

Participant Portal 'Quick info' Changes of the identity and access management on the Participant Portal

February 2012

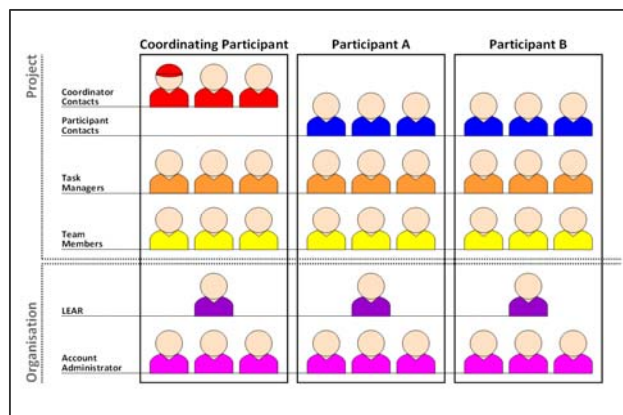
The new release of the [Participant Portal](#) will offer **more flexibility** in the management of access rights and roles in the projects and will bring a simplified structure of roles, therefore considerable changes especially for the current users of the Portal.

The main principles of the identity and access management (IAM) do not change:

- Access rights of a person are based on an **ECAS account** (European Commission Authentication System); the **unique identifier** for a **physical person** is the **e-mail** address used for the creation of the ECAS account.
- The unique identifier of the **organisations** is the 9-digit **PIC number**.
- The Commission/Agency can approve/modify the 'top' roles within the consortium, but the **granting of access** rights to projects and **provisioning of roles** within a project is delegated to **the members of each consortium**.
- Access can be granted to the project-related actions such as negotiations, amendments and/or financial and scientific reporting following a multi-level "pyramid" of rights.

The project roles of a user can be checked after logging in to the ECAS account on the Participant Portal under the "**My Roles**" tab. With the new release of the Participant Portal the access rights are automatically changed in accordance with the rules described below. All access rights will be kept, but the level of access rights will change.

Roles in the Participant Portal after February 2012

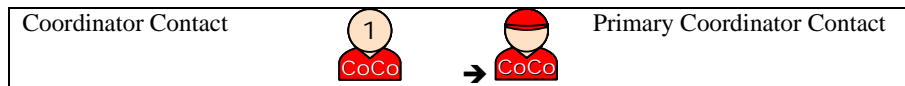


Main changes

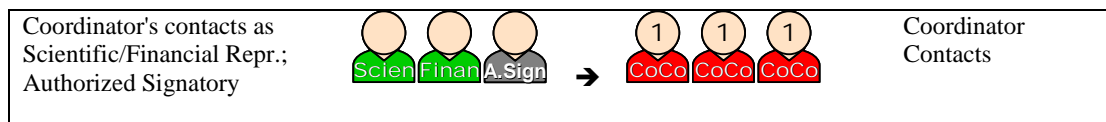
- **More than one Coordinator Contact** and **Participant Contact** can be nominated per participants in the project.
- The current Coordinator Contact will become **Primary Coordinator contact**.
- The scopes of **scientific/ administrative/legal representatives** etc. disappear and are **automatically transferred** to new roles:
 - ❖ The current scientific/financial representatives become **Participant Contacts**.
 - ❖ Authorized signatories become **Participant Contacts**.
 - ❖ Administrative/legal representatives become **Task Managers**.

Transfer of roles

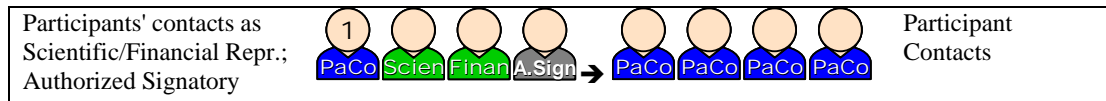
a., **The Primary Coordinator Contact** of a project is a unique role, set/modified by the Commission/Agency, similarly to the current Coordinator Contacts. All the current Coordinator contacts will automatically become Primary Coordinator Contacts. All Primary Coordinator contacts have full, read/write access to their own and the consortium's common e-forms, and can submit to the Commission/Agency via the Participant Portal.



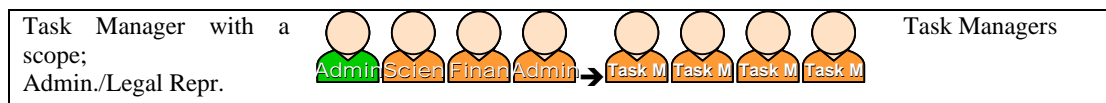
b., More **Coordinator contacts** can be nominated by the Primary Coordinator Contact. All Coordinator contacts have full, read/write access to their own and the common e-forms, and can submit to the Commission/Agency via the Participant Portal. All the previous Scientific or Financial Representatives and Authorized Signatories of the coordinating entity will automatically become Coordinator Contacts of the coordinating entity:



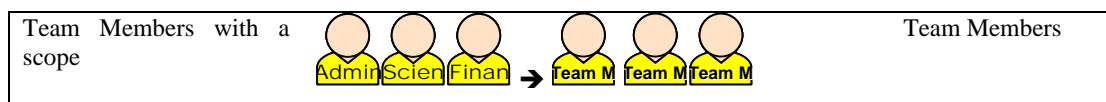
c., More **Participant Contacts** (max. 5) can be nominated either by the Primary Coordinator Contact or by Participant Contacts in the future. All Participant Contacts can submit e-forms to the Coordinator Contacts via the Participant Portal. They have read/write access to their own forms and read-only rights to certain common forms. All the previous Scientific or Financial Representatives and Authorized Signatories of the participating entities will automatically become Participant Contacts of the given entity:



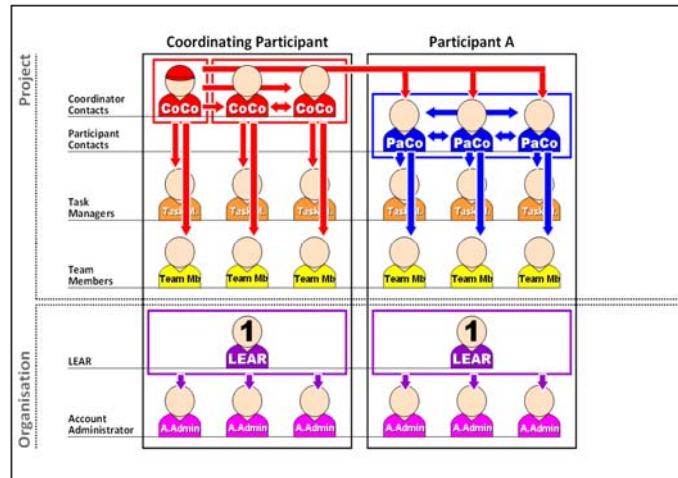
d., **Task Managers** can read, modify and save their own entity's forms. The different scopes (eg. administrative or legal) and the difference in the respective access rights to the financial/scientific reporting services disappear. All current Administrative/Legal Representatives become Task Managers:



e., **Team Members** have read-only rights to the entity's own forms. The different scopes (eg. administrative or legal) and the difference in the respective access rights to the financial/scientific reporting services disappear:



How to add or revoke roles in the Participant Portal?



- The **Primary Coordinator Contact** can nominate/revoke Coordinator Contacts, Task Managers and Team Members of the coordinating entity and Participant Contacts of other participating organisations.
- **Coordinator Contacts** can nominate/revoke other Coordinator Contacts, Task Managers and Team Members of the coordinating entity.
- **Participant Contacts** can nominate/revoke other Participant Contacts, Task Managers and Team Members of their own entity.
- The **Legal Entity Appointed Representative (LEAR)** can nominate Account Administrators of his/her own entity.

Your tasks due to the new version of the IAM

The transfer of roles will be automatic. A revision of the policy for granting accesses and roles within the consortium and within each organisation is advisable after the migration. You may check the new set of roles - under the "My Roles" or "My Projects" tab after ECAS login -, add or revoke roles within the consortium and/or within your own organisation, as necessary.

Important links:

Participant Portal: <http://ec.europa.eu/research/participants/portal>
European Commission Authentication Service (ECAS): <https://webgate.ec.europa.eu/aida/selfreg>
ECAS help: <https://webgate.ec.europa.eu/cas/selfreg/help.cgi>
Participant Portal Frequently Asked Questions:
<http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?nfpb=true&pageLabel=faq>
Technical helpdesk of Participant Portal:
<http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?nfpb=true&pageLabel=contactus>