

Information for the Legal Entity Appointed Representatives

JULY 2009

ANNEX

Access to URF: some practical consequences

URF used to be accessible via this welcome page
<http://ec.europa.eu/research/participants/urf/welcome.do>

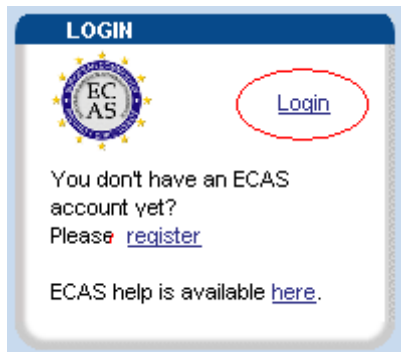
The screenshot shows the 'Welcome to The Unique Registration Facility' page. The header includes the European Commission logo and 'RESEARCH - Participants'. The main content area is titled 'YOUR ADVANTAGES ARE' and lists several benefits of the URF. A central section titled 'UNIQUE REGISTRATION FACILITY' explains the process and provides instructions on what to do if not registered, how to nominate a LEAR, and how to use a temporary PIC. To the right, there are three interactive boxes: 'SEARCH PIC' (with a search button), 'MANAGE YOUR ORGANISATION DATA' (with a login button), and 'NEW USER/ OBTAIN ECAS PASSWORD' (with a register button). The bottom of the page features the SWITCH FINANCE PROGRAMME logo.

This page has been replaced by the welcome page of the **Participant Portal**
<http://ec.europa.eu/research/participants/portal>

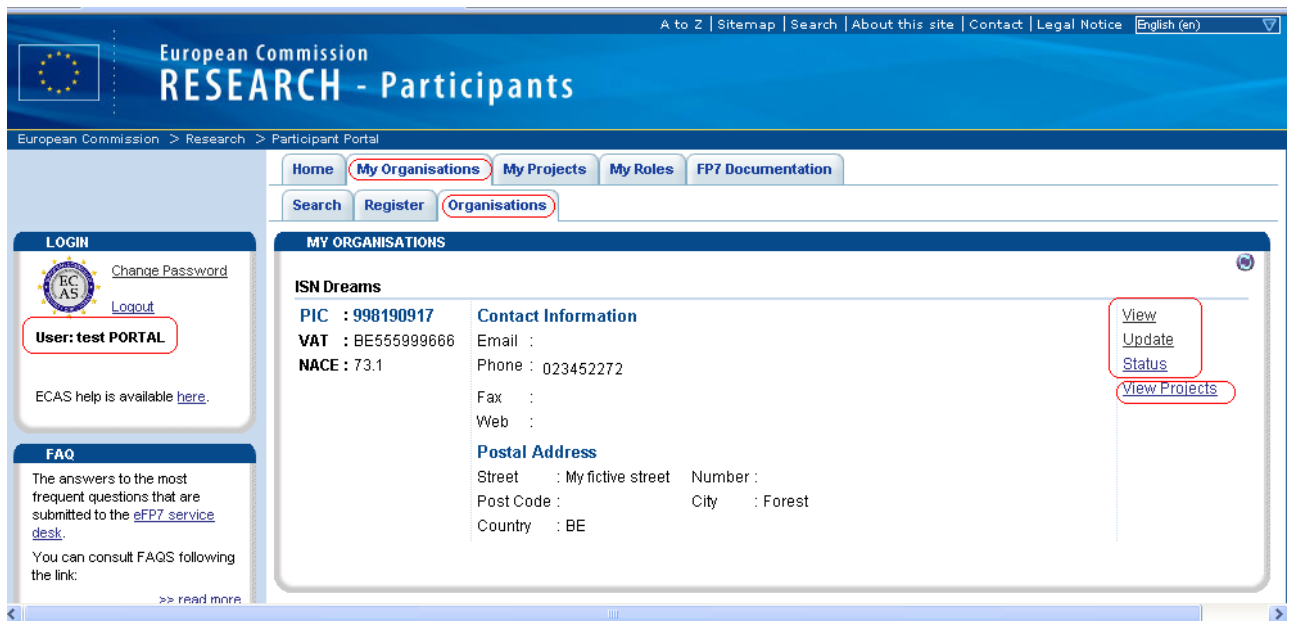
The screenshot shows the 'Welcome to the Participant Portal' page. The header includes the European Commission logo and 'RESEARCH - Participants'. The page is divided into several sections: 'LOGIN' (with a login button and a link to register), 'FAQ' (with a link to read more), 'WHAT'S NEW' (listing Organisation Registration, List of Projects, and FP7 Public Documents), 'QUICK LINKS' (with links to FP7 homepage, CORDIS, and Research site of the EC), and 'WELCOME' (with a large image of hands typing on a keyboard). The 'WELCOME' section contains a detailed introduction to the portal and lists the services it offers today, such as registering organisation data, obtaining a PIC, and checking registration status. It also lists other functionalities like searching for FP7-related support documents and accessing project details. The 'How does it work?' section explains that access to the portal requires an ECAS account and provides instructions for existing and new users. The 'Are you a new user?' section provides a link to register on the ECAS website.

The Participant Portal services will become the **unique gateway to the URF** interface. The practical implications of this change are outlined below:

- The current URF welcome page redirects to the Participant Portal;
- To access URF you need to go to the Participant Portal - <http://ec.europa.eu/research/participants/portal> - and log on to the portal;



- In order to log on to the portal, an **ECAS account is required. As a LEAR, you should already have received the ECAS login and password to access URF.** Please note that the ECAS credentials are strictly confidential and should not be shared.
- Once logged on to the portal, please go to "My Organisations" section and select the "Organisations" tab. There you will find three direct links to URF : View data / Update date / Status
- The "View Projects" link opens the list of running projects the organisation is involved in, as well as projects under negotiation or under grant agreement (note that proposals submitted but under evaluation are not covered).



More information on the Participant Portal

The **Participant Portal** will become the participants' single entry point to interact with the Research Directorates-General of the European Commission. It will host a full range of services **to facilitate the monitoring and the management of their proposals and projects** throughout their lifecycle, i.e. from call information and proposals submission to grant management.

Advantages of the Participant Portal

- Provide the participants with an intuitive, **user-friendly** web-based front office which will offer a consistent and coherent **set of services**, in order to **facilitate their interactions with the Research DGs** and improve operations and data quality;
- The participant portal is a secure Internet site that ensures **adequate authentication and confidentiality mechanisms**.

The Participant Portal can be found at the following address:

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

Currently, it supports the following services:

Organisation registration and data management (*My Organisations*)

The Participant Portal is the gateway to the Unique Registration Facility (URF).

For new entities participating for the first time in a proposal, the proposal submission will trigger the process of identification of the Legal Entity Appointed Representative (LEAR), validation of the entity and assignment of the PIC. This process, supported by URF, will be accessible through the Participant Portal.

The portal is open for online access to the LEARs in order to **view the information** stored in the account of their legal entity and to **introduce change requests**. The access to the Participant Portal is very easy for the LEARs since they only need to use their URF credentials (login and password).

On the portal, LEARs **can also access the list of projects that their organisations are currently working on**, including a project details view.

Projects management (*My Projects*)

Coordinators can access their list of projects, including project details as well as information on the requested **amendments**. Once the negotiations are open, a **link to the NEF tool** will enable them to join the negotiation sessions directly, with no additional authentication.

FP7 documentation

All visitors can use the **document search functionality** to find all FP7-related support documents.

Important links:

Participant Portal:

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

Login to access the Participant Portal services:

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

Technical helpdesk of the Participant Portal:

http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=contactus

Or by e-mail

DIGIT-EFP7-SUPPORT@ec.europa.eu

New URF features

Self Registration – Upload Documents

From now on you can also enclose in URF the supporting documents by using the 'Upload document' possibility. In this page, you can activate the upload document facility by clicking on the [**Upload Document**] button.

The total file size is limited to 10 Mb for upload and no further download is available.



In the Document properties page click on the [**Browse**] button, in order to select the file to upload. You will then select your file.



In the Document Properties page, enter the Author name and the file description. Check the 'Original' check box if your file is the original one.

Finally, click on the [UPLOAD] to save your data and to upload your file.

Balance sheet

The "balance sheet" section of the Unique Registration Facility is provided for the cases where the financial capacity of an organisation has to be verified prior to the signature of a grant agreement. Public bodies and organisations whose participation is guaranteed by a Member State or an Associated Country are exempt from financial capacity check. For all other organisations, financial capacity check is required in the following cases:

- If your organisation has the role of coordinator in a project
- If your organisation is requesting more than €500 000 EC contribution in a project
- In other cases at the particular request of the Commission

In all cases, there will be an explicit request by the Commission when your financial data are required. Once you received such a request, create a new balance sheet in this Tab (by clicking on the [newYear] button) or you can modify existing balance sheets (by clicking on the year number)

If you modify an existing balance sheet, you have to click first on the [EDIT] button to enable the data fields. If it is a new balance sheet, then the fields are enabled and empty.

The first information to enter are the closing date of your balance sheet, its duration and the currency that will be used for the values below.

European Commission
RESEARCH - Participants

European Commission > Research > Participant Portal > Unique Registration Facility

-> VIEW / UPDATE PARTICIPANT DATA

Your Organisation data (edit mode):

ORGANISATION DATA LEGAL ADDRESS STATUS OF THE ORGANISATION **BALANCE SHEET** ENTERPRISE DATA DOCUMENT MANAGEMENT

1999 2000 newYear

Balance sheet status: UNCHANGED
Action: [EDIT](#)

Organisation data of the participant

Closing date t0 (dd-mm-yyyy) 01-01-2000
Duration t0 (Month) 12
Currency EUR-EURO

Balance Sheet

ASSETS

1. Subscribed capital unpaid	6198
2. Fixed assets	6465
2.1 Intangible fixed assets	253
2.2 Tangible fixed assets	4712
2.2 Financial assets	1500

LOGOUT
Please click here to logout: [LOGOUT](#)


[Return to URF menu.](#)

The first set of values is related to assets. The second one is related to liabilities. The last one concerns the profit and loss account. Note that the calculation is performed 'on line'.

When you validate your data, by clicking on the [VALIDATE] button, a **financial viability check is performed**. The results are then displayed in the bottom of your page.

Financial Viability Simulation					
Ratio's Results			Analysis		
Indicators	Value	Qualification	Quote	Concise	More-in-depth
Quick Ratio	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
G.O. Profit Ratio	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Profitability (1)	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Profitability (2)	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Solvency	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Noteworthy value's Results					
Equity Flags	<input type="text"/>	<input type="text"/>			

* Mandatory Fields

[UPDATE YOUR DATA](#) 

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Please note that this on-line financial viability check is a simulation, it is for information purposes only, and does not represent a definitive assessment of the financial viability of your organisation. The final assessment of the financial viability will be carried out (when necessary) by the negotiating officer, with respect to the grant agreement.

The LEARs should also upload the supporting documents. The validation services, managed by the Research Executive Agency (REA) Unit A.1, will then check whether the data provided in URF are consistent with the data of the supporting documents. It is only after this verification stage that the financial data is being validated by the validation services.

Document management

For uploading documents related to the organisation, the LEARs will follow the same procedure as described in the "Self Registration – Upload Documents" chapter.

The total file size is limited to 20 Mb for upload, downloads are not allowed but a view on the documents is available.

-> VIEW / UPDATE PARTICIPANT DATA

Your Data (edit mode):

ORGANISATION DATA LEGAL ADDRESS STATUS OF THE ORGANISATION BALANCE SHEET ENTERPRISE DATA **DOCUMENT MANAGEMENT**

New Documents

	File name	Size	Date	Description	Original
	desktop.ini	0 KB	17-04-2009	Data files for balance sheet	<input type="checkbox"/>

UPLOAD

Existing Documents

	File name	Size	Date	Description	Original
	090115VW_ACC_SHEET.xls	207 KB	17-04-2009	Loaded from PDM with Privacy = false	<input type="checkbox"/>
	ABAC REQUEST.rtf	7879 KB	17-04-2009	3eme fichier - status = validation new	<input type="checkbox"/>
	Buswaterloo-pdf.pdf	79 KB	17-04-2009	Uploaded while status = validation on going	<input type="checkbox"/>
	desktop.ini	0 KB	17-04-2009	Data files for balance sheet	<input type="checkbox"/>
	fileformat.txt	0 KB	17-04-2009	again during validation on going + original	<input checked="" type="checkbox"/>
	INFSOclean2.doc	23 KB	17-04-2009	Second document durant status = Identification on going	<input type="checkbox"/>
	1PG alignement for URF.doc	182 KB	17-04-2009	Test 1	<input type="checkbox"/>
	PP_DocMgt.vsd	1082 KB	17-04-2009	big	<input type="checkbox"/>


* Mandatory Fields **UPDATE YOUR DATA**

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LOGOUT

Please click here to logout:

LOGOUT



Return to URF menu.

More information on URF:

http://ec.europa.eu/research/participants/urf/manual/URF_USER_MANUAL.pdf

[Login](#)

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

ECAS help is available
[here](#).

Portal registration
demo is available [here](#)

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](#)

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](#)

[FP7 homepage](#)

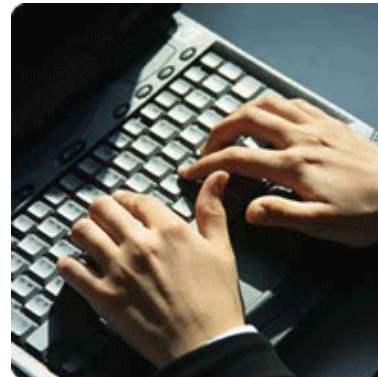


Welcome to the Participant Portal

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.

Are you a new user? [Please register](#) on the European Commission Authentication Service (ECAS).

More information about the [ECAS registration](#)?

Should you have any problems with any aspect of using the portal, please [contact our service desk](#)