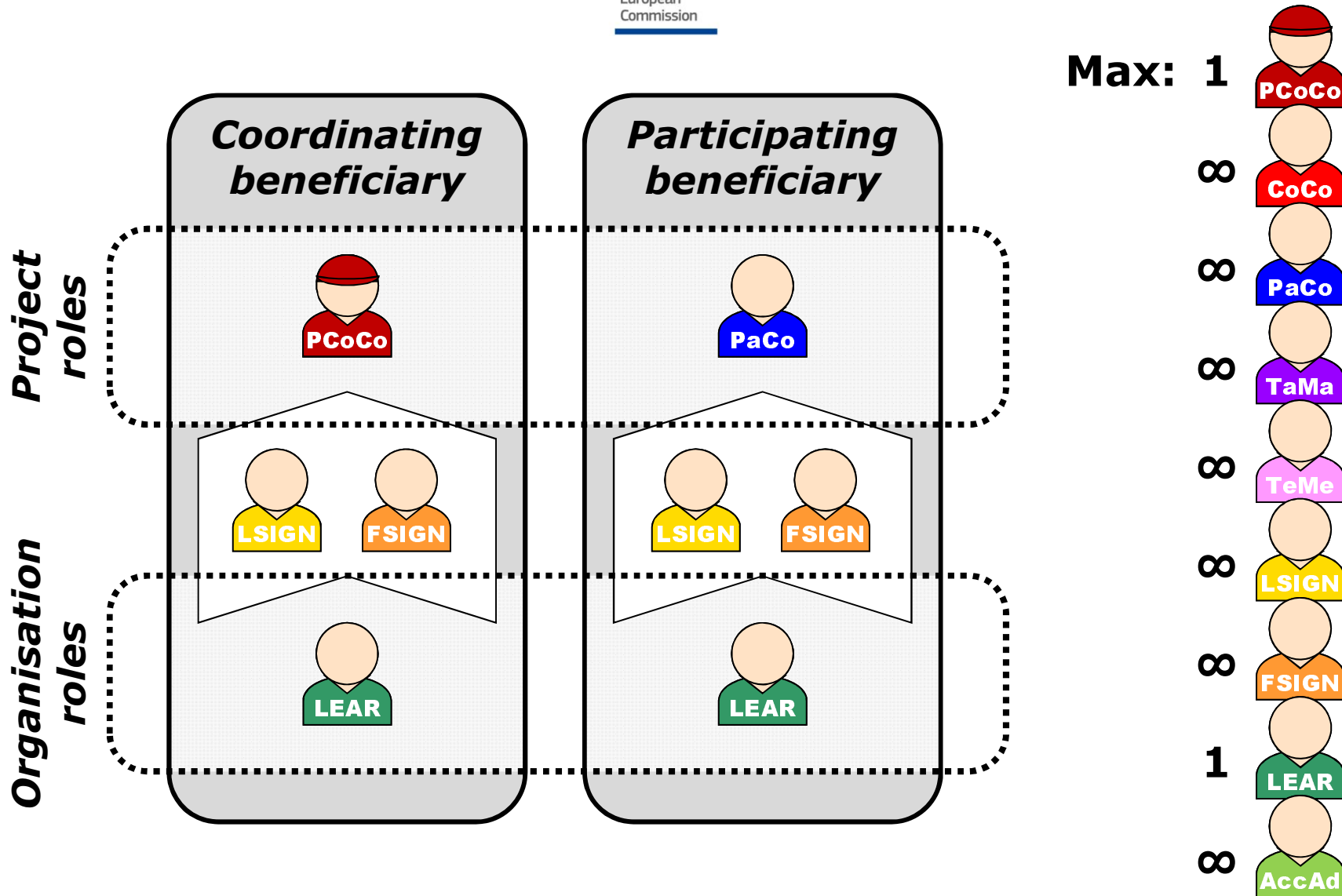


The rest is left at the discretion of the consortium.

- One person can have **several roles at the same time.**
- The complexity of the consortium depends on the participants. The **minimum configuration** is:
 - ✓ The Primary Coordinator Contact
 - ✓ 1 Participant Contact per beneficiary
 - ✓ 1 LEAR per organisation
 - ✓ 1 Legal Signatory per organisation
 - ✓ 1 Financial Signatory per organisation

Minimum configuration

European
Commission













Access rights







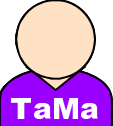


Project roles

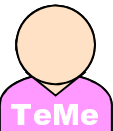

-    Read all forms
-  Write all forms
-  Submit all forms to EC

-   Read own forms
-  Write own forms
-  Submit own forms
-  Sign and submit own financial forms





-   Read own forms
-  Write own forms
-  Submit own forms (except financial forms)
-  Sign own legal forms




-   Read own forms
-  Write own forms
-  Submit own forms to coordinator (except financial forms)

-   Read own forms
-  Write own forms

-   Read own forms

Organisation roles

-   View organisation data
-  Modify organisation data
-  View lists of organisation's projects, proposals and organisation roles

-   View organisation data
-  View lists of organisation's projects, proposals and organisation roles



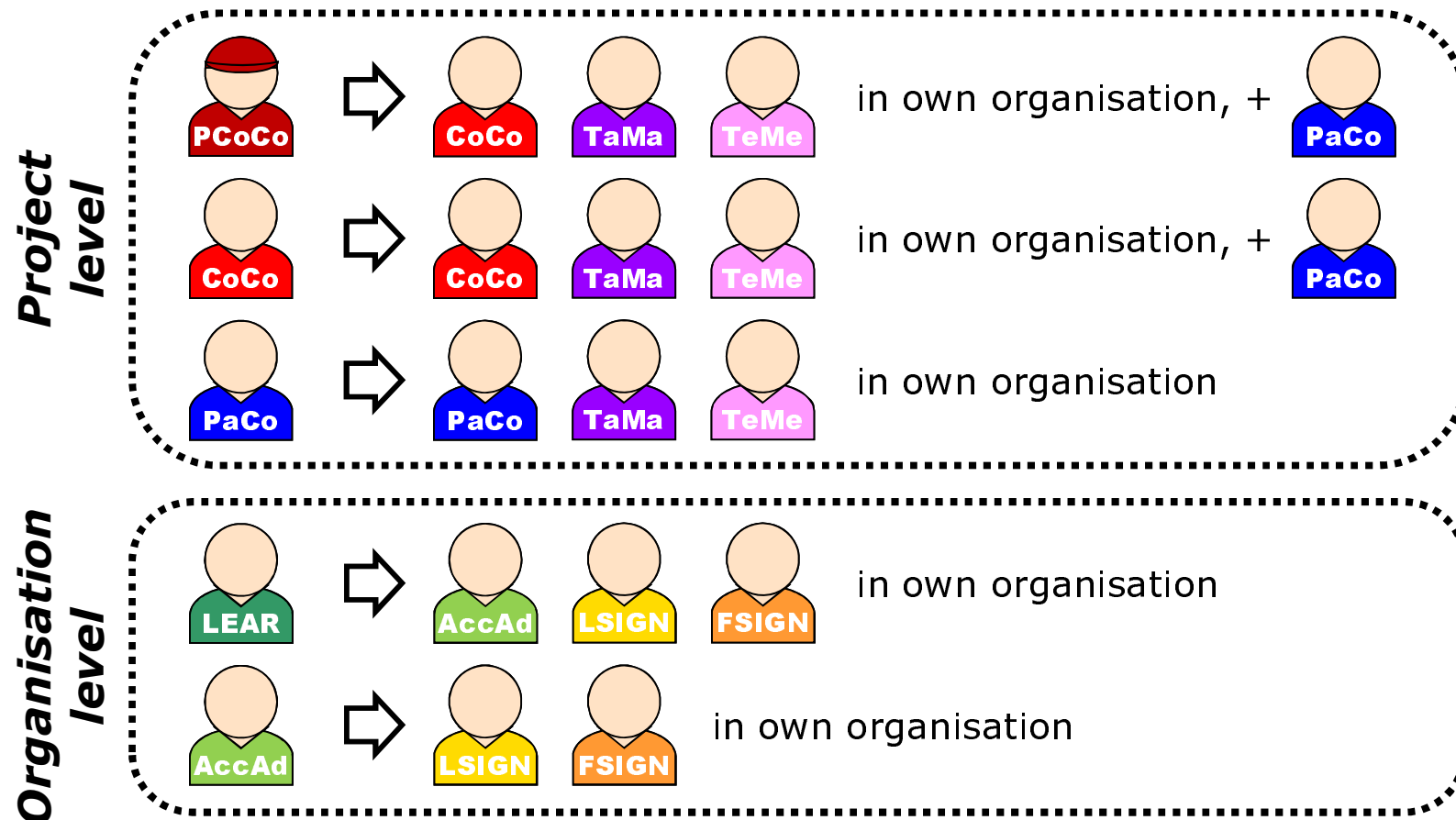
The nomination process: “Original roles”

Some roles are automatically provisioned in the early stages of the Project (“original roles”) as follows:

- The **proposal initiator in the proposal submission phase** will automatically be recognised by the Commission as the **Primary Coordinator Contact**.
- The **contact persons of the participating organisations** identified during **proposal submission** will become **Participant Contacts** at the beginning of negotiations.
- The **LEAR is validated by the Commission** during the validation process of his/her organisation.



The nomination process





The nomination process: how to nominate/revoke someone?

To grant a role, the e-mail address of the "new user" will have to be filled in; **this e-mail address should be the same as the one used for the ECAS account** of the "new user".

If this "new user" has no ECAS account, he/she will automatically receive an invitation to create his/her ECAS account.





RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > My Projects

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT

DEMO ACCOUNT

- My Organisation(s)
- My Proposal(s)
- My Project(s)**
- My Notification(s)
- My Expert Area

My projects

H2020 ONLINE MANUAL

This page enables you to access all your projects that have been selected and approved for funding.

Depending on your roles, you can view or manage the following project-related tasks:

- Negotiate your grant agreement
- Submit amendments to your grant agreement
- Manage your scientific and financial reports
- View or manage roles and access rights in your projects consortia

If you are LEAR and want to see the full list of your organisation projects, please go to **My Organisations** and click on the action button **VP**. LEAR can only view the list of projects in which their organisation is involved. If you want to see project details, your organisation main contact for this project or the project Coordinator has to give you access rights. For more details see the [H2020 online manual](#).

Legend

AA Access Amendment AN Access Negotiation MP Manage Project FR Financial Reporting PR Periodic Reporting RD Reporting & Deliverables PC Project Consortium

Show 10 entries

Search

ACRONYM	CALL	PROG	PROJECTID	ROLES	PHASE	ACTIONS
DEMO1	FP7-TEST-CALL-1	FP7	200000	PC	GRANT_MANAGEMENT	FR RD
DEMO2	FP7-TEST-CALL-1	FP7	200001	PC	GRANT_MANAGEMENT	PR

Project roles can be granted/revoked in the "My Projects" section, through the orange "PC (Project Consortium)" icon



RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > Project Consortium

- MY AREA
 - HOME
 - FUNDING OPPORTUNITIES
 - HOW TO
- My Organisation(s)
 - My Proposal(s)
 - My Project(s)**
 - My Notification(s)
 - My Expert Area

Edit roles
 (only if you are Primary Coordinator Contact, Coordinator Contact or Participant Contact)

View the organisation's basic details and full list of project roles

Project File

Details Consortium

Acronym DEMO1

ID 200000 Program FP7 RDG RTD

> COORDINATOR Organisation - Test Organisation 1	EDIT ROLES
Address: Sesame Street, 1000, Brussels, BE PIC: 999999999	
Primary Coordinator	John DOE john.doe@test.com
Coordinator Contact	Jack DOE jack.doe@test.com
Coordinator Contact	William DOE william.doe@test.com
Team Member	Averell DOE averell.doe@test.com
> BENEFICIARY Organisation - Test Organisation 2	EDIT ROLES
> BENEFICIARY Organisation - Test Organisation 3	EDIT ROLES
> BENEFICIARY Organisation - Test Organisation 4	EDIT ROLES
> BENEFICIARY Organisation - Test Organisation 5	EDIT ROLES



RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > My Organisations

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT

DEMO ACCOUNT

- My Organisation(s)
- My Proposal(s)
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- My Expert Area

My Organisations

H2020 ONLINE MANUAL

To access and manage your organisation data online, you must have registered the data initially or been nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed by the LEAR). As a Financial Statement Authorised Signatory (FSIGN), you can have a view of your organisation data. LEARs and Account Administrators can view all the roles of their organisation, nominate and revoke roles, as well as access the list of projects and proposals.

My Registered Organisations

LEGEND View Organisations Modify Organisations View Proposals View Roles View Projects

Show 10 entries Search

NAME	PIC	VAT	STATUS	ACTIONS
TEST ORGANISATION	999999999	BE123456789	VALIDATED	

Showing 1 to 1 of 1 entries. PREVIOUS 1 NEXT

Do you want to continue the registration of your organisation to receive a PIC?

If you started the registration of your organisation in the Commission register some time ago, but did not finalise it - your organisation has not received a PIC number yet - you will not be able to see it above in the section My Organisations. Please continue its registration by clicking on the button that leads you to the registration tool. You may check the information that will be necessary for the registration in the [user manual](#).

Organisation roles can be granted/revoked in the "My Organisations" section, through the blue "OR (Organisation Roles)" icon



RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > My Organisations

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT

DEMO ACCOUNT

- My Organisation(s)
- My Proposal(s)
- My Project(s)
- My Notification(s)
- My Expert Area

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To access and manage your organisation data online, you must have registered the data initially or been nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed by the LEAR). As a Financial Statement Authorised Signatory (FSIGN), you can have a view of your organisation data. LEARs and Account Administrators can view all the roles of their organisation, nominate and revoke roles, as well as access the list of projects and proposals.

My Registered Organisations

LEGEND VO View Organisations MO Modify Organisations OP View Proposals OR View Roles VP View Projects

Show 10 entries Search

NAME	PIC	VAT	STATUS	ACTIONS
TEST ORGANISATION	999999999	BE123456789	VALIDATED	VO MO OP OR VP

Showing 1 to 1 of 1 entries.

PREVIOUS 1 NEXT

Do you want to continue the registration of your organisation to receive a PIC?

Access to the "organisation" tools by clicking on its name, or by using the shortcut icons:

OD = Organisation's Data

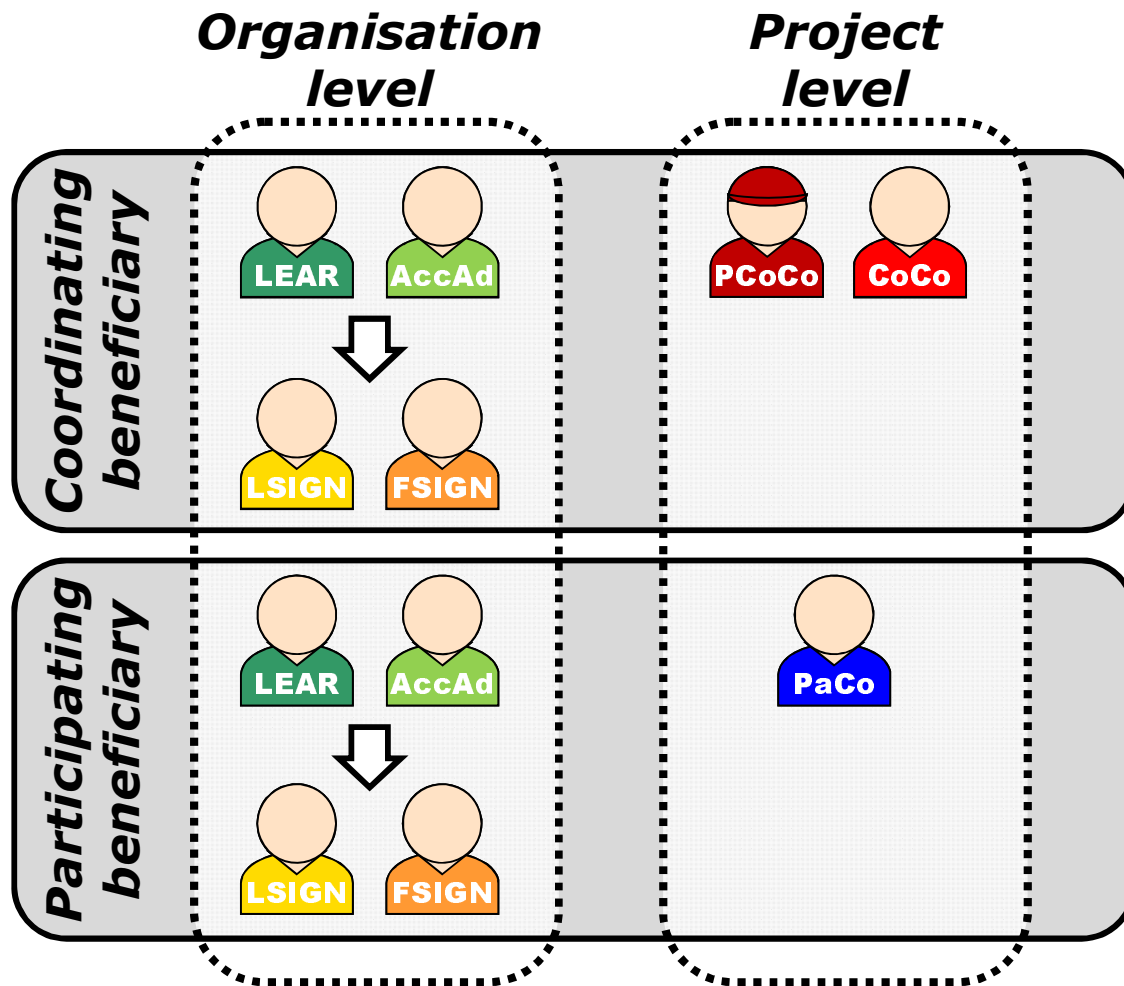
VP = View Projects

RO = Roles

OP = Organisation's Proposals

(only if you are LEAR or Account Administrator)

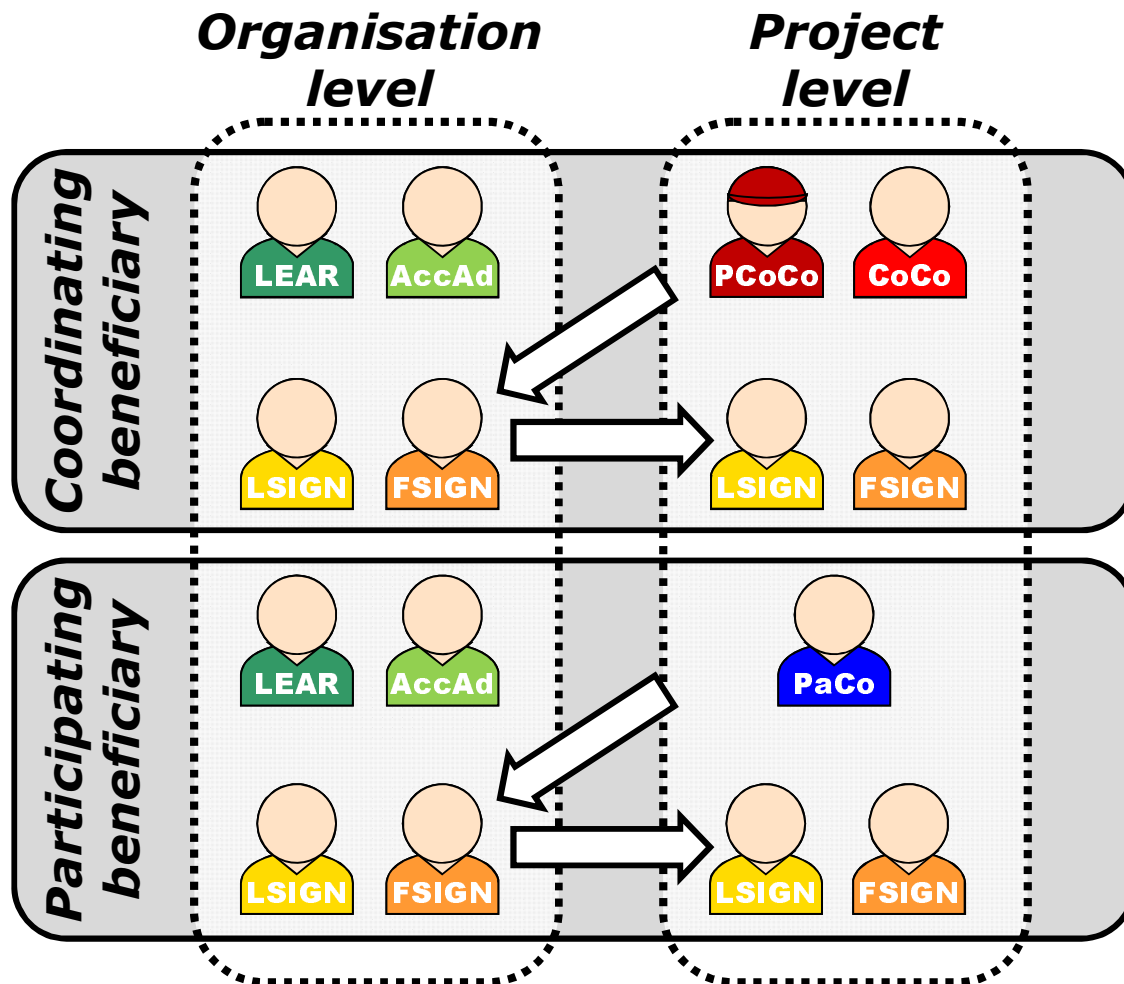
The nomination process: LSIGN/FSIGN



1. The **LEAR (or Account Administrators)** nominate as many LSIGNs/FSIGNs as they want.

At this stage, the FSIGN cannot do anything, while the LSIGN has read-only access to the organisation's data and lists of projects, proposals & roles.

The nomination process: LSIGN/FSIGN



2. The **(Primary) Coordinator Contacts / Participant Contacts**

need to assign to their project as many LSIGNs/FSIGNs for their own organisation as needed.

The LSIGN and FSIGN now have their own access to the tools.



Primary Coordinator Contact

Rights

- There can be **only one** Primary Coordinator Contact per project.
- Is the **primary point of contact between the Commission and the Consortium for negotiations.**
- Has **read and write access** to all the forms of his/her organisation and to the common forms of the consortium.
- Can **submit forms to the European Commission.**

Can nominate/ revoke...

- **Coordinator Contacts, Task Managers and Team Members** within his/her organisation.
- Assign **Legal and Financial Signatories** to a project within his/her organisation.
- **Participants Contacts** for any organisation in the consortium.

Is nominated/ revoked by...

- The proposal initiator of the coordinating entity **identified in the proposal** is automatically transferred as Primary Coordinator Contact.
- Can only be revoked or modified by **the European Commission.**



Coordinator Contact

Rights

- There can be **as many** Coordinator Contacts as needed per project.
- Has **read and write access** to all the forms of his/her organisation and to the common forms of the consortium.
- Can **submit forms to the European Commission**.

Can nominate/revoke...

- **Other Coordinator Contacts** within their organisation; all the nominated Coordinator Contacts have similar rights.
- **Task Managers** and **Team Members** within their organisation.
- Assign **Legal** and **Financial Signatories** to a project within their organisation.
- **Participants Contacts** for any organisation in the consortium.

Is nominated/revoked by...

- The **Primary Coordinator Contact** or **another Coordinator Contact**.





Participant Contact

Rights

- The Participant Contacts are nominated to **represent the organisation within the consortium.**
- There is **at least one** Participant Contact per organisation.
- All Participant Contacts have **read and write access** to their organisation's forms.
- All Participant Contacts can **submit forms to the Coordinator Contacts.**

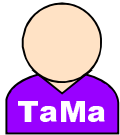
Can nominate/revoke...

- **Other Participant Contacts, Task Managers and Team Members** within their organisation.
- Assign **Legal and Financial Signatories** to a project within their organisation.

Is nominated/revoked by...

- **The Primary Coordinator Contact** or a **Coordinator Contact.**
- **Another Participant Contact** within their organisation.





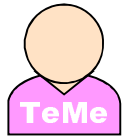
Task Manager

Rights

- There may be one or more Task Manager(s) per organisation.
- Can **create, save and update forms of their organisation**

Is nominated/revoked by...

- The **Primary Coordinator Contact** or **other Coordinator Contacts** (*for the coordinating entity*).
- **Participant Contacts** (*for other entities*).



Team Member

Rights

- There may be one or more Team Member(s) per organisation.
- Have limited access rights: **search, read-only**.

Is nominated/revoked by...

- The **Primary Coordinator Contact** or **other Coordinator Contacts** (*for the coordinating entity*).
- **Participant Contacts** (*for other entities*).





Legal Entity Appointed Representative

Rights

- There can be **only one** LEAR per organisation.
- **Access the list of organisation roles** within his/her organisation, as well as **the list of projects and proposals of his/her organisation**.
- Can **request to revoke users** from roles within his/her organisation *e.g. by asking a Coordinator Contact or a Participant Contact to revoke a role.*
- Is responsible for the **updates of the organisation-related data**, can request (online) the modification of such data, and upload supporting documents.
- Is responsible for **nominating a pool of Legal and Financial Signatories** in which Project Coordinators can choose to assign LSIGNs/FSIGNs to their project

Can nominate/revoke...

- **Account Administrators** and **Legal and Financial Signatories** within his/her organisation.

Is nominated/revoked by...

- Can only be revoked or modified by **the Commission**.



Account Administrator

Rights

- There may be one or more Account Administrator(s) within an organisation.
- **Access the list of organisation roles** within his/her organisation, as well as **the list of projects and proposals of his/her organisation**.
- Can request (online) the update of **the organisation-related data**.
- Can **request to revoke users** from roles within his/her organisation *e.g. by asking a Coordinator Contactor a Participant Contact to revoke a role*.
- Can help in **nominating a pool of Legal and Financial Signatories** in which Project Coordinators can choose to assign LSIGNs/FSIGNs to their project

Can nominate/revoke...

- **Legal and Financial Signatories** within his/her organisation.

Is nominated/revoked by...

- The **LEAR** (*of his/her entity*).



Legal Signatory

Rights

- There may be one or more Legal Signatory(s) within an organisation.
- Has read-only access to organisation's data.

Is nominated/revoked by...

- The **LEAR** or **Account Administrators** (*of his/her entity*).





Legal Signatory assigned to a project

Rights

- There may be one or more Legal Signatory(s) assigned to the same project within an organisation.
- One Legal Signatory can be assigned to multiple projects.
- Can **electronically sign legal documents** (and in some cases submit them to the coordinator).
- Has **read and write access** to his/her organisation's forms.

Is nominated/revoked by...

- The **Primary Coordinator Contact** or **other Coordinator Contacts** (*for the coordinating entity*).
- **Participant Contacts** (*for other entities*).



Financial Signatory

Rights

- There may be one or more Financial Signatory(s) within an organisation.
- Has no right as long as not assigned to a project.

Is nominated/revoked by...

- The **LEAR** or **Account Administrators** (*of his/her entity*).





Financial Signatory assigned to a project

Rights

- There may be one or more Financial Signatory(s) assigned to a project within an organisation.
- One Financial Signatory can be assigned to multiple projects.
- Can **electronically sign financial statements (Forms C)** and **submit them** to the coordinator.
- Has **read and write access** to his/her organisation's forms.

Is nominated/revoked by...

- The **Primary Coordinator Contact** or **other Coordinator Contacts** (*for the coordinating entity*).
- **Participant Contacts** (*for other entities*).



More information

- **FAQ:**
<http://ec.europa.eu/research/participants/portal/desktop/en/support/faq.html>
- **Contact us:**
<http://ec.europa.eu/research/participants/api/contact>
- **ECAS help:**
<https://webgate.ec.europa.eu/cas/help.html>

