

Participant Portal Electronic cost reporting

**“Jetzt wird abgerechnet!”
Kostenreporting im 7. Rahmenprogramm**

FFG

Wien

06. Oktober 2011

**European Commission
Research & Innovation
Cornelius Schmaltz**

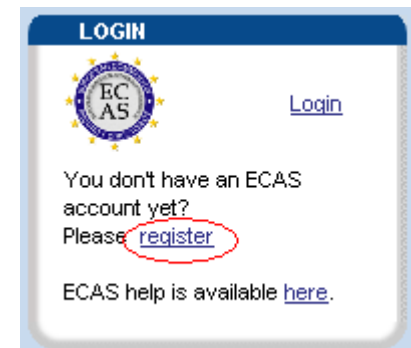
Agenda

- Participant Portal
- Identity and Access Management in the PP
- Submission of forms C
 - Process in FORCE
 - Main differences in NEF form C
- Future developments

Research Participant Portal

- Offers external stakeholders (participants, LEARs, coordinators, reviewers) a **unique entry point** in handling grant-related actions, based on a
 - ▶ Single sign-on (ECAS)
 - ▶ Role-based authorisation
- Result: personalised services on the Portal
- Brings homogeneity and better service integration for grant management
- Transparency

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



Research Participant Portal

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



The screenshot shows the Research Participant Portal website. The browser window title is "Research Participant Portal - Windows Internet Explorer" and the address bar shows "http://ec.europa.eu/research/participants/portal". The website header includes the European Commission logo and the text "Participant Portal Research & Innovation - Participants". Navigation tabs include "Home", "My Organisations", "FP7 Calls", and "Support".

LOGIN

Login

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 V3.1.1 (07/2011)

- 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

WELCOME

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.

What does it offer today?

- 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**.
- You can search for the unique identifier of your organisation, **register your organisation** or **provide updates of your organisation's data**.
- Depending on your roles in projects and organisations, you can **assign or revoke access rights to organisation and project data** for other persons.

Forthcoming functionalities

- 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.
- Direct access to FP7 related information and documentation.

How does it work?

Are you a new user? +

- 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.
- After login, the actual homepage will be replaced by a new one displaying all the processes your user profile can access.
- 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...
- When you go into the details of an organisation, project, role etc... a new contextual menu will guide you through the additional actions.

Services on the Participant Portal

- Call publication
- FP7 documentation (soon)
- URF – participant registration, managing data of legal entities
- Grant negotiation, amendments (NEF)
- Reporting (FORCE, SESAM - RTD), (NEF - INFISO)
- Proposal submission (pilot mid-2011)
- Expert services (EMPP – end 2011)

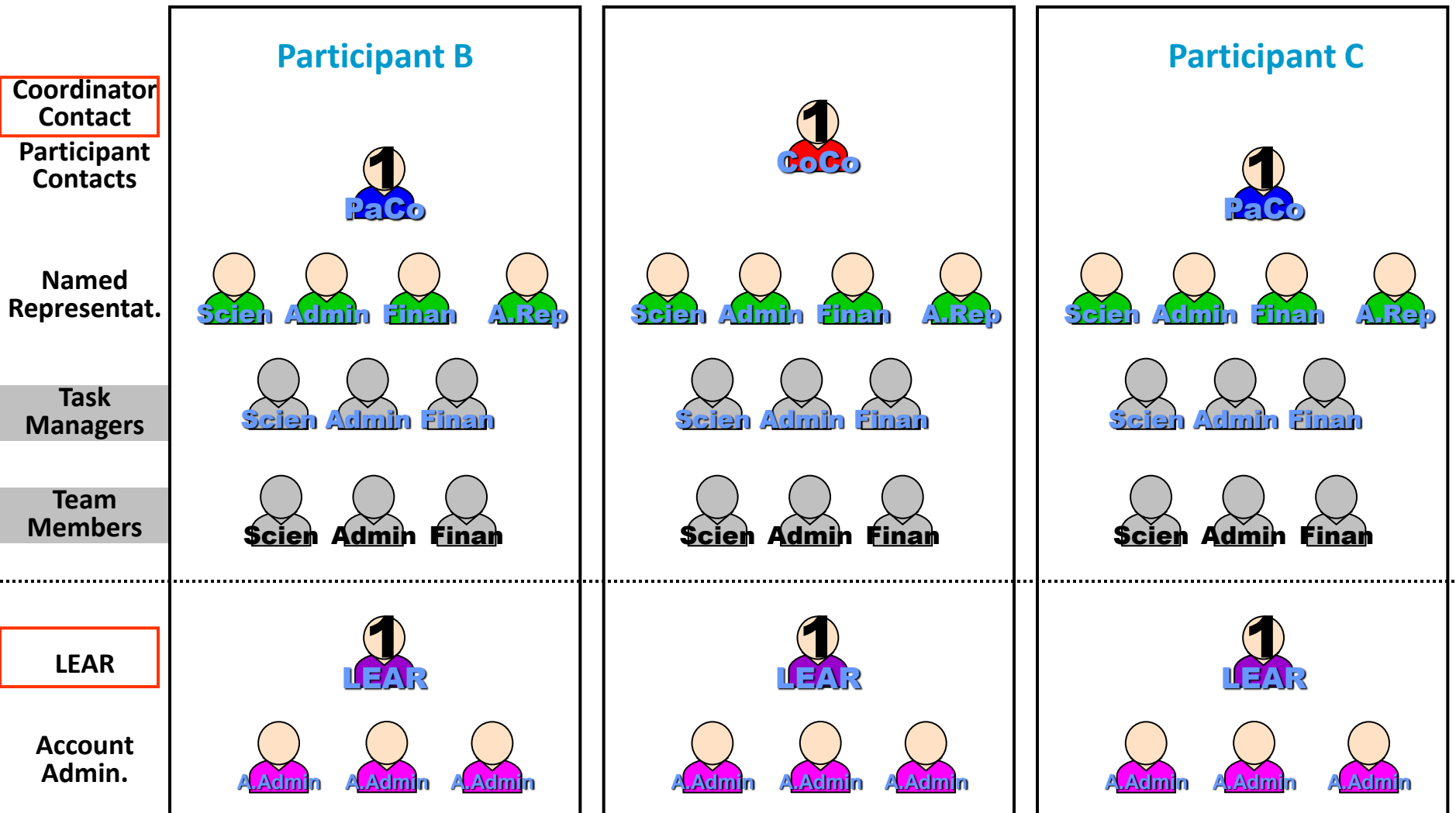
Roles on the Portal

Basic principles

- ECAS login: personal e-mail is unique identifier.
- PIC: identifier of an entity.
- Single sign-on leads to the different grant-related actions.
- Initial roles provisioned from proposal submission
- COM control on two roles: LEAR + coordinator contact
 - ▶ Coordinator contact changes managed through NEF by the PO/Legal Officer (under 'Portal coordinator contact person').
- Delegation and assignment of roles by the consortium itself:
 - ▶ The Coordinator Contact can change the Participant Contact roles in the Portal.
 - ▶ Further representatives for the entity can be named by the Coordinator and Participant Contacts for a given entity.

Role management on the Portal Up to November 2011

Coordinating Participant A



Role management on the Portal from November 2011

Project

Coordinating Participant A

Participant B

Coordinator Contacts

Participant Contacts

Task Managers

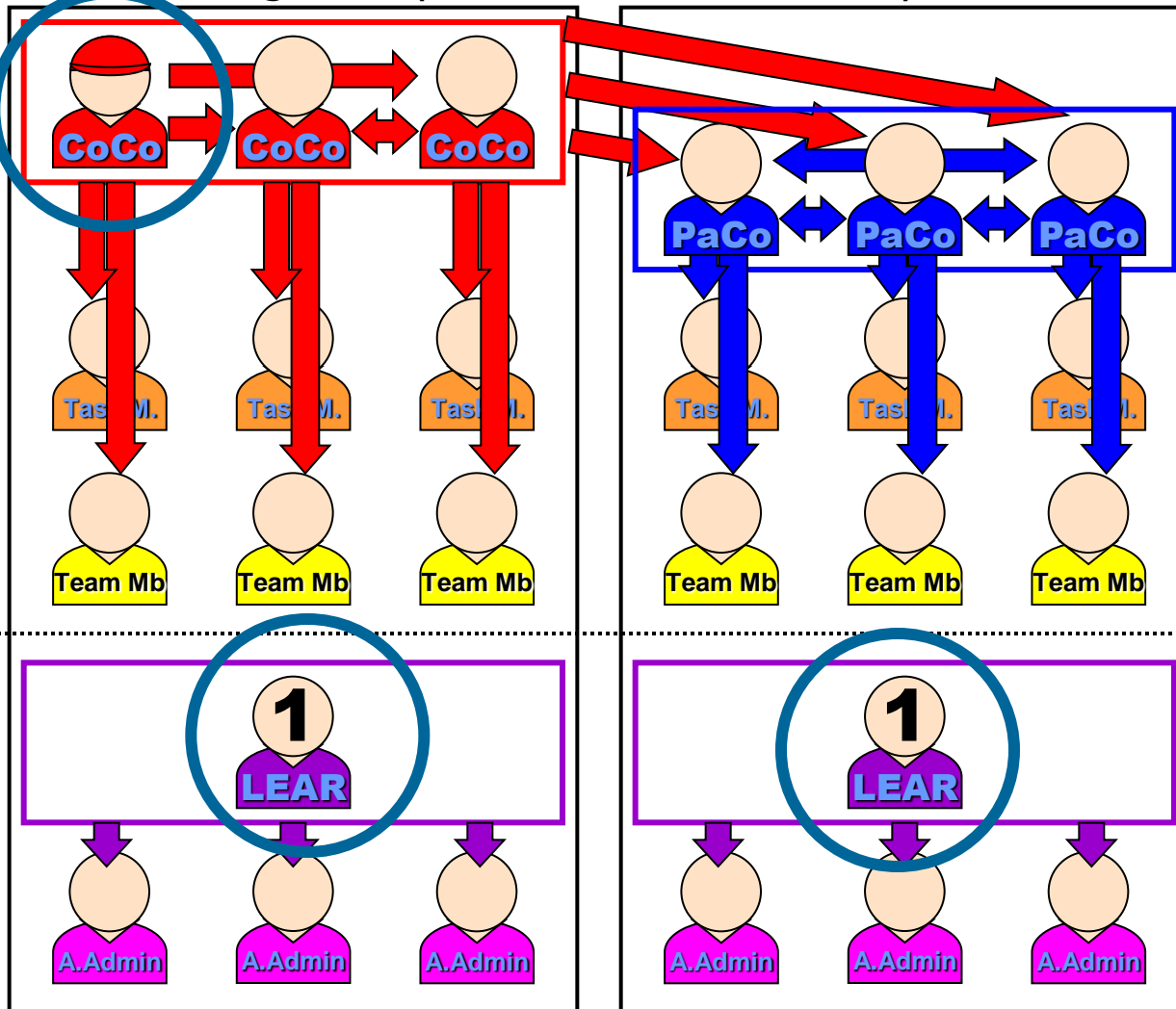
Team Members

 = Commission Control

Organisation

LEAR

Account Administrator



Role management on the Portal from November 2011

- No more different scopes of named representatives/task managers
 - ▶ Team Member = Read-only
 - ▶ Task manager = Modify
 - ▶ PaCo = Submit (forms C) to coordinator
 - ▶ CoCo = Submit to Commission
- Up to three persons (in transition: more) Participant (Coordinator) Contacts per participant
- PaCo (and CoCo) of same participant can appoint (and revoke) each other
- Transition: Named representatives will be „promoted“ to PaCo/Coco
- LEAR has read-access and can ask Commission to revoke roles
- New roles for „reviewer“ and „rapporteur“

Personalized services after ECAS login

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

European Commission
RESEARCH - Participants

European Commission > Research > Participant Portal

Home | My Organisations | My Projects | My Roles | My Notifications | FP7 Documentation | FP7 Calls | Support

LOGIN

 [Change Password](#)
[Logout](#)

John Doe

- Login help is available [here](#)
- Portal registration demo is available [here](#)

PROCESSES

Manage Organisations

Search an organisation → Register an organisation → Manage organisation data

Identify Opportunities

Read FP7 related documentation → 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

FAQ

- See the [online user manual](#)
- You can consult [FAQS](#)
- Watch the demonstration of the Participant Portal: - [Introduction](#)
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WHAT'S NEW

Participant Portal V2.2 (10/2010)

- Many nice updates

[read more](#)

QUICK LINKS

 [FP7 homepage](#)

 [Research site of the EC](#)

Home My Organisations My Projects **My Roles** My Notifications FP7 Documentation FP7 Calls Support

ORGANISATION ROLES LIST

→ **Organisation role:** for LEARs / Account Administrators

Show 10 entries Search:

PIC	Organisation Name	Role	Nominations
999646693	COUNCIL FOR SCIENTIFIC AND INDUSTRIAL RESEARCH	Account Admin.	

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

PROJECT ROLES LIST

Show 10 entries Search:

Acronym	ProjectID	Program	Role	PIC	Nominations
AgroCos	245336	FP7	Administrative and Legal Representative	999919845	
ARASCOM	222620	FP7	Participant Contact	999992401	
BONE	216863	FP7	Participant Contact	999910630	

Showing 1 to 3 of 3 entries First Previous 1 Next Last

→ **Project roles:** all project-related roles of the person;
For LEARs: overview of the entity's projects and roles

Roles in a project

ROLES OF THE PROJECT: AGROCOS (245336)

Project Acronym: AgroCos Project ID: 245336

Show 10 entries Search:

Select	Role	Name	Email	Organisation	PIC
<input type="checkbox"/>	Participant Contact	LEPERE Jean-Jacques	jean-jacques.lepere@ext.ec.eu...	CTV	999919845
<input type="checkbox"/>	Administrative and Legal Representative	HUWAERT Christian	christian.huwaert@ext.ec.euro...	CTV	999919845
<input type="checkbox"/>	Admin Task Manager		bbalian@gmail.com	CTV	999919845
<input type="checkbox"/>	Legal Task Manager		bbarian@gmail.com	CTV	999919845
<input type="checkbox"/>	Admin Team Member	SANDHAR Aman	aman.sandhar@ext.ec.europa.eu	CTV	999919845
<input type="checkbox"/>	Admin Team Member		delete@asd.com	CTV	999919845
<input type="checkbox"/>	Legal Team Member	SANDHAR Aman	aman.sandhar@ext.ec.europa.eu	CTV	999919845
<input type="checkbox"/>	Legal Team Member		delete@asd.com	CTV	999919845
<input type="checkbox"/>	Financial Team Member	SANDHAR Aman	aman.sandhar@ext.ec.europa.eu	CTV	999919845
<input type="checkbox"/>	Financial Team Member		delete@asd.com	CTV	999919845

Showing 1 to 10 of 12 entries

First Previous 1 2 Next Last

Add + **Revoke Selected**

Only actors with the appropriate privileges in the project can add or revoke other roles. LEARs can *view* the roles within the organisation.

Nominate within the organisation: 'Add role'

ADD ROLE


Nominate Role on:

Project	Acronym: AgroCos	Project ID: 245336
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for:

* EMAIL ADDRESS (used to register in the Portal):

* ORGANISATION:

* ROLE GIVEN 

ADMIN
 LEGAL

* Mandatory field

Coordinator Contact

Edit Participant Contacts' details

PARTICIPANT CONTACTS OVERVIEW FOR ARASCOM (222620)

Coordinator

THE EUROPEAN ORGANISATION FOR THE EXPLOITATION OF METEOROLOGICAL SATELLITES (999619533)

Name: LEPERE Jean-Jacques

Participant Contacts

THE EUROPEAN ORGANISATION FOR THE EXPLOITATION OF METEOROLOGICAL SATELLITES (999619533)

Name: LEPERE Jean-Jacques

SISTEMAS RADIANTES F. MOYANO, S.A. (999593149)

Name:

COMMISSARIAT A L ENERGIE ATOMIQUE ET AUX ENERGIES ALTERNATIVES (999992401)

Name: HUWAERT Christian

SELEX SISTEMI INTEGRATI SPA (999949721)

Name: DE BOUVER Oliver

EADS DEUTSCHLAND GMBH (999991819)

Name:

UNIVERSITA DEGLI STUDI DI PERUGIA (999846319)

Name:

'My Projects' tab

European Commission > Research > Participant Portal

Home My Organisations **My Projects** My Roles My Notifications FP7 Documentation FP7 Calls Support

LOGIN

Change Password
Logout

Authentication and security help is available [here](#)
Portal registration demo is available [here](#)

PROJECT LIST FOR

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		
XXXXXXXXXX	FP7-PEOPLE-2009-RG	FP7	XXXXXXXX		Active	RD	FR

View project details

View roles in the project

Access to Financial Reporting

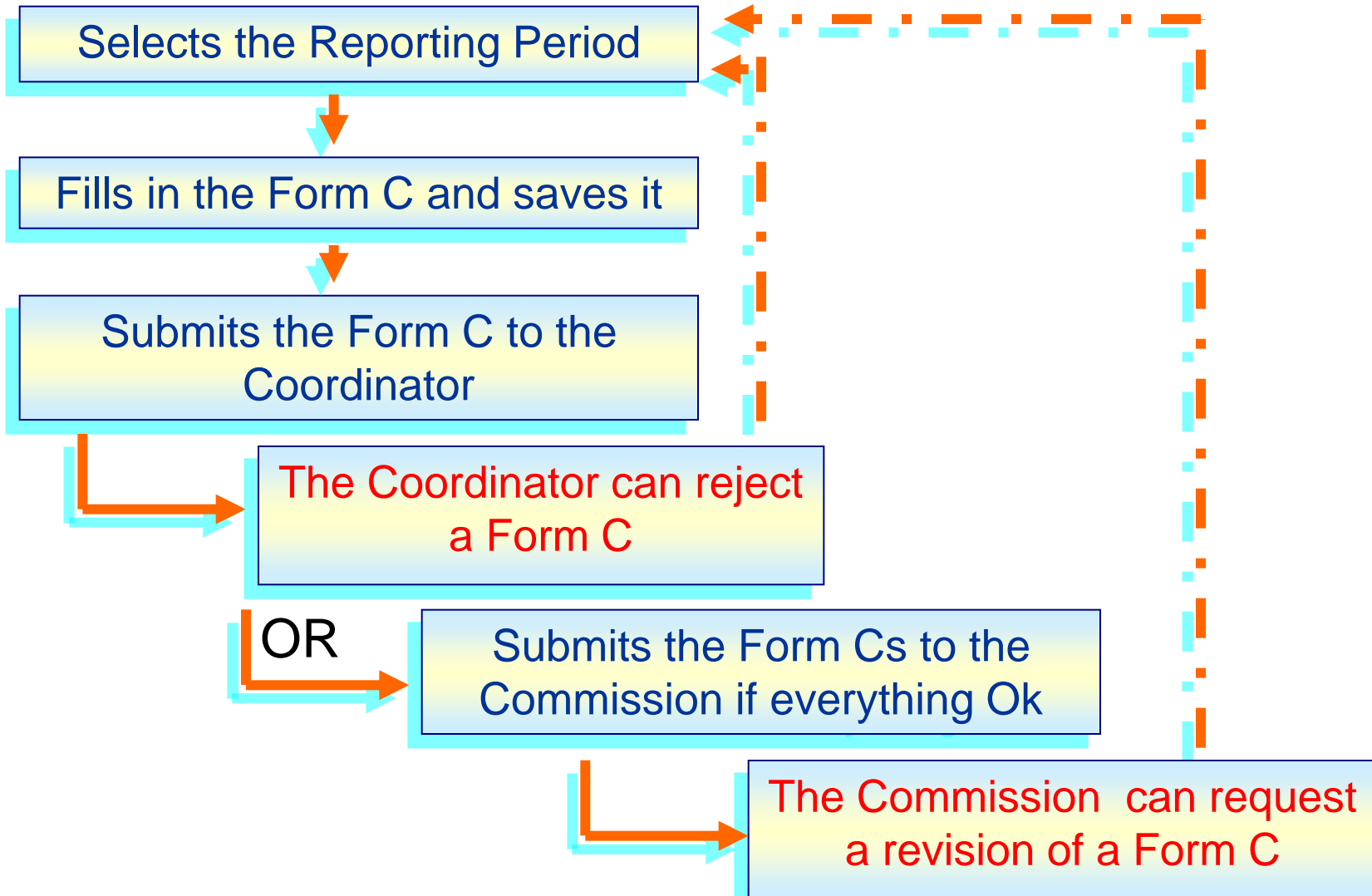
Key services offered by FORCE

- **The preparation of the FP-7 FORM Cs with updated and correct Contract information of each Beneficiary in the Project**
- **Printing of Forms C**
- **Electronic submission of FORM Cs to the Commission (signed paper version to be sent afterwards)**
- **Correction of Form Cs after refusal by Commission**
- **Form Cs are automatically transferred to internal Commission module to treat the Form Cs and to calculate the payment parameters**

Important issues to be considered

- **FORCE relies on contractual information encoded in the contract management system of the Commission**
- **Form Cs of new Beneficiaries will appear in FORCE only when the relevant amendment was signed by the Commission**
- **Indirect costs methods and funding scheme in FORCE are taken from the same Commission system**
- **For each Beneficiary the Form Cs contain the necessary 'intelligence' to ensure that:**
 - ▶ the **requested EC contribution does not exceed the maximum** that can be requested, taking into the applicable reimbursement rate for the different activities and your cost model/indirect cost methods
 - ▶ Only those activity columns can be filled in, in agreement with the Funding Scheme of your project

FORCE (Form C Editor): Workflow



Beneficiary screen

Project Information


General

Details

Reporting Period : no. 1 (from 01/01/2009 - to 30/06/2010)

Beneficiaries List ?

Reporting Period : no. 1 (from 01/01/2009 - to 30/06/2010) ▼

	Beneficiary	Beneficiary No.	Short Name	Status	Actions
	Legal name Coordinator	1	Short name Coord.	-	
		2		-	
→	Legal name Beneficiary 3	3	Short name Benef 3	-	
		4		-	
		5		-	
		6		-	
		7		-	
		8		-	
		9		-	
		10		-	

FORM C (upper part) (1) Read-only information about the Project and the Beneficiary

European Commission
RESEARCH - Form C Editor

Help | Close

Draft - Version: 1

Project Information

General Hide

Project Acronym :	AAAAA	Contract No :	111222
Contract version :	Grant (Proposal Version 1)	Framework :	FP7
Funding Scheme :	Combination of CP & CSA	Sub-Funding Scheme :	Integrating Activities / e-Infrastructures
Call Identifier :	FP7-INFRASTRUCTURES-2008-1	End Date (dd/mm/yyyy) :	28/02/2013
Start Date (dd/mm/yyyy) :	01/03/2009		

Details

Reporting Period : no. 1 (from 01/03/2009 - to 31/08/2010)

Form C

Beneficiary

Contractor's Legal Name	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Participant Identity Code	11111111
Short Name	XXXX	Beneficiary No.	1
Comment		Indirect Cost Method	Special Transitional Flat Rate
Lump Sums Used	<input type="checkbox"/>	Flat Rate for Indirect Costs %	60
Funding % for RTD activities	71		



Fill in FORM C : (2) Declaration of Eligible Costs

1. Declaration of eligible costs/lump sum/flat-rate/scale of unit (in €)

Eligible costs (in €)	Type of activities					Total (F)=(A)+(B) +(C)+(D)+(E)
	RTD (A)	Coordination (B)	Support (C)	Management (D)	Other (E)	
Personnel costs						0.00
Subcontracting [▲]						0.00
Other direct costs						0.00
Indirect costs						0.00
Access costs						0.00
Lump sums / flat-rate / scale of unit declared						0.00
Total						0.00
Maximum EC Contribution	0.00	0.00	0.00	0.00	0.00	0.00
Requested EC contribution						0.00

2. Declaration of Receipts (in €)

Did you receive any financial transfers or contributions in kind, free of charge from third parties?
 Or did the project generate any income which could be considered a receipt according to Art.II.17 of the grant agreement?

If yes, please mention the amount (in €)

3. Declaration of interest generated by the pre-financing (in €) (To be completed only by the coordinator)

Did the pre-financing you received generate any interest according to Art. II.19?

If yes, please mention the amount (in €)

4. Certificate on the methodology

Do you declare average personnel costs according to Art. II.14.1?

Is there a certificate on the methodology provided by an independent auditor and accepted by the Commission according to Art. II.4.4?

Name of the auditor Cost of the certificate (in €), if charged under this project

5. Certificate on the financial statements

Is there a certificate on the financial statements provided by an independent auditor attached to this financial statement according to Art. II.4.4?

Name of the auditor Cost of the certificate (in €)

6. Beneficiary's declaration on their honour

Name of the person authorised to sign this Financial Statement Date dd/MM/yyyy

Cancel

Save

Submit to coordinator



Third Parties (SC 10!) : Add Form C

Project Information

General Hide

Project Acronym : AAA	Contract No : 111111
Contract version : Information Letter No. 1 (Proposal Version 2)	Framework : FP7
Funding Scheme : Combination of CP & CSA	Sub-Funding Scheme : Integrating Activities / e-Infrastructures
Call Identifier : FP7-INFRASTRUCTURES-2008-1	
Start Date (dd/mm/yyyy) : 01/01/2009	End Date (dd/mm/yyyy) : 31/12/2012

Details

Reporting Period : no. 1 (from 01/01/2009 - to 30/06/2010)

Submission History

Beneficiaries List ?

Reporting Period : no. 1 (from 01/01/2009 - to 30/06/2010)

✦	Beneficiary	Beneficiary No.	Short Name	Status	Actions
		1		-	
		2		-	
		3		-	
		4		-	
		5		-	
		6		-	
		7		-	
		8		-	
	Legal name Beneficiary 9	9	WWW	-	
	↳ Legal name Third Party	-	-	-	

↳ Legal name Third Party

Showing Third party of participant XXXXXXXX

Submit to EC

Sub-departments Special Clause 30

Project Information

General Hide


<p>Project Acronym : AAAAA</p> <p>Contract version : Grant (Proposal Version 1)</p> <p>Funding Scheme : Collaborative project</p> <p>Call Identifier : FP7-KBBE-2009-3</p> <p>Start Date (dd/mm/yyyy) : 01/01/2010</p>	<p>Contract No : 111111</p> <p>Framework : FP7</p> <p>Sub-Funding Scheme : Small or medium-scale focused research project for specific cooperation actions dedicated to international cooperation partner countries (SICA)</p> <p>End Date (dd/mm/yyyy) : 31/12/2013</p>
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
Details

Reporting Period : no. 1 (from 01/01/2010 - to 30/06/2011)

 [Submission History](#)

Beneficiaries List ?

Reporting Period : no. 1 (from 01/01/2010 - to 30/06/2011) 

Beneficiary	Beneficiary No.	Short Name	Status	Actions
	1		-	
	2		-	
Legal name Beneficiary 3	-		-	
Sub-Department	3	WWW	-	 
Legal name Beneficiary 4	-		-	

Sub-Department of XXXXXX

Sub-departments as declared in the contract:

- Research TD

Showing p Please note that all subdepartments of a participant share one form per period (carrying the cumulative costs for all subdepartments)

Submit to EC

Coordinator confirms in case his submission does not include the forms C of all beneficiaries

Reporting Periods | Submission History

Project Information

General

Financial summary

✔ No errors were detected.

Beneficiary No.	If 3rd Party, linked to beneficiary	Adjustment (Yes/No)	Organisation Short Name	Type of activities										Total (F)=(A)+(B)+(C)+(D)+(E)	
				RTD (A)		Coordination (B)		Support (C)		Management (D)		Other (E)		Total	Max EC Contribution
				Total	Max EC Contribution	Total	Max EC Contribution	Total	Max EC Contribution	Total	Max EC Contribution	Total	Max EC Contribution		
1		No	AAA	50200.00	25100.00	800000.00	800000.00	500000.00	500000.00	200000.00	200000.00	0.00	0.00	1550200.00	1525100.00
2		No		501000.00	375750.00	200500.00	200500.00	60000.00	60000.00	0.00	0.00	0.00	0.00	761500.00	636250.00
3		No		2000000.00	1500000.00	500000.00	500000.00	400000.00	400000.00	0.00	0.00	0.00	0.00	2900000.00	2400000.00
4		No		140000.00	105000.00	200000.00	200000.00	100000.00	100000.00	0.00	0.00	0.00	0.00	440000.00	405000.00
Total				2691200.00	2005850.00	1700500.00	1700500.00	1060000.00	1060000.00	200000.00	200000.00	0.00	0.00	5651700.00	4966350.00

Windows Internet Explorer

Cancel

4966350.00

?

The number of Form Cs you are about to submit, does not match the number of participants. Be aware of the fact that the Form Cs which are not submitted electronically can not be taken into account by the Commission in order to proceed with the payment of the current reporting period.

Are you sure you want to continue?

OK Cancel

Rejections and printing

- Coordinator can reject forms C to the beneficiaries (will appear back in “draft” status)
- Commission can ask for revision of one or several forms C (with comments)
- “Draft” watermark only disappears after successful submission by coordinator to Commission
- Beneficiaries print and sign their form C, send it via coordinator to Commission

Main differences in "NEF form C" (DG INFSO)

- No formal "submission" step from beneficiary to coordinator
 - ▶ Beneficiaries just indicate via checkbox when they have finished their form C
 - ▶ Submission only from coordinator to Commission
- Following submission, Commission pre-checks forms C and if ok, sends pdfs via coordinator to beneficiaries for signature
 - ▶ no self-printing and signing after successful submission!

Future Developments (2012)

- "Single submission"
 - ▶ Submission of scientific elements and all forms C in "one go"
 - ▶ Mirrored by "single rejection" with all Commission comments in "one go"
 - ▶ Advantage: More transparent management of the "payment clock"
- "Electronic-only submission" of forms C and CFS
 - ▶ normal electronic submission of forms C via FORCE/NEF form C by Participant Contact
 - ▶ eReceipt sent to person who submitted and to LEAR of organisation
 - ▶ If not contested within 14 days, eReceipt/submission confirmed by beneficiary
 - ▶ CFS: upload pdf, originals to be kept at beneficiaries for audit
- Merge of "explanation of use of resources" into electronic forms C
 - ▶ Explanations "behind" each cell in form C
 - ▶ No more "Explanation of use of resources" in scientific report

Participant Portal access:

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

FAQ PP:

<http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?nfpb=true&pageLabel=faq>

Online user manual Participant Portal:

http://ec.europa.eu/research/participants/portal/ShowDoc/Participant+Portal/portal_content/help/participant_portal_usermanual_version2.0.pdf

Creation of an ECAS account to log into the Participant Portal:

<https://webgate.ec.europa.eu/aida/selfreg>

Technical helpdesk of the Participant Portal:

DIGIT-EFP7-SUPPORT@ec.europa.eu

Presentation on FORCE (to be updated soon!)

http://cordis.europa.eu/fp7/find-doc_en.html (under "Guidance Notes")

FORCE User Manual available from inside the application

Technical helpdesk for FORCE:

EC-FP7-IT-HELPDESK@ec.europa.eu

Thank you for your attention!