



# eGrants

## The Participant Portal – paperless grant management

**BELSPO event**  
**Brussels, 22 February 2018**

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CSC J3 – Common service for business processes



# Principles

- Single gateway for all exchanges: **Participant Portal**
- **Single sign-on:** One user name and password (EU Login) gives access to all designated functions. It gives a personalised and secure access to the different services of the Participant Portal.
- **Identity and Access Management:** allows to define and manage changes of access rights of users of the Participant Portal. Ensures that only correctly authorised users can make the respective transactions
- **Personalised web space and service:** after login you see all your assets related to your proposals, grants, expert account...

# Roles - Nomenclature

## Organisation roles



**Legal Entity  
Appointed  
Representative**



Account  
Administrator



**Legal  
Signatory**



**Financial  
Signatory**



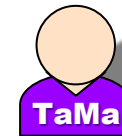
**Primary  
Coordinator  
Contact**



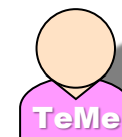
Coordinator  
Contact



**Participant  
Contact**



Task  
Manager



Team  
Member

## Project roles

## Definition of roles

Assigned to an **organisation**:

- **Legal Entity Appointed Representative [LEAR]**
- **Account Administrator [AcAd]**
- **Legal Signatory [LSIGN]**
- **Financial Signatory [FSIGN]**

Assigned to a **project**:

- **Coordinator Contact [CoCo]; Participant Contact [PaCo]**
- **Project Legal Signatory [PLSIGN]**
- **Project Financial Signatory (PFSIGN)**
- Task manager (TaMa); Team Member (TeMe)

## Roles >> rights management - principles

### Chain of trust:

- **LEAR** is formally nominated by the legal representative of the organisation
- LEAR appoints on PP a list of persons authorised to **sign legal documents (LSIGN)** and **financial statements (FSIGN)**
- Only these persons get access to sign relevant documents on PP after Project contacts (PaCos and CoCos) have appointed them to a given project
- "Sign and submit" triggers creation of **digitally signed pdf documents**
- All persons that need to know about signature are **notified** and have **access** to the signed documents
- Full **audit trail** of all electronic transactions

## Roles and access rights – organisation data

Role	Read	Write	Assign/ Revoke AcAd role	Assign/ Revoke LSIGNs and FSIGNs
LEAR	✓	✓	✓	✓
AcAd	✓	✓	✗	✓
LSIGN	✓	✗	✗	✗
FSIGN	✓	✗	✗	✗

## Roles and access rights – project data

Role	Read	Write/ Save	Submit to Coordinator	Submit to EU service	SIGN GA	SIGN FS financial statement	Assign revoke access to project
CoCo	✓	✓	✓	✓	✗	✗	✓
PaCo	✓	✓	✓	✗	✗	✗	✓
TaMa	✓	✓	✗	✗	✗	✗	✗
TeMe	✓	✗	✗	✗	✗	✗	✗
PLSIGN	✓	✓	✗	✗	✓	✗	✗
PFSIGN	✓	✓	✗	✗	✗	✓	✗

# How to acquire roles?

Access rights **managed by the organisations and consortia themselves** save **two exceptions** →

→ **LEAR**: paper process [soon we move to e-validation], **appointed by the legal representative of the organisation, approval by the EU services**

**Account Administrator [AcAd]: by LEAR**

**LSIGN, FSIGN: by LEAR or AcAd**

→ **PCoCo**: inherited from the proposal, change via the EC PO

**Coordinator Contact [CoCo]: from proposal or by other CoCo**

**Participant Contact [PaCo], Team Member [TeMe]:**

**from proposal or by CoCo, other PaCo**

**Task Manager [TaMa]: by CoCo or PaCo**

**PLSIGN, PFSIGN: from list of LSIGNs and FSIGNs; by CoCo or PaCo**



# I have EU Login but no access to any proposals, projects or organisation data – what should I do?

**Ask persons having access** to the respective data for granting you access:

- **Proposals** – person who created the proposal on PP
- **Projects** – any Participant Contact or Coordinator Contact [PaCo] or [CoCo]
- **Organisation data** – the **LEAR** of your organisation

## Minimum configuration of access rights for running a project

- ✓ 1 Primary Coordinator Contact (CoCo)
- ✓ 1 Participant Contact (PaCo) per beneficiary
- ✓ 1 LEAR per organisation
- ✓ 1 Legal Signatory (LSIGN) per organisation
- ✓ 1 Financial Signatory (FSIGN) per organisation

### **One person (= one EU Login account) can cumulate unlimited number of roles**

(e.g. owner of a one-person SME can be PaCo, LEAR, LSIGN and FSIGN at the same time)

**Example:** Consortium with 10 partners: minimum 40 roles for minimum 10 persons



# Roles for Organisations

- MY AREA
- HOME
- FUNDING OPPORTUNITIES
- HOW TO PARTICIPATE
- EXPERTS
- SUPPORT
- Search
- ATTILA BERCZIK
- My Organisation(s)**
- My Proposal(s)
- My Project(s)
- My Notification(s)
- My Formal Notification(s)
- My Expert Area

## My Organisations

H2020 ONLINE MANUAL HOW TO

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 Organisation
  - MO Modify Organisation
  - OR View Roles**
  - OP Organisation Proposals
  - VP Organisation Projects
  - CO Contact Organisation
  - MR Manage Roles
  - PS Partner Search Profile

Show 10 entries

Search

LEGAL NAME	PIC	VAT	STATUS	ACTION
European Commission Research Directorate-General Framework Program Logistics	998993495	EU12345687	DECLARED	VO MO MR PS
NCP Test Company E	934187892		VALIDATED	CO

Showing 1 to 2 of 2 entries.

← PREVIOUS 1 NEXT →

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

### Functions for LEARs:

**View or modify your organisation's data.**

**View all roles linked to the PIC.**

**View list of proposals and projects.**

### Functions for self-registrants:

**View or modify your organisation's data.**



# RESEARCH & INNOVATION

# Roles for Organisations

## 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

### 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** 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 <b>OR</b> 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?

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](#).

**LEARs can grant/revoke Organisation roles in the "My Organisations" section, through the blue "OR (Organisation Roles)" icon**

# Roles for Organisations



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

## Organisation File

Details Roles Projects Proposals

Organisation: NAME Pic: 99999999

Show 10 entries Search

ROLE	NAME	EMAIL	PROJECT
Account Admin.	Petr		
Account Admin.	Ver		
Account Admin.	Stej		
Account Admin.	Pire		
Account Admin.			
Financial Signatory	Fra		
Financial Signatory	Petr		
Financial Signatory	Noe		
Financial Signatory	Oliv		
Lear	Ag		

Showing 1 to 10 of 10 entries. PREVIOUS 1 NEXT

List of names and e-mails of contacts linked to the PIC number of the organisation.

### Edit roles:

Add roles or revoke existing rights by identifying the e-mail/name of a person.

EDIT ROLES



My Organisation(s)

My Proposal(s)

My Project(s)

My Notification(s)

My Formal Notification(s)

My Expert Area

## My projects

FP7 REF. DOCS

H2020 ONLINE MANUAL



This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.

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

- [Prepare and sign 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](#)

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

Legend

AA	Access Amendment	GP	Grant Preparation	MP	Manage Projects	FR	Financial Reporting
PR	Periodic Reporting	RD	Reporting & Deliverables	PC	Project Consortium	VP	View Proposal

Show 10 entries  Hide closed projects Search:

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
NCP-PLAYGROU ND-COMST	H2020-Adhoc- 2014-20	H2020	688926		

Showing 1 to 1 of 1 entries.  1



# 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 - if you are Primary Coordinator Contact, Coordinator Contact or Participant Contact**

Project File

Details Consortium

**Project Acronym** DEMO1

**Project ID** 200000 **Program** FP7 **RDG** RTD

> **COORDINATOR** Organisation - Test Organisation 1

EDIT ROLES

**Address:** Sesame Street, 1000, Brussels, BE **PIC:** 999999999

<b>Primary Coordinator</b>	John DOE	john.doe@test.com
<b>Coordinator Contact</b>	Jack DOE	jack.doe@test.com
<b>Coordinator Contact</b>	William DOE	william.doe@test.com
<b>Team Member</b>	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

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



**Organisation:** NCP Test Company E **PIC:** 934187892

**Street and House Number:** Test Street 1

**PoBox:**

**City:** Test City

**Postal Code:**

**Country:** NO

Show 10 entries

Search

Project Roles for the Organisation

ROLE	FULL NAME	USERID	EMAIL
<input type="checkbox"/> Primary Coordinator Contact	Piret NOUKAS	noukapi	Piret.NOUKAS@ec.europa.eu
<input type="checkbox"/> Project Legal Signatory	Piret NOUKAS	noukapi	Piret.NOUKAS@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Francisco DE LA TORRE	ntofcisc	francisco.de-la-torre-francia@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Joaquin PEREZ ECHAGUE	perezjq	Joaquin.Perez-Echague@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Peter HAERTWICH	hartwpe	Peter.Haertwich@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Ulrich GENSCHEL	genscul	Ulrich.GENSCHEL@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Isabel VERGARA OGANDO	vergais	Isabel.VERGARA-OGANDO@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Maria Arrate OYARBIDE ORBE	oyarbma	Arrate.OYARBIDE@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Geert VANCRAEYNEST	vancrge	Geert.VANCRAEYNEST@ec.europa.eu
<input type="checkbox"/> Coordinator Contact	Attila BERCZIK	berczat	Attila.BERCZIK@ec.europa.eu

Showing 1 to 10 of 14 entries

← PREVIOUS

1

2

NEXT →

ADD ROLES

REVOKE





**Organisation:** NCP Test Company E **PIC:** 934187892

**Street and House Number:** Test Street 1

**PoBox:**

**City:** Test City

**Postal Code:**

**Country:** NO

Please choose the role and enter the person's name and contact details or select a person from the provided list.

**Role : \***

Coordinator Contact

- Coordinator Contact
- Project Legal Signatory
- Project Financial Signatory
- Task manager
- Team Member

**First Name : \***

**Last Name : \***

**Email : \***

\* required field

OK

CANCEL

## Where to find help?

**H2020 ONLINE MANUAL**

**online guide divided by business processes. Provides full information on the process, reference documents**

**HOW TO** **screens & step-by-step guidance on the tools, including videos**

**FAQ database** – **searchable by categories and keywords**

## Terms of use

2.2.3 The means of access (i.e. the ECAS account user name and password) are strictly personal and users are responsible for safeguarding their confidentiality and security, and ensuring their appropriate use.

Users undertake to take all steps to prevent any unauthorised third party from gaining knowledge and making use thereof.

Users may not transfer or sell their means of access to any third party.

Users must notify the European Commission immediately (via the IT helpdesk under the ‘Support’ menu at <http://ec.europa.eu/research/participants/portal>) of the loss, theft, breach of confidentiality or any risk of misuse of the means of access.

## The nomination process for LEARs – documents

- LEAR appointment letter:  
[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/lev/h2020-lear-applet\\_en.doc](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lear-applet_en.doc)
- LEAR role and tasks:  
[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/lev/h2020-lear-roltas\\_en.doc](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lear-roltas_en.doc)
- Terms and conditions of use of the electronic exchange system:  
[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/lev/h2020-lev-terms-of-use\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lev-terms-of-use_en.pdf)
- Declaration of consent to the terms and conditions of use:  
[http://ec.europa.eu/research/participants/data/ref/h2020/grants\\_manual/lev/h2020-lev-declaration-consent\\_en.doc](http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/lev/h2020-lev-declaration-consent_en.doc)