



FFG

Rollen im Participant Portal

Stand Februar 2011



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Informationsquellen:

- Participant Portal direkt (Informations-Icon i)
<http://ec.europa.eu/research/participants/portal/appmanager/participants/portal>
- PP User Manual Nov 2010
http://rp7.ffg.at/upload/medialibrary/participant_portal_usermanual2.2.4_Nov201095464.pdf
- FP7 Quick Info zu IAM
http://rp7.ffg.at/upload/medialibrary/Quick_INFO_PP_IAM_16April_201089774.pdf

1 Welche Aufteilung existiert grundsätzlich im PP?

1.1 1.1 Organisation Roles:

LEAR: Legal Entity Appointed Representative

Account Administrator: User who act on behalf of the entity

Account Administrator is appointed by the LEAR in c to provide support with the management of the organisation data.

2.6.3 Roles of an Organisation

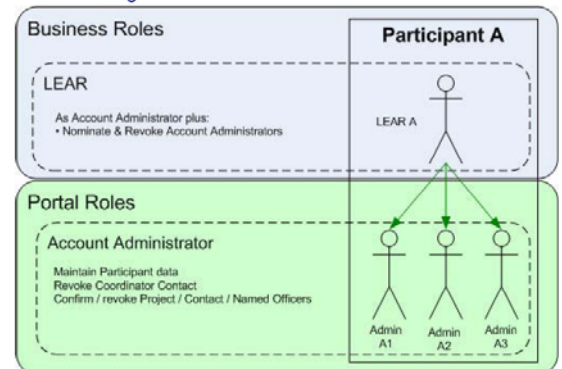
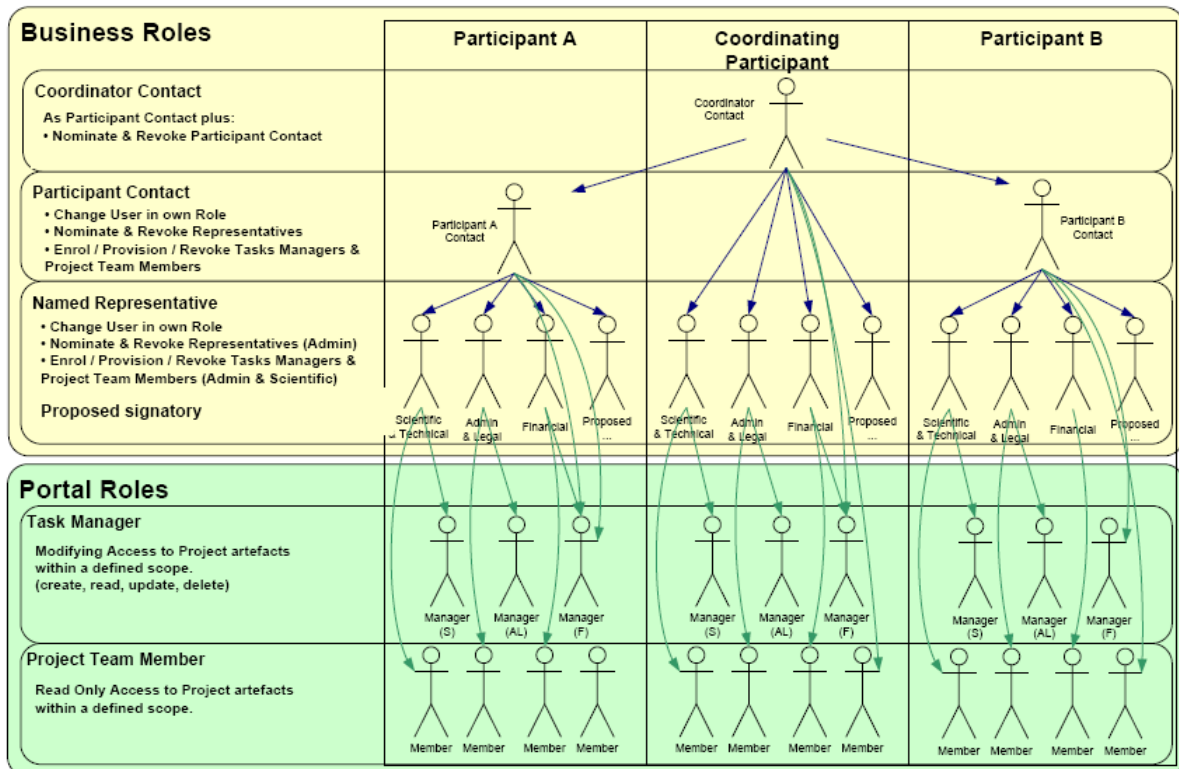


Figure 24: Participant User Account Management

1.2 Project Roles:

2.7.3 Roles of a Project

The figure below shows the roles and dependencies inside a project.



1.2.1 1st level: Coordinator Contact:

Coordinator of a project/proposal who is the first point of contact for the EC

At the top of the pyramid, there is the Coordinator Contact, who is the **main contact person for the Commission at the coordinating beneficiary.**

Nomination of **only one person per project** is possible in this role.

By default, this role is provisioned with the respective name and contact details given in the proposal (under A2. 'Contact point').

The Coordinator Contact has the **right to grant and revoke the roles of the Participant Contacts.** In addition, he/she has, for the coordinating beneficiary, the **same rights as the Participant Contacts** (see second level below).

During negotiation, the Coordinator Contact and the negotiating Project Officer have to make sure that the contact details are set properly in NEF and match one of the contact person's details given in GPF A 2.4. of the coordinating beneficiary.

Specific responsibility of the Coordinator Contact:

- Assure that the assignments of Participant Contacts are up to date and reflect the reality (including removal of obsolete access rights).
- Inform the Commission on time when the Coordinator Contact has to be changed

1.2.2 2nd level: Participant Contact:

Primary Point of contact for an organisation within a consortium

At the second level of the pyramid, there are the Participant Contacts, who are **the main contact persons for the coordinator at the participating beneficiaries.**

Nomination of **only one person per beneficiary and project** is possible in this role.

By default, these roles are provisioned with the respective names and contact details given in the proposal. These persons can be changed by the Coordinator Contact (without approval by the Commission).

The Participant Contacts have the **right to grant and revoke roles to Scientific, Administrative, Financial, Legal Representatives (3rd level) as well as Task Manager and Team Members (4th level) within their organisation.**

Specific responsibility of the Participant Contact:

- Assure that the assignments of third level roles within the own organisation are up to date and reflect the reality (including removal of obsolete access rights).
- Inform the Coordinator Contact when the Participant Contact has to be changed.

1.2.3 3rd level: Named Representatives:

At the third level and below, **several persons** can be nominated in the same role, and the **same person can be nominated in several roles**.

At the third level of the pyramid, there are the named representatives and the *authorised signatory* in each participating organisation. Their **Participant Contact can nominate them**.

The Named Representatives work on functions related to specific scopes (i.e. administrative and legal, financial, scientific) for negotiation, amendment handling and reporting.

There can be more than one Named Representative for each scope and the same person can be nominated in more than one named representative role.

Specific responsibility of the Named Representatives:

- perform the tasks relevant to their scope of expertise.

Scientific and Technical Representative (STR): Leads the research team and is responsible for technical submissions

Administrative and Legal Representative (ALR): Responsible for contractual and administrative aspects of a project

Financial Representative (FR): Responsible for financial aspect of the project

Proposed Authorised Signatory (PAS/PS): Represents the oversight and authority of the LEAR (A workflow that will allow LEARs to confirm/infirm the person designated for this role will be setup in the near future)

The Participant Contact of his/her organisation also nominates the *authorised signatory* however the LEAR must confirm him/her. The role will appear as "**Proposed Signatory**" in the Participant Portal as long as they are **unconfirmed**.

Specific responsibility of the Authorised Signatory:

- he/she is empowered with representing signature authority for his/her organisation within the legal scope (e.g. **able to sign financial statements**).

1.2.4 4th level: Task Managers and Team Members:

At the fourth level of the pyramid, there are the Task Managers and Team Members.

Task Manager: has the authorisation to perform some restricted actions, such as **submit signed documents, modify or delete the content or status of project artefacts within one or more particular scope** (Administrative, Legal, Financial and/or Scientific)

Designated by the Coordinator Contact, Participant Contact or a Representative.

Task Managers extend the Team Member role with the capacity to perform submit, update and delete actions on artefacts of the project they are assigned to and which are within their granted scope(s) (i.e. a financial report for the financial scope).

Team Member: has **read only access** to project artefacts within one or more particular scope (Administrative, Legal, Financial and/or Scientific)

Designated by the Coordinator Contact, Participant Contact or a Representative.

Team Members have minimal read-only rights to project resource information. The scope of these rights can be set to any combination of the following: administrative, legal, financial and legal.

1.2.5 Weitere Rollen

- The **EC Project Officer** (person who is dealing with the project at the European Commission)
- The **Reviewer** (person who is in charge of reviewing the project) – wird auch **Rapporteur** genannt (Haselsteiner (Uni Graz) hat diese Rolle in einem ERC Projekt im Jänner 2011 zugewiesen bekommen – soll für das Review zuständig sein, hat aber inhaltlich nichts beizutragen– vermutl. falsch ausgewählt)

2 Übersicht: Vergabe der Rollen

Wer kann wem welche Rolle zuweisen?

List of roles and their rights

FULL ROLE NAME	SHORT ROLE NAME	Who can enrol?	Who can revoke/notify revocation
LEAR	LEAR	SYSTEM	SYSTEM
ACCOUNT ADMINISTRATOR	AA	LEAR	LEAR
REGISTRANT	REG	SYSTEM	SYSTEM
COORDINATOR CONTACT	COORDINATOR	SYSTEM	SYSTEM
PARTICIPANT CONTACT	PARTICIPANT CONTACT	COORDINATOR	COORDINATOR
ADMINISTRATIVE AND LEGAL REPRESENTATIVE	ALR	PARTICIPANT CONTACT	PARTICIPANT CONTACT
FINANCIAL REPRESENTATIVE	FR	PARTICIPANT CONTACT	PARTICIPANT CONTACT
SCIENTIFIC AND TECHNICAL REPRESENTATIVE	STR	PARTICIPANT CONTACT	PARTICIPANT CONTACT
PROPOSED SIGNATORY	PS	PARTICIPANT CONTACT	PARTICIPANT CONTACT
TASK MANAGER	TM	COORDINATOR, PARTICIPANT CONTACT, ALR, FR, STR ²	COORDINATOR, PARTICIPANT CONTACT, ALR, FR, STR
TEAM MEMBER	TB	COORDINATOR, PARTICIPANT CONTACT, ALR, FR, STR ³	COORDINATOR, PARTICIPANT CONTACT, ALR, FR, STR

Table 2: List of roles and their nomination rights

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3 Übersicht: Tabs und Services im PP für Rollen

PROJECT LIFE CYCLE STAGE	SERVICES	ROLES
Organisation management	Search for an organisation	Any
	Register an organisation	Any
	Manage organisation data	LEAR, Account Administrator.
	LFV Simulation	Logged or not logged users
Identify opportunities	Read FP7 related documentation	Any
Negotiations	Browse and/or manage Negotiations	Proposed Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Representative, Financial Representative, Task Manager (A,L,F,S), Team Member (A,L,F,S),
Grant execution	Browse and/or manage Grants	Proposed Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Representative, Financial Representative, Task Manager (A,L,F,S), Team Member (A,L,F,S), LEAR, account administrator
	Browse and/or manage Amendments	Proposed Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Representative, Financial Representative, Task Manager (A,L,F,S), Team Member (A,L,F,S), LEAR, account administrator
	Browse and/or manage financial periodic and final reporting	Proposed Signatory, Participant Contact, Coordinator Contact, Administrative and Legal Representative, Financial Representative, Task Manager (A,L,F,S), Team Member (A,L,F,S), LEAR, account administrator
	Browse and/or manage deliverables and final reporting	Proposed Signatory, Participant Contact, Coordinator Contact, Scientific Representative, Task Manager (A,L,F,S), Team Member (A,L,F,S), LEAR, account administrator
Horizontal processes		
	Manage roles and nominations	Any role
	Manage notifications	Any role
	Support	Any

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