

Discover the Participant Portal

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Directorate A: Framework Programme & Interinstitutional Relations
Head of Sector “Simplification”*



EUROPEAN
COMMISSION

EU - BUILDING AN
INNOVATION UNION

Agenda

10.00 – 11.30: **Introduction to the Participant Portal
Identity and Access Management**

Coffee break

11.45 – 13.00: **Tools of the Participant Portal:
Negotiation – Amendments**

Lunch break

14.00 – 15.30: **Tools of the Participant Portal:
Scientific Reporting – Financial Reporting**

Coffee break

15.45 – 17.30: **Tools of the Participant Portal:
Review
Upcoming changes on the Participant Portal**



Introduction

to the Participant Portal



Place of the Participant Portal in EU's Research communication media (1/2)

The FP7 (7th Framework Programme for Research and Technological Development) is the EU's main instrument for funding research.

3 Internet portals related to the FP7 are currently used:

- **RESEARCH on EUROPA** → policy context
- **PARTICIPANT PORTAL** → interactions with participants
- **CORDIS** → dissemination of FP7 results

There is an ongoing reorganisation of the division of tasks in these portals until end 2012 to offer better services.



Place of the Participant Portal in EU's Research communication media (2/2)

RESEARCH on EUROPA:

<http://ec.europa.eu>

PARTICIPANT PORTAL:

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

CORDIS:

<http://cordis.europa.eu>



What is the Participant Portal?

The Participant Portal is the **single entry point for the electronic administration of EU-funded research and innovation projects.**

It hosts services for **managing proposals and projects throughout their lifecycle.**



Why the Participant Portal?

This unique entry point for the grant-related interactions with the European Commission or Agencies is based on:

- **single sign-on approach (ECAS)**
- **role-based authorisation (IAM)**

The result is a **personalised** and **secure** access to the services on the Participant Portal; it ensures **homogeneity**, **transparency** and a **better service integration** for grant management.



What is the scope of the Participant Portal?

Currently the portal covers actions under the FP7:

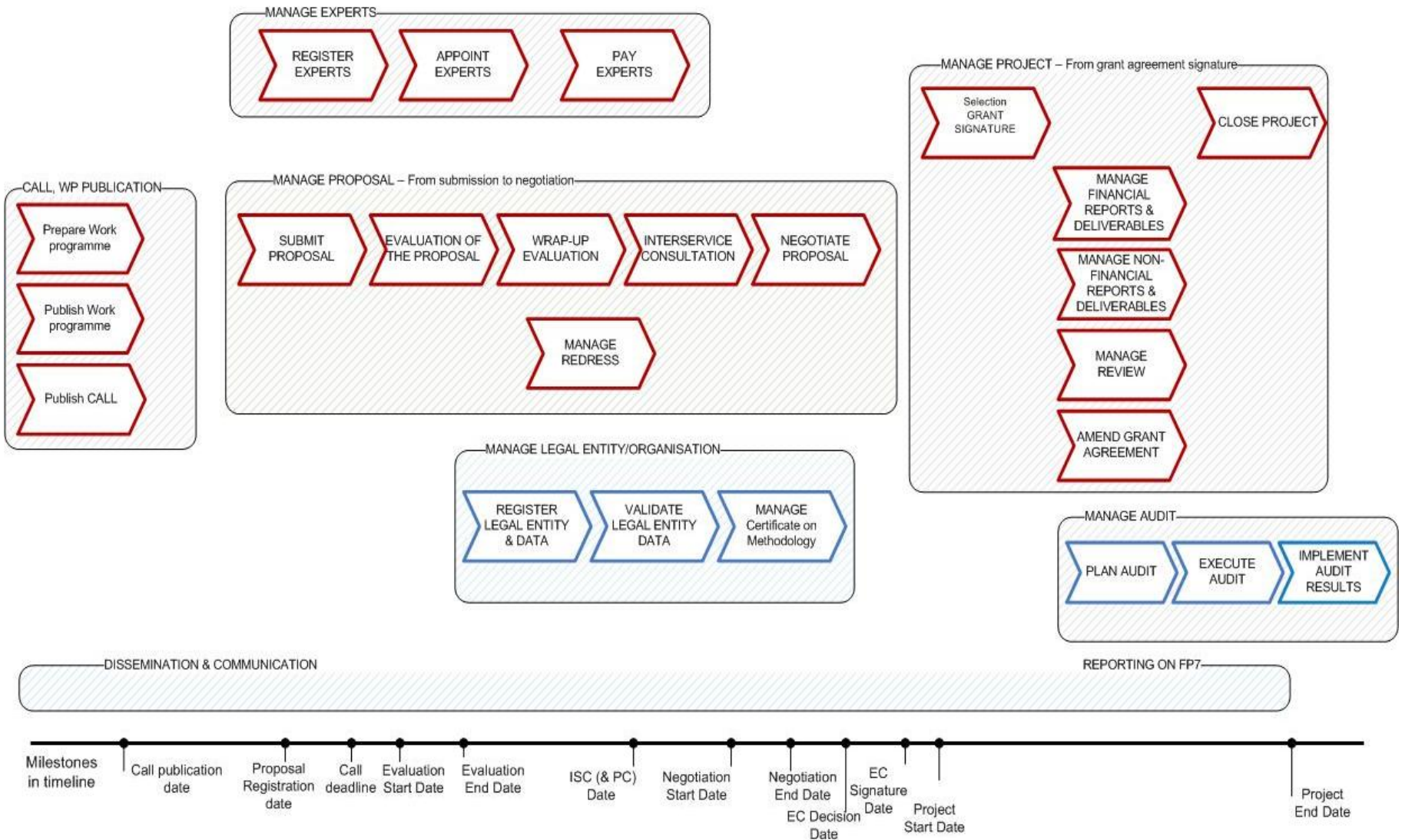
- **Cooperation**
- **Ideas (ERC)**
- **People (Marie Curie)**
- **Capacities**
- **Euratom**

In the future, other programmes will be included within the Participant Portal as well:

- **Competitiveness and Innovation Programme (CIP)**
- **Research Fund for Coal and Steel (RFCS)**
- ...



Overview of the Project life cycle in FP7



Services on the Participant Portal

- Call publication
- Organisation registration, update of the data of legal entities, financial viability check tool
- Grant negotiation, amendments
- Scientific and financial reporting
- Proposal submission (*mid-2011*)
- Expert services (*before end 2011*)
- FP7 documentation (*before end 2011*)



What can you do on the Participant Portal?

(1/4)

Some information and basic functions are available for all users without logging in:

- View & search the FP7 calls
- Search the organisations database to check if your organisation has already been registered for a PIC
- Use the financial viability check tool
- Browse the guidance & support documents, including the FAQ





Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

- Home
- My Organisations
- FP7 Calls**
- Support

LOGIN

Login

Authentication and security help is available [here](#).

NEED HELP?

- See the [online user manual](#)
- You can consult [FAQs](#)
- Watch the demonstration of the Participant Portal: - [Introduction](#)
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[read more](#)

WHAT'S NEW

Participant Portal V3.1.1 (07/2011)

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- Additional services such as RSS feeds, deep linking and e-mail notifications are also provided and users are requested to sign up for these services on the Participant Portal

[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? [+](#)

- 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.
- After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.
- 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...
- When you go into the details of an organisation, project, role etc... a new contextual menu will guide you through the additional actions.



View the FP7 calls



Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

- Home
- My Organisations
- FP7 Calls
- Support
- Latest Info
- Cooperation
- Ideas
- People
- Capacities
- Euratom
- Search Calls

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STAY TUNED

| [What is RSS?](#)

[E-mail Notification](#)

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[read more](#)

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LATEST CALLS

You can access all calls (open, closed, or forthcoming) by clicking on the specific programme tabs at the top.

Show 10 entries Search:

Programme	Call Identifier	Latest Information	Date
■ Cooperation	FP7-HEALTH-2012-INNOVATION-1	<p>Please note that the Annexes for guide for applicants and templates for stage 1 proposals for Coordinating and Supporting Actions have been modified for the allowed budget categories. Applicants already registered will be also informed by email about this change.</p> <p>EPSS is now available for this call for proposals</p> <p>Specific information for topic HEALTH.2012.2.4.4-1: Preclinical and/or clinical development of substances with a clear potential as orphan drugs.</p> <p>The EU orphan designation will need to be granted at the latest by the stage 2 deadline. Clear indication about the status of designation as an EU orphan drug should nevertheless be provided already for the stage 1 deadline.</p>	2011-09-20
■ People	FP7-PEOPLE-2010-IEF	16/09/2011 The Grant Agreement Production Progress for this call (Priority and Reserve lists - Update 16/09/2011) has been uploaded under Additional Documents.	2011-09-16
■ Cooperation	SP1-JTI-CS-2011-03	Release 2 of the Questions and Answers document was issued on 9th September 2011 and it can be downloaded from the additional documents section of this web site.	2011-09-09
■ People	FP7-PEOPLE-2012-ITN	After some errors were detected in the Guide for Applicants, please note that a corrigendum has been published, as well as an updated version of the Guide for Applicants, reflecting these changes.	2011-09-06
■ Cooperation	FP7-PEOPLE-2012-ITN	Please note that the link to the Submission Service (EPSS) will be available from the 1st Nov 2011.	2011-09-02

View the FP7 calls



Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

Home **My Organisations** FP7 Calls Support

Latest info **Cooperation** Ideas People Capacities Euratom Search Calls

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Intro
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via the eFP7 service desk

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Search the organisations database to check whether your organisation is already registered



Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

- Home
- My Organisations
- FP7 Calls
- Support

- Register
- Search
- LFV Simulation

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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.

Search the organisations database to check whether your organisation is already registered



[Home](#) [My Organisations](#) [FP7 Calls](#) [Support](#)

[Register](#) [Search](#) [LFV Simulation](#)

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 [Login](#)

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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 : *	<input type="text"/>	VAT number : *	<input type="text"/>
Country :	<input type="text"/>	City :	<input type="text"/>

d e a w e e t

Please enter the verification code as shown above:

* Either Name or VAT number are mandatory

NOTE

Search PIC functionality applies to under validation and validated organisations. If you have recently registered your organisation, the PIC of your Organisation cannot be retrieved until CVT starts the identification.

Search the organisations database to check whether your organisation is already registered

QU





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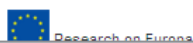
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QUICK LINKS



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Search Clear

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Browse the guidance documents



Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

- Home
- My Organisations
- FP7 Documentation
- FP7 Calls
- Support

- FP7 Documents
- Search FP7 Documents

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[read more](#)

QUICK LINKS

BROWSE DOCUMENT

This page gives you access to all FP7 documents

- Legal basis**
 - FP7 Framework Programmes (EC-Euratom)
 - Specific programmes
 - Rules for participation
- Legal documents for implementation**
 - Rules for submission, evaluation, selection, award
 - Model grant agreement
 - EC Decision on three measures to simplify the management of EU FP7 research grants. C(2011) 174 final [EN] [pdf, 38.3 KB](#) [\[more\]](#)
 - Financial Viability Check tool v4 [EN] [_application/vnd.ms-excel, 121.3 KB](#) [\[more\]](#)
 - Rules on verification of existence, legal status, operational and financial capacity [EN] [_pdf, 398.5 KB](#) [\[more\]](#)
 - Simplification of the recovery process in the framework of the implementation of the audit strategy under the Framework Programmes (EC, Euratom) for research [EN] [_pdf, 77.8 KB](#) [\[more\]](#)
- All Work Programmes**
 - 2011
 - 2010
 - 2009
 - 2008
 - 2007
- Guidance documents**
 - Negotiation
 - Project reporting
 - Project technical review
 - ERC Guides for Grant Holder
 - Ethics review checklist
 - Ethics review supporting documents
 - Fuel Cells and Hydrogen JU specific guides
 - Open Access Pilot specific guides
 - Other documents
 - Flat rates for daily allowances [EN] [_pdf, 35.4 KB](#) [\[more\]](#)
 - Short guideline on proposal submission and negotiation with third country participants [EN] [_pdf, 25.2 KB](#) [\[more\]](#)
 - Practical Guide to EU Funding Opportunities for Research and Innovation [EN] [_pdf, 381.5 KB](#) [\[more\]](#)

Browse the guidance documents

What can you do on the Participant Portal?

(2/4)

To fully benefit from the services on the Portal, users have to **register first for an ECAS account** (**European Commission Authentication System**).

This ensures a **secure, “single sign-on” approach** :
1 e-mail address = **1** person = **1** ECAS account.

This ECAS account **allow you to login** to the Participant Portal.





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QUICK LINKS

Research on Europe

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Forthcoming functionalities

- 1 Expert evaluators will be able to manage the administrative details related to their work as peer reviewers.
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Are you a new user? +



How to register for an ECAS account





Participant Portal Research & Innovation - Participants

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How does it work?

[Are you a new user?](#)

- This link will** give you access to the registration page of the European Commission Authentication Service (ECAS). [more information about the ECAS registration process](#)
- Should you have any problems with any aspect of using the portal, please contact our service desk via the [support tab](#).





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: *

Last name: *

E-mail: *

Re-enter your e-mail address: *

Email preferred language: English (en) ▾*

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

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

Fill in your e-mail address and the security check...



Thank you for registering, you will receive an e-mail allowing you to complete the registration process.

...then follow the instructions given in the e-mail

Dear Jane DOE,

You have been registered in ECAS, the European Commission Authentication Service.

Your user name is **ndoe dojf**.

To create your password, click:

[this link](#)

You have a maximum of 1h30, starting from the time that this message was sent, to create your password, but you are encouraged to do so immediately if possible. After this time, you can make another request by following the same link: you will then need to re-enter your username and confirm your request.

If the above link does not work, you can copy the following address (make sure the complete address is copied!) and paste it into your browser's address bar:

<https://webgate.ec.europa.eu/ecas/init/initialisePasswordLogin.do?wayf.domain=external&wayf.remember=checked&wayf.submit=Select&uid=ndoe dojf&resetCode=MbllelSfwmiZl9b0DVzX5qaMlevupq1i ohBQp9Bq2>

Whenever you login, please choose the domain "External", not "European Commission".

Instead of replying to this message, if you have a problem, please follow the help or contact information on the site where you were trying to register.

Sent to you by
ECAS - European Commission Authentication Service




Participant Portal Research & Innovation - Participants

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- The **Participant Portal** has become the European Commission's single authoritative website for the **publication of FP7 calls**. The FP7 call-related information is no longer published on CORDIS. Users of the 'Find a call' section on CORDIS are redirected to the relevant pages of the 'FP7 Calls' section of the Participant Portal.
- Additional services such as RSS feeds, deep linking and e-mail notifications are also provided and users are requested to sign up for these services on the Participant Portal

[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? +

- 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.
- After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.
- 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...
- 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



>> [EUROPA](#) > [Authentication Service](#) > [Login](#)

Authentication requested by: **Participants Portal**

Domain: **External (*)**

Username or e-mail address:

Password:

- Remember me
- Warn me each time an application asks for my identity
- View my ECAS account details after logging me in

[Login](#)

[Sign Up for ECAS](#)

[Forgot your password?](#)



[Security notice](#)

(*) Is the selected domain correct? If not, please [change it](#) - or else your username or e-mail will not be recognised.

Login with your ECAS account



LOGIN



Logout

Olivier MARGANNE

Authentication and security help is available [here](#).

NEED HELP?

- 1 See the [online user manual](#)
- 2 You can consult [FAQS](#)
- 3 Watch the demonstration of the Participant Portal: - [Introduction](#)
- 4 If you cannot find an answer there, then submit your question via the [eFP7 service desk](#)

[read more](#)

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[read more](#)

QUICK LINKS



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HOME

Manage Organisations

Identify Opportunities

Negotiations

Grant Execution

Others

Login with your ECAS account

What can you do on the Participant Portal?

(3/4)

Once you are logged in, you will be able to access the tools for the management of proposals and projects:

- Register your organisation to receive a unique PIC (Participant Identifier Code) and update data
- Start the negotiations of a grant agreement
- Amend the grant agreement
- Manage scientific and financial reports
- Manage your expert profile (*before end 2011*)





- Home
- My Organisations
- My Proposals
- My Projects
- My Roles
- My Notifications
- FP7 Documentation
- FP7 Calls
- Support

- Organisations
- Register
- Search
- LFV Simulation

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QUICK LINKS

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](#)

Register your organisation to receive a unique PIC (Participant Identifier Code)

as several



Home - Windows Internet Explorer

WELCOME STATUS ORGANISATION ADDRESS CONTACT PROGRAMME SUBMIT DONE

The steps:

This wizard will guide you through the process of registration. At the end of this registration, you will obtain the Participant Identification Code (PIC) of your organisation.

In order to complete the forms quickly and correctly, please keep the basic legal information (Registration extract, VAT data) of your organisation at hand and then the registration will take you 5-10 minutes.

The first step of this wizard will ask you a few questions to determine whether your organisation is registered already and to identify existing PIC numbers that may match your request.

Welcome Olivier MARGANNE

What is the legal name of the organisation?

What is the country of registration?

Follow the different steps by filling in all the required information

At the end of the process, you will receive a unique PIC (Participant Identifier Code)

User Manual



Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

- Home
- My Organisations
- My Proposals
- My Projects**
- My Roles
- My Notifications
- FP7 Calls
- Support

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Olivier MARGANNE

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Research on Europa

HOME

Manage Organisations

Search an organisation → Register an organisation → Manage organisation data

Identify Opportunities

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

Manage roles and delegations

Support

Other services





LOGIN

Logout

Johnny CADDY

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QUICK LINKS

PROJECT LIST FOR JOHNNY CADDY

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	Actions
XXXXXX	XXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	
XXX	XXXXXXXXXXXXXXXX	FP7	XXXXXX		Negotiation	
XXXXXXXX	XXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	
XXXXXXXX	XXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	
XXXXXX	XXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	
XXXXXXXXXX	XXXXXXXXXXXXXXXX-XXXXXX	FP7	XXXXXX		Active	

Showing 1 to 7 of 7 entries First Previous 1 Next Last

Phase "Negotiation" means that the Grant Agreement has NOT been signed yet

AN = Access Negotiation



LOGIN

Logout

Johnny CADDY
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XXXXXXXX	XXXXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	RD FR AA
XXXXXX	XXXXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	RD FR AA
XXXXXX	XXXXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	RD FR AA
XXXX	XXXXXXXXXXXXXXXXXX	FP7	XXXXXX		Active	RD FR AA
XXXXXXXXXXXX	XXXXXXXXXXXXXXXXXX-XXXX	FP7	XXXXXX		Active	RD FR

Showing 1 to 7 of 7 entries First Previous 1 Next Last

Phase "Active" means that the Grant Agreement has been signed

AA = Access Amendment
 RD = Reporting & Deliverables
 FR = Financial Reporting

What can you do on the Participant Portal?

(4/4)

Not only will the ECAS account allow you to login to the Participant Portal, it will also **recognise which role you have** in a specific project; this role will determine which functionalities will be available for you at the different steps of the management of proposals and projects.

The “roles & permissions” system is defined in the **Identification and Access Management (IAM).**

