

Participant Portal

User's Guide

30/01/2012 (version 3.3)

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Introduction

The Participant Portal is an Internet portal for the participants to the 7th Framework Programme (FP7) and the Competitiveness and Innovation Programme (CIP). Its ultimate aim is to become over time the participants' gateway and single entry point to interact with the Research programmes of the European Commission.

It provides a consistent and coherent set of online services in order to facilitate the participants' interactions with the Research Directorates-General of the European Commission and improve operations and data quality. It will eventually host a full range of web applications **that facilitate the monitoring and the management of proposals and projects** throughout their lifecycle.

This document describes how to access and use the Participant Portal.

Typographical convention

[Hyperlink](#) or [email address](#)

[Button]

"Tab"

Figure or Table

<Field> or <Column>

Participant Portal's main actors

The different types of users defined for the Participant Portal are organised by roles and are globally described as follow¹:

- Public : Any person that goes to the PP URL
- Registered User:
A user that has registered himself and has received credentials for logging on.
A registered user can be a natural person or a member of a legal entity.

A member of a legal entity can have one of the following roles:

- Researcher:
Person who directly or indirectly interacts with Framework Programme information
- Organisation Member : User who acts on behalf of an entity
 - Self registrant : user who self-registered an organisation in the **Unique Registration Facility**
 - Legal Entity Appointed Representative (LEAR);
possibly delegating updates of company information and other capabilities to other representatives of the organisation, called "Account Administrators" (AA) under the Participant Portal:
 - Account Administrator (AA): the Account Administrator is appointed by the LEAR in order to provide support with the management of the organisation data.
- Project/Proposal Participant :
Member of an organisation who participates in a project or a proposal

¹ Thorough descriptions of the available roles are given in sections 2.5.1 (Legal Entity Appointed Representatives and account administrators) and 2.7.3 (Roles of a Project).

- **Primary Coordinator Contact:**
Coordinator of a project/proposal who is the first point of contact between a Consortium² and the European Commission.
- **Participant Contact:**
Primary point of Contact for an organisation within a Consortium
- **Coordinator Contact:**
a Participant Contact who belongs to the same organisation as the Primary Coordinator Contact.
- **Team Member:**
Has minimal read-only rights to project resource information. For the majority of users the role represents a *project team member*.
They can be designated by a Coordinator or Participant Contact of the same organisation
- **Task Manager:**
Extends the Team Member role with the capability to perform submit, update and delete actions. Like the Team Member, they can be designated by a Coordinator or Participant Contact of the same organisation.

Depending on their role(s), users will receive different rights regarding the access to the hosted services.

Participant Portal's main services

The Participant Portal has been created to cover the whole lifecycle of the projects: proposals submission, evaluation, grant agreement negotiations and submission of periodic and final reports during project implementation, administrative support to the experts...

Currently, the Participant Portal is the gateway to access

- the **Unique Registration Facility** (URF), allowing organisations registration and data management
- the **FP7 Negotiation Facility** (NEF), facilitating the negotiation process
- the **reporting tools** (NEF, SESAM, FORCE) to submit the technical and financial reports
- the **FP7 Calls** database
- the FP7 Documentation
- the **Notification** service
- the **Legal and Financial Viability** (LFV) simulation tool
- the **proposal system** services
- the **expert** database

System requirements for using the Participant Portal

The participant portal operates on-line, without saving anything on the computer. The recommended minimum system requirements are:

- a computer with a minimum 1.2 GHz processor and minimum 1Gb RAM;
- an Internet connection, preferably 1Mb/s or higher;

² A Consortium is a group of Participants (or Beneficiaries) formed in pursuit of a Project.

- a screen with a minimum resolution of 1024 x 768;
- Internet Explorer 8.0 (or above) or Firefox 8.0 (or above). Other web browsers may work but have not been tested. Note that for security reasons your browser may request to identify the Participant Portal website and the ECAS system as "trusted". Once added as trusted, we recommend that you restart your browser session. If you encounter issues with previous versions of browsers we recommend that you first upgrade to the minimum browser version indicated before contacting the helpdesk;
- Windows (XP, 7), Mac OS X 10.7 (Lion). Other operating systems may work but have not been tested.

Where can the participants get support?

A Frequently Asked Questions section is available on the Participant Portal.

The users looking for help with the Participant Portal and its underlying services should use the contact form <http://ec.europa.eu/research/participants/portal/page/contactus> or send an email to EC-RESEARCH-IT-HELPDESK@ec.europa.eu.

For issues related to the registration and login using the European Commission's Authentication Service (ECAS), participants can visit this website <https://webgate.ec.europa.eu/cas/help.html> or send an e-mail to DIGIT-USER-ACCESS@ec.europa.eu.

For questions related to the Framework and similar RDG Programmes, the participants are invited to contact the Research enquiry services via the following link: <http://ec.europa.eu/research/enquiries>. The FP7 Help Desk can also be contacted by sending an e-mail to EC-FP7-IT-HELPDESK@ec.europa.eu.

1 HOW TO ACCESS THE PARTICIPANT PORTAL?

Except for a few services, such as the FP7 documentation, FP7 Calls, LFV simulation tool or the PIC search function, access to the Portal and its underlying services requires an ECAS account.

1.1 *European Commission's Authentication Service*

ECAS is the **European Commission's Authentication Service**.

It provides a single sign-on across a large number of Commission information systems: once you have authenticated yourself to ECAS, you do not have to re-enter your credentials (username and password) within the same browser session.

Protected information systems request ECAS to supply the current user's identity – if you have already been authenticated, it does not ask you to do so again (provided that you have not disabled the use of cookies in your browser).

ECAS authentication is available only with applications that have been specifically adapted to use it. These applications request ECAS to authenticate you on their behalf and do not authenticate you directly. This means that when you use your ECAS password, it will always be on a distinctive page belonging to ECAS, even though you may have typed in the application's address, not that of ECAS. Never enter your ECAS password on any other page.

Do not divulge your ECAS password to anyone - there is no reason for anyone else, including system administrators and support staff, to ask for it or know it.

1.2 *ECAS Registration*

If you are a new user please register on the ECAS. The creation of the ECAS account is free and easy.

1. To create your ECAS account, go to the Participant Portal home page:
<http://ec.europa.eu/research/participants/portal>. (see Figure 1: Participant Portal home page)

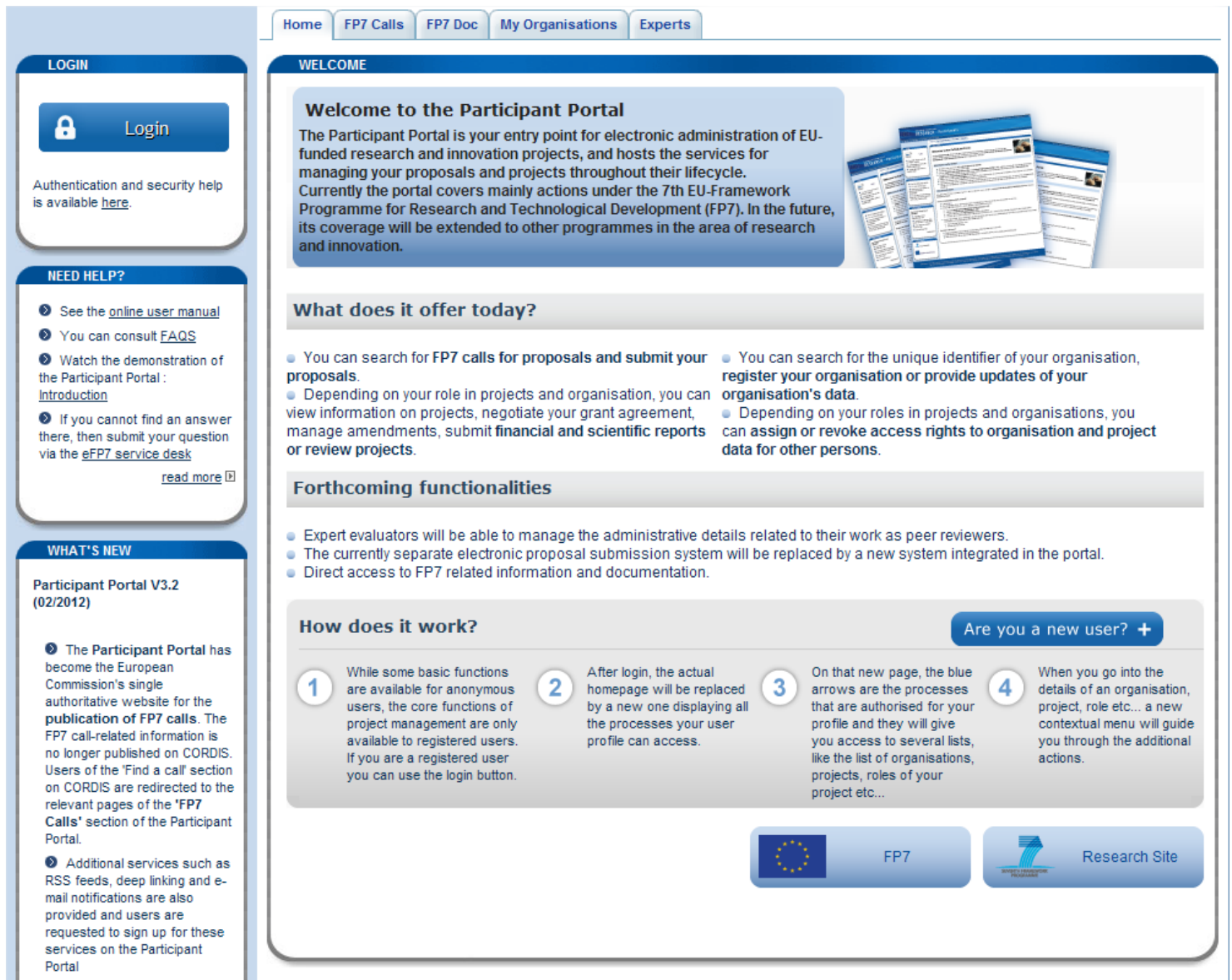


Figure 1: Participant Portal home page

2. Then click on the [Are you a new user?] and then on "[This link](#)" (see Figure 2: Register as new user).

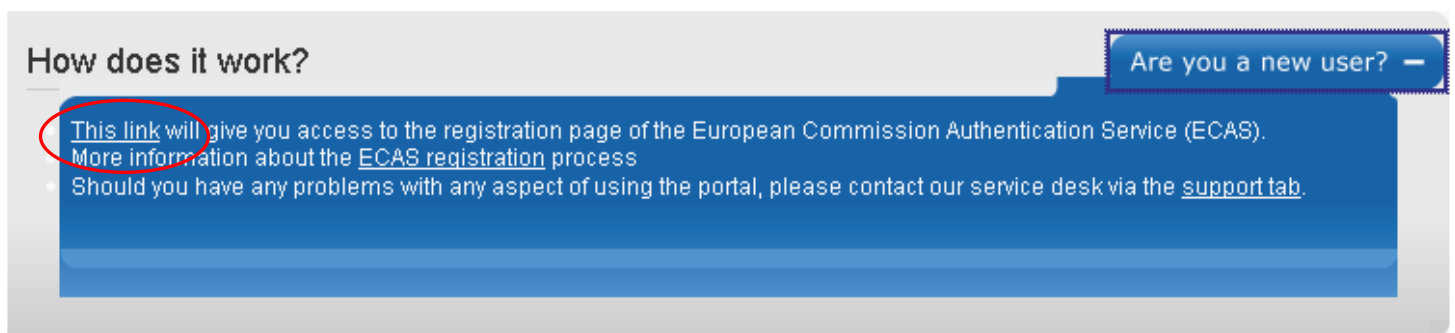


Figure 2: Register as new user

- The ECAS User Registration Form opens: please fill it in using your individual professional e-mail address in the relevant fields (Figure 3: ECAS User Registration Form). It allows the system to identify you and credit you with the right access and services.
Please avoid using your email address as Username; this could cause issue if your email address is modified.
- Select the privacy statement acknowledgement checkbox, copy the security code into appropriate text area and submit the form for processing.

Figure 3: ECAS User Registration Form

- The confirmation screen indicates that within a few minutes you will receive an email allowing you to complete the registration process. **Note that the process must be completed within 1h30 after your original request!**
- Go to your mail box. You will see that the European Commission Authentication Service has sent you a message to initialise your password. Open it and click on the link indicated in the e-mail: you will be redirected to the Password initialisation page of ECAS (Figure 4: Password initialisation page of ECAS).

External
European Commission Authentication Service (ECAS)

EUROPA > Authentication Service > New password

Is the selected domain correct? External [Change it](#)

Login New password Sign Up Help

ECAS (authenticates your identity on European Commission websites)

New password

Please choose your new password.

Username

New password *

Confirm new password *

* Required fields

Passwords cannot include your username and must contain at least 10 characters chosen from at least three of the following four character groups (white space permitted):

- ▶ Upper Case: A to Z
- ▶ Lower Case: a to z
- ▶ Numeric: 0 to 9
- ▶ Special Characters: !"#%&'()*+,-./:;<=>?@[\\]^_`{|}~

Examples:

[\[Generate other sample passwords\]](#)

Last update: 17/01/2012 (2.2.0-m) | 90 ms | [Top](#)

Figure 4: Password initialisation page of ECAS

7. On the password initialisation page create and initialise your password.
8. Click on the **[Submit]** button. The ECAS password initialisation success page will appear: your ECAS password was successfully initialised.
9. You can return to the home page of the Participant Portal. It is now possible to log on.

Please note that your ECAS credentials are strictly personal and confidential and should not be shared! They will allow you to access different services and data that might be critical for your organisation.

1.3 Log on to the Participant Portal

1. Go to the Participant Portal home page: <http://ec.europa.eu/research/participants/portal>
2. In the login box click on the login link (see Figure 5: Login box)

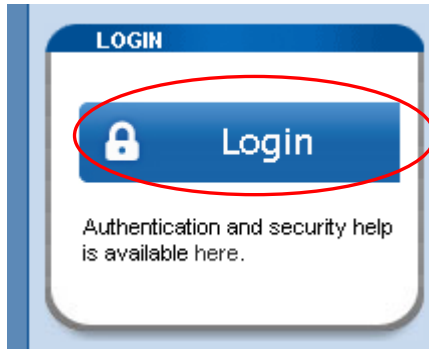


Figure 5: Login box

The login page (ECAS authentication) appears (Figure 6: ECAS Login page):

- Whenever you login, please make sure that the selected domain is “external”. Should another domain be selected, please change it by clicking on the *use a different domain* link.
- Enter your <Username> (if you have created one) or your <email address> and your <password>, and click on the [Submit] button.
- You are then redirected to the secured environment of the Participant Portal.



Figure 6: ECAS Login page

3. Now that you have logged on to the Participant Portal, you are identified as a user (Figure 7: Login box)

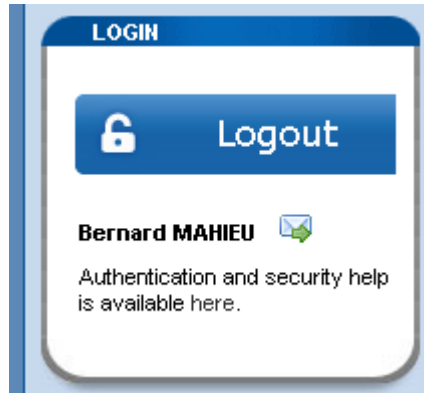


Figure 7: Login box

Depending on your role, you will be able to access different services.

1.4 Log out from the Participant Portal

1. In the login box of the Participant Portal click on the [Logout] button (Figure 7: Login box)
2. This will end your session in the Participant Portal and **close all the applications accessed via the Participant Portal and supported by the ECAS authentication (URF, NEF, SESAM, and FORCE).**

2 HOW TO USE THE PARTICIPANT PORTAL?

2.1 Roles

2.1.1 Role basics

Every user will benefit from different rights, crediting them with access to specific information and services. Once a user has been authenticated, the list of actions that can be performed in a FP7/CIP project context depending on the user's role is displayed (see Figure 8: Home Page after login).

European Commission > Research & Innovation > Participant Portal > Home

Home FP7 Calls FP7 Doc My Organisations My Proposals My Projects My Roles Notifications Experts

LOGIN

Logout

Participant one PORTAL Authentication and security help is available [here](#).

NEED HELP?

- See the [online user manual](#)
- You can consult [FAQS](#)
- Watch the demonstration of the Participant Portal : [Introduction](#)
- If you cannot find an answer there, then submit your question via the [eFP7 service desk](#) [read more](#)

WHAT'S NEW

Participant Portal V3.2 (02/2012)

- The Participant Portal has become the European Commission's single authoritative website for the **publication of FP7 calls**. The FP7 call-related information is no longer published on CORDIS. Users of the 'Find a call' section on CORDIS are redirected to the relevant pages of the 'FP7 Calls' section of the Participant Portal.
- Additional services such as RSS feeds, deep linking and e-mail notifications are also provided and users are requested to sign up for these services on the Participant Portal [read more](#)

PROCESSES

Manage Organisations

- Search an organisation
- Register an organisation
- Manage organisation data

Identify Opportunities

- Search for a call

Negotiations

- Browse and/or manage negotiations

Grant Execution

- Browse and/or access grants
- Manage amendments
- Periodic reporting
- Manage scientific deliverables

Others

- Manage roles and delegations
- Support

Figure 8: Home Page after login

"Table 1 – Processes" below describes the processes indicated in this graphical representation. The columns are:

- PROJECT LIFE CYCLE STAGE
- SERVICES related to the stage

ROLES: The roles for which the services are available.

PROJECT LIFE CYCLE STAGE	SERVICES	ROLES
Organisation management	Search for an organisation	Any
	Register an organisation	Any
	Manage registered organisation data, upload documents (until validation)	Self-Registrant
	Manage organisation data	LEAR, Account Administrator, .
Identify opportunities	LFV Simulation	Logged or not logged users
	Manage FP7 Calls	Any
Negotiations	Browse and/or manage Negotiations	Participant Contact, Coordinator Contact, Task Manager, Team Member.
Grant execution	Browse and/or manage Grants ³	Participant Contact, Coordinator Contact, LEAR, Account Administrator ,Task Manager, Team Member
	Browse and/or manage Amendments	Participant Contact, Coordinator Contact, Task Manager, Team Member
	Browse and/or manage financial periodic and final reporting	Participant Contact, Coordinator Contact, Task Manager, Team Member
	Browse and/or manage deliverables and final reporting	Participant Contact, Coordinator Contact, Task Manager, Team Member

Horizontal processes	Manage roles and nominations	Any role
	Manage notifications	Any role
	Support	Any

Table 1 – Processes

³ LEAR, Account Administrator and Team Member can only browse some information

2.1.2 Identify your roles

Every user will benefit from different rights, crediting them with access to specific information and services. These rights are related to the role(s) the user plays within an organisation (as a LEAR or Account Administrator) and/or a project (as a Coordinator, Participant, Representative, Task Manager or Team Member). You can identify your role(s) by following these instructions:

1. Log on to the Participant Portal
2. Select the **"My Roles"** tab.
3. If you have one or more organisation role(s) (i.e. LEAR or Account Administrator), a list of each organisation for which you have these roles will be displayed in the "Organisation Roles List" section. The list consists of the **P**articipant **I**dentification **C**ode (PIC), the name of the organisation and the role you are playing (Figure 9: My Roles).
4. If you have one or more project role(s) (i.e. coordinator, participant, task manager, team member, reviewer, EC Project Officer), a list of each project for which you have these roles will be displayed under the Project Roles section. The list consists of the Acronym of the project, the project identification number, the funding programme to which the project belongs, your role in the project (if you have multiple roles in the project, there will be one line per role).

Home FP7 Calls FP7 Doc My Organisations My Proposals My Projects **My Roles** Notifications Experts

ORGANISATION ROLES LIST

List of the roles existing for your username in your organisation. You can nominate or revoke account administrator for your organisation following the Roles link in "My organisation" tab.

Show 10 entries Search:

PIC	Organisation Name	Role	Nominations
996311736	BMA_TEST_PROD	Self Registrant	
996719815	Test DIGIT B Mahieu	Account Admin.	
998949360	CENTER ZA SODOBNE IZZIVE	Account Admin.	
999645723	LATVIJAS UNIVERSITATES MATEMATIKAS UN INFORMATIKAS INSTITUTS	LEAR	
999646693	COUNCIL FOR SCIENTIFIC AND INDUSTRIAL RESEARCH	Account Admin.	
999646693	COUNCIL FOR SCIENTIFIC AND INDUSTRIAL RESEARCH	LEAR	
999740104	NORSK SAMFUNNSVITENSKAPELIG DATATJENESTE AS	LEAR	
999852236	LINKOPINGS UNIVERSITET	LEAR	
999861548	CENTRE FOR TECHNOLOGICAL RESEARCH OF CRETE	LEAR	
999884052	POLITECHNIKA WARSZAWSKA	Account Admin.	

Showing 1 to 10 of 21 entries First Previous 1 2 3 Next Last

PROJECT ROLES LIST

Show 10 entries Search:

Acronym	ProjectID	Program	Role	PIC	Nominations
AEROTHERMOPROP	267614	FP7	Participant Contact	996874821	
AgroCos	245336	FP7	Participant Contact	999645723	
AgroCos	245336	FP7	Participant Contact	999919845	
ARASCOM	222620	FP7	Participant Contact	999625450	
ARASCOM	222620	FP7	Participant Contact	999991819	
ARASCOM	222620	FP7	Primary Coordinator	999619533	
BalticGrid-II	223807	FP7	Participant Contact	999611579	
BalticGrid-II	223807	FP7	Task Manager	999611579	
BIOIONS	208589	FP7	Participant Contact	999861548	
CESSDA-PPP	212214	FP7	Primary Coordinator	999856989	

Showing 1 to 10 of 34 entries First Previous 1 2 3 4 Next Last

Figure 9: My Roles

The <Nominations> column's functionality is explained in section 2.7.3 below.

Select the  icon in order to refresh the memory cache; it allows reloading the most recent data.

2.2 The list search/filter box

You can use the Search box to filter out any list displayed by the participant portal. Simply start typing the word to filter on and the list will dynamically adapt itself in order to show you only the relevant lines. The filtering is done on all the fields of the table.

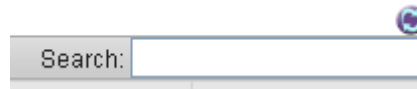


Figure 10: The search/filter box

2.3 Search for an organisation and retrieve its Participant Identification Code

It is possible to check if an organisation has already registered by retrieving its PIC. However the search module provided on the Participant Portal will only retrieve the name and PIC of validated or under validation organisations. So if you have just registered your organisation, your PIC will not be displayed until the validation of your registration request has started.

1. Under the **"My Organisation"** tab, select the **"Search"** tab
2. The search organisations module appears (Figure 11 : Search Organisation)
3. There you can check whether your organisation has already registered and if so, retrieve the PIC that has already been assigned. It is obligatory to complete **either** the <legal name> field **or** the <VAT number> field with at least a three character string. The other search fields can be left blank (Figure 12: Search Results)

4.

Note: if searching for a legal name in the national language does not yield results you might try with a translation in English

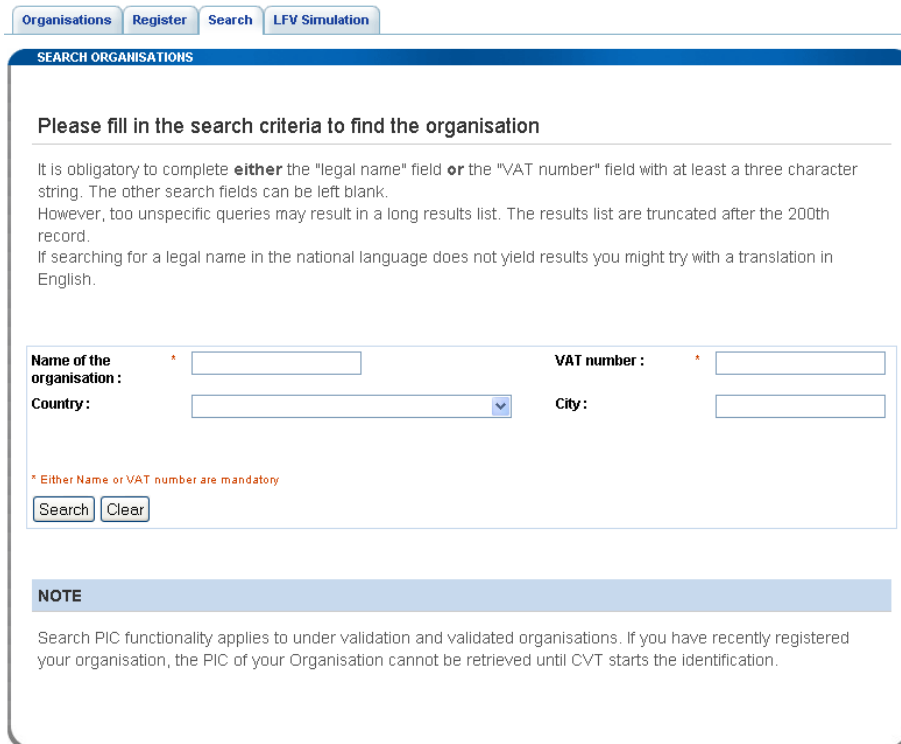


Figure 11 : Search Organisation

Note: When your search returns too many results only the first 200 are shown. You should refine your search criteria

Organisations Register Search LFV Simulation

SEARCH ORGANISATIONS

Please fill in the search criteria to find the organisation

It is obligatory to complete **either** the "legal name" field **or** the "VAT number" field with at least a three character string. The other search fields can be left blank.
However, too unspecific queries may result in a long results list. The results list are truncated after the 200th record.
If searching for a legal name in the national language does not yield results you might try with a translation in English.

Name of the organisation : * VAT number : *

Country: City:

* Either Name or VAT number are mandatory

NOTE

Search PIC functionality applies to under validation and validated organisations. If you have recently registered your organisation, the PIC of your Organisation cannot be retrieved until CVT starts the identification.

Show 10 entries Search:

Name of the organization	PIC	Country	City	VAT number	Status
THE WALT DISNEY STUDIOS SCHWEIZ GMBH	992654060	CH	ZURICH	CH279815	VALIDATED

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

Figure 12: Search Results

This feature is also available when you are not logged in (but there is an additional field to be filled for the security code).

As explained in section 2.2, you can use the Search box to filter out any list displayed by the participant portal.

2.4 Using the LfV Simulation tool

Any user (logged in or not) has the ability to perform a simulation related to the legal and financial viability (LFV) of his organisation. This simulation tool does not save the data on any server of the European Commission. The data is lost when the tool is closed.

If the user is not logged in then a verification code is asked before launching the ratio's calculation.

Just go on the "**LFV Simulation**" tab and click on the **[Go to LFV simulation]** button in order to launch the LFV simulation tool (see Figure 13: LFV simulation tab).

In this tool (see Figure 14: LFV Simulation tool), you have to enter balance sheet data (assets and liabilities) and data related to profit and loss account.

When done, you can launch the financial viability simulation by clicking the **[Calculate]** button. If you are not logged in you have to fill the verification code first.

The screenshot shows a web interface with a navigation bar at the top containing buttons for Home, My Organisations, My Proposals, My Projects, My Roles, My Notifications, FP7 Documentation, FP7 Calls, and Experts. Below this is a secondary bar with buttons for Support, Organisations, Register, Search, and LfV Simulation. The main content area is titled "LFV SIMULATION" and features a red "Warning / Disclaimer" heading. The text below the heading states that the Commission services provide a user-friendly electronic tool for applicants to simulate their financial viability check, but the results are non-binding and do not pre-empt formal checks. It also notes that if a formal check is required, the LEAR of the organisation will be invited to submit data via the Portal or the Commission officer will inform them of the steps to follow. At the bottom of the main content area is a button labeled "Go to LFV Simulation".

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Support

Organisations Register Search LfV Simulation

LFV SIMULATION

Warning / Disclaimer

The Commission services provide this user-friendly electronic tool for applicants so that they could simulate their financial viability check for their own information. The results of this simulation provide non-binding indications; they do not pre-empt the results of a formal financial viability check by the Commission services.

If a formal financial viability check by the Commission services is required for a participation in a project, either the LEAR of your organisation will be invited to submit data via the Portal or the Commission officer will inform you what steps should be followed.

The simulation tool uses the ratios described in the 'Rules on verification of existence, legal status, operational and financial capacity' document (http://cordis.europa.eu/fp7/find-doc_en.html).

Go to LFV Simulation

Figure 13: LFV simulation tab

-	Interest paid	0.00
-	Similar charges	0.00
=	Profit/loss on ordinary activities	0.00
+	Extraordinary income	0.00
-	Extraordinary charges	0.00
-	Taxes on profits	0.00
=	Profit/loss for financial year	0.00

W o r t e d

Please enter the verification code above :

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"/>		

Figure 14: LfV Simulation tool

2.5 Register an organisation

In the past, participants had to provide the Commission with their organisation legal and financial information every time they submitted a proposal or negotiated a contract. This is simplified in FP7.

Participants can register their organisations data ONCE. This will generate a **Participant Identification Code (PIC)**, which defines their organisation's details and status, to be used in the process of electronic proposal submission and negotiation.

Registering an organisation will allow you to receive its Participant Identification Code (PIC). Using a PIC for your organisation has several advantages which are fully explained in [this FAQ entry](#).

Use the search facility to check if an organisation has already a PIC.

If you do not find a PIC for your organisation you have to first register as an ECAS user.

With your ECAS password you can register your organisation as **Self Registrant**.

Log on to the Participant Portal, under **"My Organisations"** tab click on the **"Register"** sub-tab (see Figure 15: Register steps).

Follow the steps described below:

STEP 1. Search

Use the [search](#) facility to check whether your organisation is already registered or in the process of being registered (see section 2.4).

STEP 2. Self-Register your organisation in PP

Register your organisation using your ECAS account details.
After providing all the necessary details, press the **[CONFIRM]** button to submit your registration information to the [Validation Services \(VS\)](#).
If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the **[Save Draft]** button. You may then resume your registration at any time.

STEP 3. Modify your Self Registration

STEP 3a

If you saved your data as draft it is still possible to [modify or delete](#) your self-registration.

or

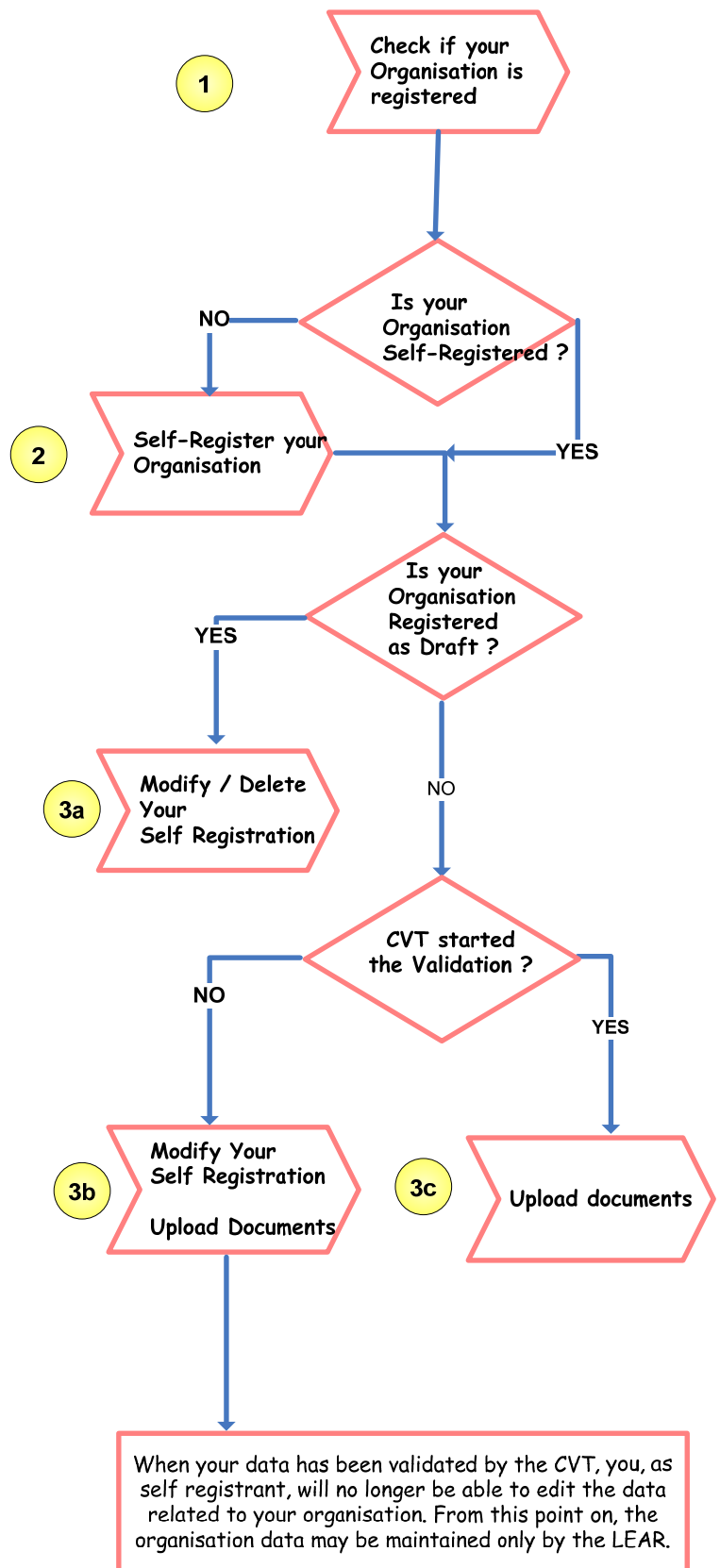
STEP 3b

If you have already submitted your registration and if VS has not started the verification process that will eventually lead to the [appointment of a Legal Entity Appointed Representative \(LEAR\)](#), it is still possible to [modify](#) your self-registration and/or [upload](#) additional documents.

or

STEP 3c

If VS has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload](#) additional documents



After identification, the VS begins a verification process that will eventually lead to the [appointment of a Legal Entity Appointed Representative \(LEAR\)](#). During this period, the data that you have declared about your

organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents.

Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the VS, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR. For the self-registration, you are re-directed to URF. (See Figure 16: URF – Self Registration).

You can find more information in the [URF user's manual](#).


Home FP7 Calls **FP7 Doc** My Organisations My Proposals My Projects My Roles Notifications Experts

Organisations **Register** Search LFV Simulation

REGISTER NEW ORGANISATION

Register an organisation

Registering an organisation will allow you to receive its Participant Identification Code (PIC). More information about PICs can be found [here](#). Using a PIC for your organisation has several advantages which are fully explained in this [FAQ entry](#). Use the search facility to check if an organisation has already a PIC. You can check if an organisation has already a PIC [here](#) If you do not find a pic for your organisation you have to first register as ECAS user [here](#). With your ECAS password you can register your organisation [here](#).



STEP 1: Search

Use the [search](#) facility to check whether your organisation is already registered.

STEP 2: Self-Register your organisation in PP

[Register](#) your organisation using your ECAS account details. After providing all the necessary details, press the **[CONFIRM]** button to submit your registration information to the Central Validation Team (CVT). If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the **[Save Draft]** button. You may then resume your registration at any time.

STEP 3: Modify your self Registration

- **STEP 3a**
If you saved your data as draft , it is still possible to [modify or delete](#) your self-registration.
- **STEP 3b.**
If you have already submitted your registration and if CVT has not started the verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR), it is still possible to [modify your self-registration and/or upload additional documents](#)
- **STEP 3c.**
If CVT has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload additional documents](#)

After identification, the CVT begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents. Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

More info

Upon registering your organisation, you will receive a Participant Identification Code (PIC). Using a PIC for your organisation has several advantages which are fully explained in this [FAQ entry](#).

Figure 15: Register steps

The steps:

This wizard will guide you through the process of registration. At the end of this registration, you will obtain the Participant Identification Code (PIC) of your organisation.

In order to complete the forms quickly and correctly, please keep the basic legal information (Registration extract, VAT data) of your organisation at hand and then the registration will take you 5-10 minutes.

The first step of this wizard will ask you a few questions to determine whether your organisation is registered already and to identify existing PIC numbers that may match your request.

Welcome John DOE

What is the legal name of the organisation?

What is the country of registration?

Does your organisation have a Value Added Tax (VAT) number? yes no

Does it have a business registration number? yes no

Does it have a website? yes no

next >>

User Manual

Figure 16: URF – Self Registration

2.5.1 Legal Entity Appointed Representatives and account administrators

The Legal Entity Appointed Representative (LEAR) is the person chosen by the organisation to ease the communication with the E.C. and avoid double registrations. Only the LEAR (or account administrator, see the end of the section below) may do a change request of his/her organisation's data and submit legal documents through URF.

LEARs can submit requests for update for

- Legal Data (Name, address, registration number etc)
- FP7 account legal type (SME, Public private, educational etc...) and indirect cost method (ICM)
- Balance sheet data (if requested)

And they can upload supporting documents in URF to back their requests.

More information on the LEAR is available in the FAQ section of the Participant Portal:

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

The documents to appoint a LEAR (LEAR appointment form and role and task definition) are available on <ftp://ftp.cordis.europa.eu/pub/fp7/docs/appointment-lear.pdf>

and <ftp://ftp.cordis.europa.eu/pub/fp7/docs/lear-role-tasks.pdf>

Both documents must be signed and stamped, and then sent to the Validation Services (VS) by regular letter.

Note that this guide describes only the access to the URF services. URF does offer a user-friendly environment and its use is very straightforward. Nevertheless, a user manual provides a detailed description of the URF services and how to use them:

http://ec.europa.eu/research/participants/portal/ShowDoc/Participant+Portal/portal_content/help/URF_USER_MANUAL.pdf

This is how the Participant Portal supports the LEARs' action.

They can

- **View the information** stored in the account of their legal entity and to **introduce change requests**.
- **Access the list of projects** that their organisations are currently working on.
- **View the roles** of people in their organisation on the projects.

All these services are protected so you must first log on to the Participant Portal.

The process to follow is described under the "Log on the Participant Portal" chapter of this guide.

In order to lighten the LEAR workload (especially in bigger organisations), the participant portal provides the capability to the LEAR to nominate (and subsequently revoke) one or more account administrators.

These persons will have all the rights of the LEAR (except the one of nominating/revoking account administrators themselves) and can therefore perform those tasks on his/her behalf. See section 2.6.4, Roles of an Organisation for more information.

2.6 Manage the organisation data

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select the **"My Organisations"** tab, and then click on **"Organisations"**. You can also click on the "Manage Organisation Data" icon in the home page displayed after login.
3. This tab is divided in 2 parts (see Figure 17: My Organisations):
 - A list of organisations where you are LEAR or Account Administrator or Self Registrant
 - A list of organisations where you are involved in a project.

The screenshot shows the 'MY ORGANISATIONS' section of the Participant Portal. The 'My Organisations' tab is highlighted with a red circle. Below the navigation bar, there are two main sections:

Organisation(s) as LEAR or Account Administrator. or Self Registrant

Show 10 entries Search:

Name	Pic	VAT	Actions
CHAMBRE DE COMMERCE ET D'INDUSTRIE DU LUXEMBOURG BELGE	999917129	BE413204756	OD VP RD
DOBON'S TECHNOLOGY S.L.	998407712	ESB38626040	OD VP RD
EADS SECURE NETWORKS	999486158	FR13414848986	OD VP RD
Joan David Tabara Villalba	984218358	ES 43403058B	OD VP RD
Test DIGIT B Mahieu	996719815	BE4578979	OD VP RD
Verband Region Stuttgart	996747169		OD VP RD

Showing 1 to 6 of 6 entries First Previous 1 Next Last




Organisation(s) linked via projects.


Show 10 entries Search:

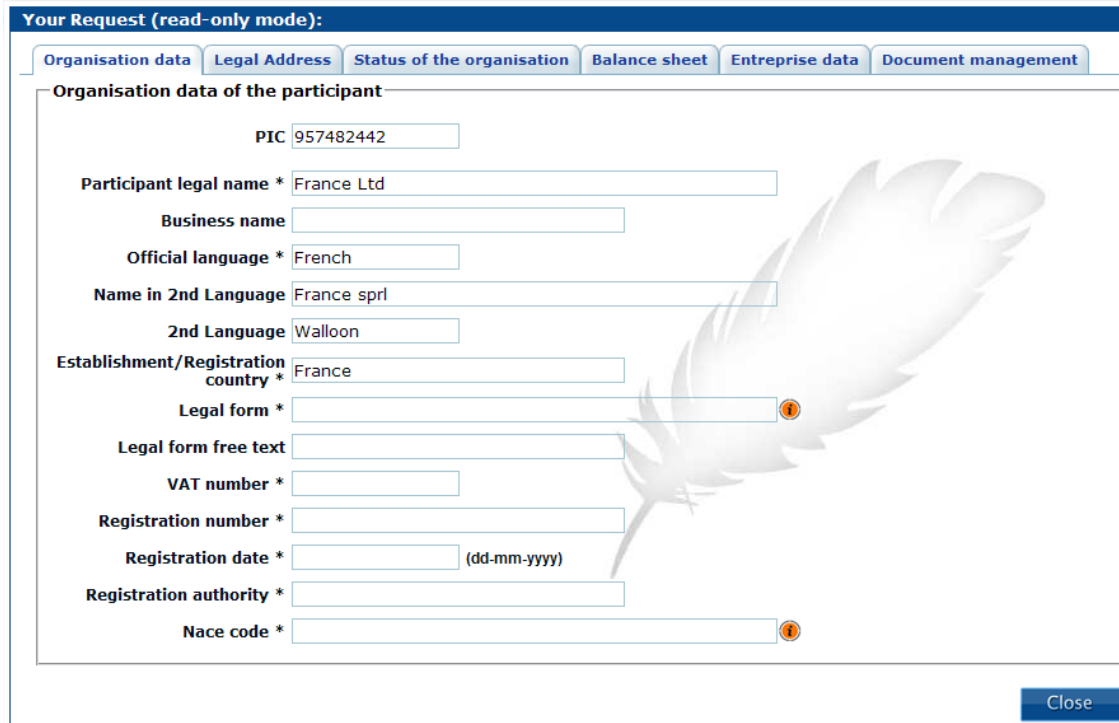
Name	Pic	VAT
BELARUSIAN NATIONAL TECHNICAL UNIVERSITY	999636896	
CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE	999997930	FR40180089013
CESKA TELEVIZE	999919845	CZ00027383
ESTONIAN EDUCATIONAL AND RESEARCH NETWORK	999614004	EE100900754
EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH	999988133	N/A
KEEMILISE JA BIOLOOGILISE FUUSIKA INSTITUUT	999605856	EE100518544
LATVIJAS UNIVERSITATES MATEMATIKAS UN INFORMATIKAS INSTITUTS	999645723	LV90002111761
RIGAS TEHNISKA UNIVERSITATE	999920718	LV90000068977
THE HENRYK NIEWODNICZANSKI INSTITUTE OF NUCLEAR PHYSICS, POLISH ACADEMY OF SCIENCES	999611579	PL6750000444
UNITED INSTITUTE OF INFORMATICS PROBLEMS OF NATIONAL ACADEMY OF SCIENCES OF BELARUS	999662116	

Showing 1 to 10 of 12 entries First Previous 1 2 Next Last

Figure 17: My Organisations

4. If you are a LEAR, Account Administrator or Self-Registrant of the organisation, under the [Actions](#) column three buttons are present at the right of the screen:  [Organisation Details](#) /  [View Projects](#) /  [Roles](#). By clicking one of these buttons you can open a new *portlet*⁴ below the "Organisations" sub-tab.

If you are Self-Registrant, selecting the  [Organisation Details](#) button will display the URF screen corresponding to that organisation (see Figure 18 - Organisation details for Self-Registrant).



Your Request (read-only mode):

Organisation data | Legal Address | Status of the organisation | Balance sheet | Enterprise data | Document management

Organisation data of the participant

PIC: 957482442

Participant legal name *: France Ltd

Business name:

Official language *: French

Name in 2nd Language: France sprl

2nd Language: Walloon

Establishment/Registration country *: France

Legal form *:

Legal form free text:

VAT number *:

Registration number *:

Registration date *: (dd-mm-yyyy)

Registration authority *:

Nace code *:

Close

Figure 18 - Organisation details for Self-Registrant

5. If you are not a LEAR or Account Administrator but only linked to an organisation as a project member, you will only be able to see the  [Roles](#) button.

Note : no hyperlink is present in the organisation name where you are self registrant for the other role the organisation details applet is displayed when you click on the organisation name.

2.6.1 The organisation menu and organisation summary portlets

Whenever specific project information is displayed in the main area of the portal, two portlets are shown on the left side of the screen: Organisation menu and Organisation summary (see Figure 19: Organisation Menu and Summary).

The "Organisation Summary" will display core essential information about the currently selected project (Organisation PIC, Business Name VAT and NACE code).

The "Organisation menu" allows the following global navigation actions:

⁴ A web *portlet* is a small, self-contained window within a web portal that displays useful information or offers a relevant service.

- Returning to the Organisation list (by selecting the [Back to list] orange button
- Displaying the Organisation Details
- Displaying/Managing Roles that are bound to this Organisation
- Displaying the Proposals bound to the Organisation

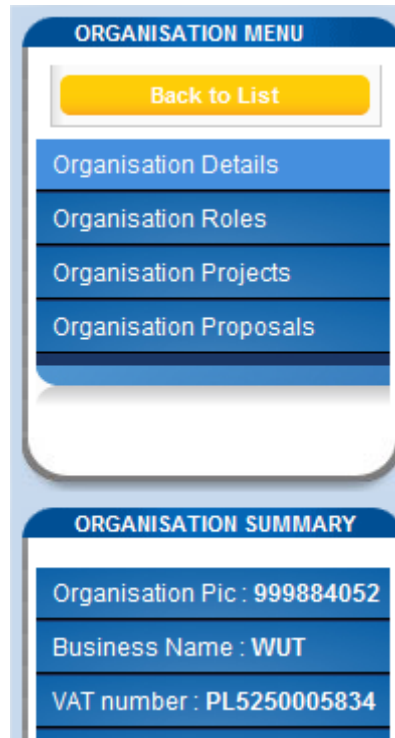
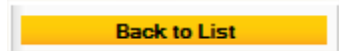

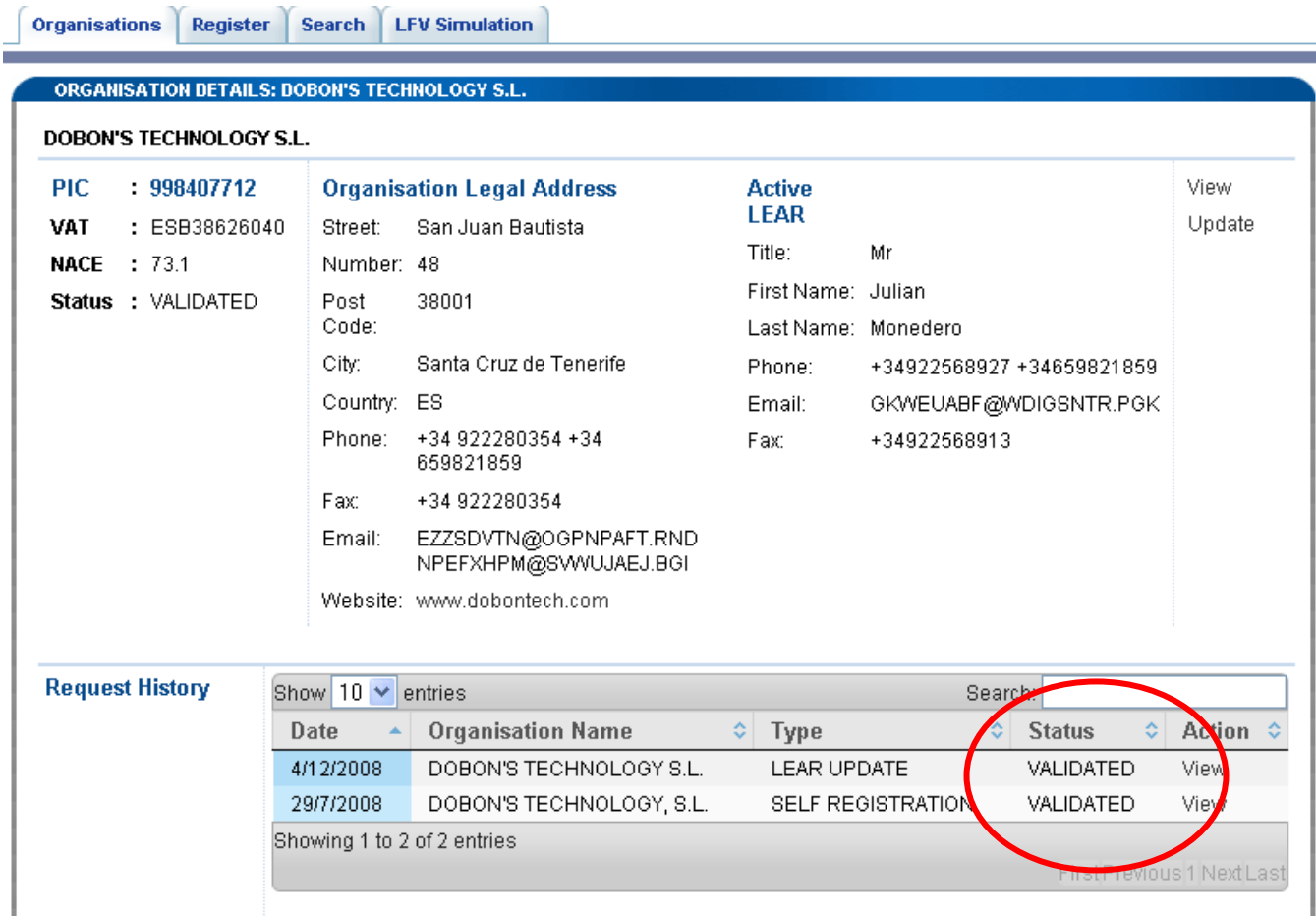


Figure 19: Organisation Menu and Summary

2.6.2 Status of my organisation

By clicking on the  [Organisation Details](#) button or on the [Organisation Name](#) in the "My Organisation" tab (see Figure 17: My Organisations) you can:

2.6.2.1 Check if your request has been validated or is in validation.



Organisations Register Search LFV Simulation

ORGANISATION DETAILS: DOBON'S TECHNOLOGY S.L.

DOBON'S TECHNOLOGY S.L.

PIC : 998407712	Organisation Legal Address	Active LEAR	View Update
VAT : ESB38626040	Street: San Juan Bautista	Title: Mr	
NACE : 73.1	Number: 48	First Name: Julian	
Status : VALIDATED	Post: 38001	Last Name: Monedero	
	Code:	Phone: +34922568927 +34659821859	
	City: Santa Cruz de Tenerife	Email: GKWEUABF@WDIGSNTR.PGK	
	Country: ES	Fax: +34922568913	
	Phone: +34 922280354 +34 659821859		
	Fax: +34 922280354		
	Email: EZZSDVTN@OGPNPAFT.RND NPEFXHPM@SWWUJAEJ.BGI		
	Website: www.dobontech.com		

Request History

Show 10 entries Search:

Date	Organisation Name	Type	Status	Action
4/12/2008	DOBON'S TECHNOLOGY S.L.	LEAR UPDATE	VALIDATED	View
29/7/2008	DOBON'S TECHNOLOGY, S.L.	SELF REGISTRATION	VALIDATED	View

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Figure 20: Status of an Organisation

2.6.2.2 View organisation or change (within request history)

You get redirected to URF. No extra authentication will be requested. In URF you will be able to view or modify your organisation data, or verify the status of your registration request (if it has been validated or not). (See Figure 20: Status of an Organisation).

2.6.2.3 Create a change request

If you need to change the data of your organisation through URF, you have to click on the [Update](#) link. (See Figure 21: Status of an Organisation - Update request).

You are then redirected to URF where you can create an update request of your data.

The screenshot shows the 'ORGANISATION DETAILS: DOBON'S TECHNOLOGY S.L.' page. On the right side, there are two links: 'View' and 'Update'. The 'Update' link is circled in red. Below the details is a 'Request History' section with a table showing two entries.

Date	Organisation Name	Type	Status	Action
4/12/2008	DOBON'S TECHNOLOGY S.L.	LEAR UPDATE	VALIDATED	View
29/7/2008	DOBON'S TECHNOLOGY, S.L.	SELF REGISTRATION	VALIDATED	View

Figure 21: Status of an Organisation - Update request

Please note that when VS is validating your change request, you are no longer able to modify your data. Only the [View](#) option is available.

Two types of change request can be managed from this tab:

- "NORMAL" change requests defined as "LEAR UPDATE" under the <Type>column of the "Request History" area – **financial info as balance sheet cannot be created/modified.**
- "FINANCIAL" change requests: this change request has to be done "on demand" from NEF. The message below appears:

You are requested to provide additional financial information in order to complete the negotiation of your grant for proposal #proposal_id#.

For this new request type, you can only Create/Modify balance sheets and upload documents (mandatory).

You can find more information in the URF user manual, available at:

http://ec.europa.eu/research/participants/portal/ShowDoc/Participant+Portal/portal_content/help/URF_USER_MANUAL.pdf

2.6.2.4 Delete change request

You can delete your change request as long as the VS has not yet started the validation of your request. The [Delete](#) link is displayed in the request history part. (See Figure 22: Status of an Organisation - Request not yet validated).

A message asks you to confirm your deletion.

2.6.2.5 Update change request

You can also modify your change request while VS has not yet started the validation of your request.

The [Update](#) link is displayed in the request history part. (See Figure 22: Status of an Organisation - Request not yet validated).

You are directed to URF and your data can be modified.

ORGANISATION DETAILS: DOBON'S TECHNOLOGY S.L.

DOBON'S TECHNOLOGY S.L.

PIC : 998407712	Organisation Legal Address	Active LEAR	View
VAT : ESB38626040	Street: San Juan Bautista	Title: Mr	
NACE : 73.1	Number: 48	First Name: Julian	
Status : VALIDATED	Post Code: 38001	Last Name: Monedero	
	City: Santa Cruz de Tenerife	Phone: +34922568927 +34659821859	
	Country: ES	Email: GKWEUABF@WDIGSNTR.PGK	
	Phone: +34 922280354 +34 659821859	Fax: +34922568913	
	Fax: +34 922280354		
	Email: EZZSDVTN@OGPNPAFT.RND NPEFXHPM@SWWUJAEJ.BGI		
	Website: www.dobontech.com		

Request History

Show 10 entries Search:

Date	Organisation Name	Type	Status	Action
26/4/2011	DOBON'S TECHNOLOGY S.L.	LEAR UPDATE	CREATED	View Update Delete
4/12/2008	DOBON'S TECHNOLOGY S.L.	LEAR UPDATE	VALIDATED	View
29/7/2008	DOBON'S TECHNOLOGY, S.L.	SELF REGISTRATION	VALIDATED	View

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

Figure 22: Status of an Organisation - Request not yet validated


2.6.3 View Projects of an Organisation

By clicking on the  [View Project](#) button, you can display a view of all the Projects an organisation is involved in, (see Figure 23: Project list of an Organisation).

PROJECT LIST FOR POLITECHNIKA WARSZAWSKA

The list displayed below might not be the exhaustive list of the FP7/CIP projects associated with your organisation. Only the projects for which on-line services are available through the Participant Portal for the specific user are currently presented. Technical work is ongoing to resolve this limitation.

A LEAR can only view projects their organisation is linked with. Granting access to projects is done separately. Please contact the Project Coordinator if you want a participant contact role, or contact your participant contact to obtain a specific role.



Acronym	Call	Prog.	Project ID	Phase
HITECAST	SP1-JTI-CS-2011-01	FP7	296250	Negotiation
SAGE	FP7-REGIONS-2011-1	FP7	285833	Active
NanoBRIDGES	FP7-PEOPLE-2011-IRSES	FP7	295128	Negotiation
M-FUTURE2011	FP7-NMP-2010-CSA-4	FP7	266976	Active
NanoCIS	FP7-PEOPLE-2010-IRSES	FP7	269279	Active
EuCARD	FP7-INFRASTRUCTURES-2008-1	FP7	227579	Active
BIO-CT-EXPLOIT	FP7-SME-2008-1	FP7	232164	Active
TIME for Nano	FP7-NMP-2008-CSA-2	FP7	233481	Active
SOS	FP7-PEOPLE-2011-IAPP	FP7	286105	Negotiation
2BFUNTEX	FP7-NMP-2011-CSA-5	FP7	290500	Negotiation
ESPOSA	FP7-AAT-2011-RTD-1	FP7	284859	Active
TALOS	FP7-SEC-2007-1	FP7	218081	Active
SwarmItFIX	FP7-NMP-2007-SMALL-1	FP7	214678	Active
appliCMA	FP7-NMP-2007-SMALL-1	FP7	214407	Active
PILLS	FP7-NMP-2007-SMALL-1	FP7	214599	Active

Figure 23: Project list of an Organisation

2.6.3.1 Project details

Click on the underlined Acronym of a Project (leftmost column) (see Figure 23: Project list of an Organisation) to see the details of this project (see Figure 24: Details of a project).

PROJECT DETAILS FOR: PILLS (214599)

Title	Process intensification methodologies for liquid-liquid systems in structured equipment		
Project ID	214599	Call	FP7-NMP-2007-SMALL-1
Programme	FP7	Rdg	RTD
Keywords			
Activity Codes	NMP-2007-3.2-2		

Abstract

This project has the objective to develop and validate a design methodology & criteria for dealing with two-phase liquid-liquid systems leading to a new generation of flexible and high-performance process equipment (micro through to macro structured) for continuous manufacturing. This generic approach will be developed by the project members and will involve practical, theoretical and modelling aspects. The devices developed will be applied to 2 different industrial systems to show the wide applicability in the chemical industry: the monomerisation of benzene and the cyclisation of 5-isomers. Micro and macro-scale reactors will be operated at scales relevant to commercial production to demonstrate improved selectivity, yield and specific performance. A state-of-the-art experimental research facility will be designed and constructed, this will be modular, flexible and expandable to ensure flexibility of process and operation. Having developed an improved fundamental understanding of these multiphase processes and the design and operation of appropriate microstructured environments, the partners will codify this learning, in the form of a 'toolkit', to identify the most suitable continuous processing methods for any liquid-liquid system. This will allow operators to improve the sustainability of chemical production by selecting intensified process methods that are both eco-efficient and offer increased safety. The partners are drawn from six countries and include a knowledge transfer company, two SMEs, two manufacturers of equipment and three potential end-users thereof. Manufacturers of two complementary continuous processing systems (micro and macro-scale) will combine forces with these end-users (two of whom in fact are engaged on pre-competitive research). The project will develop an e-learning course and a practical demonstration on a educational micro system to train process technologists in the toolkit of methodologies developed during the project.

Participants

- INSTITUT FÜR MIKROTECHNIK UND GMSH (098058408) - PARTICIPANT
- CHEMISTRY INNOVATION LIMITED (098058088) - COORDINATOR
- CRITEC LTD (098058088) - PARTICIPANT
- UNIVERSIDADE DE COIMBRA (098058088) - PARTICIPANT
- FLUIDINOVA ENGENHARIA DE FLUIDOS SA (098048025) - PARTICIPANT
- CUF-Química Industrial, S.A. (098068213) - PARTICIPANT
- POLITECHNIKA WARSZAWSKA (098084053) - PARTICIPANT
- SYMUCHI SUDOC SA (098083584) - PARTICIPANT
- ECOLE POLYTECHNIQUE FEDERALE DE LAUSANNE (098073071) - PARTICIPANT
- HUYTSMAH (ELICOR) GMSH (098080800) - PARTICIPANT

Figure 24: Details of a project

2.6.4 Roles of an Organisation

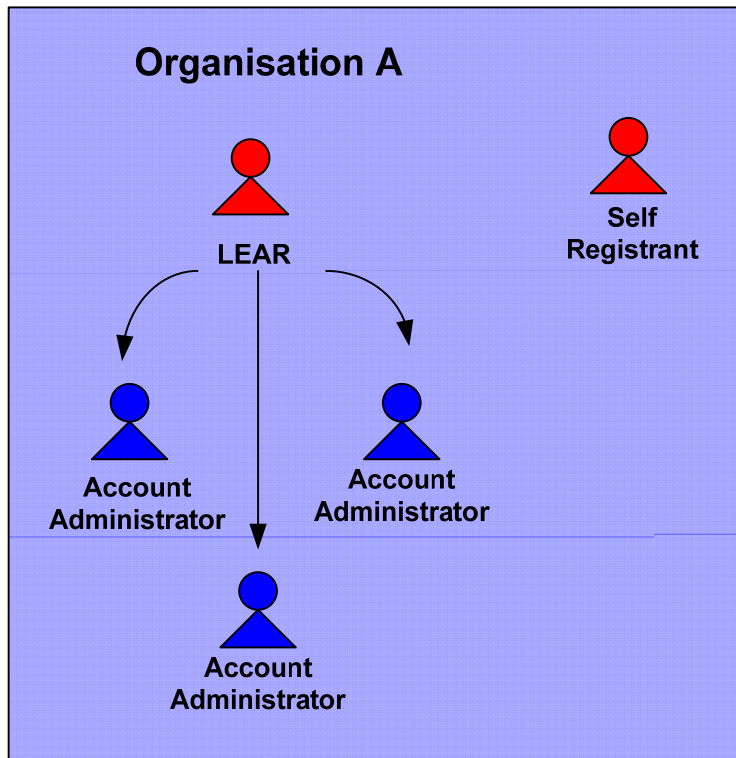


Figure 25: Participant User Account Management

By clicking on the  **Roles** button, in the **"My Organisation"** tab you can display all the roles of the people in your organisation. (See Figure 26: Roles of the Organisation).

ROLES OF POLITECHNIKA WARSZAWSKA (999884052)

Depending on 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 entries Search:

Select	Role	Name	Email	Project
<input type="checkbox"/>	LEAR	PORTAL Participant One	participant1.portal@gmail.com	
<input type="checkbox"/>	Account Admin.	PORTAL Participant One	participant1.portal@gmail.com	
<input type="checkbox"/>	Primary Coordinator	DOMBOZCZYŃC Jerolim	dombozcy@polska.pw.edu.pl	223984
<input type="checkbox"/>	Primary Coordinator	MOSLACIŃSKI Andrzej	wim.van-pelt@paf.ec.sorbonne.eu	231323
<input type="checkbox"/>	Primary Coordinator	MOSLACIŃSKI Andrzej	amoslac@polska.pw.edu.pl	269201
<input type="checkbox"/>	Coordinator Contact	MOSLACIŃSKI Andrzej	wim.van-pelt@paf.ec.sorbonne.eu	223984
<input type="checkbox"/>	Participant Contact	KUJAWSKI Wiesław	wok@polska.pw.edu.pl	246906
<input type="checkbox"/>	Participant Contact	KUJAWSKI Wiesław	wok@polska.pw.edu.pl	246906
<input type="checkbox"/>	Participant Contact	KUJAWSKI Wiesław	wok@polska.pw.edu.pl	246906
<input type="checkbox"/>	Participant Contact	MOSLACIŃSKI Andrzej	wim.van-pelt@paf.ec.sorbonne.eu	216366
<input type="checkbox"/>	Participant Contact	SITNIK Robert	r.sitnik@polska.pw.edu.pl	247860

Showing 1 to 10 of 54 entries First Previous 1 2 3 4 5 Next Last

Figure 26: Roles of the Organisation

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

As explained in section 2.2, you can use the Search box to filter out any list displayed by the participant portal.

2.6.4.1 Add a role to an organisation

As LEAR, you can add an Account Administrator role. Just click on the [Add+] button. Enter the first name, last name and email address of the person that will get the Account Administrator. He will receive a mail announcing him his nomination. If he does not have an ECAS account yet, he will be asked to confirm the creation of a new ECAS account. (See Figure 27: Add an Account Administrator role).

ADD ROLE TO POLITECHNIKA WARSZAWSKA (999884052)

Participant One PORTAL As: Role LEAR For POLITECHNIKA WARSZAWSKA

Grants The User:

First Name:

Last Name:

Email Address:

With The Role: Account Admin.

All fields are mandatory.


OK Cancel





















Figure 27: Add an Account Administrator role

2.6.4.2 Revoke a role from an organisation

Account Administrators can also be revoked by the LEAR. Select the check box on the left of the role to be revoked. Click on the [Revoke Selected] button and confirm the revocation.

2.6.5 Proposals of an Organisation

If you are a LEAR or Account Administrator of an Organisation, you can view a list of the Proposals in which it is taking part by selecting "Organisation Proposals" from the Organisation Menu (see Figure 19: Organisation Menu and Summary) (remember that you can reach the Organisation Menu by choosing Organisation Details  from the My Organisation list).



PROPOSALS LIST FOR LINKOPINGS UNIVERSITET						
Show	10	entries	Search: <input type="text"/>			
Number ^	Acronym ^	Role ^	Contact ^	Pic ^	Legal Name ^	More ^
238033	RIPS 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238081	TeachingSex 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238096	genderknow 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238210	InVIDA 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238464	HEALTH'ssrt 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238503	EUChild 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238606	hESC-Trainer 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
238838	A4MAP 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
239556	SynEnergy 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	
239824	STEAM 	Participant Representative	Contact Information	999852236	LINKOPINGS UNIVERSITET	

Showing 1 to 10 of 197 entries

First Previous 1 2 3 4 5 Next Last

Figure 28 - Organisation Proposal List

The list is composed of:

- The proposal number
- The proposal acronym (if you hover over the yellow information icon , the complete title of the proposal is displayed)
- The role of the Organisation within that proposal
- The contact person name (selecting the name will enable to send an email to that person)
- The PIC that was used for this Organisation at the time of that proposal submission
- The Legal Name for this Organisation at the time of that proposal submission
- An information icon . If you select it, a small pop-up window containing the Framework Program Call and Funding scheme information of the proposal will appear.

2.7 Manage projects

Note that all the services described below are protected so you must first log on to the Participant Portal. The process to follow is described under the "Log on to the Participant Portal" chapter of this guide.

2.7.1 Access to the list of projects and project details

Coordinators, participants, task managers and team members can access the list of the projects they are involved in:

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select the **"My Projects"** tab
3. You will see a list of all the projects you are involved in.

PROJECT LIST FOR PARTICIPANT ONE PORTAL

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
AEROTHERMOPROP	SP1-JTI-CS-2009-02	FP7	267614		Active	
AgroCos	FP7-KBBE-2009-3	FP7	245336		Active	
ARASCOM	FP7-ICT-2007-2	FP7	222620		Active	PR AA
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807		Active	PR
BIOIONS	ERC-2007-StG	FP7	208589		Active	
CESSDA-PPP	FP7-INFRASTRUCTURES-2007-1	FP7	212214		Active	RD FR
CommonWell	CIP-ICT-PSP-2007-1	CIP	225005		Active	PR AA
DaC of BreF	FP7-PEOPLE-2007-4-2-IIF	FP7	219146		Active	RD FR
DEMASST	FP7-SEC-2007-1	FP7	218264		Active	RD FR
DIESIS	FP7-PEOPLE-IOF-2008	FP7	234914		Active	RD FR








Showing 1 to 10 of 24 entries

[First](#) [Previous](#) [1](#) [2](#) [3](#) [Next](#) [Last](#)

Figure 29: My Projects

4. The interface will display the list (see Figure 29: My Projects), originally sorted by the Project Acronym for which you have a relevant role (for example, participant contact, coordinator contact or Primary Coordinator)

The following fields will be displayed for each project listed:

- The <Acronym> of the project. (You can see the full title if you hover over the acronym).
- The <Call identifier> of the Project
- The <programme> of the Project
- The <project ID> (or project number)
- The <Roles> Icons (blue  for managing Nominated roles, orange  for Consortium/participant Contacts management if you are Primary Coordinator. Note that Participant Contacts⁵ will only be able to nominate/revoke other Participant Contacts of their own Organisation with the orange icon)
- The <Phase> of the project (possible values Active or Negotiation)
- One or more links to the available process of the projects (depending on the current one(s) the links can be:
 - Periodic reporting 
 - Reporting & Deliverables 
 - Financial Reporting 
 - Access Amendment 
 - Access Negotiation 
- For an example of a link to the Negotiation Facility tool (NEF) see § 2.7.4 Access to the negotiations activities (Negotiation Facility tool -NEF)

5. If you have a vast amount of projects, you can filter them using the Search box (as explained in section 2.2).

By selecting the underlined acronym from the list (see Figure 29: My Projects), the same Project Details portlet than the one described in section 2.6.3.1 (Project details, see above), will replace the project list. It contains a more complete set of information about the project that was selected. You can go back to the project list by using the project menu portlet described in section 2.7.2 below.

⁵ Including Coordinator Contacts.

2.7.2 The project menu and project summary portlets

Whenever specific project information is displayed in the main area of the portal, two portlets are shown on the left side of the screen: project menu and project summary (see Figure 30: Project Menu and Summary).

The "Project Summary" will display core essential information about the currently selected project (Acronym, ID, Call, Programme and Activity codes).

The "Project menu" allows the following global navigation actions:

- Returning to the project list (by selecting the "Back to list" orange button
- Displaying the Project Details
- Managing Roles that you have nominated for the project
- Managing the Project Consortium (if you are a Primary Coordinator) of the project (note that if you are Participant contact (or Coordinator Contact), you will also see the "Project Consortium" button but you will only be able to add Participant Contacts for your own Organisation, whereas the Primary Coordinator can add Participant Contacts in other Organisations, (see Figure 31: Business and portal roles in a project).

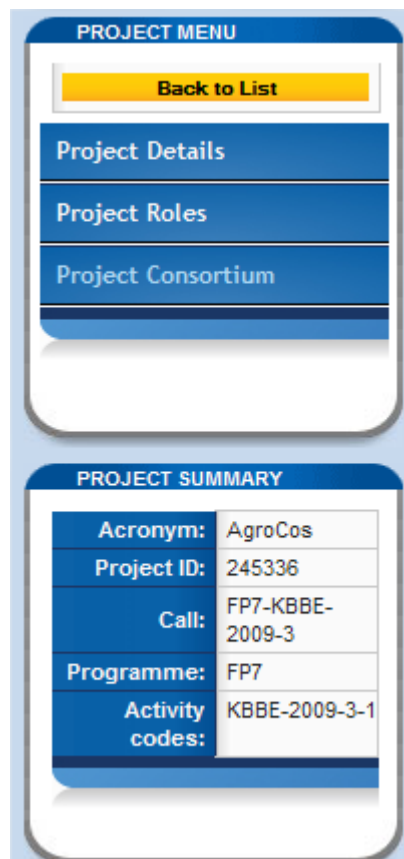
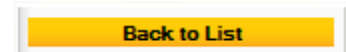


Figure 30: Project Menu and Summary

2.7.3 Roles of a Project

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

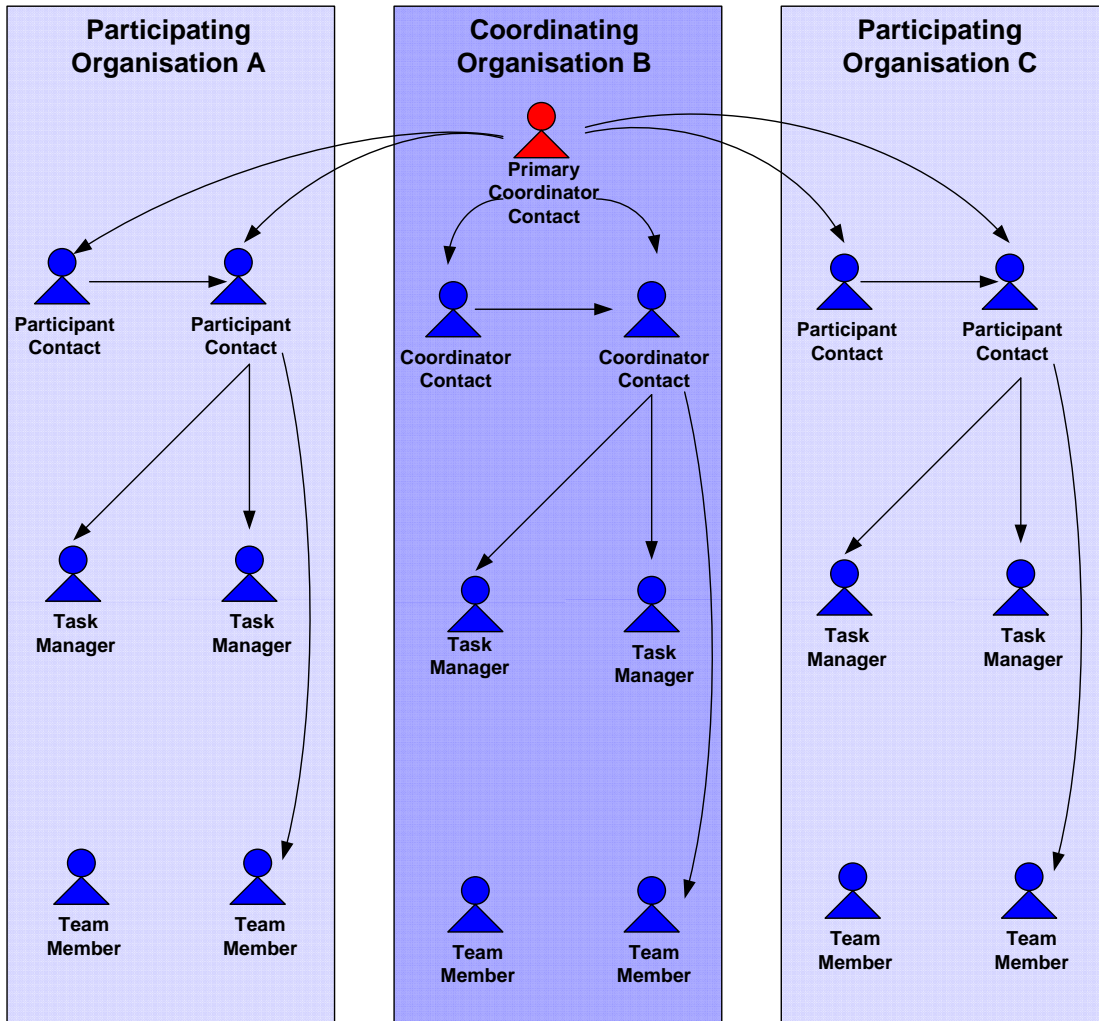


Figure 31: Business and portal roles in a project

2.7.3.1 First level: Primary Coordinator Contact

At the top of the pyramid, there is the Primary 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 Primary Coordinator Contact has the right to grant and revoke the roles of the Participant Contacts in any organisation that is taking part in the Consortium.

In addition, he/she has, for the coordinating beneficiary (i.e. his/her own Organisation, 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.

2.7.3.2 Second level: Participants Contacts (including Coordinator Contacts)

At the second level of the pyramid, there are the Participant Contacts, who are the main contact persons for the Primary Coordinator at the participating beneficiaries. Nomination of only five persons per beneficiary and project is possible in this role (note that the Primary Coordinator Contact count in this total for the Coordinator beneficiary).

Participant Contacts who belong to the same Organisation as the Primary Coordinator Contact are called Coordinator Contacts.

By default, these roles are provisioned with the respective names and contact details given in the proposal.

A Participant Contact can nominate other Participant Contacts within his/her own Organisation.

(without approval by the Commission).

The Participant Contacts have also the right to grant and revoke Task Manager and Team Members (3rd 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 Primary Coordinator Contact when the Participant Contact has to be changed.

2.7.3.3 Third level: Task Managers and Team Members

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

Team Members have minimal read-only rights to project resource information.

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.


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

2.7.3.4 Other roles:

The portal also supports two other roles that you might see in the project roles list:

- 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).

2.7.3.5 Display Roles

When you click on the blue  icon that is on the line of a project (see Figure 32: The project list roles icon), the roles of this project are displayed (see Figure 33: Roles of a project), along with the project menu and project summary (see section 2.7.2 for a description of the project menu and project summary).

PROJECT LIST FOR PARTICIPANT ONE PORTAL

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 **10** entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase	Actions
AEROTHERMOPROP	SP1-JTI-CS-2009-02	FP7	267614		Active	
AgroCos	FP7-KBBE-2009-3	FP7	245336		Active	
ARASCOM	FP7-ICT-2007-2	FP7	222620		Active	PR AA
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807		Active	PR
BIOIONS	ERC-2007-StG	FP7	208589		Active	
CESSDA-PPP	FP7-INFRASTRUCTURES-2007-1	FP7	212214		Active	RD FR
CommonWell	CIP-ICT-PSP-2007-1	CIP	225005		Active	PR AA
DaC of BreF	FP7-PEOPLE-2007-4-2-IIF	FP7	219146		Active	RD FR
DEMASS	FP7-SEC-2007-1	FP7	218264		Active	RD FR
DIESIS	FP7-PEOPLE-IOF-2008	FP7	234914		Active	RD FR

Showing 1 to 10 of 24 entries First Previous 1 2 3 Next Last

Figure 32: The project list roles icon

ROLES OF BALTICGRID-II (223807)

Nominated Roles on:

Project	Acronym:	BalticGrid-II	Project ID:	223807
----------------	----------	----------------------	-------------	---------------

Show **10** entries Search:

Select	Role	Name	Email	Organisation	PIC
<input type="checkbox"/>	Primary Coordinator	ARMSTRONG Lance	participantportal999@gmail.com		999990946
<input type="checkbox"/>	Participant Contact	PORTAL Participant One	participant1.portal@gmail.com	IFJ PAN	999611579
<input type="checkbox"/>	Participant Contact	ARMSTRONG Lance	participantportal999@gmail.com	KBFI	999605856
<input type="checkbox"/>	Task Manager	PORTAL Participant One	participant1.portal@gmail.com	IFJ PAN	999611579
<input type="checkbox"/>	Task Manager	ARMSTRONG Lance	participantportal999@gmail.com	KBFI	999605856
<input type="checkbox"/>	Team Member	PORTAL Participant Two	participant2.portal@gmail.com	IFJ PAN	999611579

Showing 1 to 6 of 6 entries (filtered from 47 total entries) First Previous 1 Next Last

[Add +](#) [Revoke Selected](#)

Figure 33: Roles of a project

2.7.3.6 Add a new role in your project

When you click on the [Add] button (Figure 33: Roles of a project), you have to enter the email address, first name and last name of the user you grant in the "Add role" area (Figure 34: Add role). This user will receive a notification (see section 2.9 Manage notifications) announcing him his nomination. If not already done, he will be asked to register in ECAS.

Then, depending on your own role, you have to choose the role given (see Figure 31: Business and portal roles in a project for more information about the nominations you can make depending on your own role).

ADD ROLE TO BALTICGRID-II (223807)

Nominate Role on:

Project	Acronym: BalticGrid-II	Project ID:	223807
---------	------------------------	-------------	--------

For:

Participant One PORTAL as Participant Contact for THE HENRYK NIEWODNICZA... (IFJ PAN)

In BalticGrid-II Grants the User:

First Name

Last Name

Email

For the Organisation THE HENRYK NIEWODNICZANSKI INSTITUTE OF... (999611579)

With The Role : Task Manager

All fields are mandatory.

OK Cancel

Figure 34: Add role

In the above example, a Participant Contact is adding a Task Manager.

2.7.3.7 Revoke a role from your project

Depending on your role, you can also revoke some roles (see Figure 35: Confirmation of the revocation). Select the check box on the left of the role to be revoked. Click on the [Revoke Selected] button and confirm the revocation.

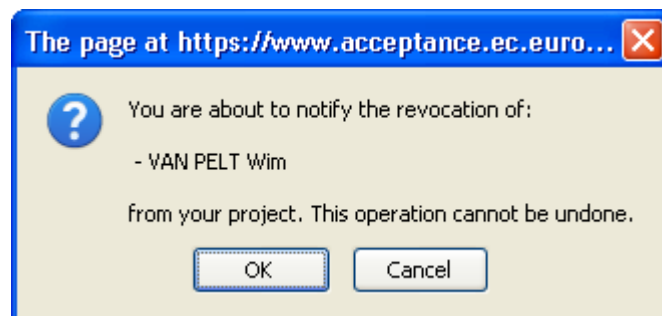


Figure 35: Confirmation of the revocation

2.7.3.8 Manage the Consortium (or Manage Participants)





























If you are Primary Coordinator or Participant contact (including Coordinator contact⁶) you will see the orange icon that allows you to manage all the Participant Contacts bound to the project  (see Figure 36: Project list of a Participant Contact).

If you are a Participant Contact, you will be able to modify Participant Contacts for your Organisation only. If you are Primary Coordinator, you will be able to modify Participant Contacts for any Organisation making up the Consortium.

PROJECT LIST FOR JEAN-JACQUES LEPERE

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

Acronym	Call	Prog.	Project ID	Roles	Phase	Actions
ACCORDANCE	FP7-ICT-2009-4	FP7	248654		Negotiation	
BalticGrid-II	FP7-INFRASTRUCTURES-2007-2	FP7	223807		Active	
BONE	FP7-ICT-2007-1	FP7	216863	 	Active	 
CommonWell	CIP-ICT-PSP-2007-1	CIP	225005		Active	
CON4COORD	FP7-ICT-2007-2	FP7	223844		Active	
TEST STIFF 22		FP7	999999	 	Negotiation	
EFIPSANS	FP7-ICT-2007-1	FP7	215549	 	Active	 
AgroCos	FP7-KBBE-2009-3	FP7	245336		Active	 
HIP	FP7-ICT-2007-C	FP7	221889		Active	 
IMPACT	FP7-ICT-2007-2	FP7	223877	 	Active	

Showing 1 to 10 of 14 entries First Previous 1 2 Next Last

Figure 36: Project list of a Participant Contact

When you click on the orange "Edit Consortium" icon , the Participant Contact Overview screen is displayed (see Figure 37: Managing the Participant Contact details). This screen gives you an overview of all the Participants taking part in the Project (i.e. the Consortium) and, for each Participant, a list of their Contacts.

In order to see the details of a particular Organisation, you must select the expand button: . Once expanded, the organisation area will display some summary information on the left side of the screen and a list of contacts on the right side.

To add a contact, you must select the little "plus" button at the top of the list ( Contacts  ).

⁶ Quick reminder: a Participant Contact belonging to the Coordinating Organisation is called Coordinator Contact.

PARTICIPANT CONTACTS OVERVIEW FOR ARASCOM (222620)

Coordinating Organisation ▾

EUMETSAT

THE EUROPEAN ORGANISATION FOR THE EXPLOITATION OF METEOROLOGICAL SATELLITES
1, Eumetsas Allee, 64295 DARMSTADT, DE
PIC: 999619533

Contacts + ⓘ

- Primary Coordinator Participant One PORTAL ⓘ
- Coordinator Contact Christian HUWAERT ⓘ ✕
- Coordinator Contact Priti YADAV ⓘ ✕

Participating Organisation ▾

TECHNISCHE UNIVERSITAET DARMSTADT

5, Karolinenplatz , 64289 DARMSTADT, DE
PIC: 999986581

Contacts + ⓘ

- Participant Contact a@universitaet.darmstadt.org ⓘ ✕
- Participant Contact Bernard MAHIEU ⓘ ✕

Participating Organisation ▾

CEA

COMMISSARIAT A L ENERGIE ATOMIQUE ET AUX ENERGIES ALTERNATIVES
25, RUE LEBLANC , 75015 PARIS 15, FR
PIC: 999992401

Contacts + ⓘ

- Participant Contact a@energie.atomique.org ⓘ ✕

Figure 37: Managing the Participant Contact details

Note that there is a limitation of 5 Contacts per Participant. If you reach that number the little + button will not be visible.

By selecting "+", the "Add a contact" screen is displayed (see Figure 38 - Adding a Contact to a Participant).

Figure 38 - Adding a Contact to a Participant

If you want to remove a contact from the list, select the X button next to his name. A confirmation screen will be shown (see Figure 39 - Removing a Contact). Select OK to remove the Contact.

Figure 39 - Removing a Contact

Reminders:

- The Primary Coordinator cannot be removed.
- If you are a Participant Contact or Coordinator Contact, you can only add or remove contacts to or from your own Organisation.
- The Primary Coordinator can add or remove contacts to or from any Organisation

2.7.4 Access to the negotiations activities (Negotiation Facility tool -NEF)

Your project has been selected for negotiation. Once the negotiations are opened by the Commission, you will receive an e-mail (see Figure 40: Invitation from NEF) inviting you to connect to the Participant Portal in order to access the negotiation sessions supported by NEF (Figure 41: Projects list - Access Negotiation).

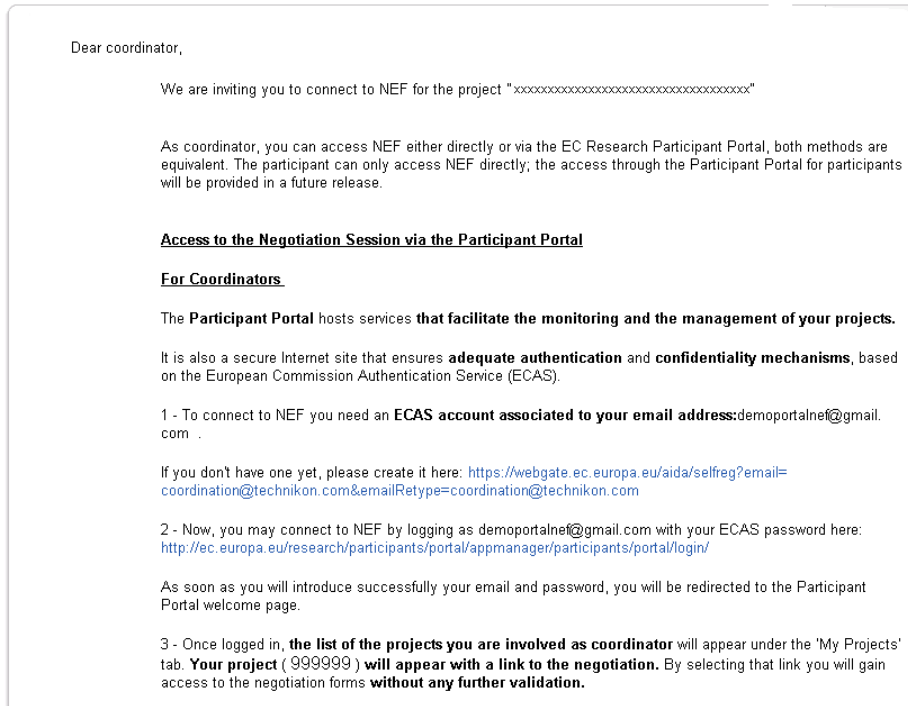


Figure 40: Invitation from NEF

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select **"My Projects"** tab
3. The list of the projects you are involved will be displayed. On the right side of the screen, the link [Access Negotiation](#) ^{AN} is displayed only once the negotiations are open by the Commission (see Figure 41: Projects list - Access Negotiation)
4. Note that for some projects, a link to [Access Amendment](#) ^{AA} is provided. It is displayed only once a grant agreement has been signed and amendments are requested (see Figure 42: My Projects - Links to NEF for amendments).

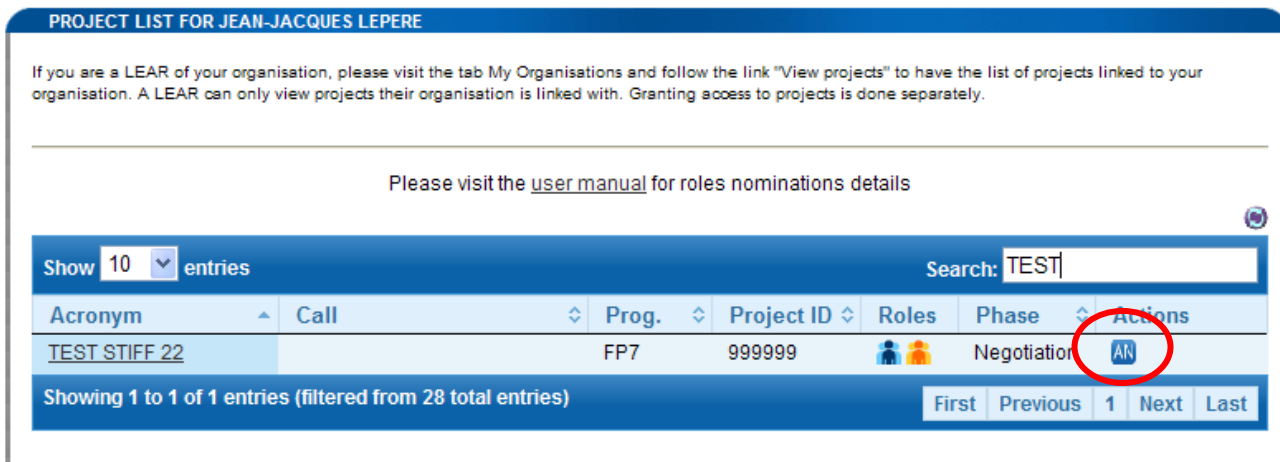


Figure 41: Projects list - Access Negotiation

5. You will be automatically redirected to the project page of NEF, with no further authentication requirements (see Figure 43: NEF). Depending on your role, you will be able to perform different tasks on NEF. In case of multiple partners' projects, the participants can also access NEF in a more limited

way – mainly to enter data to be submitted by the coordinator. The validation of the data you might enter in NEF is the sole responsibility of the coordinator of the project.

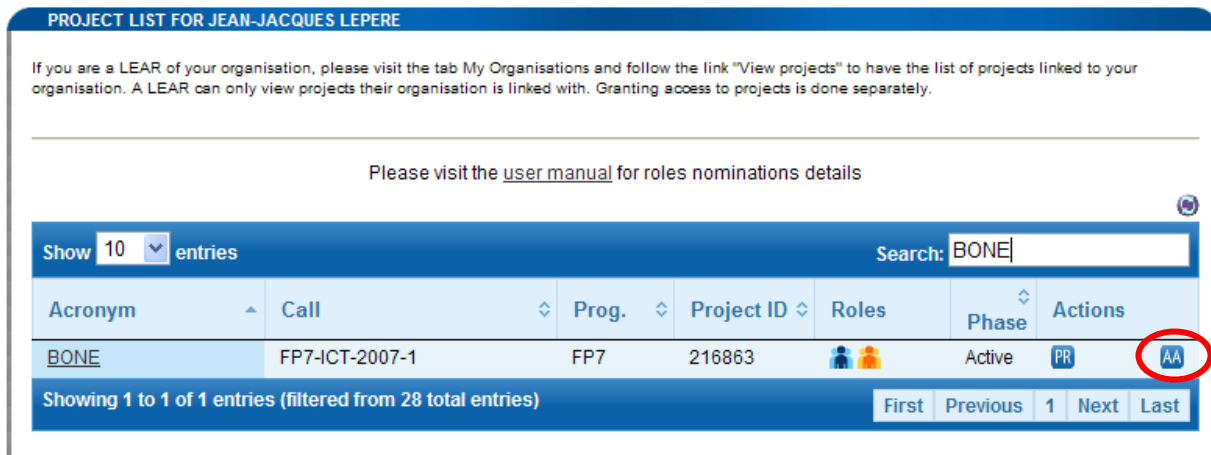


Figure 42: My Projects - Links to NEF for amendments

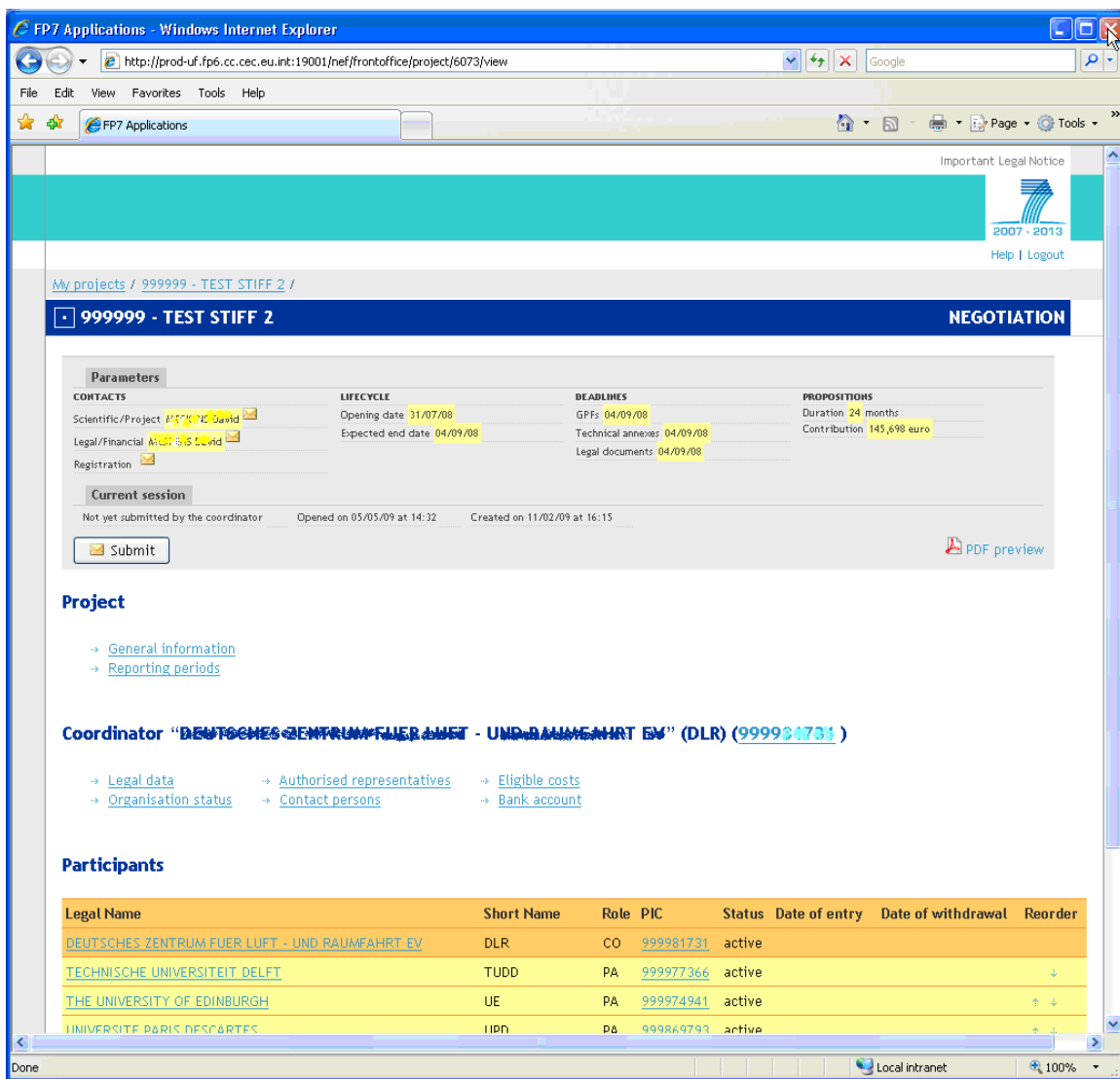


Figure 43: NEF

More information on how to use NEF can be found in the [NEF user guide](#).

Please note that the Participant Portal is the single gateway to NEF for both coordinators and other participants involved in negotiations, replacing the old way of accessing NEF – the access key mechanism.

2.7.5 Access to the reporting activities

In order for a user to have access to the Reporting functionality, s/he must have the role of Participant Contact (incl Coordinators) or task manager.

2.7.5.1 Accessing the reporting functions

1. Log on to the Participant Portal
2. Once you are connected to the secured environment of the Participant Portal, select **"My Projects"** tab
3. The list of the projects you are involved with will be displayed. (See Figure 44: Access to Reporting applications).
4. For any of your project that is in the "Active" phase, you can access both the technical reporting (Reporting & Deliverables **RD**) as the financial one **FR**, (Form C). Once you have clicked on the link, you will be redirected to the right supporting application.

PROJECT LIST FOR JEAN-JACQUES LEPERE

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 10 entries Search: dac

Acronym	Call	Prog.	Project ID	Roles	Phase	Actions
DaC of BreF	FP7-PEOPLE-2007-4-2-IIF	FP7	219146		Active	RD FR

Showing 1 to 1 of 1 entries (filtered from 28 total entries)

First Previous 1 Next Last

Figure 44: Access to Reporting applications

2.8 Manage roles

Please see sections "2.1 Roles", "2.6.4 Roles of an Organisation" and "2.7.3 Roles of a Project" for a complete description of Role management within the portal.

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
SELF REGISTRANT	REG	SYSTEM	SYSTEM
PRIMARY COORDINATOR CONTACT	PRIMARY COORDINATOR	SYSTEM	SYSTEM
COORDINATOR CONTACT ⁷	COORDINATOR	PRIMARY COORDINATOR, COORDINATOR	PRIMARY COORDINATOR, COORDINATOR
PARTICIPANT CONTACT	PARTICIPANT CONTACT	PARTICIPANT CONTACT (same PIC), PRIMARY COORDINATOR	PARTICIPANT CONTACT (same PIC), PRIMARY COORDINATOR
TASK MANAGER	TM	COORDINATOR, PARTICIPANT CONTACT	COORDINATOR, PARTICIPANT CONTACT
TEAM MEMBER	TB	COORDINATOR, PARTICIPANT CONTACT	COORDINATOR, PARTICIPANT CONTACT

Table 2: List of roles and their nomination rights

⁷ It is a Participant Contact with the same PIC as the PRIMARY COORDINATOR

2.9 Manage notifications

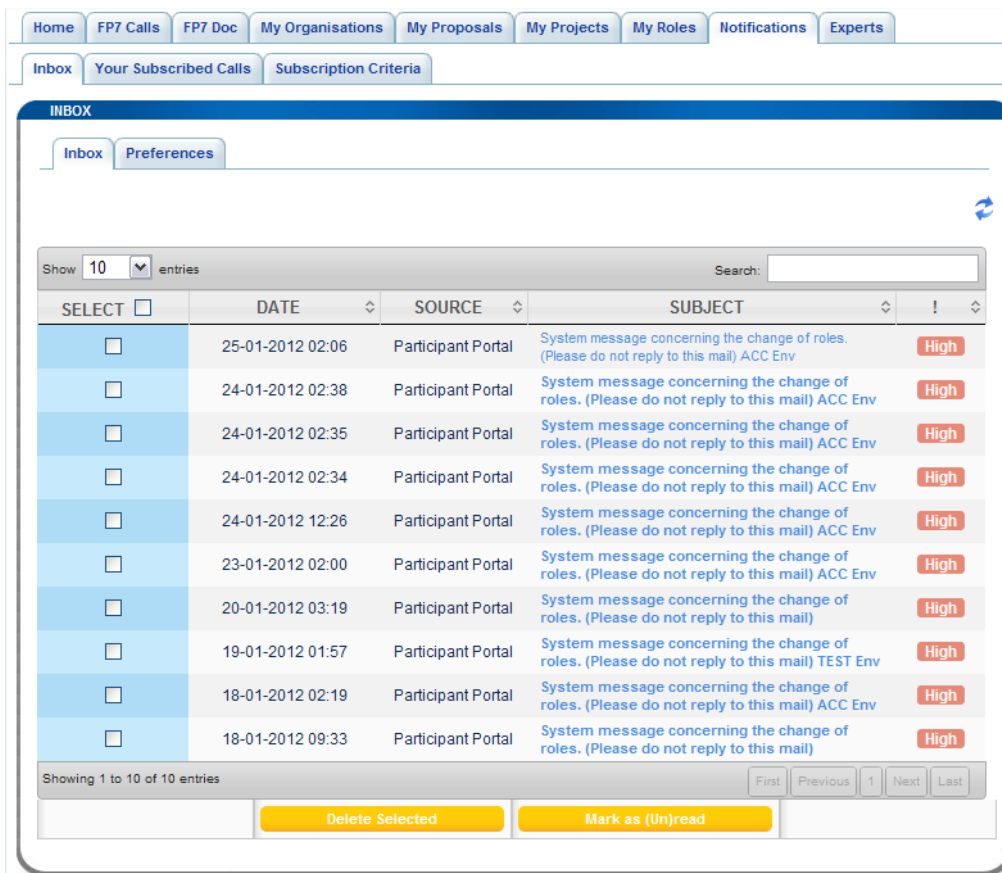
Notifications are messages sent by the different services available on the Participant Portal. Currently, notifications are sent via email but it is foreseen that other channels will be made available in the future. They are also displayed in the "Inbox" sub tab of the "My Notifications" tab. (See Figure 45: My Notifications).

Examples of notifications:

- You will receive a notification if you are nominated in a new role.
- A LEAR will receive a notification if someone of his/her organisation is nominated in a new role.
- A notification can be sent to all Portal users in case of an exceptional situation of the Portal or its services.
- Notifications are sent when modifications are done on calls that you have subscribed to (see "Your Subscribed Calls" below) and also on calls that fulfil your selected criteria (see "Subscription Criteria" below).

2.9.1 Notifications

In the Participant Portal, your notifications are visible from the "Inbox" sub tab of the "My Notifications" tab. (See Figure 45: My Notifications).



The screenshot displays the 'My Notifications' interface. At the top, there is a navigation bar with tabs: Home, FP7 Calls, FP7 Doc, My Organisations, My Proposals, My Projects, My Roles, Notifications, and Experts. Below this, there are sub-tabs: Inbox, Your Subscribed Calls, and Subscription Criteria. The 'Inbox' sub-tab is active, showing a list of notifications. The list has columns for SELECT, DATE, SOURCE, SUBJECT, and a priority indicator. All notifications are from 'Participant Portal' and have a 'High' priority. The subject of all notifications is 'System message concerning the change of roles. (Please do not reply to this mail)'. The dates range from 18-01-2012 to 25-01-2012. At the bottom of the list, there are buttons for 'Delete Selected' and 'Mark as (Un)read', along with pagination controls (First, Previous, 1, Next, Last).


SELECT	DATE	SOURCE	SUBJECT	Priority
<input type="checkbox"/>	25-01-2012 02:06	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	24-01-2012 02:38	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	24-01-2012 02:35	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	24-01-2012 02:34	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	24-01-2012 12:26	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	23-01-2012 02:00	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	20-01-2012 03:19	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail)	High
<input type="checkbox"/>	19-01-2012 01:57	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) TEST Env	High
<input type="checkbox"/>	18-01-2012 02:19	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail) ACC Env	High
<input type="checkbox"/>	18-01-2012 09:33	Participant Portal	System message concerning the change of roles. (Please do not reply to this mail)	High

Figure 45: My Notifications

2.9.1.1 Columns in the Inbox tab

- A <SELECT>checkbox allows the participant to delete or mark as (un)read the selected records.
- The <DATE> is the date of the notification when the message was sent.
- The <SOURCE> represents the sender of the notification message. The source of the messages can be:
 - Participant Portal: e.g. when the user has been assigned to a new role;
 - FP7 Calls: e.g. when data of a call you subscribed has changed
 - Notification coming from the Submission and Evaluation of Proposals system.
- If the <SUBJECT> is underlined (hyperlink mode) then the participant can click on it, in order to open the notification and display the message body (see Figure 46: Notification content). If the message body is empty then the subject is not underlined. The font style of the subject is bold when the message is unread and regular once the message is read.
- The <!> symbol (as in Outlook) is the importance level of the notification. The levels are LOW- NORMAL – HIGH and VERY HIGH. The records can be filtered by introducing one of the four statuses above in the "Search" text box.

2.9.1.2 Buttons

A refresh button  allows the participant to refresh his notifications. No automatic refresh exists. The button should be used e.g. if after logging in the user adds a new call to the e-mail notifications. The call will be listed under the "My Notifications" "Your Subscribed Calls" tab, after the refresh button has been used or after the user logs in again.

The **[Delete Selected]** button allows the participant to delete the selected notifications.

The **[Mark as (un)Read]** button changes the status of all the selected notifications. If all the selected notifications are read then the button displays **[Mark as Unread]** else it displays **[Mark as Read]**

The **[Select All]** button allows the participant to select all the notifications currently displayed.

2.9.1.3 Notification content

The screenshot shows a notification content window. At the top, there is a navigation bar with buttons for 'Home', 'My Organisations', 'My Proposals', 'My Projects', 'My Roles', 'My Notifications', 'FP7 Calls', and 'Support'. Below this is a sub-navigation bar with 'Inbox', 'Your Subscribed Calls', and 'Subscription Criteria'. The main window has a blue header labeled 'INBOX'. The message details are as follows:

Date: 08-03-2011 08:29
From: PPW
Subject: System message concerning the change of roles. (Please do not reply to this mail)
Importance: High
Message body:

Dear Participant Portal User,

You have been granted the role of **Admin Task Manager, Legal Task Manager, Financial Task Manager, Scientific Task Manager** for the project AgroCos. If you do not have a Participant Portal account please register via the "register" link on the participant portal <http://ec.europa.eu/research/participants/portal/appmanager/participants/portal>.

Regards,
The Participant Portal Administration team

At the bottom of the window, there are three yellow buttons: 'Previous', 'Close', and 'Next'.

Figure 46: Notification content

The notification is displayed in the page above when the participant clicks on an underlined subject. It contains

1. The date when the message was sent
2. The sender (see above)
3. The subject
4. The importance level in text mode
5. The message body with vertical and horizontal scroll bars displayed when the message body is too long or too large.

The [**Close**] button closes the notification content and returns to the notification list.

The [**Previous**] and [**Next**] buttons allow browsing through the set of notifications of the "My Notifications" tab.

2.9.1.4 Example of an e-mail notification

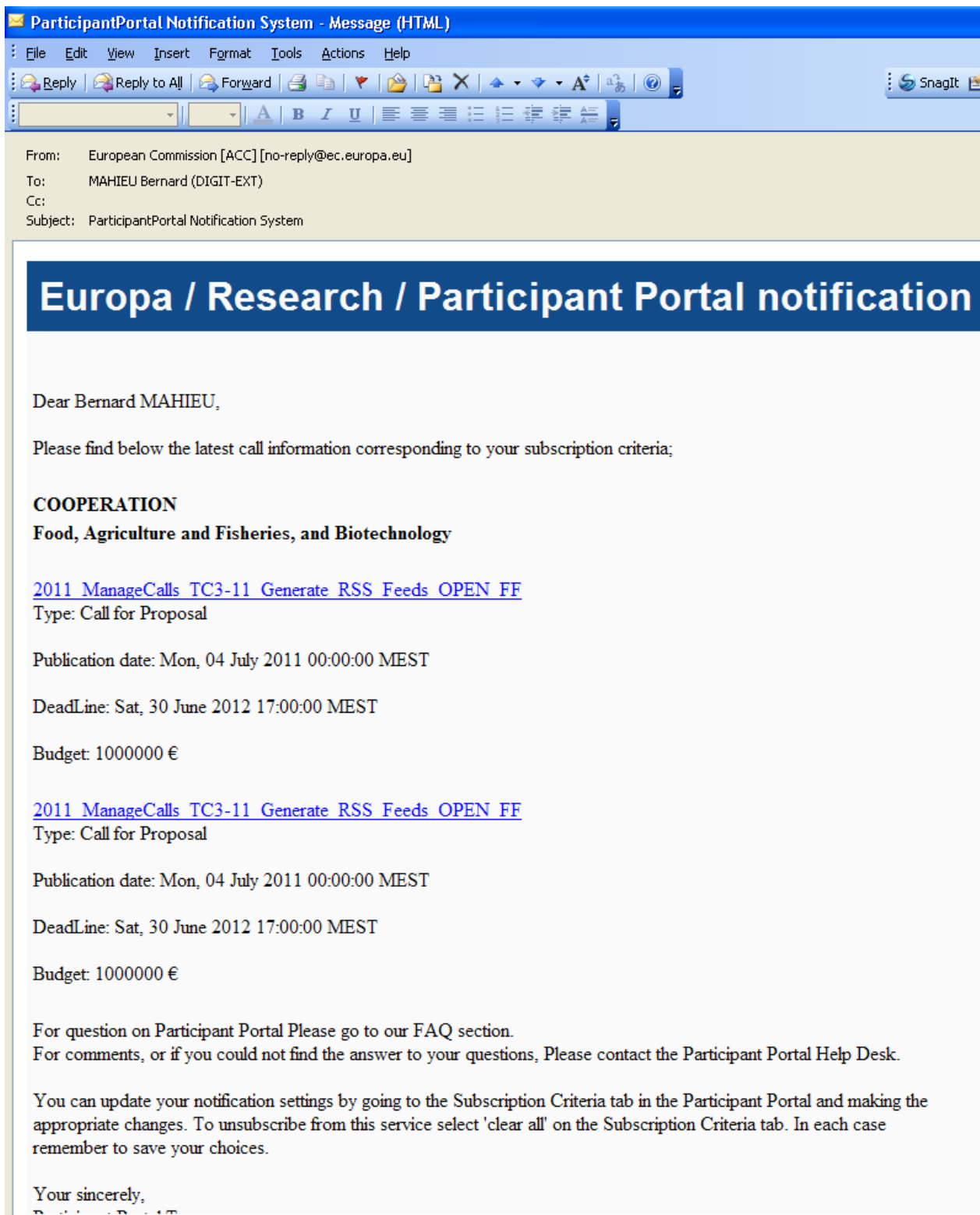


Figure 47: Notification e-mail

2.9.1.5 Notification and event

The following table gives an overview of the messages currently sent through the notification service:

NOTIFICATION	LEVEL	EVENT	RECIPIENT(S)
Organisation Role Nomination	High	A new Account Administrator has been nominated by the LEAR of an organisation. Automatically generated message.	<ul style="list-style-type: none"> All the Account Administrators of the organisation⁸. The newly nominated user.
Project Role Nomination	High	The Primary Coordinator Contact of a Project has nominated a user as a Participant Contact (see section 2.7.3.8, Manage the Consortium) or a new nomination is done at project level (e.g. a Participant Contact nominates a Team Member; see section 2.7.3.6, Add a new role in your project). Automatically generated message.	<ul style="list-style-type: none"> The LEAR of the Organisation for which the Contact has been nominated. All the Account Administrators of the Organisation of the newly nominated user. The newly nominated user.
Call	Normal	When a call has been published or when any call-related information (e.g. the "Latest information on call") is modified. Criteria to be defined by the user.	<ul style="list-style-type: none"> Any user that subscribed to call(s) or defined subscription criteria

Table 3: Current Notification details

2.9.1.6 Preferences

As a user, you can decide the minimum level of Notification you want to receive (knowing that the "Very High" level cannot be ignored) as well as the frequency of reception per level (as soon as they occur, daily or weekly).

You can change this through the "Preferences" link available from the "inbox" sub tab of the "My Notifications" tab. (See Figure 48: Notifications – Preferences).

⁸ It is the LEAR who is the originator of the nomination, therefore he/she is not notified.

Figure 48: Notifications – Preferences

If you select **High** as minimum level of notification you will not receive FP7 calls notification – see **Table 3: Current Notification details**)

If you select **Asap** the notification/event is sent immediately.

If you select **Daily** the notification/event is sent from midnight.

If you select **Weekly** the notification/event is sent Friday from midnight.

The figure above shows you the recommended configuration.

2.9.2 Subscription Criteria

The Participant Portal e-mail notification feature allows the Participant Portal's users to receive notifications about any new information published on a specific call or a group of calls as defined by the user.

Under this tab, the registered users can define the types of calls on which they are interested in receiving information. The users can add/modify or delete the e-mail notification criteria at any time.

You will receive notification e-mails whenever new information is published which meets one of your criteria or when a specific call (chosen previously as your subscription criteria) is reaching a deadline (2 weeks and 1 week).

The criteria are the following:

Global Criteria

- **Call categories:** Call for Proposals, Call for Tenders

If e.g. Call for Proposal is selected the user will receive notifications for each update on calls for proposals. This can be an update of information, the opening of a call for proposal, the closing of a call for proposal, etc.

- **Call States:** Open, Closed, Forthcoming

If e.g. Open is selected the user will receive a notification whenever a new call is opened/published.

Other example: if "Call for proposal" is selected and "Open" is selected the user will receive notifications on all "Call for proposals" that are opened.

The criteria can be more specific by choosing a Programme or a theme (see below). Example: if a user chooses COOPERATION/Health he/she will be notified on any change concerning the call for COOPERATION/Health. If "Open" is selected the notification will be limited to the COOPERATION/Health calls that are opened..

Important remark: The "Subscription Criteria" does not reflect the changes you made in the "Your subscribed calls" section See the paragraph below for more explanation about the tab "Your subscribed calls".

Specific Criteria linked to Programmes and themes – see the following print screen (Figure 49: Subscription criteria)

Home | FP7 Calls | FP7 Doo | My Organisations | My Proposals | My Projects | My Roles | Notifications | Experts

Inbox | Your Subscribed Calls | Subscription Criteria

SUBSCRIPTION CRITERIA

[select all](#) | [clear all](#)

Subscribe to the following call categories

- Call for Proposals
- Call for Tenders

Subscribe to the following call States

- Open
- Closed
- Forthcoming

Subscribe to the following programmes and themes

- COOPERATION
 - Food, Agriculture and Fisheries, and Biotechnology
 - Health
 - Information and Communication Technologies
 - Nanosciences, Nanotechnologies, Materials and New Production Technologies - NMP
 - Energy
 - Environment (including Climate Change)
 - Transport (including Aeronautics)
 - Socio-economic sciences and Humanities
 - Space
 - Security
 - General Activities
 - Joint Technology Initiatives (Annex IV-SP1)
 - Article 169 (Annex IV-SP1)
- IDEAS
 - ERC
- PEOPLE
 - Marie Curie Actions
- CAPACITIES
 - Research Infrastructures
 - Research for the benefit of SMEs
 - Regions of Knowledge
 - Research Potential
 - Science in Society
 - Support for the coherent development of research policies
 - Activities of International Cooperation
 - Article 169 Joint (Annex IV-SP4)
- EURATOM
 - Fusion Energy
 - Nuclear Fission and Radiation Protection
 - JRC direct nuclear actions

[Save](#)

Figure 49: Subscription criteria

2.9.3 Your Subscribed Calls

Under the "FP7 Calls" tab, after choosing a specific call, users can subscribe to the e-mail notification related to that selected call. Click on the "[Subscribe to e-mail notification of this call](#)" link at the bottom of the page, see (Figure 50: FP7 Calls – Details of a specific call).

Home FP7 Calls FP7 Doc My Organisations My Proposals My Projects My Roles Notifications Experts

Latest Info Cooperation Ideas People Capacities Euratom Search Calls

EURATOM

Open Closed Forthcoming

Nuclear Fission, Safety and Radiation Protection [Return to calls](#)

Identifier: FP7-Fission-2012
Publication Date: 17 January 2012
Budget: € 53 251 000
Deadline: 27 March 2012 at 17:00:00 (Brussels local time)
OJ Reference: [OJ C014 of 17 January 2012](#)
Specific Programme(s): EURATOM
Theme(s): Nuclear Fission and Radiation Protection

Latest information on Call

18/01/2012
EPSS is now available for this call for proposals

[History](#)

Information Package [Key documents required for the preparation of your proposal](#)

In order to receive a complete Information Package for this call, you will need to select the following elements:

1. The call fiche (only available in .pdf format)
2. The work programme (.pdf format)
3. FP7 factsheets in your preferred language - an overview of the basic features of this programme (.pdf format)
4. The Guides for Applicants relevant to the funding schemes used in this call (.pdf format)

All files have been treated uniformly and compressed to facilitate the access to the individual documents and to optimise the speed of transfer. To access the files, you will need a file compression utility capable of opening the '.zip' format. [select all](#) | [clear all](#)

<input type="checkbox"/>	Call Fiche	English
<input type="checkbox"/>	Work Programme 2012 - Euratom	English
<input type="checkbox"/>	Guide for Applicants	English

[Download](#)

Additional Documents Useful documents on the call and on FP7 in general

Choose which documents you would like to download.
You can select all documents in the Additional Documents at the top of this section.
All documents are available in English. Some documents are also available in other languages. [select all](#) | [clear all](#)

<input type="checkbox"/>	Council decision concerning Euratom Specific Programme 2012-2013	English
<input type="checkbox"/>	Council Decision concerning the Euratom Framework Programme 2012-2013	English
<input type="checkbox"/>	Regulation laying down the rules for the participation to Euratom 2012-2013	English

[Download](#)

Electronic Proposal Submission Service (EPSS) Instructions on the submission of your proposal through the EPSS

Please select the funding scheme, or sub-funding scheme, corresponding to the work programme topic you are addressing, from the list below. You will then be linked to the correct EPSS entry point.

Combined Collaborative Project (Large-scale integrating project) and Coordination and Support Action [CP-CSA] [Go](#)

Get Support

- View or contact relevant [National Contact Points](#) for further help.
- To ensure compliance with ethical issues, further information is available on the [Ethics review](#) on CORDIS and on the [Europa Portal](#)
- Enquiry service: Ask your questions about any aspect of European research in general and the EU Research Framework

Programmes in particular from the [Research Enquiry Service](#).

- The [European IPR Helpdesk](#) assists beneficiaries on intellectual property issues.
- A partner search is offered on [CORDIS Partners Service](#)

[Enterprise Europe Network](#)

- [Enterprise Europe Network](#)

- Do you know how to tackle standardization in your future project proposal? Contact CEN and CENELEC, the European Standards Organizations to receive tailor-made help at research@cenenelec.eu (CEN-CENELEC Research Helpdesk) or visit the websites of [CEN](#) and [CENELEC](#)

E-mail notification

[Subscribe to e-mail notification of this call](#) [Return to calls](#)

Figure 50: FP7 Calls – Details of a specific call

The list of calls that you have subscribed to in this way, is displayed in the "Your Subscribed Calls" tab. You can unsubscribe to the subscription to a single call by selecting it and by clicking the [Unsubscribe] button. (See Figure 51: Your Subscribed Calls).

The screenshot shows a web interface with a navigation bar at the top containing buttons for Home, My Organisations, My Proposals, My Projects, My Roles, My Notifications, FP7 Calls, and Support. Below this is a sub-navigation bar with buttons for Inbox, Your Subscribed Calls (which is active), and Subscription Criteria. The main content area is titled 'YOUR SUBSCRIBED CALLS' and features a list of calls organized into categories. Each category is expanded to show its sub-items. At the top right of the list area are 'select all' and 'clear all' links. At the bottom right is an 'Unsubscribe' button.

- Cooperation
 - Joint Technology Initiatives (Annex IV-SP1)
 - [SP1-JTI-CS-2011-02](#)
- Ideas
 - ERC
 - [ERC-2011-PoC](#)
- People
 - Marie Curie Actions
 - [FP7-PEOPLE-2011-IEF](#)
- Euratom
 - Fusion Energy
 - [FP7-Fusion-2007](#)

Figure 51: Your Subscribed Calls

2.10 Manage FP7 Calls

Any user (logged or not) can have access to the "FP7 Calls" tab.

LOGIN

Logout

Bernard MAHIEU

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

STAY TUNED

RSS | [What is RSS?](#)

[E-mail Notification](#)

WHAT'S NEW

Participant Portal V3.1.1 (07/2011)

- The portal is ready to become the only official source of info for two additional type of Calls: the list of COFUND fellowship programmes and a subset of calls for tender
- e-Mail notification for FP7 calls
- Several fixes

[read more](#)

Home My Organisations My Proposals My Projects My Roles My Notifications FP7 Calls Support

Latest Info Cooperation Ideas People Capacities Euratom Search Calls

FP7 CALLS

You can access all calls (open, closed, or forthcoming) by clicking on the specific programme tabs at the top or by using [the search feature here](#).

Latest dates of call publications:

- New calls published on **12/07/2011**
- New calls published on **07/07/2011**
- New calls published on **04/07/2011**
- New calls published on **01/07/2011**
- New calls published on **30/06/2011**

Show 10 entries Search:

Programme	Call Identifier	Latest Information	Date
People	FP7-PEOPLE-2011-IEF	EPSS is now available for this call for proposals	2011-07-07
Cooperation	SP1-JTI-CS-2011-02	EPSS is now available for this call for proposals	2011-07-07
Cooperation	SP1-JTI-CS-2011-02	EPSS is now available for this call for proposals	2011-07-07
People	FP7-PEOPLE-2011-IEF	EPSS is now available for this call for proposals	2011-07-06
People	FP7-PEOPLE-2011-IEF	EPSS is now available for this call for proposals	2011-07-06

Figure 52: FP7 Calls

When you click on this tab, the "Latest info" tab is displayed. It contains the latest dates of call publications and the latest calls published.

The calls can be filtered by specific programme in the following tabs: "Cooperation", "Ideas", "People", "Capacities" and "Euratom".

2.10.1 Calls by programme

When you open a specific tab by programme, the list of open call is displayed by default, the FP7 calls are classified by call type (call for proposal / call for tender) and by theme. (See Figure 53: Calls by programme).

Closed and forthcoming calls are displayed in adjacent tabs with the same classification principle..

Home FP7 Calls FP7 Doc My Organisations My Proposals My Projects My Roles Notifications Experts

Latest Info **Cooperation** Ideas People Capacities Euratom Search Calls

COOPERATION

Open Closed Forthcoming

- [Energy](#) / 2 open calls
- [Environment \(including Climate Change\)](#) / 1 open calls
- [Food, Agriculture and Fisheries, and Biotechnology](#) / 1 open calls
- [General Activities](#) / 1 open calls
- [Health](#) / 2 open calls
- [Nanosciences, Nanotechnologies, Materials and new Production Technologies - NMP](#) / 1 open calls
- [Regions of Knowledge](#) / 1 open calls
- [Socio-economic sciences and Humanities](#) / 3 open calls
- [Transport \(including Aeronautics\)](#) / 3 open calls
- [Information and Communication Technologies](#) / 2 open calls
- [Joint Technology Initiatives \(Annex IV-SP1\)](#) / 2 open calls

Energy (back to top)

Call for proposals

Show 10 entries Search:

Call Identifier	Call Title	Publication Date	Deadline
FP7-ERANET-2012-RTD	ERA-NET Call 2012	2011-07-20	2012-02-28
FP7-ENERGY-2012-2	Energy Call Part 2	2011-07-20	2012-03-08

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

Environment (including Climate Change) (back to top)

Call for proposals

Show 10 entries Search:

Call Identifier	Call Title	Publication Date	Deadline
FP7-JPROG-2012-RTD	Joint Programming Coordination 2012	2012-01-12	2012-03-20

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

Figure 53: Calls by programme

2.10.2 Call info

When you click on the Call Identifier hyperlink, the call info page is displayed (see Figure 54: Call info). This page contains all the info related to the selected FP7. You can download documents and subscribe to receive notifications about this FP7 call.

You can also be redirected to the Electronic Proposal Submission Service –EPSS (see Figure 55: EPSS) or in the future to the new Negotiation and Evaluation facility tool (NEF)

The screenshot shows the EURATOM website interface for a specific call. At the top, there is a navigation bar with links like Home, FP7 Calls, FP7 Doc, My Organisations, My Proposals, My Projects, My Roles, Notifications, and Experts. Below this is a secondary navigation bar with tabs for Latest Info, Cooperation, Ideas, People, Capacities, Euratom, and Search Calls. The main content area is titled 'EURATOM' and has sub-tabs for Open, Closed, and Forthcoming. The current call is 'Nuclear Fission, Safety and Radiation Protection'. Key details include: Identifier: FP7-Fission-2012, Publication Date: 17 January 2012, Budget: € 53 251 000, Deadline: 27 March 2012 at 17:00:00 (Brussels local time), and OJ Reference: OJ C014 of 17 January 2012. A section titled 'Latest information on Call' shows a date of 18-01-2012 and a message: 'EPSS is now available for this call for proposals'. The 'Information Package' section lists four required documents: Call Fiche, Work Programme 2012 - Euratom, and Guide for Applicants. Below this is an 'Additional Documents' section with three documents for download: Council decision concerning Euratom Specific Programme 2012-2013, Council Decision concerning the Euratom Framework Programme 2012-2013, and Regulation laying down the rules for the participation to Euratom 2012-2013. The 'Electronic Proposal Submission Service (EPSS)' section provides instructions and a dropdown menu for selecting a funding scheme, currently set to 'Combined Collaborative Project (Large-scale integrating project) and Coordination and Support Action [CP-CSA]'. The 'Get Support' section offers links to National Contact Points, Ethics review, Europa Portal, Research Enquiry Service, European IPR Helpdesk, and CORDIS Partners Service. The 'E-mail notification' section has a button to 'Subscribe to e-mail notification of this call'. The page concludes with a 'Return to call's button.

Figure 54: Call info



The EPSS web application is best viewed with
 - Internet Explorer 6.0 (and above)
 - or Mozilla Firefox 1.0 (and above)
 Safari is NOT supported (whatever the OS)
 For other browsers please refer to the EPSS User Guide

Attention!

EPSS Helpdesk working hours from 11/07/2011 until 26/08/2011:
 the EPSS helpdesk will be available from 9am to 5pm Brussels local time and from 8am to 8pm during 48 hours before calls deadlines.

Welcome to EPSS, the Electronic Proposal Submission Service

Call Selected: **ENIAC-2011-2**
 Sub-Scheme Selected: **JTI-CP-ENIAC**

I am the coordinator of a proposal and I need a user name and a password		REGISTER¹
I already have an online user name and a password		LOGIN
I am a participant (not the coordinator) in a proposal and I need a user name and password		CONTACT YOUR COORDINATOR

[EPSS user guide](#)
[Privacy Statement](#)

Figure 55: EPSS

2.10.3 Search Calls

Any user can use the Search Calls functionality from the **"FP7 Calls"** tab, by clicking the **[Search]** button. (See Figure 56: Search Calls).

The user can enter as search criteria: search terms, programme, call status, call type, sorted by information and click **[Search]**.

The page is refreshed with the calls matching the request, and an opportunity to Search again.

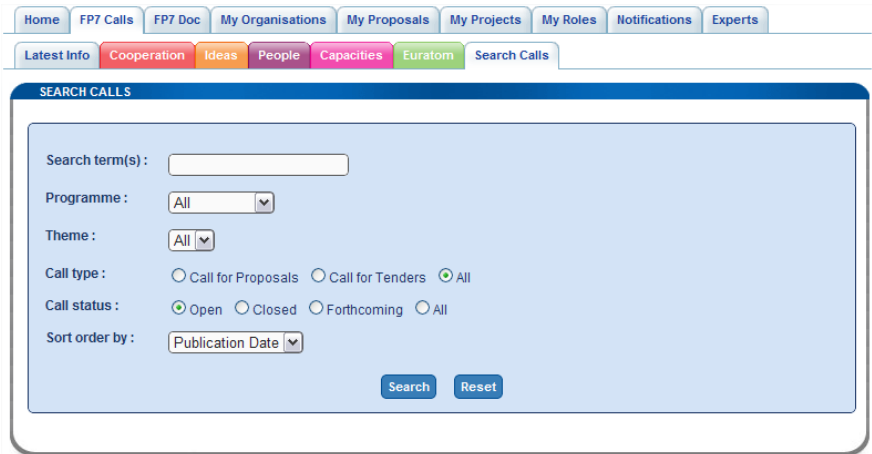


Figure 56: Search Calls

2.11 Manage Experts

A top level tab ("**Experts**") is used for the experts management (see Figure 57: PP home page below). This tab is displayed for all logged-in and not logged in users. For users that are not logged in, it displays a home page inviting users to take some actions: If you are are logged in, some different actions need to be executed

2.11.1 Not logged in users

The screenshot shows the Participant Portal home page. At the top, there is a navigation bar with the following links: Home, FP7 Calls, FP7 Doc, My Organisations, and Experts. The 'Experts' tab is circled in red. Below the navigation bar, there is a 'WELCOME' section with the text: 'Welcome to the Participant Portal. The Participant Portal is your entry point for electronic administration of EU-funded research and innovation projects, and hosts the services for managing your proposals and projects throughout their lifecycle. Currently the portal covers mainly actions under the 7th EU-Framework Programme for Research and Technological Development (FP7). In the future, its coverage will be extended to other programmes in the area of research and innovation.' Below this, there is a 'What does it offer today?' section with two columns of bullet points. The first column lists: 'You can search for FP7 calls for proposals and submit your proposals.', 'Depending on your role in projects and organisation, you can view information on projects, negotiate your grant agreement, manage amendments, submit financial and scientific reports or review projects.', and 'You can search for the unique identifier of your organisation, register your organisation or provide updates of your organisation's data.'. The second column lists: 'Depending on your roles in projects and organisations, you can assign or revoke access rights to organisation and project data for other persons.'. Below this, there is a 'Forthcoming functionalities' section with three bullet points: 'Expert evaluators will be able to manage the administrative details related to their work as peer reviewers.', 'The currently separate electronic proposal submission system will be replaced by a new system integrated in the portal.', and 'Direct access to FP7 related information and documentation.'. Below this, there is a 'How does it work?' section with a numbered list of four steps: 1. 'While some basic functions are available for anonymous users, the core functions of project management are only available to registered users. If you are a registered user you can use the login button.', 2. 'After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.', 3. 'On that new page, the blue arrows are the processes that are authorised for your profile and they will give you access to several lists, like the list of organisations, projects, roles of your project etc...', 4. 'When you go into the details of an organisation, project, role etc... a new contextual menu will guide you through the additional actions.'. At the bottom of the page, there are two buttons: 'FP7' and 'Research Site'.

Figure 57: PP home page

For not 'logged in' connected users (anonymous) the **Expert** tab is displayed in the following portlet (Figure 58: Experts tab - anonymous user):

The screenshot shows the 'Experts' tab of the Research & Innovation Participant Portal. The page is designed for anonymous users and includes a navigation menu with 'Home', 'FP7 Calls', 'FP7 Doc', 'My Organisations', and 'Experts'. The main content area is titled 'EXPERT AREA' and features a prominent heading: 'Join the database of independent experts for European research and innovation'. Below this heading, there is a brief description of the role of independent experts and a photograph of a group of people in a meeting. The page is organized into several sections: 'New Experts', 'What do the assignments involve?' (listing tasks like evaluation and monitoring), 'Who can be an Expert?' (listing requirements like high-level expertise and a university degree), 'Registered Experts', 'Already registered with CORDIS/EMM?' (providing instructions on account creation and profile updates), and 'Interested in participating as an expert for the European Commission?'. This last section contains two numbered steps: '1 Create your ECAS Account' and '2 Register or update your profile'. A footer at the bottom of the page contains copyright information for the European Communities from 1995-2011.

Figure 58: Experts tab - anonymous user

In this page, the [Create Your Ecas Account](#) link is enabled while the [Register or update your profile](#) is not.

[Create Your Ecas Account](#) opens a page to create ECAS account at <https://webgate.ec.europa.eu/cas>

2.11.2 Logged in users without Expert profile defined in EMPP

If a "logged-in" user selects the **Experts** tab and if he does not have an Expert profile, he will see a similar page as non-logged users except the fact that the [Register or update your profile](#) link that is now activated while the [Create your ECAS account](#) link is deactivated (see Error! Reference source not found.)

A to Z | Sitemap | Search | About this site | Contact | Legal Notice | English (en)



Research & Innovation Participant Portal

European Commission > Research & Innovation > Participant Portal > Experts > Welcome

Home
FP7 Calls
FP7 Doc
My Organisations
My Proposals
My Projects
My Roles
Notifications
Experts

LOGIN

 Logout

Participant one PORTAL 

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

HELP FOR EXPERTS

- [FAQ](#)
- [Technical help](#)
- [Question about FP7](#)

NEWS FOR EXPERTS

Welcome to the brand new area in the Participant Portal dedicated to experts. A new registration service is now available.

QUICK LINKS FOR EXPERTS

- [List of appointed experts](#)
- [EMEX](#)
- [Expert recommendations](#)

EXPERT AREA

Join the database of independent experts for European research and innovation

The European Commission appoints independent experts to assist with research and innovation assignments including the evaluation of proposals, the review of projects and the monitoring of programmes or policies.



New Experts

What do the assignments involve?

- Experts, as peer reviewers, assist in the:
 - **evaluation** of research and innovation proposals;
 - **review** of research and innovation projects.
- In addition experts assist in:
- **monitoring** the progress, outcome and impact of research and innovation programmes as well as giving advice on the shape of future research and innovation activities.
- Assignments mainly concern research and technological development, falling within the [current framework programme \(FP7\)](#) aimed at improving employment, competitiveness and quality of life in Europe.
- Take a look at the most [recently funded projects](#).

Who can be an Expert?

You have a chance of being selected as an expert if you:

- have a high level expertise in research or innovation in any scientific and technological field, including managerial aspects;
- have at least a university degree, and
- can be available for occasional, short-term assignments.

Registered Experts

Already registered with CORDIS/EMM ?

- First create an ECAS account, if you have not created one yet, in order to have the possibility to retrieve your CORDIS/EMM profile.
- Some changes to the design of the new registration service require additional information from experts, so please log-in and update your profile.

Interested in participating as an expert for the European Commission?

1

Create your ECAS Account

2

[Register or update your profile](#)

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Figure 59: Logged in users without Expert profile

"Register or update your profile" opens the "Import/create Expert Profile" page (see Figure 60: Import/Create Expert profile).

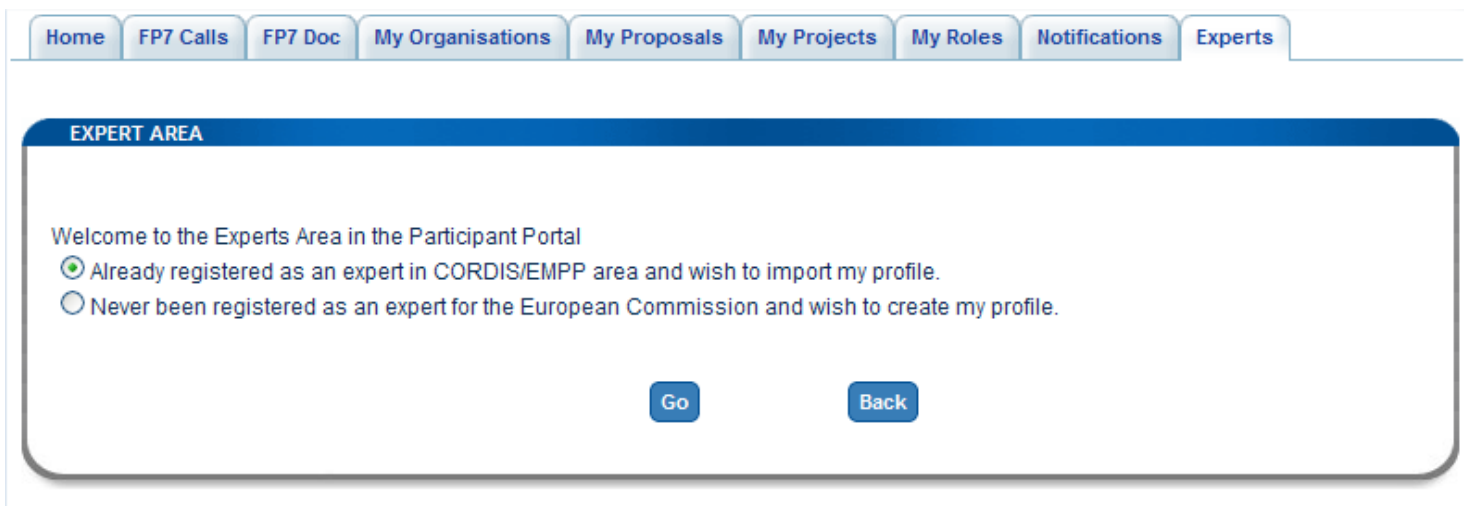


Figure 61: Import/Create Export profile

If "Never been registered as an expert ..." is selected, by clicking the [Go] button it opens the following page in the Participant Portal (see Figure 62: Create your profile)

The [Create profile] button opens EMPP where the user can define his profile (see Figure 63: EMPP).

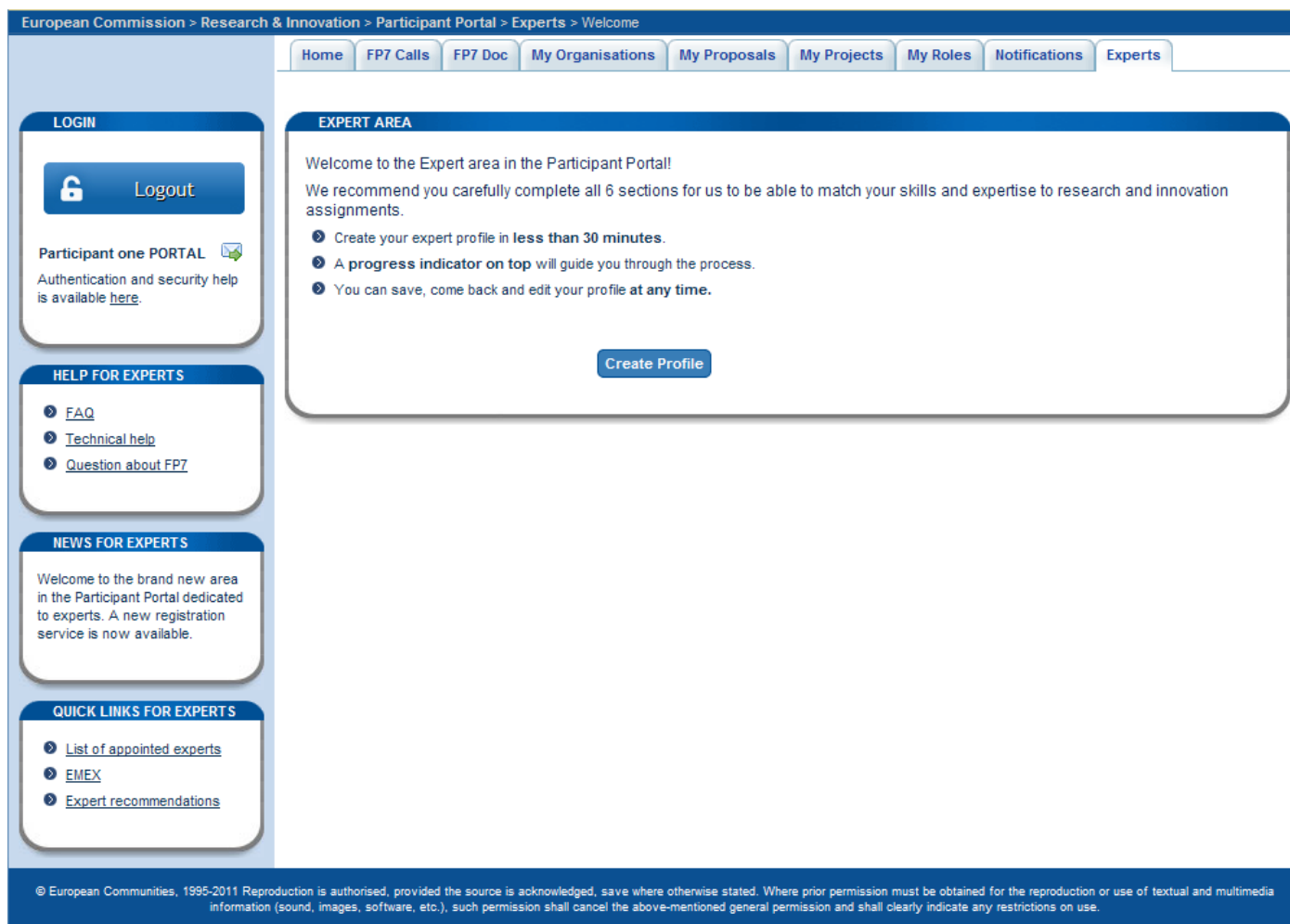


Figure 62: Create your profile

PERSONAL details	LANGUAGES	EDUCATION	AREA of expertise	PROFESSIONAL experience	DATA privacy
-------------------------	-----------	-----------	-------------------	-------------------------	--------------

Welcome

Candidature number
EX2011D095598

0/6 Status
Invalid

Personal Details

Languages

Education

Area of Expertise

Professional Experience

Data Privacy

Questions?

FAQ

Contact

Personal Details

Let us know who you are.

i We respect your privacy. You can consult our privacy statement [here](#)

Title	Mr. <input type="button" value="v"/>
First name	<input type="text"/>
Family name	<input type="text"/>
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female
Date of birth <small>(dd/mm/yyyy)</small>	<input type="text"/>
Nationality	Select... <input type="button" value="v"/>
Second nationality <small>(if applicable)</small>	Select... <input type="button" value="v"/>

Contact Details

Let us know how to contact you and where to send any documentation

i e-mail is the main form of communication, although we may need to get in touch by other means.

e-mail address <small>If you want to change this email, please update your ECAS account.</small>	Bernard.MAHIEU@ext.ec.europa.eu
Street name and number	<input type="text"/>
Town/City	<input type="text"/>
Country	Select... <input type="button" value="v"/>
Post code	<input type="text"/>
Use a different address for correspondence	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Figure 63: EMPP

If " *Already registered as an expert in CORDIS and wish to import my profile* " is selected, by clicking the [Go] button it opens the Expert profile import (see Figure 64: Import Expert profile from CORDIS).

2.11.2.1 Import Expert profile from CORDIS

The user has to enter his user name and password **previously used in CORDIS**

Home FP7 Calls FP7 Doc My Organisations My Proposals My Projects My Roles Notifications Experts

EXPERT AREA

Login to CORDIS

Please enter your CORDIS username:

Please enter your CORDIS password:

Import Profile

Forgot the username and/or password? Click [here](#)

Back

duction is authorised, provided the source is acknowledged, save where otherwise stated. Where prior permission must be obtained for the reproduction or use of textual and multimedia (sound, images, software, etc.), such permission shall cancel the above-mentioned general permission and shall clearly indicate any restrictions on use.

Figure 64: Import Expert profile from CORDIS

If the entered data is OK, you can click the **[Import profile]** button, in order to import his data from CORDIS.

If the import is successful, the exported Expert profile is displayed.

If the manual import cannot be processed due to various reasons then the user is presented with the following message:

"We are sorry but your profile cannot be imported at this time. Please try again later. If the problem persists, please contact the [Help-Desk](#) (hyperlink to eFP7 Service Desk form)."

If you forgot your user name and/or password, you can recover them by clicking the [Click here](#) hyperlink and be directed to the password/user name recovery (see Figure 65: Recover user name /password from CORDIS)

The **[Back]** buttons goes back one step up.

2.11.2.2 Recover CORDIS profile

Home My Organisations My Proposals My Projects My Roles My Notifications FP7 Documentation FP7 Calls Experts

Support

WELCOME EXPERTS

Please enter the email address that was declared on your CORDIS profile. You will receive an email shortly with the link to access your expert profile.

Email registered on CORDIS:

Send Back

Figure 65: Recover user name /password from CORDIS

You have to enter your email address recorded in CORDIS. By clicking on the **[Send]** button, the application requests CORDIS to send an email with a link allowing the user to recover his CORDIS user name and password. The mail is sent to your mailbox associated with your ECAS account. A copy of this mail can also be found in the **My Notifications** tab.

If the email address is not valid then an error message "*Invalid email address. Please check the email address provided to CORDIS.*" is displayed.

The **[Quit]** button is used to return to home page for not logged in experts (see Error! Reference source not found.)

When the Expert profile is imported from Cordis you are redirected to the Expert Profile page (see **Error! Reference source not found.**)

2.11.3 Logged users with Expert profile imported from Cordis

When the user logs in for the **first time** in the PP (expert area) and if he uses, in ECAS, an email address already registered on his CORDIS profile then his EMPP profile will automatically be imported and associated with his ECAS account

When the Expert profile of a new EMPP user has been automatically imported from CORDIS, then the following portlet is displayed in the **"Expert"** tab (see **Error! Reference source not found.**)

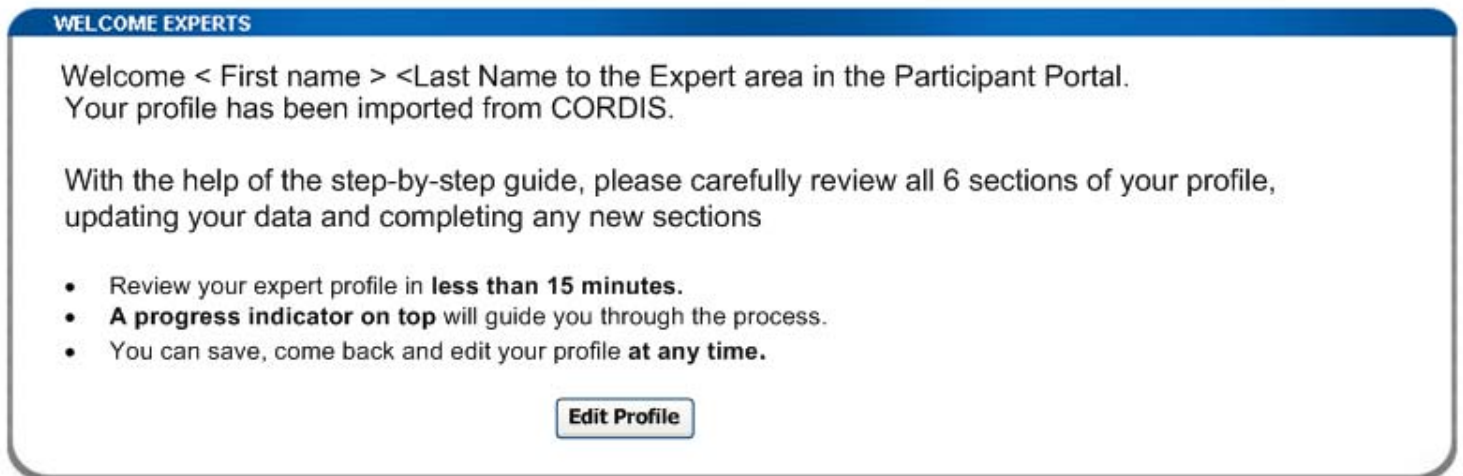


Figure 66: Expert profile after import from CORDIS

The [\[Edit profile\]](#) button opens EMPP and takes the expert to the 'personal details' page and users review all screens to edit the profile.

2.11.4 Logged in users with Expert profile defined in EMPP

When logged experts open the **"Expert"** tab then the following portlet is displayed

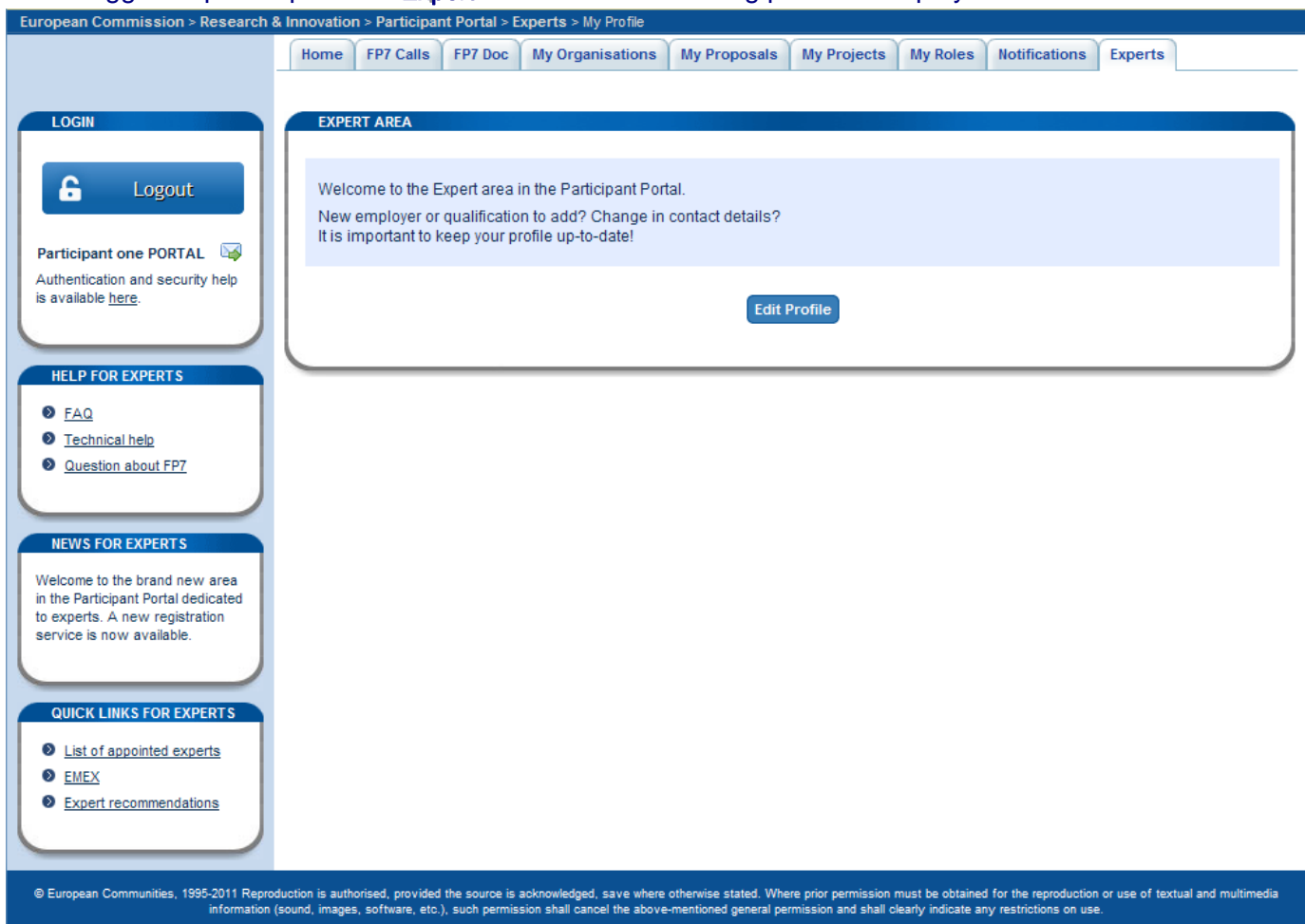


Figure 67: Expert profile in PP

The **[Edit profile]** button opens EMPP and takes the expert to the 'personal details' page (see Error! Reference source not found.)

2.12 Logged in users with JTI Representative or Member State Representative role

Through the **"Expert"** tab , EMPP will be used to provide access to the database of experts for users that have the following roles:

- Member State and countries associated to the Framework Programme contact points (representatives of the Member States and FP Associated Countries)
- JTIs contact points (representatives of JTIs)

Member State and Associated Country contacts are able to search through the group of experts that have explicitly allowed their profile to be made available to them, while JTI contacts will be able to search through the group of experts that have explicitly allowed their profile to be made available to them.

2.13 RSS

2.13.1 What is the RSS format?

RSS is a data presentation format facilitating the automated broadcast of information streams to Internet users. It also facilitates the syndication of content by giving other web sites the opportunity to reproduce such data, in full or in part, with ease.

With the RSS format there is no need to visit your favourite sites one by one to receive news from them; all you have to do is enter their RSS information stream into a compatible program and all your news sources will appear on a single screen!

In this way, by receiving Research Participant Portal information streams you can read the latest news published on our site on your computer screen without even having to visit our homepage.

2.13.2 How to access RSS feeds

There are several ways to receive information streams published by Research Participant Portal on your computer.

You can:

- use your e-mail application to consult this information source while reading your e-mails
- use your Internet browser to display the various newsfeeds in the form of a homepage
- use specialist RSS information stream aggregation software, known as an RSS reader or news aggregator or even read information streams on your Smartphone, PDA or pocket PC connected via Bluetooth to a GRPS mobile phone.

Whichever method you choose, you must register the URL of each newsfeed you wish to receive in the chosen software. This is a very simple operation - often it only takes a click of your mouse

indeed, most sites broadcasting information streams display a small icon on their RSS or XML pages. By clicking on the icon, your software application will recognise the information stream automatically and add it to your content aggregation list.

2.13.3 What do they look like?

For a first look at a newsfeed, without installing anything on your computer, you can use an online RSS reader which can read any RSS feed. Open a new window in your browser and enter one of the following URLs in the address field:

- [RSS Feed - FP7 Call Latest information](#)
- [RSS Feed - Recently published FP7 calls](#)

This is what a Research Participant Portal RSS feed looks like. If you wish to view another feed, simply enter its address in the address field. Now you can move on to the next step by installing a real content aggregation tool.

There are content aggregators to suit all users and all platforms; many are available free of charge.

2.13.4 Step by step

2.13.4.1 How can I read RSS feeds?

You will need a news reader to check the feeds you subscribe to and let you view headlines and links to newly published content. See below for details of how to get a reader if you don't currently have one

RSS feeds, on this site, are indicated by orange icons next to the title of a specific RSS feed.

Clicking the icon will take you to a page that describes the feed in greater detail. From there you can click a link to open the feed window. Copy and paste its URL into your newsreader to subscribe.

Some browsers including Internet Explorer 7+, Firefox, Opera, Safari and Chrome, automatically support RSS and do not require you to paste the feed URL into a separate reader.

If you have difficulties subscribing to a feed, please refer to the instructions that come with your reader.

When new content is published, you can use the reader to scan headlines and click through to our web site to view the full version of the article or feature.

2.13.4.2 How do I get a news reader?

There are many different versions of newsreaders, some accessed using a browser and some which are downloadable applications. Deciding which one to use is a matter of personal choice. Different readers work on different operating systems, so you will need to choose one that will work with your computer.

Below is a list of popular readers that you may wish to use:

Windows:

- [FeedException](#)
- [Newzcrawler](#)

Mac OSX:

- [NetNewsWire](#)

Web:

- [Bloglines](#)

- [Newsgator](#)
- [Google Reader](#)
- [How do I unsubscribe from an RSS feed?](#)

Please refer to the instructions that come with your browser or newsreader if you would like to unsubscribe from an RSS feed.

2.13.4.3 Webmasters

Content contained in Research Participant Portal RSS feeds can be added to websites a number of different ways. Each method for displaying the RSS feed has pros and cons associated with it. Webmasters will need to determine which option will best meet their hosting and technology needs.

Using JavaScript to Display RSS:

JavaScript is the easiest way to display RSS feeds on a website. There are a number of sites that will allow you to generate code that can be inserted into a website. The JavaScript will auto-update, showing the latest headlines as the feed is updated. Each time a visitor visits the website the JavaScript pulls the data from the feed. Often, the various scripts can be customized so that the look of the feed can be made to match a specific web site feeds with hopes that the search engines will devour and spider the contents, you will be disappointed. When JavaScript is used to display RSS feeds, search engines do not actually "see" the contents of the feed, meaning that the search engines will not index the contents of the feed within the website.

Feedroll:

Feedroll is a free service for syndicating RSS and ATOM news feeds on your website. Simply select a feed, customize the design, then copy and paste the code provided onto your page - [Feedroll](#)

Using PHP to Display RSS:

PHP is a slightly more complex solution for displaying RSS. Like JavaScript, as the contents of the feed updates, the web page contents will update as the page is refreshed. The benefit of using PHP to display RSS is that the contents of the feed displayed with the webpage can be spidered and indexed by search engines. The result is a feed that always displays the most current information from the RSS feed and the web page content is considered search engine spider and robot-friendly.

rss2html.php:

The rss2html.php script allows users to create web pages that will always display the most current information from the RSS feed, and because the resulting page is pure HTML, it will be in a format friendly to search engine robots. Using rss2html.php, webmasters can customize the format and look of the web page created from the feed. The RSS feed's contents can easily be integrated into an existing website's theme. The rss2html.php script parses the RSS file, extracts the pertinent information, formats it, and serves it up as regular HTML - [Feedforall](#)

Using ASP to Display RSS:

ASP is similar to PHP. The free ASP/ASP.NET scripts can be used to convert RSS feeds into HTML and display on ASP/ASP.NET web-server.

rss2html.asp:

ByteScout has implemented a guide for displaying of RSS/XML feed using free RSS2HTML.ASP script in ASP or ASP.NET environment. This script can be used free of charge on any ASP or ASP.NET web-server and generate HTML from RSS feed. This free ASP script uses MSXML to load RSS feed from URL and display it. You can use it as a standalone or call from script on HTML page to generate HTML content from RSS feed and then display on your HTML page - [Bytescout](#)

RssFeed:

RssFeed is an open-source custom ASP.NET server control that displays the contents of a specified RSS feed in an ASP.NET web page - [RssFeed](#)

If PHP or ASP is used to update feeds, the website will have free fresh, relevant content each time the feeds referenced are updated.

Export RSS to HTML:

If you wish to dress up the feed's appearance you can use a template exporting the feed as HTML or an HTML table. Publishers can incorporate exported tables into an HTML template using a server-side include. Each time the feed is updated, the feed will need to be exported to HTML and uploaded along with the feed. Though this only takes a few moments, exporting RSS to HTML does require webmaster intervention to update the content. The end result, though, is a complete web page with an RSS feed in it that will be search engine-friendly.

FeedForAll:

FeedForAll allows users to export RSS feeds from RSS to HTML. The look of the HTML can be modified to match an existing website's design - [Feedforall](#)

Using Services:

There are a number of services available that host and display RSS feeds, in many cases free of charge. Because these services operate on a different domain server there is little benefit to end-users displaying their feeds in this fashion. That said, the services are generally free of charge, so you get what you pay for.

RSS2HTML.com:

Select a layout, colour scheme and enter the URL of the feed. A web page URL will be generated that will display the feed in the selected scheme - [RSS2hTML](#)

FeedBurner:

FeedBurner provides a number of online services. Among them is a service that displays RSS feeds on a website - [Feedburner](#)

Using XSL to Display RSS:

Although using XSL and CSS style sheets to display XML directly is easy to understand in theory, it is rather tricky to implement in the real world and is very tough for novices to use successfully. Webmasters must be fairly familiar with CSS and XSL to have the formatting work well, and webmasters then have to address browser incompatibilities and exceptions. As a result, not a lot of resources or services yet exist to display RSS using XSL.

Using highly targeted feeds, webmasters can enhance their websites with themed content. Ultimately, providing relevant, educational or newsworthy information from reputable related sources will establish expertise in a specific area.

2.13.5 Research Participant Portal RSS feeds

In the Participant portal, you have to open the "FP7 Calls" tab . In the "Stay Tuned" element (on the left column) click on the RSS icon (see Figure 68: Stay tuned - RSS).

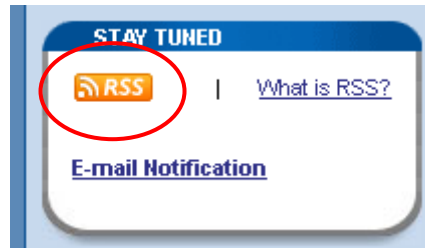


Figure 68: Stay tuned - RSS

If you select the RSS orange icon, you will be presented with a choice of RSS feeds that you can subscribe to (see Figure 69: RSS - Choose your feed)

[RSS Feed - FP7 Call Latest information](#)

[RSS Feed - Recently published FP7 calls](#)




Figure 69: RSS - Choose your feed

In the Subscription page, you can filter the content of the Common Feed list (depending on your browser. See Figure 70: Feed Subscription on Internet Explorer and Figure 71: Feed Subscription on Mozilla using Google)

Research Participant Portal - FP7 Calls - Latest information

You are viewing a feed that contains frequently updated content. When you subscribe to a feed, it is added to the Common Feed List. Updated information from the feed is automatically downloaded to your computer and can be viewed in Internet Explorer and other programs. [Learn more about feeds.](#)

 [Subscribe to this feed](#)

Displaying 3 / 176

All 176

Sort by:

▼ Date
Title

Filter by category:

Call for Proposals 176
Capacities 21
Cooperation 74
● Euratom 3
Ideas 10
People 68

Nuclear Fission and Radiation Protection

08 July 2011, 00:00:00 →

Identifier: FP7-Fission-2011

Specific programme: Euratom

Theme(s): Nuclear Fission and Radiation Protection

Type: Call for Proposals

Publication Date: Fri, 20 Aug 2010

Deadline: Thu, 7 Apr 2011 00:00:00 (Brussels local time)

Budget: 41.000.000,00 €

Modification Date: Fri, 8 Jul 2011

Latest information:

Flash Information on the Evaluation Results available under "Additional documents"

Figure 70: Feed Subscription on Internet Explorer



Research Participant Portal - FP7 Calls - Recently published Calls

FP7 calls for proposals and calls for tenders published in Research Participant Portal since 12 May 2011.

<http://ec.europa.eu/research/participants/portal/rss/call/fp7/newest>

Google offers two different ways to keep up-to-date with your favorite sites:

Your **Google homepage** brings together Google functionality and content from across the web, on a single page.

Google Reader makes it easy to keep up with the latest content from a large number of sites, all on a single reading list.

Add to Google homepage

or

Add to Google Reader



© 2010 Google - [Help](#)

Figure 71: Feed Subscription on Mozilla using Google

3 Deep linking

3.1 INTRODUCTION

This chapter gives an overview of the url contracts to be used for deep linking to participant portal pages from an external source.

Currently deep linking has been implemented on the FP7 calls in Participant Portal. In future deep linking can be implemented to directly reach other pages in Participant Portal. This chapter will be updated when new url contracts are known.

3.2 EXTERNAL PATH

From outside Participant Portal all the links will be referred by the absolute path: <http://ec.europa.eu/research/participants/portal>

3.3 FP7 CALLS - LATEST INFORMATION ON CALLS PAGE

http://ec.europa.eu/research/participants/portal/page/fp7_calls will display the latest information on calls.

3.4 FP7 CALL LISTS

3.4.1 Specific programme call list:

http://ec.europa.eu/research/participants/portal/page/specific_programme will display the open calls list of a *specific programme*.

The value of the parameter *specific programme* can be:

- cooperation
- ideas
- people
- capacities
- euratom

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

3.4.2 Specific programme call list with specific state:

http://ec.europa.eu/research/participants/portal/page/specific_programme&state=state will display the calls list of a *specific programme* and a certain *state*.

The value of the parameter *specific programme* is as described above. The value of the parameter *state* can be:

- open

- closed
- forthcoming

Example: <http://ec.europa.eu/research/participants/portal/page/ideas&state=closed>

3.4.3 List of calls with specific call type, state and/or theme:

http://ec.europa.eu/research/participants/portal/page/searchcalls?type=type&state=state&theme=theme_identifier will display list all calls that have a specific type, state and or theme. All combinations of the parameters can be used.

The value of the parameter *type* can be:

- cfp (calls for proposals)
- cft (calls for tender)
- all

Example: <http://ec.europa.eu/research/participants/portal/page/searchcalls?type=cfp>

The value of the parameter *state* can be:

- open
- closed
- forthcoming
- all

Example: <http://ec.europa.eu/research/participants/portal/page/searchcalls?state=forthcoming>

The value of the parameter *theme_identifier* can be:

- the official abbreviation of the theme as listed in the table below. The theme parameter can be used in upper or lower case.
- all

Example: <http://ec.europa.eu/research/participants/portal/page/searchcalls?theme=energy>

3.4.4 Programme Theme Abbreviation

Programme	Theme	Parameter value
Cooperation	Health	HEALTH
	Food, Agriculture and Fisheries, and Biotechnology	KBBE
	Information and Communication	ICT

Programme	Theme	Parameter value
	Technologies	
	Nanosciences, Nanotechnologies, Materials and New Production Technologies - NMP	NMP
	Energy	ENERGY
	Environment (including Climate Change)	ENV
	Transport (including Aeronautics)	TPT
	Socio-economic sciences and Humanities	SSH
	Space	SPA
	Security	SEC
	General Activities	GA
	Joint Technology Initiatives (Annex IV-SP1)	SP1-JTI
	Article 169 (Annex IV-SP1)	SP1-169
Ideas	ERC	ERC
People	Marie Curie Actions	PEOPLE
Capacities	Research Infrastructures	INFRA
	Research for the benefit of SMEs	SME
	Regions of Knowledge	REGIONS
	Research Potential	REGPOT
	Science in Society	SiS
	Support for the coherent development of research policies	COH
	Activities of International Cooperation	INCO
	Article 169 Joint (Annex IV-SP4)	169-SP4
EURATOM	Fusion Energy	FUSION

Programme	Theme	Parameter value
	Nuclear Fission and Radiation Protection	FISSION

Table 4: List of theme identifiers

The above parameters can be used in all possible combinations, examples:

- Open calls (for proposals and calls for tenders) for the theme: Support for the coherent development of research policies:

<http://ec.europa.eu/research/participants/portal/page/searchcalls?state=open&theme=coh>

- Calls for tenders for the theme: Information and Communication Technologies:

<http://ec.europa.eu/research/participants/portal/page/searchcalls?type=cft&theme=ict>

- Closed calls for proposals for the theme: Food, Agriculture and Fisheries, and Biotechnology:

<http://ec.europa.eu/research/participants/portal/page/searchcalls?type=cfp&state=closed&theme=kbbe>

3.4.5 List of calls of a specific theme and state in the specific programme pages:

<http://ec.europa.eu/research/participants/portal/page/programme&state=state#theme>

identifier positions you to the calls of the corresponding theme in the FP7 call page of the corresponding programme and state.

The value of the *parameter programme* is as described above.

The value of the parameter *state* can be:

- open
- closed

The value of the parameter *theme_identifier* is as listed in **Table 4: List of theme identifiers**.

Example: <http://ec.europa.eu/research/participants/portal/page/capacities&state=closed#ict>

3.5 CALL DETAILS

http://ec.europa.eu/research/participants/portal/page/fp7_calls?callIdentifier=call identifier

will display a specific call details page. *Call Identifier* is a mandatory parameter and contains the call identifier as it is displayed in the call lists and call details in Participant Portal.

Example:

http://ec.europa.eu/research/participants/portal/page/fp7_calls?callIdentifier=FP7-PEOPLE-2011-CIG

The url: <http://ec.europa.eu/research/participants/portal/page/programme?callIdentifier=call identifier> can also be used.

The value of the parameter *specific programme* is as described above:

The value of the parameter *call identifier* is as described above

Example:

<http://ec.europa.eu/research/participants/portal/page/capacities?callIdentifier=FP7-SCIENCEIN-SOCIETY-2011-1>

3.6 COFUND PAGE

The url: <http://ec.europa.eu/research/participants/portal/page/cofund> will display the cofunded calls page.

3.7 SEARCH CALL PAGE

The url: <http://ec.europa.eu/research/participants/portal/page/searchcalls> will display the search call page.

3.8 RSS Feeds

The url: <http://ec.europa.eu/research/participants/portal/rss/call/fp7/newest> will display the RSS feed page for recently published FP7 calls.

The url: <http://ec.europa.eu/research/participants/portal/rss/call/fp7/latestinfo> will display the RSS feed page for the latest information on FP7 calls.

4 GLOSSARY

Term	Definition
FP7	7th Framework Programme of Research and Technological Development of the European Commission
CIP	Competitiveness and Innovation Programme
Coordinator	The participants' coordinator in a consortium
EC Officer	European Commission's Project/Scientific Officer or Administrative Officer representing the European Commission during the negotiations.
NEF	The negotiation process is supported by the online Negotiation Facility tool (NEF), an electronic implementation of the negotiation forms used to exchange information between the participants and the European Commission. NEF provides the main channel for interactive communication between the Consortium and the EC Project Officer as all necessary administrative and financial data about the projects and the participants is collected and agreed through NEF.
Negotiation	Concerns one stage of the procedure applicable immediately after a favourable evaluation. The negotiation is a process during which the details about the proposal are agreed between the participants and the Commission. The participants of proposals that may be selected will receive a request to provide further information Negotiation covers three areas : <ul style="list-style-type: none"> - scientific negotiation - financial negotiation - contractual negotiation
Negotiation session	A period during which the coordinators are allowed to provide changes on their proposals
PIC (Participant Identity Code)	Participant Identity Code (The unique ID of an organisation) Unique Identifier for an organisation – obtained through URF registration & used in each step of the process to identify an organisation. The Temporary PIC received directly after URF registration and Validated PIC (VS has validated the data & legal documents of the organisation) are the exact same number: 9 digits starting with 99...and will remain the same during the entire existence of its organisation.
URF	Unique Registration Facility: a service providing unique registration for participants in the Framework Programmes at proposal and contract stages. It encompasses a set of rules for data acquisition and validation.

LEAR	<p>A legal signatory of each legal entity will be asked by the Commission to appoint one person (the so-called LEAR - Legal Entity Appointed Representative) for being the correspondent towards the Commission on all issues related to the legal status of the entity.</p> <p>The LEAR provides the Commission with up-to-date legal and financial data (including supporting documents, where necessary) and commits to maintain the account so that it is up-to-date enabling future use for grants and other transactions between the entity and the Commission research (and other) programmes.</p> <p>This person is chosen by the organisation itself in order to ease the communication with the E.C. & avoid double registrations. Only the LEAR may do a Change request (of his organisation's data) through URF and submit legal documents through URF.</p>
Status of validation	Indicates that data provided in a form have been validated by the Commission.
Participant Portal	<p>The Participant Portal hosts services that facilitate the monitoring and the management of the participants' proposals and projects.</p> <p>It is a secure Internet site that ensures adequate authentication and confidentiality mechanisms, based on the European Commission Authentication Service (ECAS).</p>
Participant	<p>Any entity, legal or otherwise, that has some dealings with FP or CIP programmes. For example: Legal Entity as partner to a grant agreement, department or institute of such, person working in participating organisation and relevant to the programmes, expert. Participants are external to the Commission.</p> <p>In order to structure this participant concept into further details, a clear distinction should be made between:</p> <p>The "<i>executing participant</i>" proposing and executing an action (e.g. a department within a university or an independent expert)</p> <p>The "<i>participating legal entity</i>" endorsing the responsibility of this proposition and execution (e.g. a university or the expert as a legal natural person). "A participating legal entity is any Legal Entity that has participated, participates, or will participate in the programmes of FP and CIP, whether in Grant Agreements, contracts or proposals only" (List of Agreements PDM/URF WG, as of 14th January 2007).</p> <p>"<i>Contacts</i>" by the executing participants and participating legal entities for exchange of information (e.g. a professor within the university department, the financial officer of the university, an expert him/herself, etc.). Contacts typically play roles within participating entities and may have a specific address.</p> <p>It is worth noting that the "executing participant" and the "participating legal entity" can be the same entity (e.g. a private company) or that several legal entities could collectively endorse the responsibility for a single executing participant (case of a consortium).</p>

