eGrants
The Participant Portal – paperless grant management

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CSC J3 – Common service for business processes

"The views expressed in this presentation are those of the author and do not necessarily reflect the views of the European Commission"
Principles

- Single gateway for all exchanges: Participant Portal

- **Single sign-on:** One user name and password (EU Login) gives access to all designated functions. It gives a personalised and secure access to the different services of the Participant Portal.

- **Identity and Access Management:** allows to define and manage changes of access rights of users of the Participant Portal. Ensures that only correctly authorised users can make the respective transactions

- **Personalised web space and service:** after login you see all your assets related to your proposals, grants, expert account...
Roles - Nomenclature

**Organisation roles**
- Legal Entity Appointed Representative
- Account Administrator

**Project roles**
- Primary Coordinator Contact
- Coordinator Contact
- Participant Contact
- Task Manager
- Team Member
Definition of roles

Assigned to an organisation:

- **Legal Entity Appointed Representative** [LEAR]
- **Account Administrator** [AcAd]
- **Legal Signatory** [LSIGN]
- **Financial Signatory** [FSIGN]

Assigned to a project:

- **Coordinator Contact** [CoCo]; **Participant Contact** [PaCo]
- **Project Legal Signatory** [PLSIGN]
- **Project Financial Signatory** (PFSIGN)
- **Task manager** (TaMa); **Team Member** (TeMe)
Roles >> rights management - principles

Chain of trust:

- **LEAR** is formally nominated by the legal representative of the organisation

- LEAR appoints on PP a list of persons authorised to **sign legal documents** (LSIGN) and **financial statements** (FSIGN)

- Only these persons get access to sign relevant documents on PP after Project contacts (PaCos and CoCos) have appointed them to a given project

- "Sign and submit" triggers creation of **digitally signed pdf documents**

- All persons that need to know about signature are **notified** and have **access** to the signed documents

- Full **audit trail** of all electronic transactions
## Roles and access rights – organisation data

<table>
<thead>
<tr>
<th>Role</th>
<th>Read</th>
<th>Write</th>
<th>Assign/Revoke AcAd role</th>
<th>Assign/Revoke LSIGNs and FSIGNs</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEAR</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>AcAd</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>✓</td>
</tr>
<tr>
<td>LSIGN</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>FSIGN</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
## Roles and access rights – project data

<table>
<thead>
<tr>
<th>Role</th>
<th>Read</th>
<th>Write/Save</th>
<th>Submit to Coordinator</th>
<th>Submit to EU service</th>
<th>SIGN GA</th>
<th>SIGN FS financial statement</th>
<th>Assign revoke access to project</th>
</tr>
</thead>
<tbody>
<tr>
<td>CoCo</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>✓</td>
</tr>
<tr>
<td>PaCo</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>TaMa</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>TeMe</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>PLSIGN</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>PFSIGN</td>
<td>✓</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>✓</td>
<td>x</td>
</tr>
</tbody>
</table>
### How to acquire roles?

Access rights managed by the organisations and consortia themselves save two exceptions

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LEAR</strong></td>
<td>Paper process [soon we move to e-validation], appointed by the legal representative of the organisation, approval by the EU services</td>
</tr>
<tr>
<td><strong>Account Administrator [AcAd]</strong></td>
<td>by LEAR</td>
</tr>
<tr>
<td><strong>LSIGN, FSIGN</strong></td>
<td>by LEAR or AcAd</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PCoCo</strong></td>
<td>Inherited from the proposal, change via the EC PO</td>
</tr>
<tr>
<td><strong>Coordinator Contact [CoCo]</strong></td>
<td>From proposal or by other CoCo</td>
</tr>
<tr>
<td><strong>Participant Contact [PaCo], Team Member [TeMe]</strong></td>
<td>From proposal or by CoCo, other PaCo</td>
</tr>
<tr>
<td><strong>Task Manager [TaMa]</strong></td>
<td>By CoCo or PaCo</td>
</tr>
<tr>
<td><strong>PLSIGN, PFSIGN</strong></td>
<td>From list of LSIGNs and FSIGNs; by CoCo or PaCo</td>
</tr>
</tbody>
</table>
I have EU Login but no access to any proposals, projects or organisation data – what should I do?

Ask persons having access to the respective data for granting you access:

- **Proposals** – person who created the proposal on PP
- **Projects** – any Participant Contact or Coordinator Contact [PaCo] or [CoCo]
- **Organisation data** – the LEAR of your organisation
Minimum configuration of access rights for running a project

✓ 1 Primary Coordinator Contact (CoCo)
✓ 1 Participant Contact (PaCo) per beneficiary
✓ 1 LEAR per organisation
✓ 1 Legal Signatory (LSIGN) per organisation
✓ 1 Financial Signatory (FSIGN) per organisation

One person (= one EU Login account) can cumulate unlimited number of roles
(e.g. owner of a one-person SME can be PaCo, LEAR, LSIGN and FSIGN at the same time)

Example: Consortium with 10 partners: minimum 40 roles for minimum 10 persons
Functions for LEARs:
- View or modify your organisation's data.
- View all roles linked to the PIC.
- View list of proposals or projects.

Functions for self-registrants:
- View or modify your organisation's data.

Roles for Organisations

To access and manage your organisation data online, you must have registered the data initially or been nominated as a Legal Entity Appointed Representative (LEAR) or an Account Administrator (appointed by the LEAR). As a Financial Statement Authorised Signatory (FSIGN), you can have a view of your organisation data. LEARs and Account Administrators can view all the roles of their organisation, nominate and revoke roles, as well as access the list of projects and proposals.
LEARs can grant/revoke Organisation roles in the "My Organisations" section, through the blue "OR (Organisation Roles)" icon.
Edit roles:
Add roles or revoke existing rights by identifying the e-mail/name of a person.

List of names and e-mails of contacts linked to the PIC number of the organisation.
Project roles can be granted/revoked in the "My Projects" section, through the orange "PC (Project Consortium)" icon.
View the organisation's basic details and list of project roles.

Edit roles - if you are Primary Coordinator Contact, Coordinator Contact or Participant Contact.
**Organisation:** NCP Test Company  
**PIC:** 934187892

- **Street and House Number:** Test Street 1
- **City:** Test City
- **Country:** NO

### Project Roles for the Organisation

<table>
<thead>
<tr>
<th>ROLE</th>
<th>FULL NAME</th>
<th>USERID</th>
<th>EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Coordinator Contact</td>
<td>Piret NOUKAS</td>
<td>noukapi</td>
<td><a href="mailto:Piret.NOUKAS@ec.europa.eu">Piret.NOUKAS@ec.europa.eu</a></td>
</tr>
<tr>
<td>Project Legal Signatory</td>
<td>Piret NOUKAS</td>
<td>noukapi</td>
<td><a href="mailto:Piret.NOUKAS@ec.europa.eu">Piret.NOUKAS@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Francisco DE LA TORRE</td>
<td>ntofcisc</td>
<td><a href="mailto:francisco.de-la-torre-francia@ec.europa.eu">francisco.de-la-torre-francia@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Joaquin PEREZ ECHAGUE</td>
<td>perezjq</td>
<td><a href="mailto:Joaquin.Perez-Echague@ec.europa.eu">Joaquin.Perez-Echague@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Peter HAERTWICH</td>
<td>hartwpe</td>
<td><a href="mailto:Peter.Haertwich@ec.europa.eu">Peter.Haertwich@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Ulrich GENSCHEL</td>
<td>genscul</td>
<td><a href="mailto:Ulrich.GENSCHEL@ec.europa.eu">Ulrich.GENSCHEL@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Isabel VERGARA OGANDO</td>
<td>vergais</td>
<td><a href="mailto:Isabel.VERGARA-OGANDO@ec.europa.eu">Isabel.VERGARA-OGANDO@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Maria Arrate OYARBIDE ORBE</td>
<td>oyarbma</td>
<td><a href="mailto:Arrate.OYARBIDE@ec.europa.eu">Arrate.OYARBIDE@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Geert VANCRAEYNEST</td>
<td>vancrge</td>
<td><a href="mailto:Geert.VANCRAEYNEST@ec.europa.eu">Geert.VANCRAEYNEST@ec.europa.eu</a></td>
</tr>
<tr>
<td>Coordinator Contact</td>
<td>Attila BERCZIK</td>
<td>berczat</td>
<td><a href="mailto:Attila.BERCZIK@ec.europa.eu">Attila.BERCZIK@ec.europa.eu</a></td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 14 entries

[ADD ROLES]

[REVOKE]
Organisation: NCP Test Company E PIC: 934187892

Street and House Number: Test Street 1

PoBox:

Postal Code:

City: Test City

Country: NO

Please choose the role and enter the person's name and contact details or select a person from the provided list.

Role: *

Coordinator Contact
Project Legal Signatory
Project Financial Signatory
Task manager
Team Member

First Name: *

Last Name: *

Email: *

* required field

OK CANCEL
Where to find help?

online guide divided by business processes. Provides full information on the process, reference documents

screens & step-by-step guidance on the tools, including videos

FAQ database – searchable by categories and keywords
2.2.3 The means of access (i.e. the ECAS account user name and password) are strictly personal and users are responsible for safeguarding their confidentiality and security, and ensuring their appropriate use.

Users undertake to take all steps to prevent any unauthorised third party from gaining knowledge and making use thereof.

Users may not transfer or sell their means of access to any third party.

Users must notify the European Commission immediately (via the IT helpdesk under the ‘Support’ menu at http://ec.europa.eu/research/participants/portal) of the loss, theft, breach of confidentiality or any risk of misuse of the means of access.
The nomination process for LEARs – documents


