FP7 & CIP

New ways of interacting

Coordinators Day
28/11/2011

JmReynders
Ways of interacting - Topics

- **Part 1 : The Research Participant Portal (PP)**
  - Roles and Access Management
  - Participant Portal tools
  - Registration & Unique Registration Facility (URF) & PIC

- **Part 2 : NEF**
  - Negotiation – NEF via the PP
  - Amendment – NEF via the PP
  - Periodic Reporting and Cost Claims – NEF via the PP
  - Social networks

- **Documentation**
- **Q & A**
Part 1

The Research Participant Portal
The Research Participant Portal

- Offers external stakeholders (participants, LEARs, coordinators,...) a unique entry point in handling grant-related actions, based on a
  - single sign-on (ECAS)
  - role-based authorization (Identity and Access Management – IAM)

Result: personalised services on the Portal

- Access to legal entity registration, negotiation, amendments, financial and scientific reporting

- Remember: Each person logging in the Portal must create an ECAS account!

http://ec.europa.eu/research/participants/portal
To access the functionalities of the Portal, you need an ECAS (European Commission Authentication Service) Login/password.
Services after ECAS login
- Call publication (FP7)
- Participant registration, managing data of legal entities
- Grant negotiation,
- Amendments – NEF
- Periodic Reporting – NEF (INFSO)
- Periodic Reporting - FORCE, SESAM (RTD)
- FP7 documentation
- Proposal submission (pilot from 2012)
- Expert services (2012)
Roles on the Portal – until Jan 2012

Coordinator Contact
Participant Contacts
Named Representat.
Task Managers
Team Members
LEAR
Account Admin.

Participant A

Coordinating Participant

Participant B

1 PaCo

1 PaCo

1 PaCo
Major changes of the new version

(1/2)

The major objective of the new version is to **simplify the role management and make it more flexible**.

In that perspective, the following changes are made:

1. **The uniqueness of the Coordinator and Participant Contacts disappear:**
   
   → one **Primary Coordinator Contact** as the main contact for the European Commission;
   
   → more **Coordinator Contacts** can be nominated per project;
   
   → more **Participant Contacts** can be nominated per organisation in a project.
2. Task Managers and Team Members are no longer restricted to specific scope(s).

3. The roles of Named Representatives are redistributed:

   → Former Financial and Scientific Named Representatives, and Authorised Representatives automatically become Participant Contacts (Coordinator Contacts for the Coordinating Participant).

   → Former Administrative/Legal Named Representatives automatically become Task Managers.

   → Former Authorised Signatories automatically become Participant Contacts as well.

4. Those using the new URF version to register an organisation for a PIC, will have a self-registrant role.
### Project List for Jean-Marc Reynders

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.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Call</th>
<th>Project ID</th>
<th>Roles</th>
<th>Phase</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>EnergyTIC</td>
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</tr>
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</table>

Showing 1 to 4 of 4 entries

- View project details
- View roles in the project
‘My Organisations’ tab

Details of the LEAR and the Organisation

View roles within the Organisation
My tasks as a Coordinator Contact

- Coordinator Contact details are taken from the proposal and are shown in the Negotiation Facility (NEF) under ‘Coordinator Contact for the Portal’.

- Check the data of the Participant Contacts for the project – add/change them, if necessary on the Portal.

- Add your colleagues within your organisation with different roles: (named representatives)/task managers/team members.

- **Revoke** Participant Contact roles within the consortium, if necessary.
My tasks as a Participant Contact

- Participant contacts are provisioned from the proposal – any changes on the Portal can be asked from the Coordinator Contact.

- Participant Contacts can add a role for the colleagues of the project within the entity: (named representatives)/task managers/team members.

- Review roles regularly, revoke roles if necessary, eg. if a colleague has left the organisation.
My tasks as a LEAR on the Portal

- Check the data under the ‘My Organisations’ tab. Update data, if necessary on the Portal; upload supporting documents.

- Possibility: appoint Account Administrator for further help in managing the organisation data.

- Can check roles within the organisation – note the LEAR cannot directly revoke roles in the project.

- General task description is given with the LEAR appointment: see http://cordis.europa.eu/fp7/pp/lear_en.html
Legal Entity Management

The Validation Service (or VS) centralises the collection of legal and financial documents and validates all participating organisations only once.

The validation service will process new requests with a priority:
1) Following a change done by the LEAR
2) Following the addition of a partner in NEF
The validation process

• The validation of a participant is unique and valid throughout the entire FP7 programme.

• During the validation of a legal entity, the validation services verify the (i) legal existence and (ii) FP7 status of an applicant.

• These verifications are based on supporting documents.

• Documents can be uploaded directly on the URF or send via e-mail to the validation mailbox: REA-URF-Validation@ec.europa.eu;

• When sending an e-mail, always quote your PIC number and proposal number (when applicable) in the subject title.
How To Get Help on the Portal?

Where can the participants get support?

- A Frequently Asked Questions section is available on the Participant Portal.
- 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/ecas/help.jsp or send an e-mail to DIGIT-USER-ACCESS@ec.europa.eu.
- For technical help, ask the eFP7 Help Desk at: DIGIT-EFP7-SUPPORT@ec.europa.eu.
- Or use the form: http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pagelabel=contactus.
- For questions related to the Framework and similar RDG Programmes, the participants are invited to contact the FP7 Help Desk by sending an e-mail to EC-FP7-IT-HELPDESK@ec.europa.eu.
Online tool: NEF

Purposes

- **Single front-office** tool to interact with consortia in DG INFSO for:
  - Negotiations
  - Amendments
  - Periodic reporting and payments

- The tool is:
  - **Session** based
  - Used to store **electronic documents**
  - Is integrated with **URF** facility
  - Is integrated with **Participant Portal**
The Coordinator contact receives the first e-mail from the COM to start to negotiate the grant/amendment/Periodic reports with a list of Participant contacts.

The Coordinator contact has by default full editing access to NEF - own data and data of all participants - via the Participant Portal with the e-mail provided in the proposal.

Participant contacts have edit-access to their data and read-only access to the data of other participants and to the general project info.

Only the coordinator can submit a NEF session to the Commission.
Open a **Session**

Provide requested information

**Submit** for the whole project

Check information

---

PO

Coordinator

Beneficiary

*Notifies that work is completed*

---

**accept**

PO

**reject**

end

Online tool: NEF
Generic behavior
Access your session

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.

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<td></td>
<td>AN</td>
</tr>
</tbody>
</table>

Showing 1 to 3 of 3 entries

AN : Access Negotiations
AA : Access Amendments
PR : Periodic Reporting
## Project info

- **General Information**
- **Budget Overview**
- **Work packages**
- **LFV**
- **Reporting periods**
- **Portal Coordinator Contact Person**
- **Project reviews**

## Participant info

<table>
<thead>
<tr>
<th>#</th>
<th>Legal Name</th>
<th>Short Name</th>
<th>Role</th>
<th>PIC</th>
<th>Part. Status</th>
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<tr>
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<td>299860481</td>
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</tr>
</tbody>
</table>

[Add new participant]
Good to know...

- In AMD there is **no** automatic refresh of URF data (legal data, FP7 account, ICM) in NEF. Automatic refresh is only in NEGO.
  - The PO can chose to manually update the data for a participant

- In AMD, you cannot remove a participant only terminate.
  - Also in the case of an UTRO

- New partners
  - will not access NEF until they have a PIC
  - Validation by the CVT will be triggered as soon as they are added in NEF.
The participant cannot submit the data to the E.C. and doesn’t even have the button “Submit” to do so. Only the coordinator can submit information to the E.C.
Access to periodic reporting
Cost Claim input as structured data

### Periods Summary

<table>
<thead>
<tr>
<th>Period</th>
<th>Period 1 (1 - 12)</th>
<th>Period 2 (13 - 24)</th>
<th>Period 3 (25 - 36)</th>
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</thead>
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<tr>
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<td></td>
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<tr>
<td>period 1</td>
<td>Financial Statement FINALIZED</td>
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<td>period 2</td>
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<tr>
<td>period 3</td>
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### Attached files

<table>
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<th>Description</th>
<th>File</th>
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<tr>
<td>Self declaration of the coordinator</td>
<td>Declaration of the coordinator</td>
<td>CARARE declaration by coordinator.pdf</td>
</tr>
<tr>
<td>Project objectives, progress and action</td>
<td>CARARE Progress report for year 1</td>
<td>CARARE year 1 progress report.pdf</td>
</tr>
<tr>
<td>Project management and use of resources</td>
<td>CARARE use of resources for year 1</td>
<td>CARARE use of resources year1 updates.xls</td>
</tr>
</tbody>
</table>

- Publishable summary
- Self declaration of the coordinator
- Project objectives, progress...
- Project management
- + any supporting documents
Periodic Reporting FP7

**Cost**: Input the costs for the period

**Other**: Declaration of receipts, Declaration of interest yielded by the pre-financing, Certificate on the financial statements

**Signature**: Name of the person(s) authorised to sign this Financial Statement
Usage of Resources

Form C - Financial Statement (Period 2: Month 13 - 21)

Please correct the following issues:

1. The explanation cannot be empty.
2. Name of the person(s) authorised to sign this Financial Statement - Please fill this field

Maximum funding % for RTD (A): 75.00

Cost model: Actual indirect costs

My legal entity is established in:

1. Costs Table

RTD/Innovation /Personnel costs

<table>
<thead>
<tr>
<th>Cost</th>
<th>Explanation</th>
<th>Work Package</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td>WP1, WP5, WP6, WP7, WP8</td>
</tr>
</tbody>
</table>

TOTAL 0

Other direct costs 0 0 0 0 0
Periodic Reporting - Good to know

- Attention, it is not possible to have an AMD and a PR session in NEF at the same time!
  - Example, you need to submit a PR while an AMD is ongoing. The AMD is not affecting the PR -> Ask the PO to:
    - Close the NEF AMD Ex.
    - Start a new PR Ex.
    - At the end of the PR, restart the AMD Ex.

- NEF is opened by the commission at the end of the reporting period – not opened at all times!
  - You can start preparing the reports before NEF opens.

- No decimals.
On-Line Support

- iKnow contains the NEF on-line documentation

http://212.68.215.215/display/iKnowextern/NEF+Documentation
Social Networks

- Create a communication channel with coordinators and participants (FaceBook, Twitter http://twitter.com/#!/nef_tweeet, ...)

Facebook

NEF External

NEF External

IEF

NEF External

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Thanks!

Questions?