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

This page has been replaced by the welcome page of the **Participant Portal**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

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;
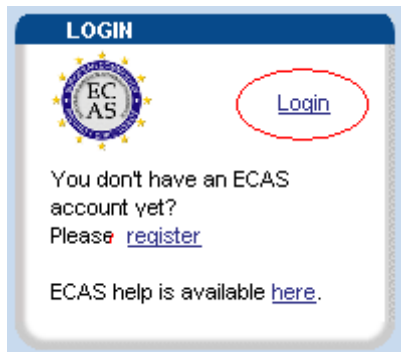
- In order to log on to the portal, an **ECAS account is required**. **As a LEAR, you should already have received the ECAS login and password to access URF**. Please note that the ECAS credentials are strictly confidential and should not be shared.

- 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).
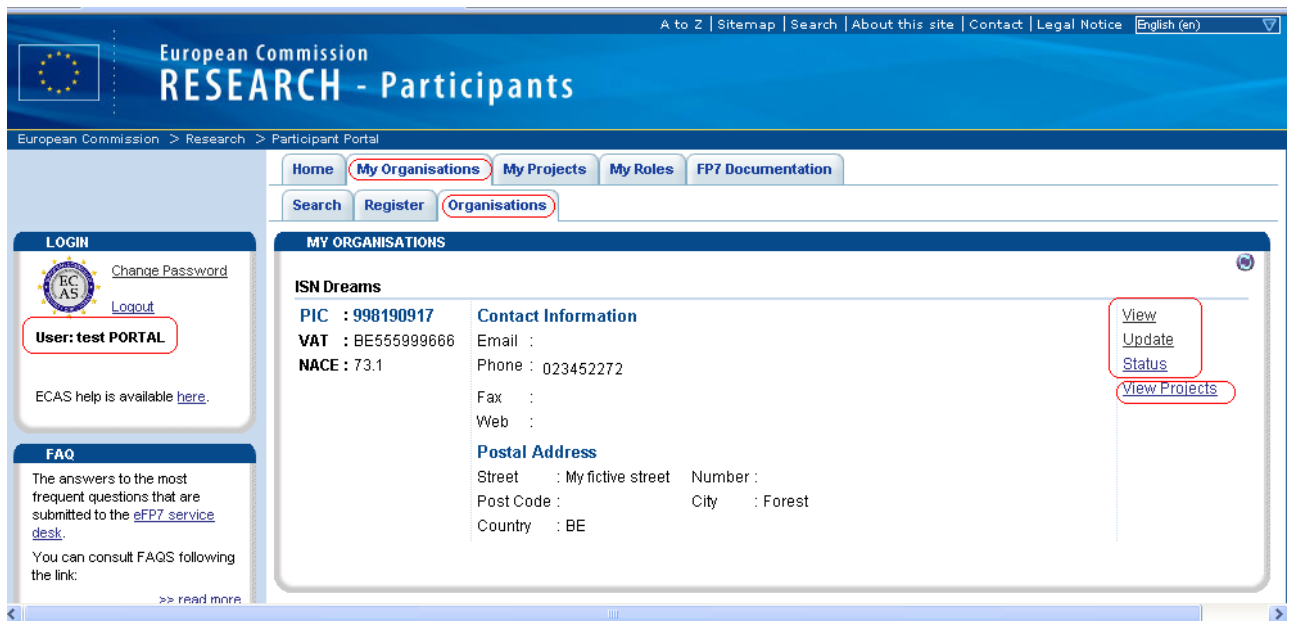
More information on the Participant Portal

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.

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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

</div>

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.

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.

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.

More information on URF:

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

English (en)

Home   **My Organisations**   **FP7 Documentation**

European Commission Research Participant Portal

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

CORDIS

Recently published calls

Research site of the EC

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.
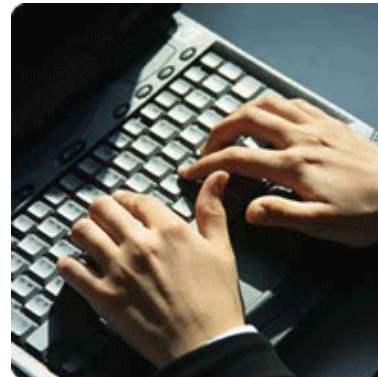
Other functionalities are currently implemented as pilot services:

- 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