

# **FP7 & CIP**

## **New ways of interacting**

**Coordinators Day**  
**28/11/2011**

**JmReynders**



European Commission  
Information Society and Media



# 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**

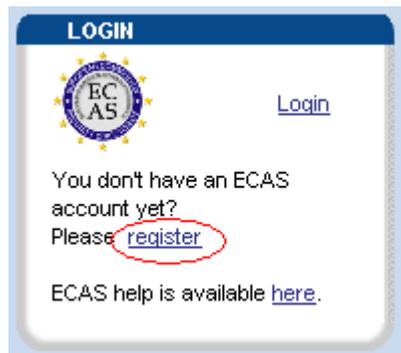
# The Research Participant Portal



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## 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> ●●● 4



# Participant Portal - ECAS

To access the functionalities of the Portal, you need an ECAS (European Commission Authentication Service) Login/password

European Commission  
**RESEARCH - Participant Portal**

European Commission > Research > Participant Portal

Home My Organisations FP7 C  
Register Search LFV Sim

**LOGIN**

Login

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

**REGISTER NEW ORGANISATION**

Registering an organisation will a  
More information about PICs can b  
this [FAQ entry](#).  
Use the search facility to check if a  
find a pic for your organisation you  
**With your ECAS password you can register your organis**

**Login** [Not registered yet](#)

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

Username or e-mail address \*

Password \* [Lost your password?](#)

More options... ▶

**Login!**

\* Required fields

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# Services after ECAS login

The screenshot shows the 'Participant Portal' interface for the European Commission. At the top, there is a navigation bar with the European Commission logo and the text 'RESEARCH - Participants'. Below this is a secondary navigation bar with links: Home, My Organisations, My Proposals, My Projects, My Roles, My Notifications, FP7 Calls, and Support. The main content area is divided into several sections:

- LOGIN:** A 'Logout' button with a lock icon. Below it, the user name 'Jean-marc REYNDERS' is displayed, along with a message: 'Authentication and security help is available [here](#)'.
- NEED HELP?:** A section with three bullet points: 'See the [online user manual](#)', 'You can consult [FAQS](#)', and 'Watch the demonstration of the Participant Portal: - [Introduction](#)'. A final bullet point states: 'If you cannot find an answer there, then submit your question via the [eFP7 service desk](#)'. A 'read more' link is at the bottom.
- WHAT'S NEW:** A section titled 'Participant Portal v3.1.0 (06/2011)' with three bullet points: 'RSS Feed for eFP7 calls', 'Deep Linking functionality', and 'Fixing of the absence of links to the negotiation system'. A 'read more' link is at the bottom.
- QUICK LINKS:** A section at the bottom left.
- HOME:** The main content area, divided into four main sections:
  - Manage Organisations:** Contains three blue arrow-shaped buttons: 'Search an organisation', 'Register an organisation', and 'Manage organisation data'.
  - Identify Opportunities:** Contains two blue arrow-shaped buttons: 'Read FP7 related documentation' and 'Search for a call'.
  - Negotiations:** Contains one blue arrow-shaped button: 'Browse and/or manage negotiations'.
  - Grant Execution:** Contains three blue arrow-shaped buttons: 'Browse and/or access grants', 'Manage amendments', and 'Periodic reporting'.
- Others:** A section on the right side containing two folder icons: 'Manage roles and delegations' and 'Support'.

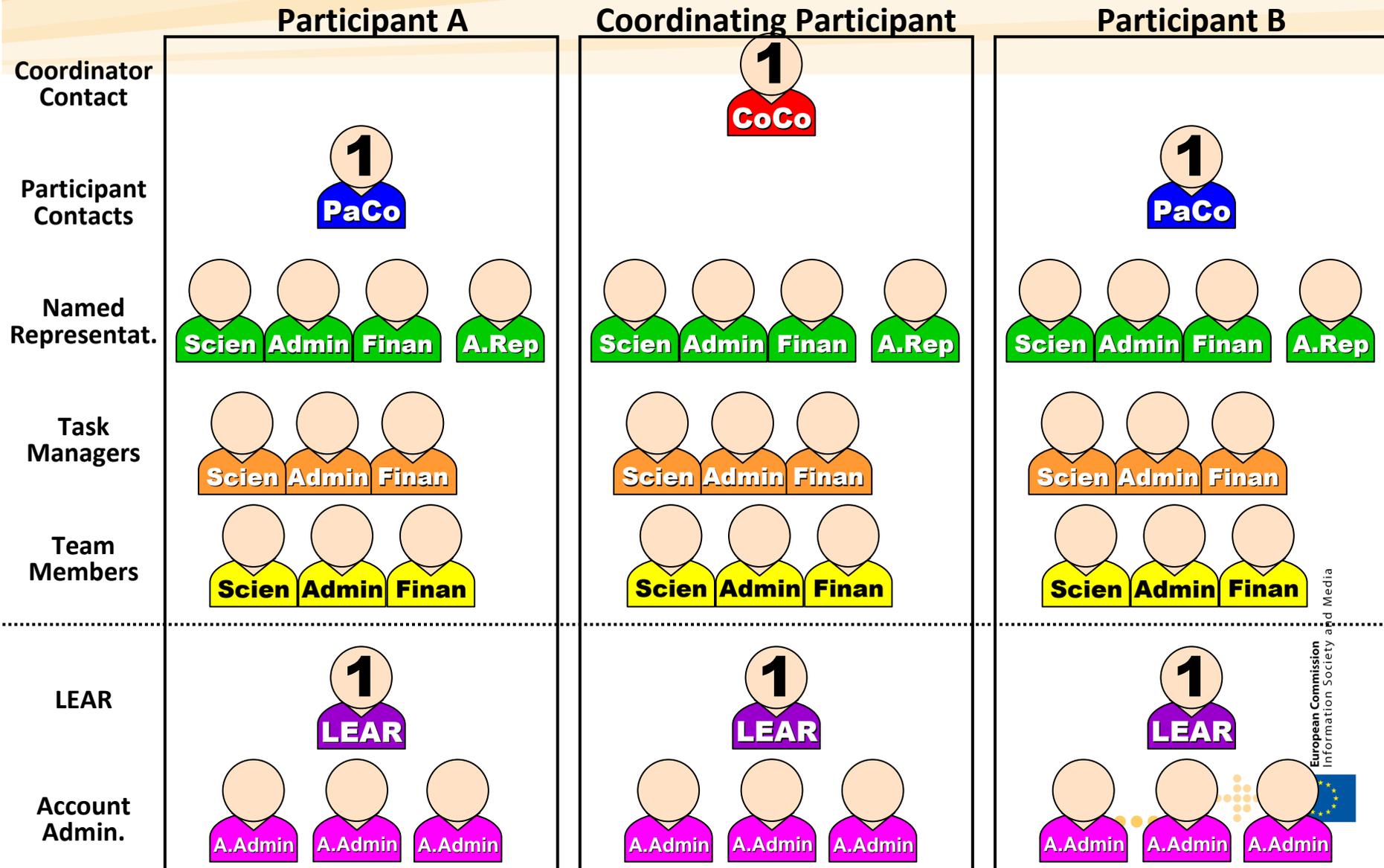


## Participant Portal Integrated services

- 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



# 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.



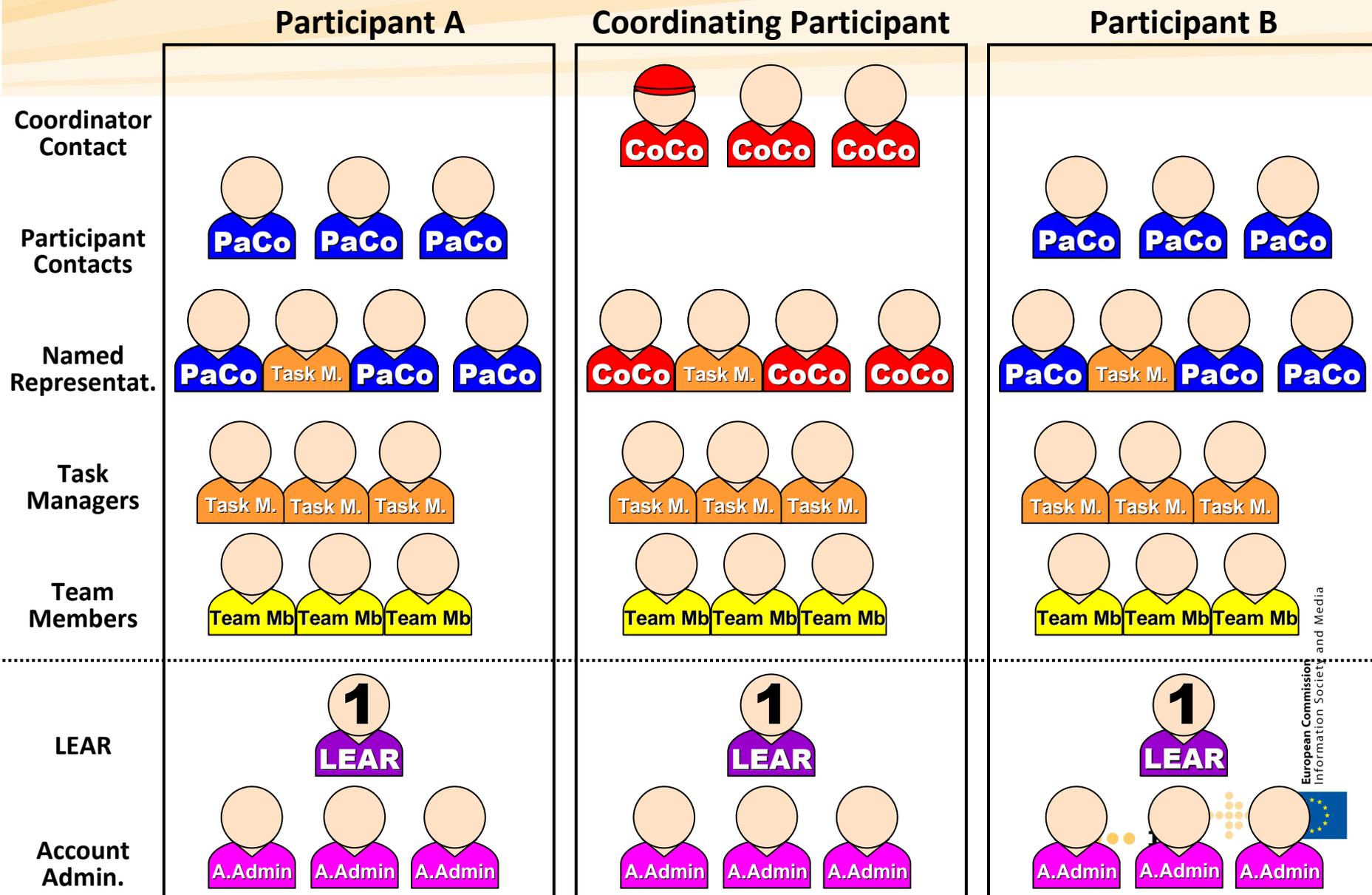
# Major changes of the new version

(2/2)

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**.



# Roles on the Portal – after Jan 2012



# 'My Projects' tab

**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

Show  entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase	Actions
<a href="#">EnergyTIC</a>		FP7	999995		Negotiation	
<a href="#">PRECISIQ</a>		FP7	999996		Negotiation	<a href="#">AN</a>
<a href="#">TEST STIFF 22</a>		FP7	999999		Negotiation	<a href="#">AN</a>
<a href="#">LarkC</a>		FP7	999997		Active	<a href="#">PR</a> <a href="#">AA</a>

Showing 1 to 4 of 4 entries First Previous 1 Next Last

View project details

View roles in the project



# 'My Organisations' tab

The screenshot shows the 'My Organisations' section of the European Commission Research - Participants portal. The main content area displays details for 'UNIVERSITAET INNSBRUCK'. The details are organized into sections: 'Organisation(s) linked via projects.', 'UNIVERSITAET INNSBRUCK', 'PIC : 999869114', 'VAT : ATU57495437', 'NACE : 80.3', 'Contact Information' (with sub-sections for Email, Phone, Fax, Web), and 'Postal Address' (with sub-sections for Street, P.O. Box, Post Code, Region, County, Country). A red circle highlights the 'Roles' link, and a red arrow points to it from a callout box below.

**Details of the LEAR and the Organisation**

**Roles**

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.

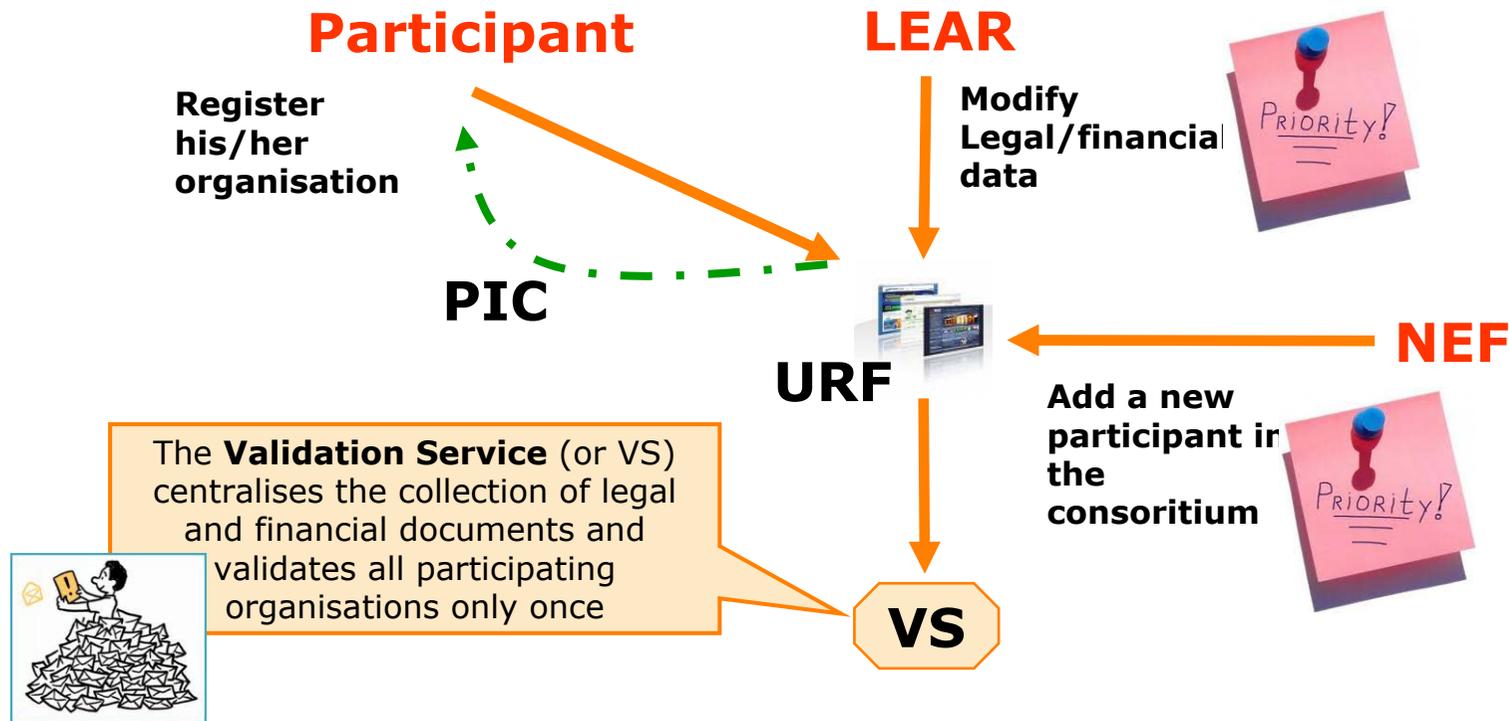


## My tasks as a LEAR on the Portal

- 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](http://cordis.europa.eu/fp7/pp-lear_en.html)



# Legal Entity Management



- 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](mailto: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/ppmanager/participants/portal?\\_nfpb=true&\\_pagelabel=contactus](http://ec.europa.eu/research/participants/portal/ppmanager/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**.



## Part 2

# NEF Negotiation Amendments CostClaim & Periodic Reporting



Legal Name	Short Name	Role	PIC	Status	Status	Date of Birth	Date of Birth	Date of Birth	Date of Birth
PROFACTOR GMBH	PROFACTOR	CO	00000000	active	00	13-10-2009	13-10-2009	13-10-2009	13-10-2009
TECHNISCHE UNIVERSITÄT DUISBURG	TU	PA	00000000	active	00	01-10-2009	01-10-2009	01-10-2009	01-10-2009
FAKULTÄT FÜR INGENIEURWISSENSCHAFTEN	FILM	PA	00000000	active	00	14-10-2009	14-10-2009	14-10-2009	14-10-2009
UNIVERSITÄT DUISBURG ESSEN	UNIVERSITÄT	PA	00000000	active	00	21-10-2009	21-10-2009	21-10-2009	21-10-2009
UNIVERSITÄT DUISBURG ESSEN	UNIVERSITÄT	PA	00000000	active	00	17-10-2009	17-10-2009	17-10-2009	17-10-2009
UNIVERSITÄT DUISBURG ESSEN	UNIVERSITÄT	PA	00000000	active	00	12-10-2009	12-10-2009	12-10-2009	12-10-2009

# 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**



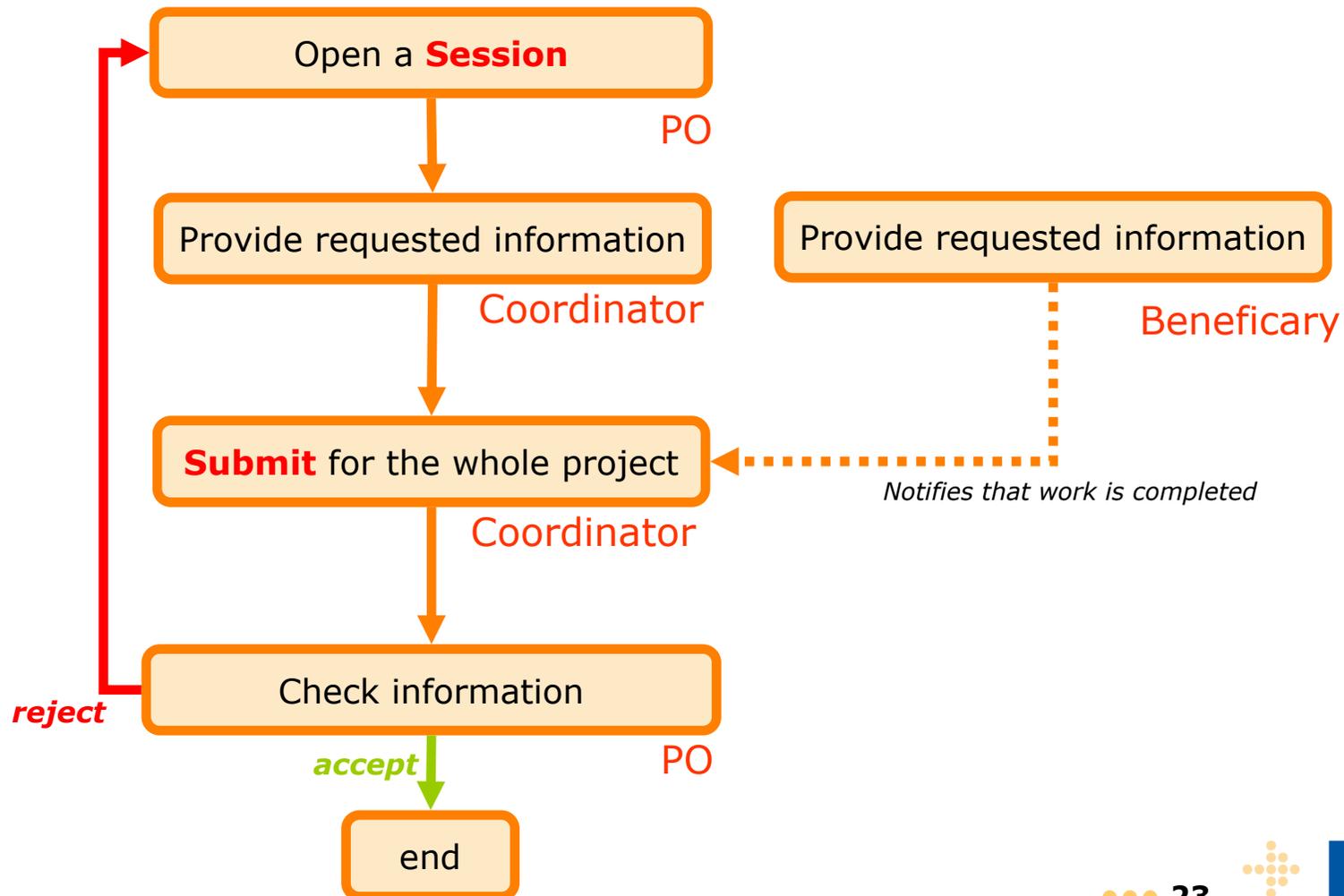
# Access Nego /AMD /Periodic Reporting

- 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.



# Online tool: NEF

## Generic behavior



# Access your session

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

### 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

Show 10 entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase	Actions
<a href="#">EnergyTIC</a>	CIP-ICT-PSP-2010-4	CIP	999995		Negotiation	<a href="#">AN</a>
<a href="#">NEWCOM++</a>		FP7	999997		Active	<a href="#">PR</a> <a href="#">AA</a>
<a href="#">TEST STIFF 22</a>		FP7	999999		Negotiation	<a href="#">AN</a>

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

AN : Access Negotiations  
AA : Access Amendments  
PR : Periodic Reporting



# NEGO/AMD



European Commission  
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# NEGO / AMD

Not yet submitted by the coordinator | Opened on 21/09/11 at 10:21 | Created on 17/01/10 at 12:39

[Submit](#) [PDF preview](#)

## Project ✖

→ [General information](#) → [Budget Overview](#) → [Work packages](#) → [LFV](#)  
→ [Reporting periods](#) → [Portal Coordinator Contact Person](#) → [Project reviews](#)

## Participants

↕ Reorder participants [Show all menus](#) - [Hide all menus](#)

#	Completion status <span>⬇</span>	Legal Name	Short Name	Role	PIC	Part. Status
1	<a href="#">✎</a>	<a href="#">UNIVERSITY OF BRIGHTON (UK)</a> <span>✖</span>	UB	CO	<a href="#">999860481</a>	active <span>NEW</span>
→ <a href="#">Legal data</a> → <a href="#">Authorised representatives</a> <span>✖</span> → <a href="#">Eligible costs</a> → <a href="#">Organisation status</a> → <a href="#">Contact persons</a> → <a href="#">Bank account</a> <span>✖</span>						
4	<a href="#">✎</a>	<a href="#">JAST SA (CH)</a> <span>✖</span>	JAST	PA	<a href="#">996390985</a>	active
	<a href="#">✎</a>	↳ <a href="#">UNIVERSITY OF BRIGHTON (UK)</a> <span>✖</span>		TP/SC10	<a href="#">999860481</a>	active

[+ Add new participant](#)

Project info

Participant info



## 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.



# Coordinator's main page NEGO/AMD

**265099 - EuroMarine**

**Parameters**

**CONTACTS**

Project/Scientific Officer [NASTASEANU Nicoleta Ariana \(RTD.I.3\)](#) ✉

Legal officer

Financial officer

**LIFECYCLE**

Opening date 04/05/10

Expected end date 05/10/10

**Current session**

Not yet submitted by the coordinator    Opened on 21/05/10 at 09:51    Created on 20/05/10 at 17:51

[✉ Submit](#)

**Project** ⌵

→ [General information](#)    → [Budget Overview](#)    → [Work packages](#)    → [LFV](#)

→ [Reporting periods](#)    → [Portal Coordinator Contact Person](#)    → [Project reviews](#)

**Participants**

↑↓ [Reorder participants](#)    [Show all menus](#) - [Hide all menus](#)

#	Completion status	Legal Name	Short Name	Role	PIC	Part. Status
1	<input type="checkbox"/> ✎	<a href="#">GOETEBORGS UNIVERSITET (SE)</a>	UGOT	CO	<a href="#">999981925</a>	active
		→ <a href="#">Legal data</a> → <a href="#">Authorised representatives</a> → <a href="#">Eligible costs</a>				
		→ <a href="#">Organisation status</a> → <a href="#">Contact persons</a> → <a href="#">Bank account</a>				
2	✎	<a href="#">CENTRO DE CIENCIAS DO MAR DO ALGARVE (PT)</a> ✕	CCMAR	PA	<a href="#">998611994</a>	active
3	✎	<a href="#">CLIMAR - Centro Interdisciplinar de Investigação Marinha e Ambiental (PT)</a> ✕	CIIMAR	PA	<a href="#">997223536</a>	active
4	✎	<a href="#">CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE (FR)</a> ✕	CNRS	PA	<a href="#">999997930</a>	active
5	✎	<a href="#">DANMARKS TEKNISKE UNIVERSITET (DK)</a> ✕	DTU-AQUA	PA	<a href="#">999990655</a>	active
6	✎	<a href="#">INSTITUT FRANCAIS DE RECHERCHE POUR L'EXPLOITATION DE LA MER (FR)</a> ✕	IFREMER	PA	<a href="#">999630300</a>	active
7	✎	<a href="#">INSTITUT DE RECHERCHE POUR LE DEVELOPPEMENT (FR)</a> ✕	IRD	PA	<a href="#">999513803</a>	active

**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.**

**PDF preview**

**Part A**

**Description of Work**

# Periodic Report



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# Periodic Reporting

**Project**

- [General information](#)
- [Budget Overview](#)
- [Work packages](#)
- [LFV](#)
- [Reporting periods](#)
- [Portal Coordinator Contact Person](#)
- [Project reviews](#)
- [PDM Status](#)

**Participants**

Display the terminated participants [Show all menus](#) - [Hide all menus](#)

Fin. Stat.	#	Status	Legal Name	Short Name	Role	PIC	Part. Status	EWS Status	Date of entry
	1		<a href="#">UNIVERSITY OF WOLVERHAMPTON (UK)</a>	UW	CO	<a href="#">999852527</a>	active	No EWS	1/5/2010

→ [Legal data](#)    → [Authorised representatives](#)    → [Eligible costs](#)    → [Periods Summary](#)  
→ [Organisation status](#)    → [Contact persons](#)    → [Bank account](#)

Access to periodic reporting



# Periodic Reporting FP7

You are currently working on period 1

## Cost Claim input as structured data

### Periods Summary

	Period 1 (1 - 12) (01-02-2010 - 31-01-2011)	Period 2 (13 - 24) (01-02-2011 - 31-01-2012)	Period 3 (25 - 36) (01-02-2012 - 31-01-2013)
Submitted in period 1	<a href="#">Financial Statement FINALIZED</a> 		
Submitted in period 2			
Submitted in period 3			

### Attached files

File type	Description	File
<input type="text" value="Publishable summary"/>	CARARE Annual report 2010-11	<a href="#">CARARE Annual report_2010-2011.pdf</a>
<input type="text" value="Self declaration of the coordinator"/>	Declaration of the coordinator	<a href="#">CARARE declaration by coordinator.pdf</a>
<input type="text" value="Project objectives, progress and achievements"/>	CARARE Progress report for year 1	<a href="#">CARARE year 1 progress report.pdf</a>
<input type="text" value="Project management and use of resources"/>	CARARE use of resources for year 1	<a href="#">CARARE-use of resources_Year1_update2.xls</a>

- 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

The screenshot shows a web interface for periodic reporting. At the top, there are buttons for 'Return to Summary', 'Save Changes', 'Finalize', and 'Unfinalize'. Below these are tabs for 'Costs', 'Other', 'Signatures', and 'Comment'. The 'Costs' tab is active, displaying a table titled '1. Costs Table'. The table has two columns: the category and the 'Current Period' value. The categories and values are: Personnel costs (166916), Subcontracting (0), Other Specific direct costs (34259), Total costs (201,175), Maximum European Union contribution (160,940), and Requested European Union contribution (160940). At the bottom of the interface, there are social media icons for Facebook, Twitter, YouTube, and LinkedIn, along with links for 'Top', 'Help Desk', and 'D'.

	Current Period
Personnel costs	166916
Subcontracting	0
Other Specific direct costs	34259
Total costs	201,175
Maximum European Union contribution	160,940
Requested European Union contribution	160940



# Usage of Resources

247926 - NOBEL / CERTH / Form Cs /

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

[Return to Summary](#) [Save Changes](#) [Finalize](#) [Unfinalize](#)

Please correct the following issues

- [1] The explanation cannot be empty.
- 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 est

Costs Other

### 1. Costs Table

RTD/Innovation /Personnel costs			
Cost	Explanation	Work Package	
0		<input type="checkbox"/> WP1 <input type="checkbox"/> WP5 <input type="checkbox"/> WP6 <input type="checkbox"/> WP7 <input type="checkbox"/> WP8	
<b>TOTAL</b>	<b>0</b>		<a href="#">Done</a>

Other direct costs

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 and 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>

**Concepts**

- NEF Sessions
- NEF Users

**By Transactions**

- NEF Amendments
- NEF Negotiations
- NEF Periodic Report

**By Forms**

- All NEF Forms



# Social Networks

- Create a communication channel with coordinators and participants (FaceBook, Twitter [http://twitter.com/#!/nef\\_tweet](http://twitter.com/#!/nef_tweet), ...)

facebook

Adresse électronique  Mot de passe  **Se connecter**

Garder ma session active  Mot de passe oublié ?

**Inscription** Facebook vous permet de rester en contact et d'échanger avec les personnes qui vous entourent.

**NEF External**

Logiciels

**Mur** NEF External · **Meilleures publications** ▼

**NEF External**  
Change PIC button will be visible during Negotiations in the Legal Data screen. Allowing quick synchronisation with PDM/URF in case of UTRO!  
Il y a 18 heures via Ping.fm · J'aime · Commenter  
Mària Sanchez Moreno aime ça.

**NEF External**  
In the next release, all ERCEA projects will benefit from a prefilling of all contact details within the contact and auth. officers screens.  
14 juin, 03:18 · J'aime · Commenter

**NEF External**  
EURATOM calls are now part of the automatic FVC process set by NEF. Participants are contacted by CVT team in DG RTD  
**The European Atomic Energy Community (EURATOM)**  
ec.europa.eu  
European Commission – Nuclear energy in Europe  
10 juin, 09:19 · J'aime · Commenter

**38** personnes aiment.  
Créer une Page



**Thanks !**

Questions ?



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