

# Latest news on FP7 IT tools and related processes

**Legal and financial NCPs  
Brussels, 10 February 2010**



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European Commission, Brussels



- **Participant Portal**
- **NEF part B**
- **Reporting Tool**
- **LEAR change requests via the Participant Portal**



## LOGIN



[Login](#)

You don't have an ECAS account yet? Please [register](#).

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:

- [Introduction](#)
- [For all users](#)
- [For LEARs](#)
- [For Coordinators](#)
- [Getting support](#)

You can consult [FAQs](#)

[>> read more](#)

## WHAT'S NEW

### Participant Portal v1.2

- Support for participant contacts on a project (new roles)
- Reviewed layout of the Organisations and MyProjects tabs
- New contact Form
- New tab called My Roles displaying your roles known by the Participant Portal

[>> read more](#)

## WELCOME

# Welcome to the Participant Portal

The **Participant Portal** will become your single entry point of interaction with the Research Directorates-General of the European Commission. It will host a full range of services **that facilitate the monitoring and the management of your proposals and projects** throughout their lifecycle.



## What does it offer today?

- You can **register your organisation's data** in the **Unique Registration Facility (URF)**, avoiding redundant requests for information;
- After registration you will receive a **Participant Identification Code (PIC)** that uniquely identifies your organisation. You can use it to maintain your organisation's details and monitor its status in the processes of electronic proposal submission and negotiation;
- You can also **check whether your organisation has already registered** and if so, retrieve the PIC that has already been assigned;
- The appointed representative of your organisation, called the **LEAR (Legal Entity Appointed Representative)** **can provide and update relevant legal & financial data** via the portal.

Other functionalities are currently implemented as pilot services:

- All visitors may search for **FP7-related support documents**;
- LEARs may access the **list of projects** associated with their organisation, including project details and the status of amendments.

## How does it work?

Except for the FP7 documentation and the PIC search function, **access to the Portal and its underlying services** requires an **ECAS account**.

### Do you already have an ECAS account?

- Please [log in](#)
- "My organisations" and "My projects" tabs will appear
- Under "My organisations":
  - You may **register your organisation's data and obtain a PIC**
  - LEARs may **update their organisation's data**
  - LEARs may access the **list of projects** of their organisation
- Under "My projects":
  - Coordinators will soon be able to access the list of their projects.





## Participant Portal - Purpose?

- Today
  - Offer external stakeholders (participants, LEARs, coordinators,...) a **unique entry point**, based on a **single sign-on** (ECAS),
  - Access to unique registration, negotiation, amendments, financial and scientific reporting
  - **Bring homogeneity** and better service integration for grant management
- Later on ...
  - Unified look & feel
  - Centralized document access (delivery and consortium documents)
  - Homogeneity and visibility on Business Processes (transparency)
  - Access to calls information, consortium building, etc.
  - Management of proposals



# Identity and access management

## Access

- Access to the Portal and its services requires an **ECAS account**.
- New users are invited to register on the European Commission Authentication Service (ECAS).



## Roles, delegation

- Roles in projects are transferred from EPSS and NEF
- Note: The e-mail address is the unique identifier for persons.
- Next version (March): extended functionalities for delegation and assignment of roles by the consortium itself

A to Z | Sitemap | Search | About this site | Contact | Legal Notice | English (en)

European Commission

## RESEARCH - Participants

European Commission > Research > Participant Portal

**LOGIN**

[Change Password](#)

[Logout](#)

**User: test PORTAL**

ECAS help is available [here](#).

Portal registration demo is available [here](#)

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**FAQ**

The answers to the most frequent questions that are submitted to the [eFP7 service desk](#).

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Watch the demonstration of the Participant Portal:

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- [For Coordinators](#)
- [Getting support](#)

You can consult [FAQS](#)

[>> read more](#)

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**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](#)

**PROCESSES**

**Manage Organisations**

Search  
an organisation

Register  
an organisation

Manage  
organisation data

**Identify Opportunities**

Read  
FP7 related  
documentation

**Negotiations**

Browse and/or  
manage  
negotiations

**Grant Execution**

Browse and/or  
access grants

Manage  
amendments

Periodic  
reporting

Manage  
scientific  
deliverables

**Others**

Manage roles  
and delegations

Support

SEVENTH FRAMEWORK PROGRAMME



# Important links

## FAQ

The answers to the most frequent questions that are submitted to the [eFP7 service desk](#).

See the [online user manual](#)

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- [For LEARs](#)
- [For Coordinators](#)
- [Getting support](#)

You can consult [FAQs](#)

[>> read more](#)

## Participant Portal (FAQ box)

<http://ec.europa.eu/research/participants/portal>

## Login to access the Participant Portal secured services

<http://ec.europa.eu/research/participants/portal/appmanager/participants/portal/login/>

## Creation of an ECAS account

<https://webgate.ec.europa.eu/aida/selfreg>

## Technical helpdesk

[http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?nfpb=true&pageLabel=contactus#wlp\\_contactus](http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?nfpb=true&pageLabel=contactus#wlp_contactus)



# Novelties in NEF



# Accessing NEF from the PP

1. Access the Participant Portal: <http://ec.europa.eu/research/participants/portal/>
2. Login to your ECAS account
3. Go to 'My Projects' tab. Choose the relevant project then click on 'Access Negotiation'

Home My Organisations My Projects FP7 Documentation

**PROJECT LIST FOR TEST PORTAL**

Page 1 of 1 First / Previous Next / Last

Acronym	Title	Starting Date	Duration	Phase	Programme	RDG	Project ID		
TEST STIFF	Enhancing biomorphic ...		36	NEGOTIATION	FP7	INFSO	999999	<a href="#">View Details</a>	<a href="#">Access Negotiation</a>

**PROJECT DETAILS OF TEST STIFF 2 (999999)**

**Acronym :** TEST STIFF      **Programme :** FP7      **RDG :** INFSO      **Starting Date :**      **Duration :** 36

**Call ID :** FP7-ICT-2007-3      **Title :** Enhancing biomorphic agility

**Abstract :**

the human and robotic arm is: &apos;how is stiffness used to enhance performance?&apos; and this project represents one of the first attempts where targeted modelling studies will go the full circle by exploiting these results for optimal control of an embodied, high dimensional, variable impedance robotic system.

**Participants :**

DEUTSCHES ZENTRUM FUER LUFT - UND RAUMFAHRT EV (999981731) as COORDINATOR  
TECHNISCHE UNIVERSITEIT DELFT (999977366) as PARTICIPANT  
THE UNIVERSITY OF EDINBURGH (999974941) as PARTICIPANT  
UNIVERSITE PARIS DESCARTES (999869793) as PARTICIPANT  
FONDAZIONE BRUNO KESSLER (999625450) as PARTICIPANT

**Activity Codes :** ICT-2007.2.2

**Keywords :** Stiffness, joint impedance, human arms, robotic arms, variable impedance actuation systems, grasping, human arm model, human-robot interaction, optimal feedback control, reinforcement learning



# NEF part B

## (submission of technical annex, including structured data)

FP7 Applications - Microsoft Internet Explorer provided by European Commission

http://prod-uf.fp6.cc.cec.eu.int:19001/nefb/backoffice/project/22747/view

File Edit View Favorites Tools Help

SysLog Web Formation http://wlssp2pr.cc.cec.eu.i... Research Participant Portal Windows Live Hotmail FP7 Applications

Calls / FP7-SSH-2009-B / 244443 - CLICO /

### 244443 - CLICO NEGOTIATION

**Parameters**

<p><b>CONTACTS</b></p> <p>Project/Scientific Officer: <a href="#">LIBERATORE Angela (RTD.L.3)</a></p> <p>Legal officer: <a href="#">ADAMESCU Ioana-Olga (RTD.L.6)</a></p> <p>Financial officer: <a href="#">PORCU Salvatore (RTD.T.1.99)</a></p>	<p><b>LIFECYCLE</b></p> <p>Opening date: 15/06/09</p> <p>Expected end date: 28/09/09</p>	<p><b>DEADLINES</b></p> <p>GPF: 20/07/09</p> <p>Technical annex: 06/07/09</p> <p>Legal documents: 07/09/09</p>	<p><b>PROPOSITIONS</b></p> <p>Duration: 36 months</p> <p>Contribution: 2,991,356 euro</p>
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**Current session**

Verified on 26/11/09 at 16:05   Submitted on 26/11/09 at 15:54   Opened on 24/11/09 at 15:20   Created on 23/11/09 at 15:53

[Session management](#)   [Edit Parameters](#)

[PDF preview](#)   [XML export](#)

**Project**

- [General information](#)   [Budget Overview](#)   [Work packages](#)   [LFV](#)
- [Reporting periods](#)   [Contact persons Overview](#)   [Project reviews](#)

**Coordinator "UNIVERSITAT AUTONOMA DE BARCELONA" (UAB) (999986484 - S4)**

- [Legal data](#)   [Authorised representatives](#)   [Eligible costs](#)   [Financial information](#)
- [Organisation status](#)   [Contact persons](#)   [Bank account](#)

**Participants**

#	Completion status	Legal Name	Short Name	Role	PIC	Part. Status	PDM Status	PDM Last change	EWS Status	Reorder
1		UNIVERSITAT AUTONOMA DE BARCELONA (ES)	UAB	CO	<a href="#">999986484</a>	active	S4	5/11/2009	No EWS	
2		UNIVERSITY OF EAST ANGLIA (UK)	UEA	PA	<a href="#">999985611</a>	active	S4	15/10/2009	No EWS	↓
3		ECOLOGIC INSTITUT gemeinnützige GmbH (DE)	ECOLOGIC	PA	<a href="#">999741171</a>	active	S4	11/5/2009	No EWS	↑ ↓
4		INSTITUTT FOR FREDSFORSKNING STIFTELSE (NO)	PRIO	PA	<a href="#">999483539</a>	active	S4	12/1/2010	No EWS	↑ ↓
5		THE HEBREW UNIVERSITY OF JERUSALEM, (IL)	HUJI	PA	<a href="#">999975038</a>	active	S4	6/2/2009	No EWS	↑ ↓
[Redacted]										
8		THE CYPRUS RESEARCH AND EDUCATIONAL FOUNDATION (CY)	Cyl-EEWRC	PA	<a href="#">999573555</a>	active	S4	6/10/2009	No EWS	↑ ↓

Local intranet 100%

start | Calendar - Microsof... | 22 Reminders | FW: New procedur... | FP7 Applications - M... | NOTE FOR THE ATT... | Microsoft PowerPoi... | FR | 9:39



# Preparation of the DoW

Prepare worktables under 'Work packages', 'Deliverables' and 'Milestones'

Important Legal Notice  
2007 - 2013  
FP7 Applications - CP

Calls / FP7-SSH-2009-B / 244443 - CLICO /

**Work packages**

[Return to Summary](#)

**Work packages**

Number	Title	Type of activity	Lead beneficiary	Person months	Start month	End month
Total						

**Deliverables**

1 title  [Search](#) [Show all](#)

Number	Work package	Title	Lead beneficiary	Person months	Nature	Dissemination	Delivery date	Scientific
Total								

**Milestones**

Number	Work package	Name	Lead beneficiary	Delivery date	Comments
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**Part B**

File name	Uploaded on
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Top | Help Desk | NEF v.1.14.18

Upload narrative text as pdf under 'Part B' section



## Preparation of the DoW

No changes in **content** of the templates, but there are **structural changes** in the DoW:

- **Part A consists of:** a cover page, **the** project summary, **the** list of participants, **the** budget breakdown, **and in addition to these, as a new section the 8 Workplan Tables – generated by NEF**
- **Part B consists of the narrative part uploaded as a pdf document**

**NEF generates out of the two parts one complete file for the DoW, Annex I.**



## FP7 reporting tool

- Online tool for preparation and submission of periodic and final scientific FP7 reports, project technical reviews by external experts (SESAM)
- Deployed under the Participant Portal
- It is not necessary to send parallelly paper documents or by e-mail!
- Test phase since November 2009; use will become mandatory in March/April 2010
- Quick guides available



## FP7 reporting

- Web forms for collecting structured data plus upload of text documents (pdf)
- All publishable info (publishable summaries, publications, patents, non-confidential foreground) automatically transferred to CORDIS (and available for further analysis)
- Accepting the reports: timing and process
- Future plans: merging submission of scientific and financial reports (forms C) under the participant portal, electronic signature on form C



# LEAR change requests via the Participant Portal

## LEAR's rights and obligations

- **Enter legal and financial data of the legal entity on the Participant Portal (URF)**
- **Upload supporting documents**
- **Modify such data**
- **Inform internal staff about the legal entity's data**
- **Official contact person for introducing changes, clarifying any issues with the Validation services**



## Type of data to be handled by LEARs

### Data handled via the Participant Portal

<http://ec.europa.eu/research/participants/portal>

- Organisation data;
- Legal address;
- FP7 data (including indirect cost model);
- Status of the organisation;
- Enterprise data (in particular the SME status)
- Documents for the financial capacity check (eg. balance sheet data)
- Uploading supporting documents
- Mergers, acquisitions



# LEAR change requests: What-When

## Proposal submission phase

- **After self-registration of a new entity: no change possible before validated of the legal entity by the Commission.**
- **After validation, a LEAR should be appointed. LEARs can introduce change requests online via the Participant Portal, which then have to be validated by the VS.**

### From end-February:

- **After self-registration and before validation: editorial changes (e-mail, tel. no.) can be introduced any time - until the Validation Service has validated the entity's data. More significant modifications require nomination of a LEAR and validation by the Commission.**
- **Mistakes in legal entity data can be ignored for submission of proposals. Corrections to the data can be introduced during the negotiation phase.**



## Proposal submission phase

### From end-February:

- **With the new Portal release, users will be able to update their organisation data after receiving a temporary PIC. However, as soon as the Validation Service start the analysis of the legal documents submitted, users will no longer be able to introduce changes directly via the Portal. If urgent, users should contact the Validation Service via e-mail and quote their temporary PIC in the subject heading.**
- **Once the entity has been validated and received a final PIC, the LEAR will be able to update certain data fields without interference from the VS (e-mail, telephone number, etc.).**
- **In case of more significant modifications, the LEAR has to introduce the request via the Portal and submit the required supporting documents. The VS will then analyse the requested modification before approving it.**



## Negotiation phase

- **Validation of the entities takes place at the latest during the negotiation phase.**
- **Change requests via the Portal can be introduced just like during the submission phase.**
- **The legal data stored in URF-PDM cannot be changed in NEF.**
- **Automatic synchronisation between URF-PDM and NEF every 24h – validated changes will appear in NEF on the next day.**



## During the project

- **If a beneficiary has a signed grant agreements, modifications related to the grant or the legal entity can be initiated in accordance with the [amendment guidelines](#).**

### Current procedure for changes to legal entity data:

- **The entity informs the Commission about the changes:**
  - if there is a LEAR, online change request via the PPortal, including upload of supporting documents
  - if there is no LEAR yet, a contact person sends change request with supporting documents to the REA-URF e-mail box.
- **After validation of the changes, all operational units concerned are informed and the COM issues information letters to all coordinators of consortia in which the entity participates.**



## During the project

### Changes proposed in the revised guidelines:

- **The entity informs the Commission about the changes:**
  - if there is a LEAR, the request has to be sent via the Portal then the LEAR has to upload the supporting documents (no paper version of the statement is necessary, exception: ICM change (e-mail is sufficient)).
  - if there is no LEAR yet, the entity has to appoint one and then the procedure of modifying the data can start.
- **The Validation Service handle the request and after verification the updated data will be available on the Portal. No letter will be sent to the LEAR about accepting the change request. The RTD operational units will be informed about the changes and will issue an information letter to the coordinator only.**



## ICM change requests

- **Basic rules: one unique ICM per entity; changes only towards “higher” accounting standards**
- **Correction of mistakes: Handling of change request depends on the ongoing projects.**
- **For entities with ongoing FP7 projects, the validation process for correcting mistakes in ICM choice takes longer, as the impact on all ongoing projects has to be analysed.**
- **Requests have to be initiated by the LEAR with sending an e-mail to the VS ([REA-URF-validation@ec.europa.eu](mailto:REA-URF-validation@ec.europa.eu)), giving reasons for the change request.**

### Revised amendment guide:

- **If the beneficiary has submitted a CFS by an auditor, the ICM change request should be accompanied by a statement from a qualified auditor.**



# HOW

**Participant Portal <http://ec.europa.eu/research/participants/portal>**

- **ECAS registration**
  - **Go to 'My Organisations' tab**
  - **Currently under 'Status' (previously known as URF data) the legal and financial data of the participant is editable for LEARs**
  - **Modify data, upload supporting documents**
  - **Submit request**
- 
- **Once this procedure is accomplished, in principle, no further communication between the LEAR and the Commission is necessary.**
  - **However, in case of problems, such as missing supporting documents, the validation service of the Commission (REA.A.1) will contact the LEAR by e-mail to request the additional information.**