

Identity and Access Management (IAM)



Objectives of the role management (1/2)

- The **I**ntity and **A**ccess **M**anagement **defines the roles** for each service of the Participant Portal.
This allows the **management of the access rights of the users to the Participant Portal.**
- It gives each user a **personalised and secured access to the different services.**
- **Any change in the roles of the users is saved** to allow a monitoring & tracking service.
- It implies a **minimal involvement of the European Commission in the internal staffing processes.**
Only the top roles – **Primary Coordinator Contact** and the **LEAR** – are defined by the Commission services.



Objectives of the role management (2/2)

- Unique identifier for **persons**: **ECAS** (**European Commission Authentication System**) **account**.

This ensures a **secure, “single sign-on” approach** :
1 e-mail address = **1** person = **1** ECAS account,
for all the projects the person is involved in,
with all the corresponding roles per project.

- Unique identifier of entities: the 9-digit PIC number.





LOGIN

Logout

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

NEED HELP?

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- You can consult [FAQs](#)
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[read more](#)

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[read more](#)

QUICK LINKS

PROJECT LIST FOR JEAN 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
ATOME	FP7-HEALTH-2007-B	FP7	222994		Active	RD FR
TEST	FP7-SSH-2009-A	FP7	200000		Active	RD FR

Showing 1 of 2 of 2 entries First Previous 1 Next Last

View Project details

View roles in the Project

**Edit Consortium
 (only available for
 Coordinator Contacts)**

Major changes of the new version (1/2)

The major objective of the new version is to simplify the role management and make it more flexible.

In that perspective, the following changes are made:

1. The **uniqueness of the Coordinator and Participant Contacts disappear**:
 - one **Primary Coordinator Contact** as the main contact for the European Commission
 - **more Coordinator Contacts** can be nominated per project
 - **more Participant Contacts** can be nominated per organisation in a project



Major changes of the new version (2/2)

2. Task Managers and Team Members are **no longer restricted to specific scope(s)**.
3. The roles of **Named Representatives** are redistributed:
 - Former **Financial and Scientific Named Representatives**, and **Authorised Representatives** automatically become **Participant Contacts** (**Coordinator Contacts** for the Coordinating Participant).
 - Former **Administrative/Legal Named Representatives** automatically become **Task Managers**.

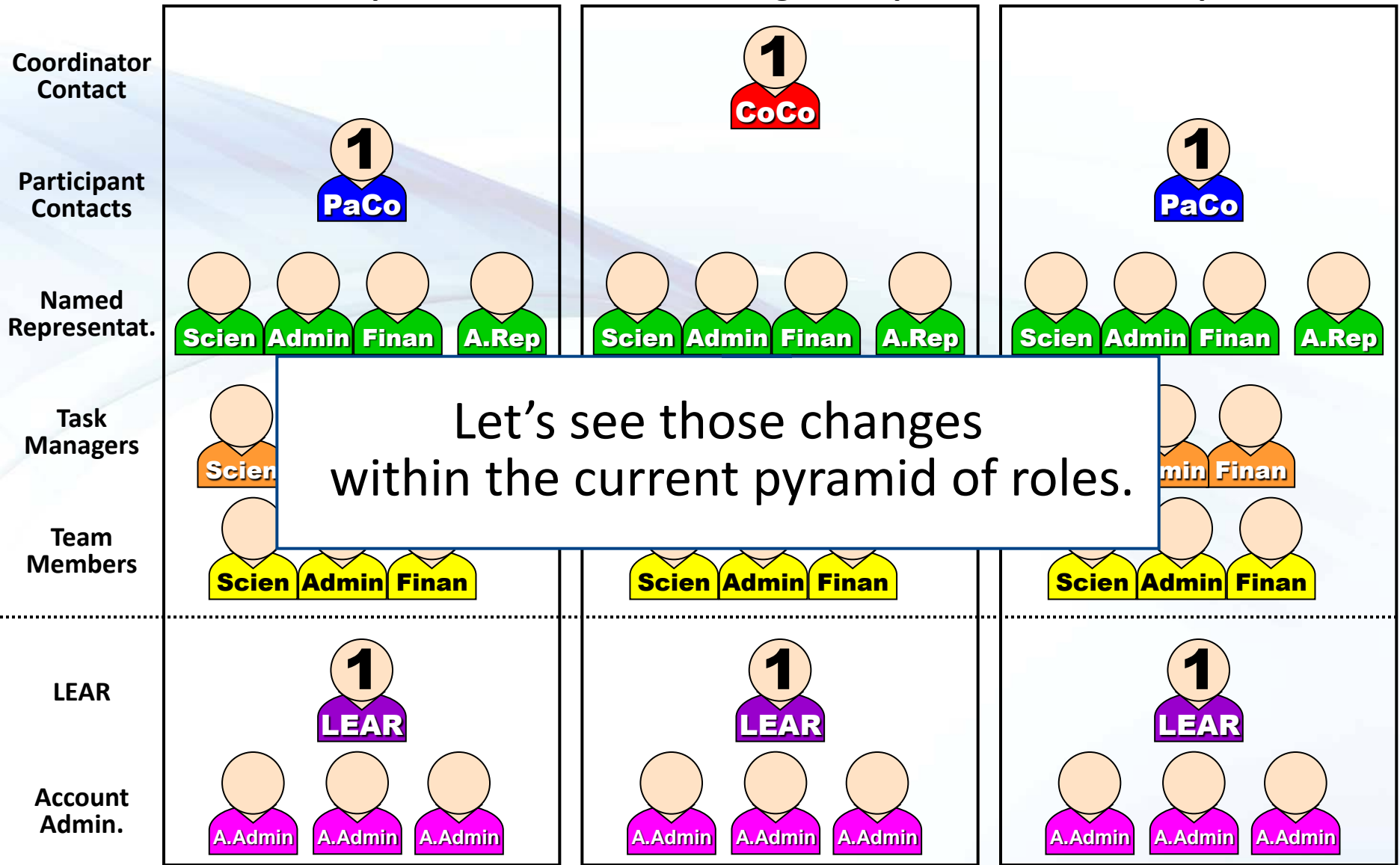
Note: Former **Authorised Signatories** automatically become **Participant Contacts** as well.



Participant A

Coordinating Participant

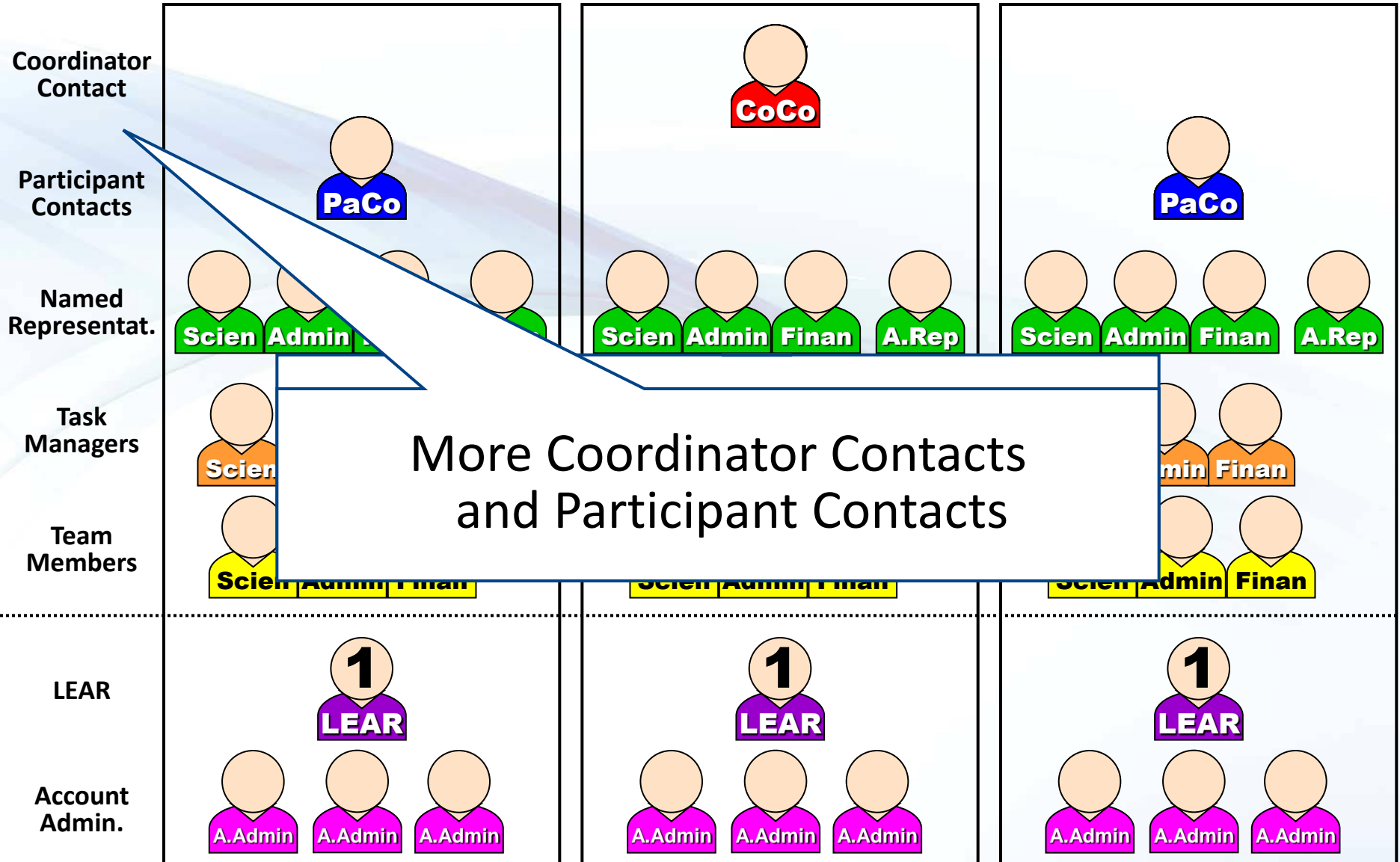
Participant B



Participant A

Coordinating Participant

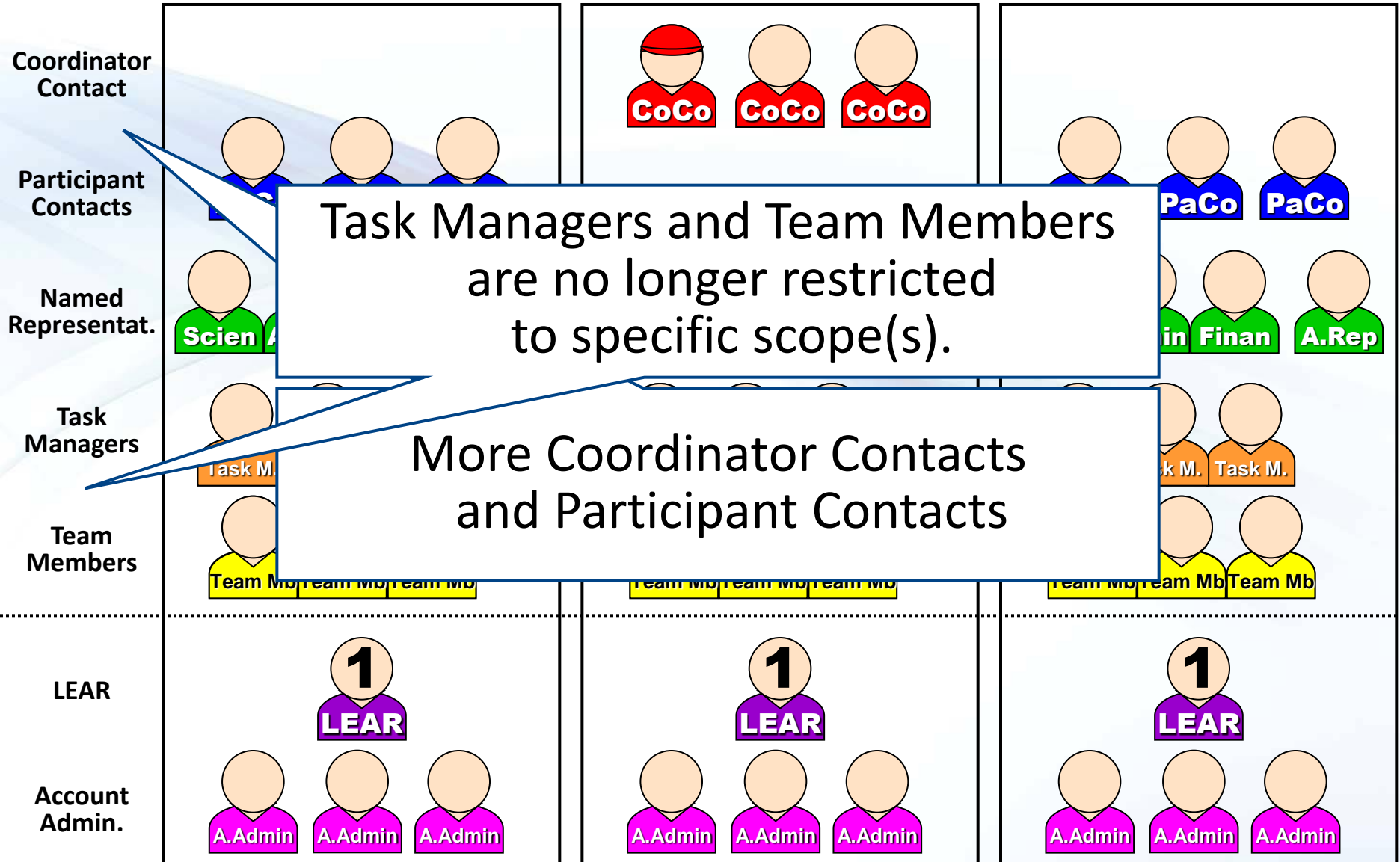
Participant B



Participant A

Coordinating Participant

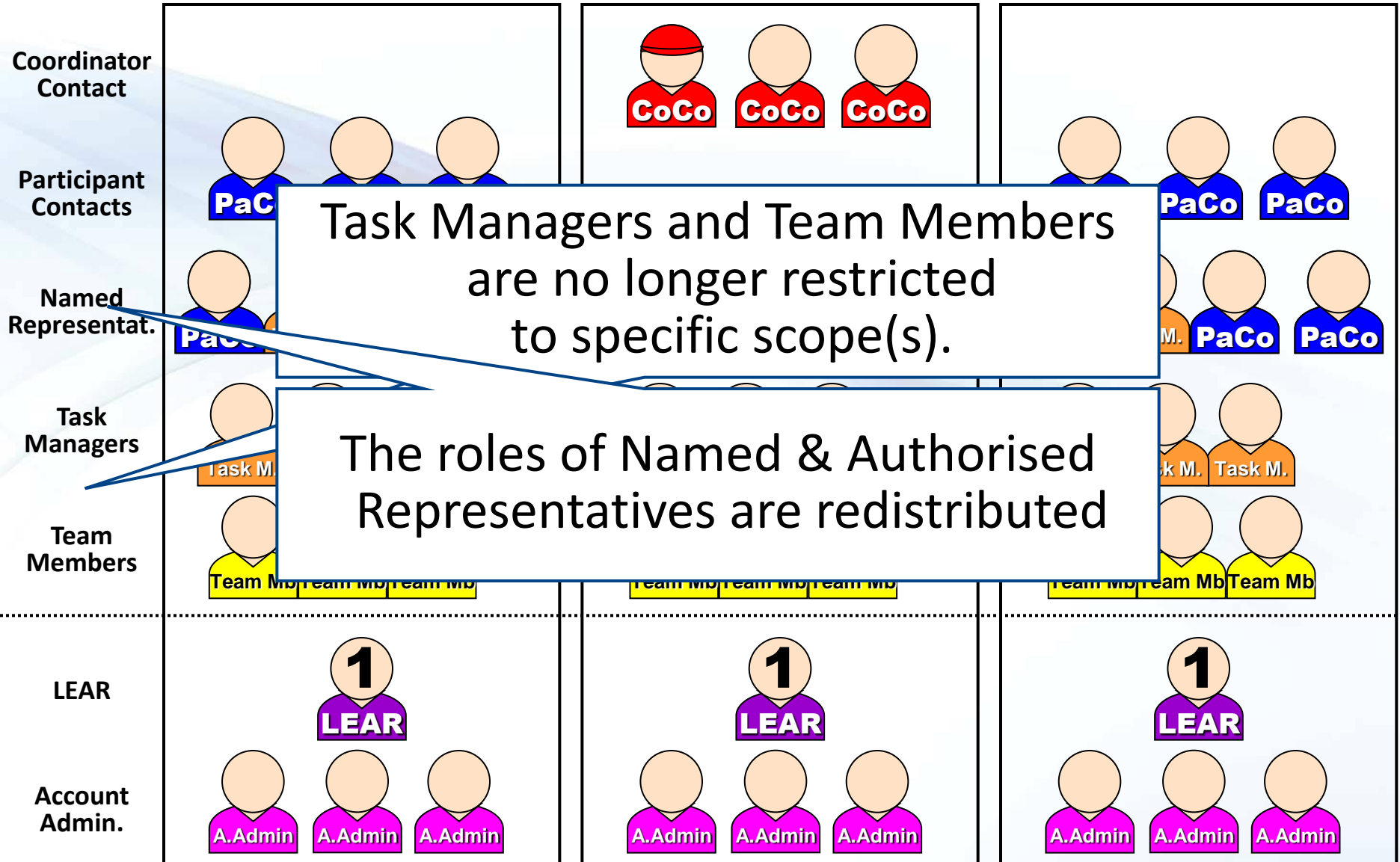
Participant B



Participant A

Coordinating Participant

Participant B



Task Managers and Team Members are no longer restricted to specific scope(s).

The roles of Named & Authorised Representatives are redistributed

Participant A

Coordinating Participant

Participant B

Coordinator Contact

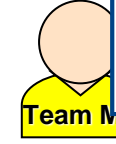
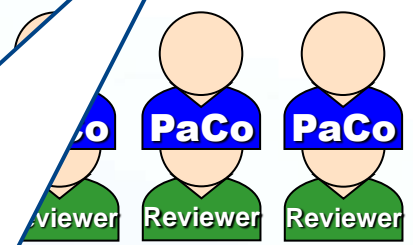
Participant Contacts

Task Managers

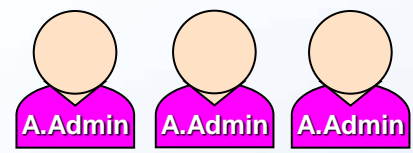
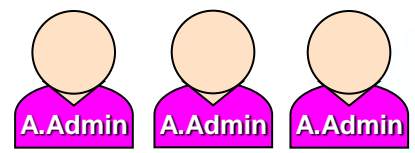
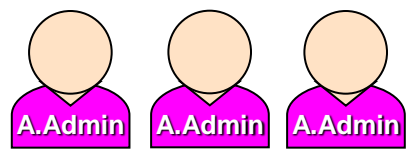
Team Members

LEAR

Account Admin.



Activation of non-participant roles:
Reviewer and Rapporteur



Participant A

Coordinating Participant

Experts

Coordinator Contact

Participant Contacts

Task Managers

Team Members

LEAR

Account Admin.



Which brings us to the new version of IAM...



Project

Coordinating Participant

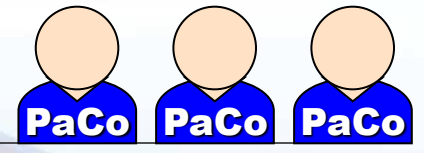
Participant A

Experts

Coordinator Contacts



Participant Contacts



Reviewers

Task Managers



Rapporteur

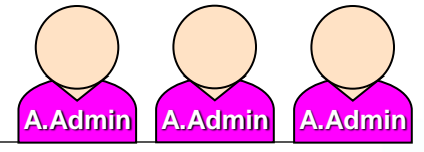
Team Members

Which brings us to the new version of IAM...

LEAR



Account Administrator



Organisation





Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

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

LOGIN

Logout

Olivier MARGANNE

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[read more](#)

QUICK LINKS

Research on Europa

ORGANISATION ROLES LIST

Show 10 entries

PIC	Organisation Name	Role	Nominations
XXXXXXXX	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Account Admin.	

Showing 1 to 1 of 1 entries

PROJECT ROLES LIST

Show 10 entries

Acronym	ProjectID	Program	Role	PIC	Nominations
XXXXXX	XXXXXX	FP7	Administrative and Legal Representative	XXXXXXXXXX	
XXXXXX	XXXXXX	FP7	Participant Contact	XXXXXXXXXX	
XXXXXX	XXXXXX	FP7	Participant Contact	XXXXXXXXXX	

Showing 1 to 3 of 3 entries

The list of roles will be changed automatically with the new IAM

The nomination/revocation process

- “How can I give access to my colleagues?”
- “How can I revoke the rights of colleagues who left the organisation?”

→ The nomination & revocation process



The nomination/revocation process: “Original roles”

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

- The **Coordinator Contact identified in the proposal** will 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/revocation process

Except for the Primary Coordinator Contact and the LEAR, every role must be modified by the Participants.

Each user can be nominated or revoked by another user following a fixed predetermined pattern.

Let's review the nomination/revocation process.



Project

Coordinating Participant

Participant A

Coordinator Contacts



Participant Contacts



Task Managers



Team Members



LEAR



Account Administrator



Organisation



Project

Coordinating Participant

Participant A

Coordinator Contacts

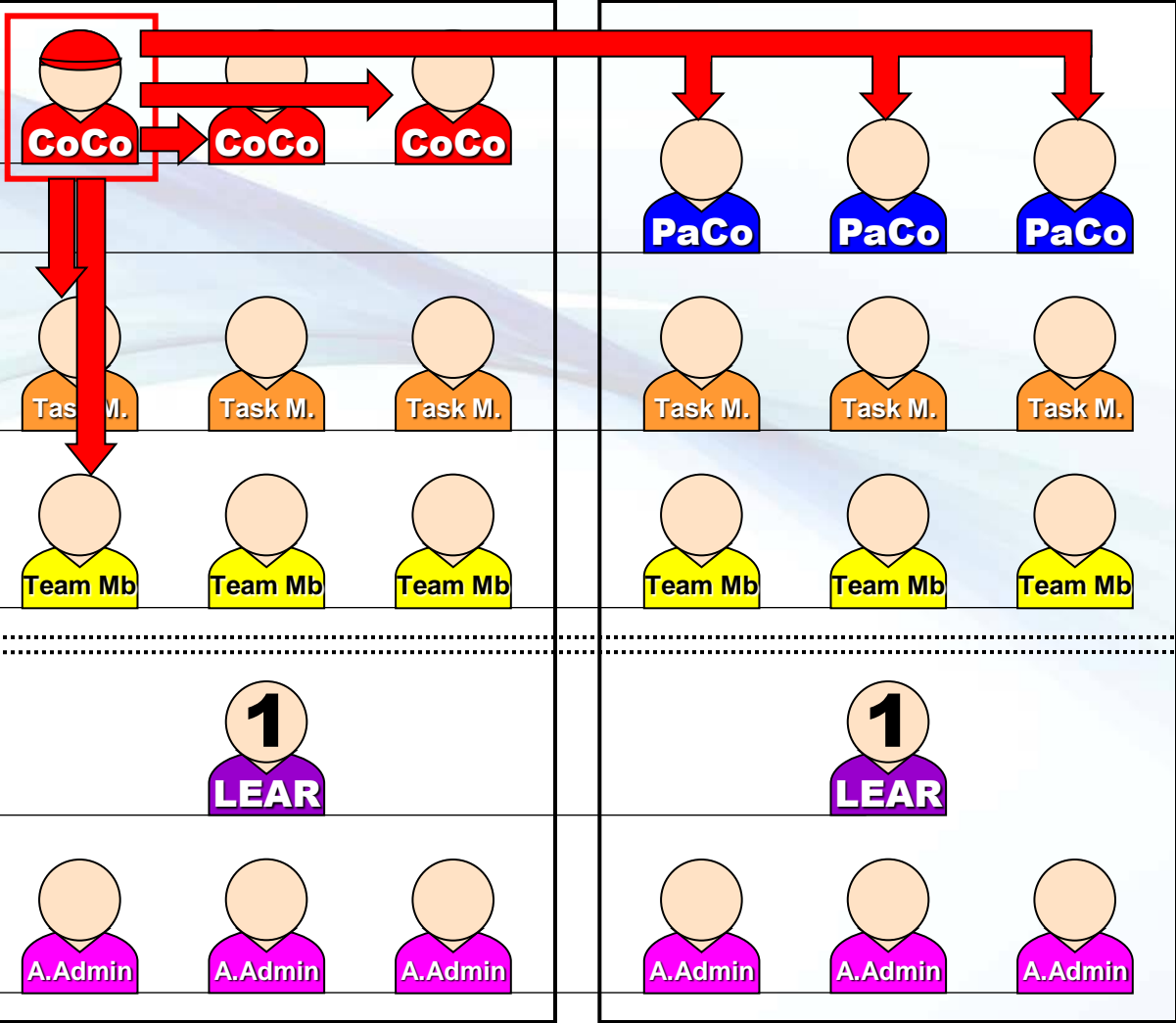
Participant Contacts

Task Managers

Team Members

LEAR

Account Administrator



Project

Coordinating Participant

Participant A

Coordinator Contacts

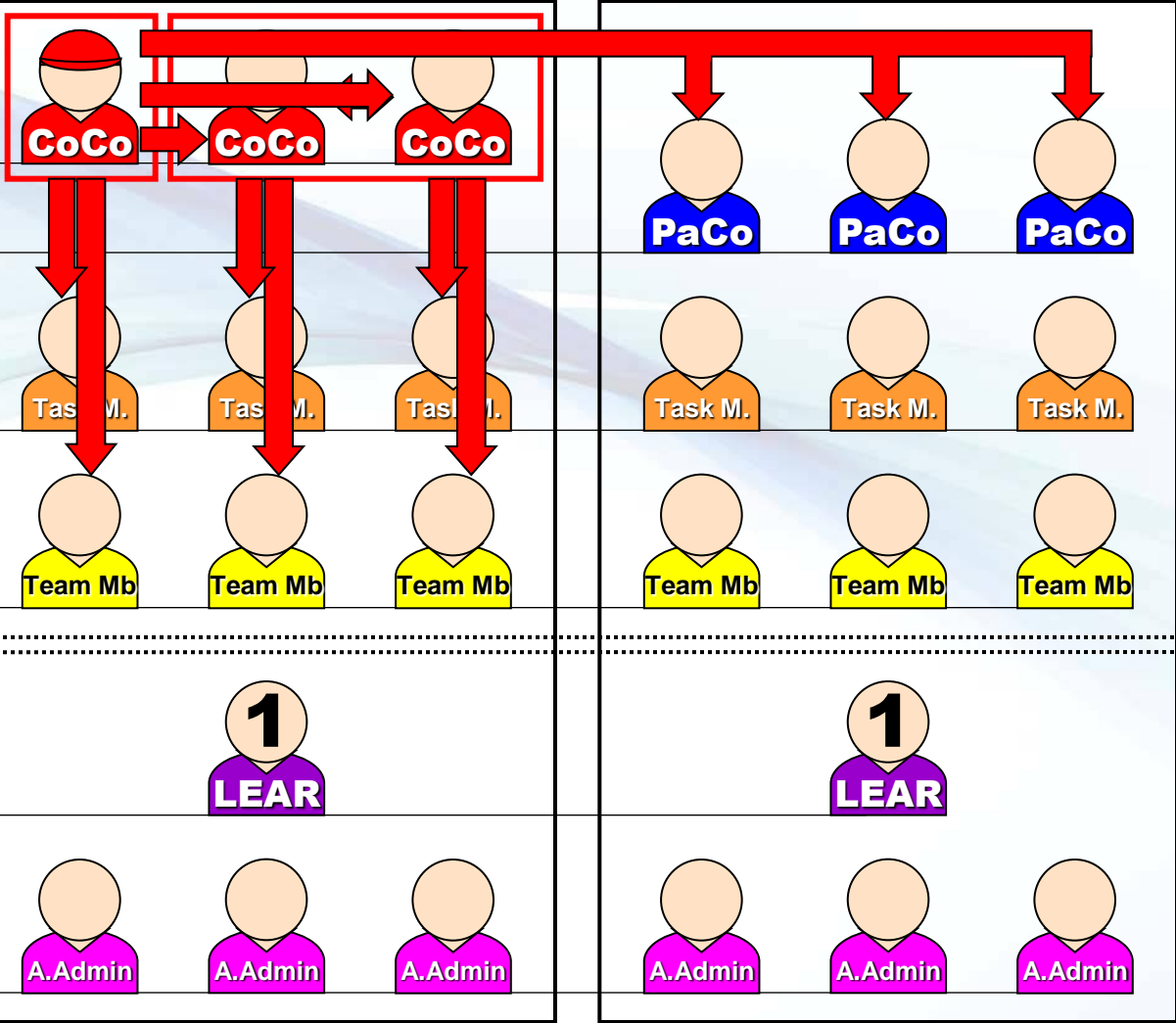
Participant Contacts

Task Managers

Team Members

LEAR

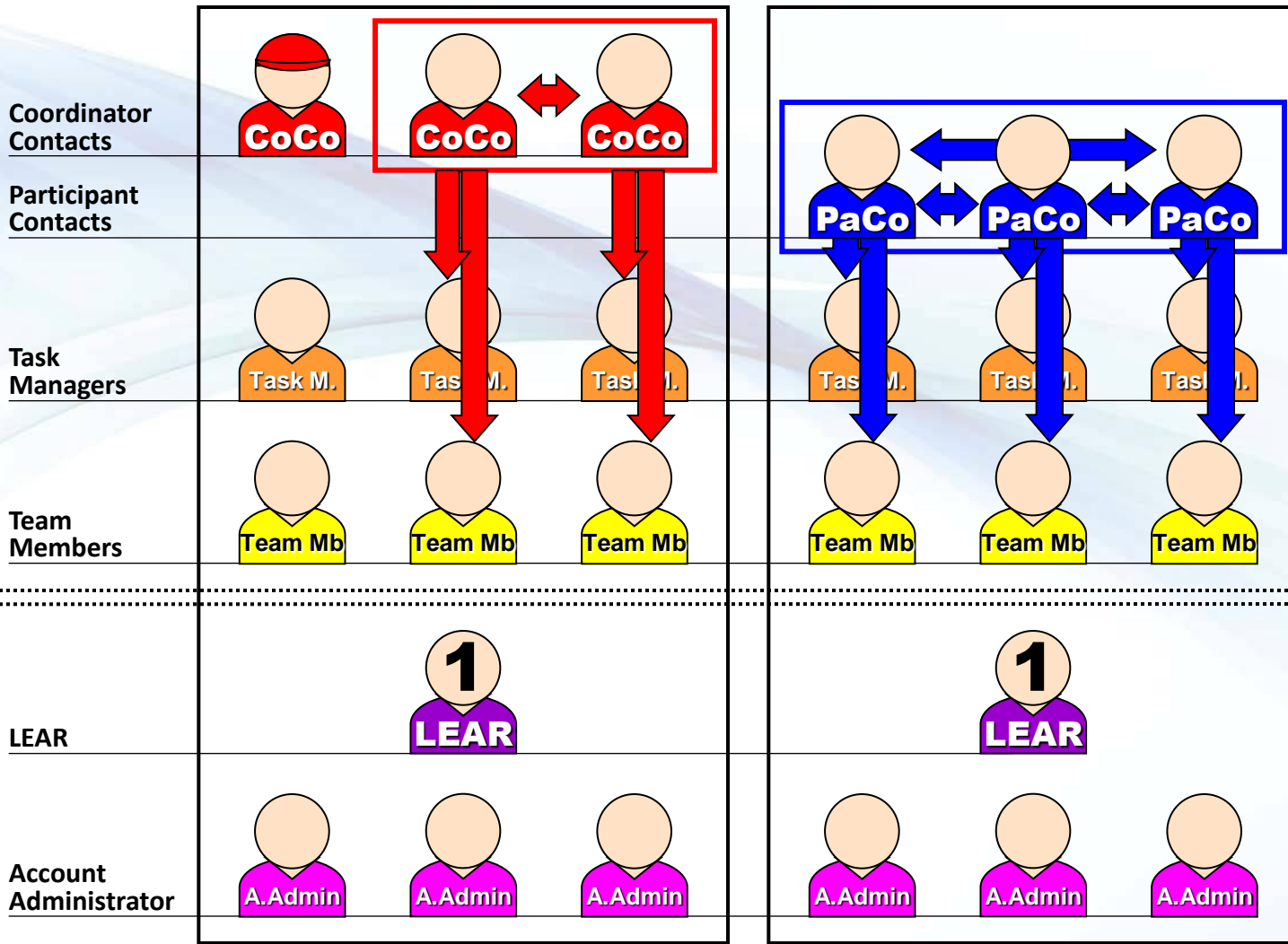
Account Administrator



Project

Coordinating Participant

Participant A



Organisation

Project

Coordinating Participant

Participant A

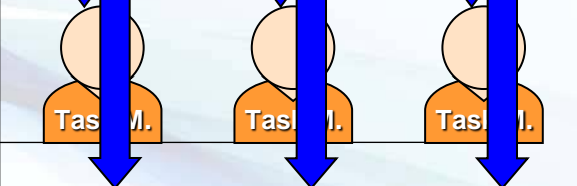
Coordinator Contacts



Participant Contacts



Task Managers



Team Members

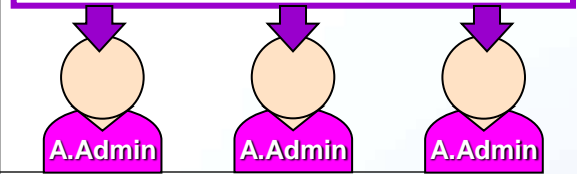
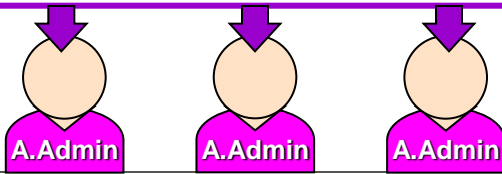


Organisation

LEAR



Account Administrator



Project

Coordinating Participant

Participant A

Coordinator Contacts



Participant Contacts



Task Manag

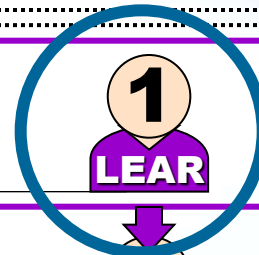
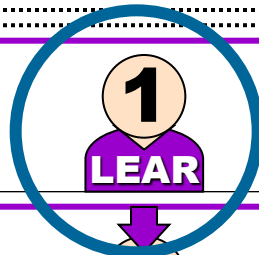


Team Memb

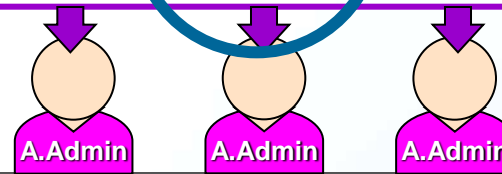
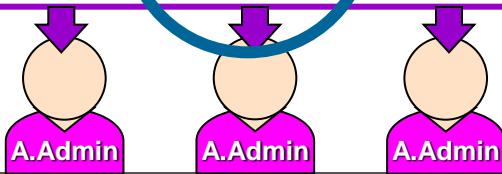
Only the key roles of the **LEAR** and **Primary Coordinator Contact** are **defined/modified** by the Commission.

Organisation

LEAR



Account Administrator



Project

Coordinating Participant

Participant A

Coordinator Contacts



Participant Contacts



Task Manag

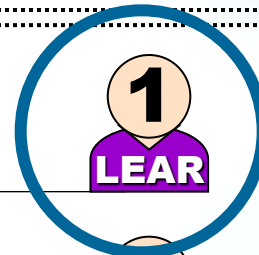
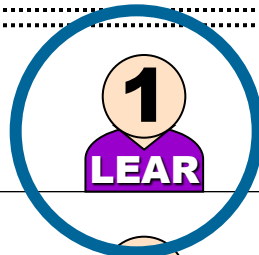


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Organisation

LEAR



Account Administrator





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Logout

Jean CADDY
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XXXX	FP7-HEALTH-2007-B	FP7	XXXX		Active	RD FR
<u>TEST</u>	FP7-SSH-2009-A	FP7	200000		Active	RD FR

Showing 1 to 2 of 2 entries [First](#) [Previous](#) 1 [Next](#) [Last](#)

View roles in the Project



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[read more](#)

QUICK LINKS

ROLES OF THE PROJECT: AGROCOS (245336)

Project Acronym:

Show 10 entries

Select	Role ?	Name			
<input type="checkbox"/>	Participant Contact	LEPERERE Jean-Jac			
<input type="checkbox"/>	Administrative and Legal Representative	HUWAER			
<input type="checkbox"/>	Admin Task Manager	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Legal Task Manager	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Admin Team Member	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Admin Team Member	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Legal Team Member	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Legal Team Member	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Financial Team Member	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX
<input type="checkbox"/>	Financial Team Member	XXXXXXXXXX	XXXXXXXXXXXXXXXXXX	CTV	XXXXXXXXXX

Showing 1 to 10 of 12 entries

First Previous 1 2 Next Last

Add +

Revoke Selected

The list of roles will be changed automatically with the new IAM; these new roles may be modified

Add or revoke roles in the Project



Participant Portal Research & Innovation - Participants

European Commission > Research & Innovation > Participant Portal

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

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Logout

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[read more](#)

QUICK LINKS

ADD ROLE

Nominate Role on:

Project	Acronym:	AgroCos	Project ID:	245336
----------------	----------	---------	-------------	--------

for:

* EMAIL ADDRESS (used to register in the Portal):

* ORGANISATION:

* ROLE GIVEN

OK Cancel

* Mandatory field

Add a new role for the Project



LOGIN

Logout

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<u>TEST</u>	FP7-SSH-2009-A	FP7	200000		Active	RD FR

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Edit Consortium (only available for Coordinator Contacts)



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

PROJECT MENU

[Back to List](#)

[Project Details](#)

[Project Roles](#)

[Process History](#)

[Project Activities](#)

PROJECT SUMMARY

Acronym:	XXXXX
Project ID:	XXXXXX
Call:	XXXX
Programme:	FP7
Activity codes:	XXXXXXXX

PARTICIPANT CONTACTS OVERVIEW FOR ATOME (222994)

Coordinator

XX

jcadellis@hotmail.com

Name: CADDY Johnny

Participant Contacts

XX

XX

Name:

XXXXX

XX

Name: XXXXXXXXXXXXXXX

XX

XX

Name: XXXXXXXXXXXXX

XX

XX

Name: XXXXXXXX

XX

XX

Name: XXXXXXXXXXXXXXX

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Name:

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Name:

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Name:

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XX

Name:

XX

XX

Name: XXXXXXXXXXXXXXX

XX

XX

Name: XXXXXXXXXXXXXXX

XX

XX

Name: XXXXXXXX

[Save Changes](#)

[Reset](#)

Edit Participant Contact details



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
- Organisations Register Search LFV Simulation

LOGIN

Logout

Olivier MARGAINE
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[read more](#)

QUICK LINKS

MY ORGANISATIONS

Organisation(s) linked via projects.

Show entries

Search:

Name	Pic	VAT
XXXXXXXXXXXXXXXXXXXX	XXXXXXXX	XXXXXXXXXX

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

The organisation appears in the "My Organisations" tab



ORGANISATION MENU

Back to List

Organisation Details

ORGANISATION SUMMARY

Organisation Pic:	999869114
Business Name:	UIBK
VAT number:	ATU574954...
Nace:	80.3

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ROLES OF THE ORGANISATION: COUNCIL FOR SCIENTIFIC AND INDUSTRIAL RESEARCH

Depending of your role in the organisation, you could grant or revoke contact. Details are available in the user manual. You can only revoke roles you have granted.

Show 10 entries

Search:

Select	Role ⁱ	Name	Email	Project
<input type="checkbox"/>	LEAR	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Account Admin.	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Account Admin.	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Account Admin.	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Participant Contact	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Participant Contact	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Participant Contact	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Participant Contact	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX
<input type="checkbox"/>	Participant Contact	XXXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX

Showing 1 to 10 of 32 entries

First Previous 1 2 3 4 Next Last

Add Revoke Selected Close

LEARs can view the roles within the organisation. Add or revoke roles in the project only if he/she has project roles too.

Access rights for each role

Each person within this pyramid has different access rights according to his/her own role, and according to the state of the project.

Let's review these rights for each role.



Project

Coordinating Participant

Participant A

Coordinator Contacts



Participant Contacts



Task Managers



Team Members



LEAR

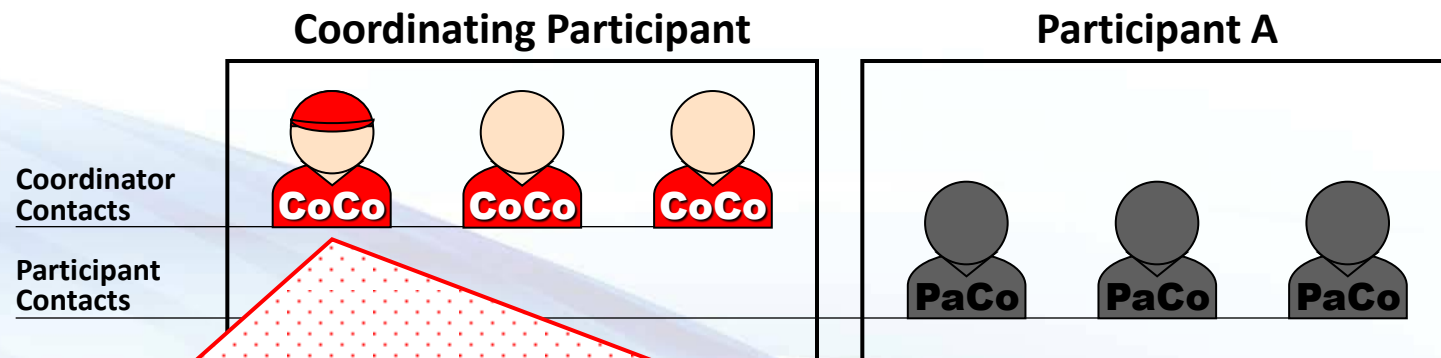


Account Administrator



Organisation





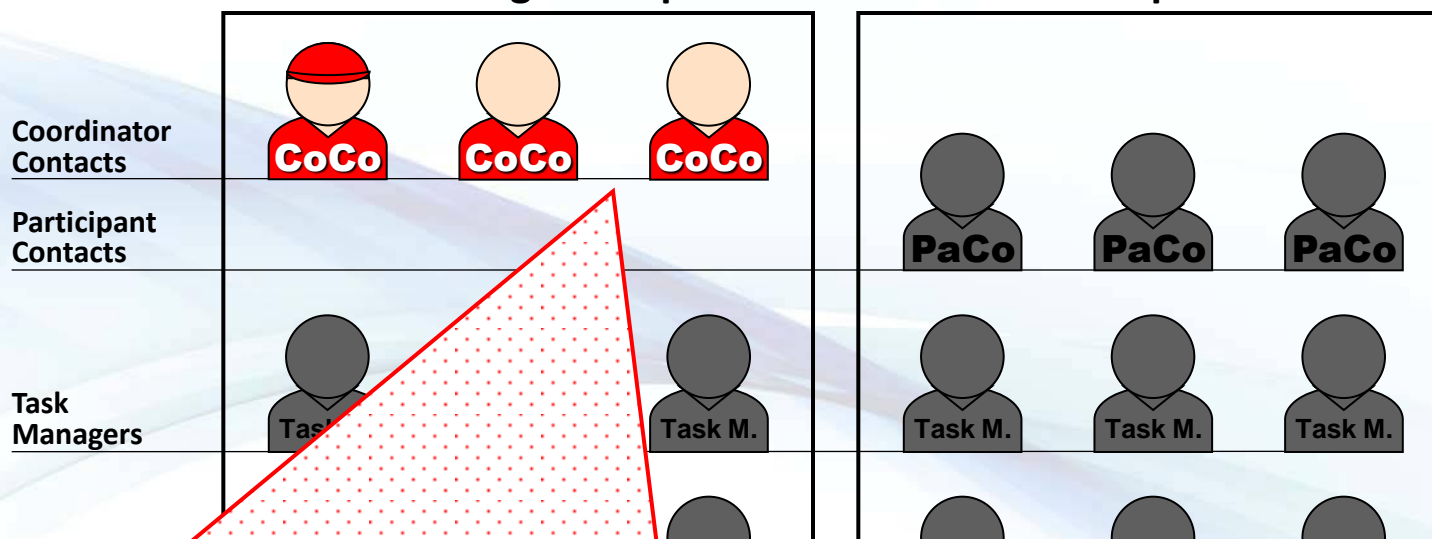
The Primary Coordinator Contact:

- The contact person of the coordinating entity **identified in the proposal** is automatically transferred as the Primary Coordinator Contact; (s)he is the **primary point of contact between the Commission and the Consortium for negotiations.**
- The Primary Coordinator Contact can **only be revoked or modified by the Commission.**
- The Primary Coordinator Contact can **nominate and revoke Coordinator Contacts, Task Managers and Team Members** within his/her organisation.
- The Primary Coordinator Contact can **nominate and revoke Participants Contacts** for any organisation in the consortium.
- The Primary Coordinator Contact has **read and write access** to all electronic tools, to the forms of his/her organisation and to the common forms of the consortium.
- The Primary Coordinator Contact can **submit forms to the European Commission.**

Project

Coordinating Participant

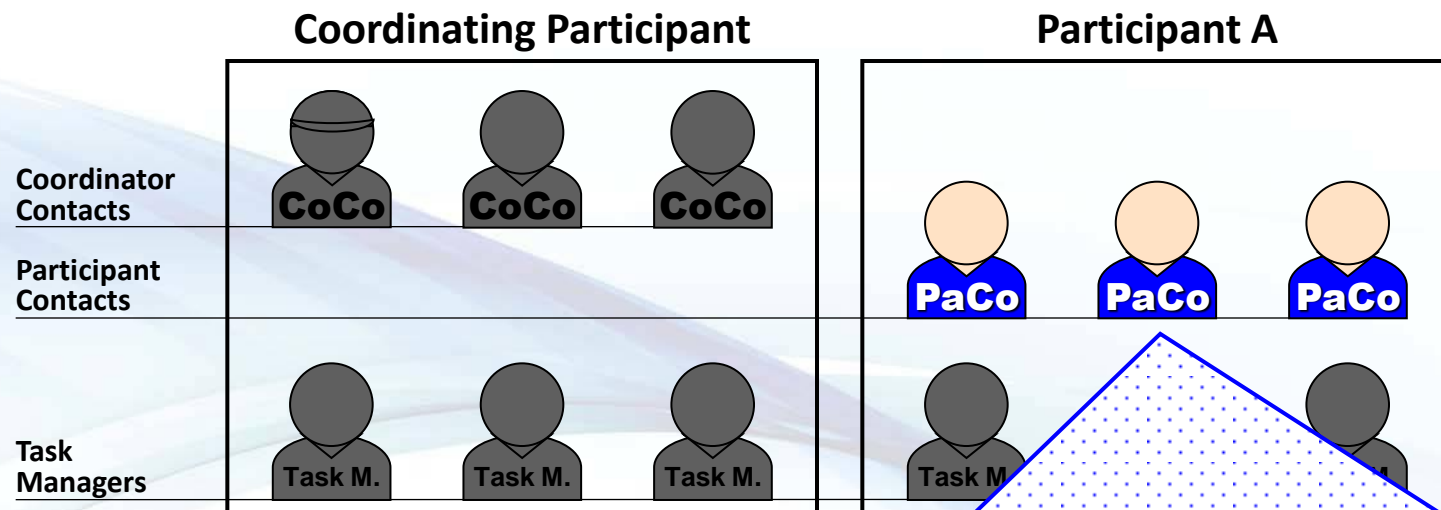
Participant A

**Coordinator Contacts:**

- All Coordinator Contacts can **nominate and revoke other Coordinator Contacts** within their organisation; all the nominated Coordinator Contacts have similar rights.
- All Coordinator Contacts can **nominate and revoke Task Managers and Team Members** within their organisation.
- All Coordinator Contacts have **read and write access** to all electronic tools, to their own forms and to the common forms of the consortium.
- All Coordinator Contacts can **submit forms to the European Commission**.



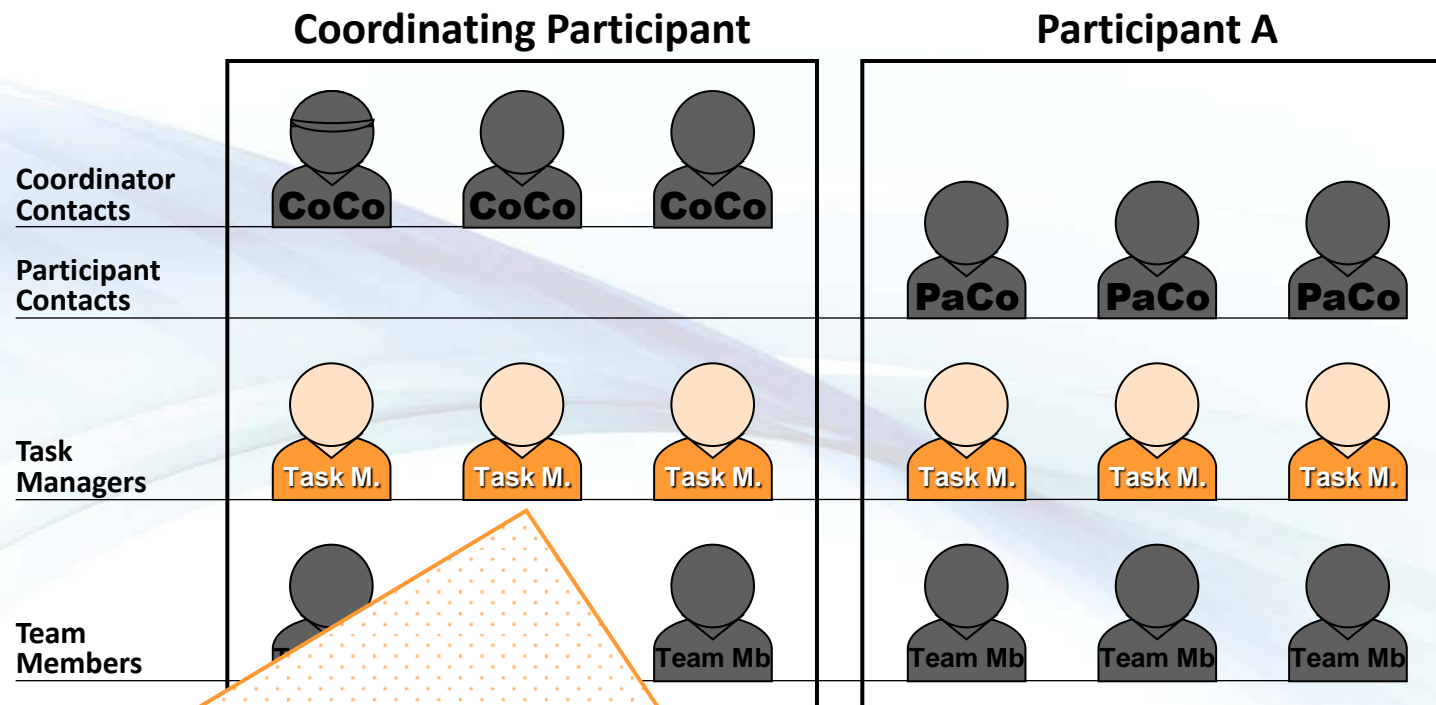
Project



Participant Contacts:

- The Participant Contacts are nominated to **represent the organisation within the consortium.**
- There is at least one Participant Contact per organisation, with a **maximum of 5 Participant Contacts** per organisation, but there can be more than 5 with the migration of roles for organisations which are already registered.
- All Participant Contacts can **nominate and revoke other Participant Contacts, Task Managers and Team Members** within his/her organisation.
- All Participant Contacts have **read and write access** to their organisation's forms.
- All Participant Contacts can **submit forms to the Coordinator Contacts.**



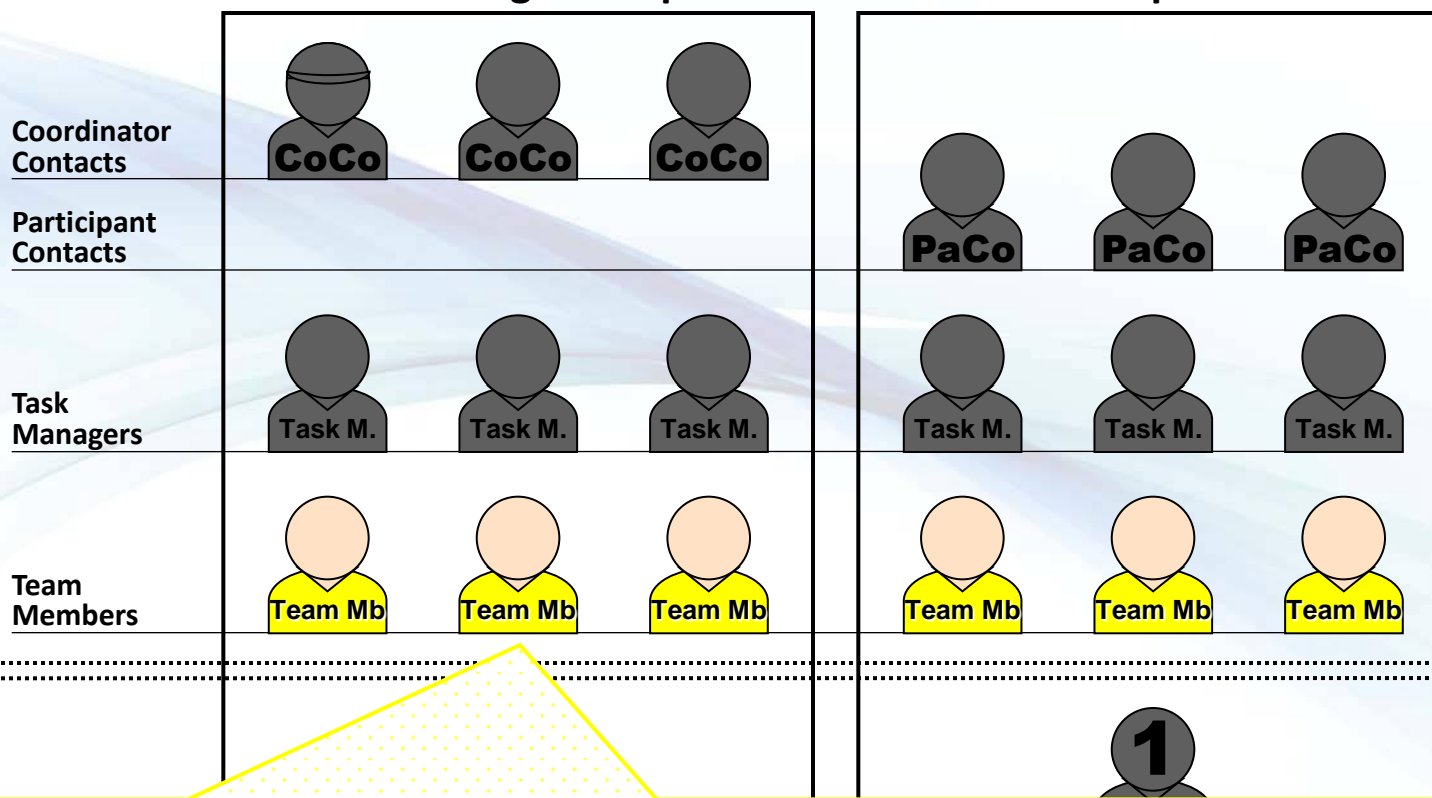


Task Managers:

- There may be one or more Task Manager(s) per organisation.
- Task Managers are nominated by their Participant Contacts.
- Task Managers can **create and update forms of their organisation** and submit to the Participant Contacts.
- Task Managers cannot **delegate** the role further or any of their rights.

Coordinating Participant

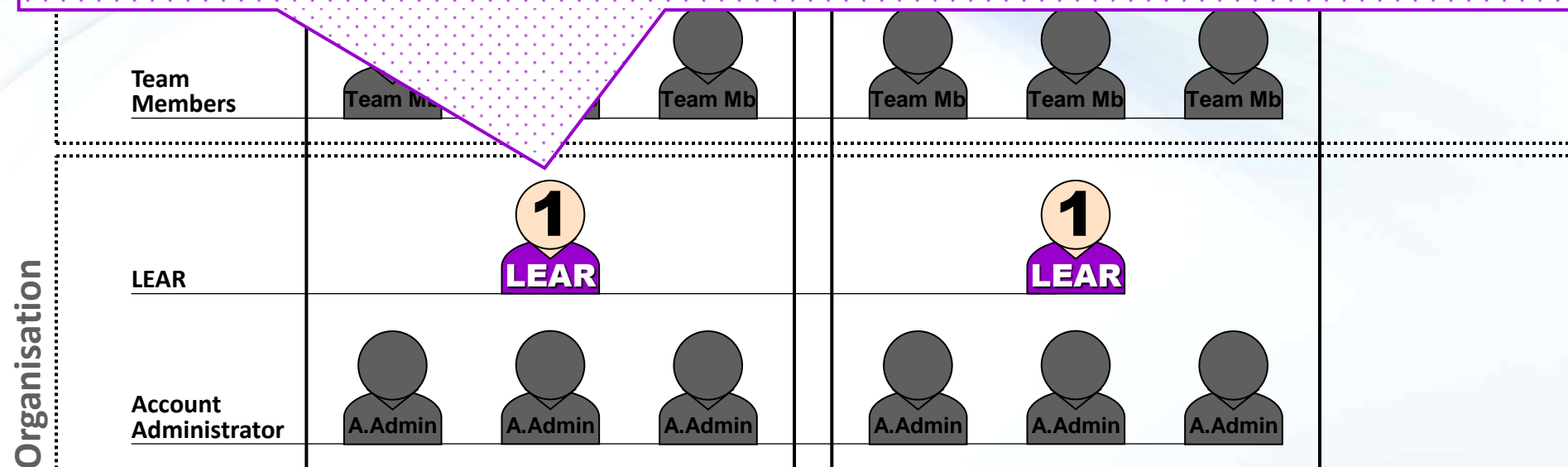
Participant A

**Team Members:**

- Team Members are nominated by the Participant Contacts.
- Team Members have limited access rights: **search, read-only**.
- Team Members **cannot further delegate** the role or any of their rights.

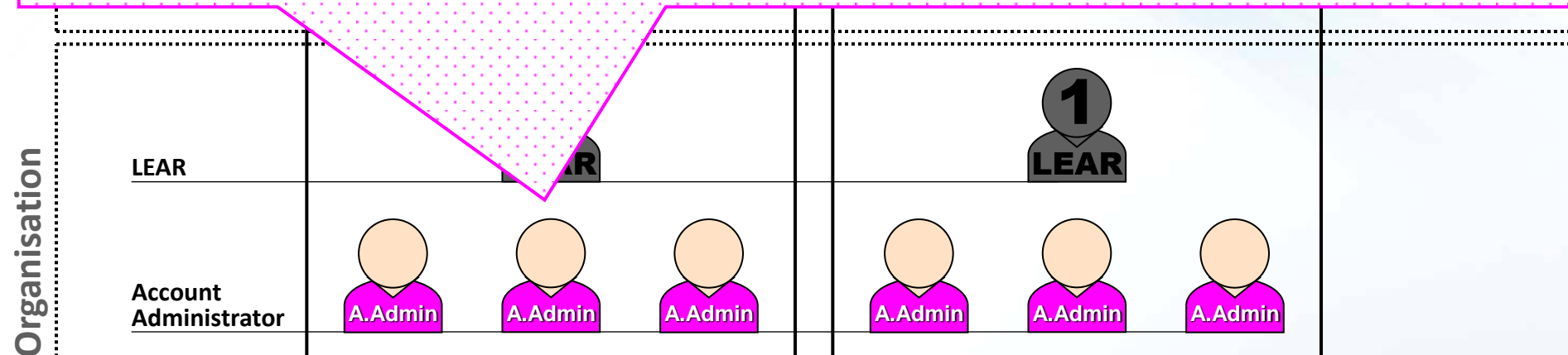
The LEAR:

- The LEAR can **access the list of roles/persons** representing his/her organisation in Projects **and the Project list of his/her organisation**.
- The LEAR may **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.*
- The LEAR can **only be revoked or modified by the Commission**.
- The LEAR is responsible for the **updates of the organisation-related data**, can request (online) the modification of such data, and upload supporting documents.



The Account Administrator:

- There may be one or more Account Administrator(s) within an organisation (*nominated by the LEAR of the organisation*).
- All Account Administrators may **access the list of roles/persons** representing his/her organisation in Projects **and the Project list of their organisation**.
- All Account Administrators can request (online) the update of **the organisation-related data**.
- All Account Administrators may **request to revoke users** from roles within their organisation
e.g. by asking a Coordinator Contactor a Participant Contact to revoke a role.



Project

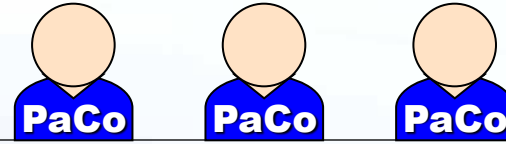
Coordinating Participant

Participant A

Coordinator Contacts



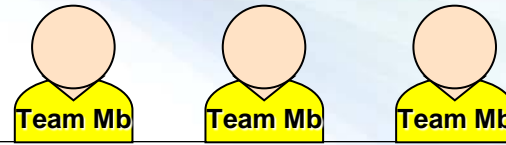
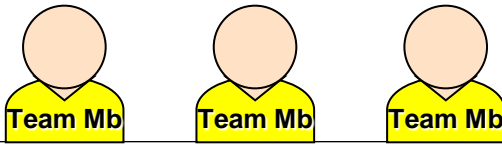
Participant Contacts



Task Managers



Team Members



LEAR



Account Administrator



Organisation



Project roles: summary



- Nominate and revoke Participant Contacts for any participating organisation



- Nominate and revoke other Coordinator Contacts
- Read/write access to own forms and to common forms
- Submit to European Commission / Agency



- Nominate and revoke Participant Contacts, Task Managers and Team Members within their organisation
- Read/write access to own forms
- Submit to the Coordinator Contacts



- Create and update forms



- Read-only access



Organisation roles: summary



- Nominate and revoke Account Administrators within their organisation



- Access the list of roles/persons representing their organisation
- Access their organisation's list of Projects and their summaries
- May request to revoke users from roles within his/her organisation



Access rights for each step of the project

Now that we have a better idea of the general scheme, let's review the possibilities of the different roles at each step of the project.

Proposal
submission

Negotiation

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agreement
signature

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Access rights for proposal submission

Currently, the proposal submission is dealt with outside of the Participant Portal, but certain roles are provisioned automatically.

In the future, roles will be integrated within the proposal submission phase.

Coordinators and participant contacts will be able to provision the roles at this stage in the proposal submission system.

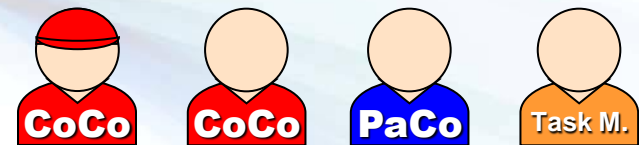


Access rights for negotiations

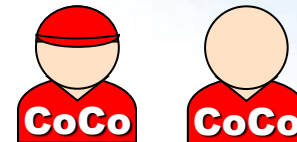
- Read-only rights to all negotiation-related data:



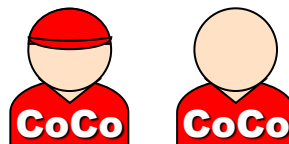
- Draft and validate their forms:



- Draft and validate common forms:



- Submit data on behalf of the whole consortium to the Commission:



Proposal submission

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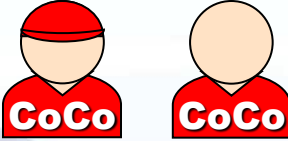


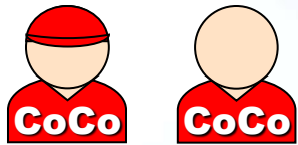
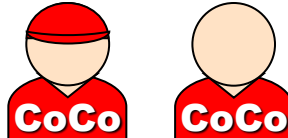
Reports

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Amendments

Access rights for amendments

- Initiate an action: 
- Read-only rights to all amendment-related data: 
- Draft and validate their forms: 
- Draft and validate common forms: 
- Submit data on behalf of the whole consortium to the Commission: 

Proposal submission

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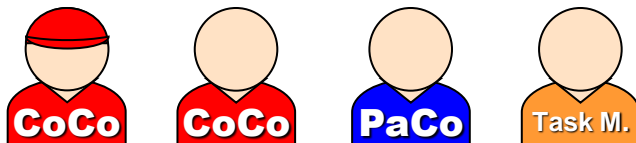
Access rights for financial reports (1/2)

(Form C, CFS, financial summary)

- Read-only rights to their Forms C/CFS:



- Draft and upload their Forms C/CFS:



- Read-only rights to the financial summary:



Access rights for financial reports (2/2)

(Form C, CFS, financial summary)

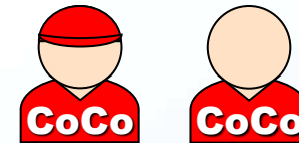
- Read-only rights to all participants' Forms C/CFS:



- Submit to the Coordinator Contacts:



- Submit to the European Commission:

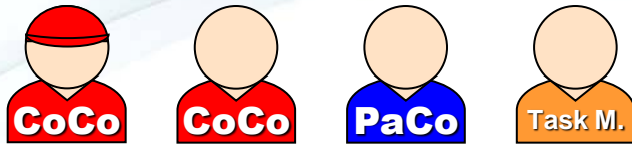


Access rights for scientific reports (1/2)

- Read-only rights to their forms & documents:



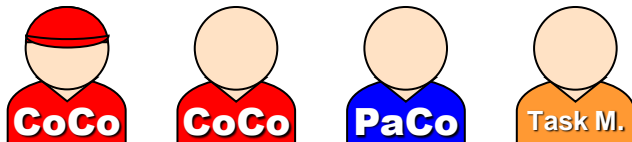
- Draft and upload their forms & documents:



- Read-only rights to common forms & documents:



- Draft and upload common forms & documents:



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Access rights for scientific reports (2/2)

- Read-only rights to all participants' forms:    
- Read-only rights to all participants' deliverables:       
- Draft and upload all participants' deliverables:    
- Submit to the Coordinator Contacts: 
- Submit to the European Commission:  

Proposal submission

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Access rights for reviews (1/2)

- Read-only rights to review forms & documents:



- Draft and upload their review forms & documents:



- Submit review:



- Review all sessions:



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the project

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Access rights for reviews (2/2)

- Read-only rights to consolidated review forms & documents:



- Draft and upload consolidated review forms & documents:



- Submit consolidated review:



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Access rights for the organisation

- View and update the organisation's data:



- Upload / download / update documents regarding the organisation:

