FP7 & CIP

New ways of interacting

Coordinators Day
28/11/2011

JmReynders

European Commission
Information Society and Media

Ways of interacting - Topics

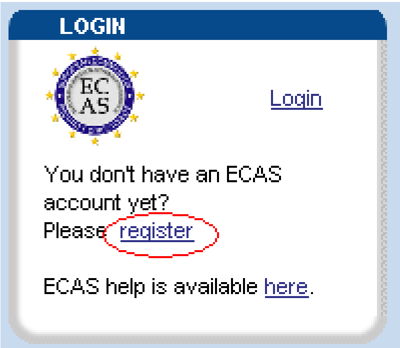
- Part 1 :The Research Participant Portal (PP)
  - Roles and Access Management
  - Participant Portal tools
  - Registration & Unique Registration Facility (URF) & PIC
- Part 2 : NEF
  - Negotiation – NEF via the PP
  - Amendment – NEF via the PP
  - Periodic Reporting and Cost Claims – NEF via the PP
  - Social networks
- Documentation
- Q & A

Part 1

The Research Participant Portal

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

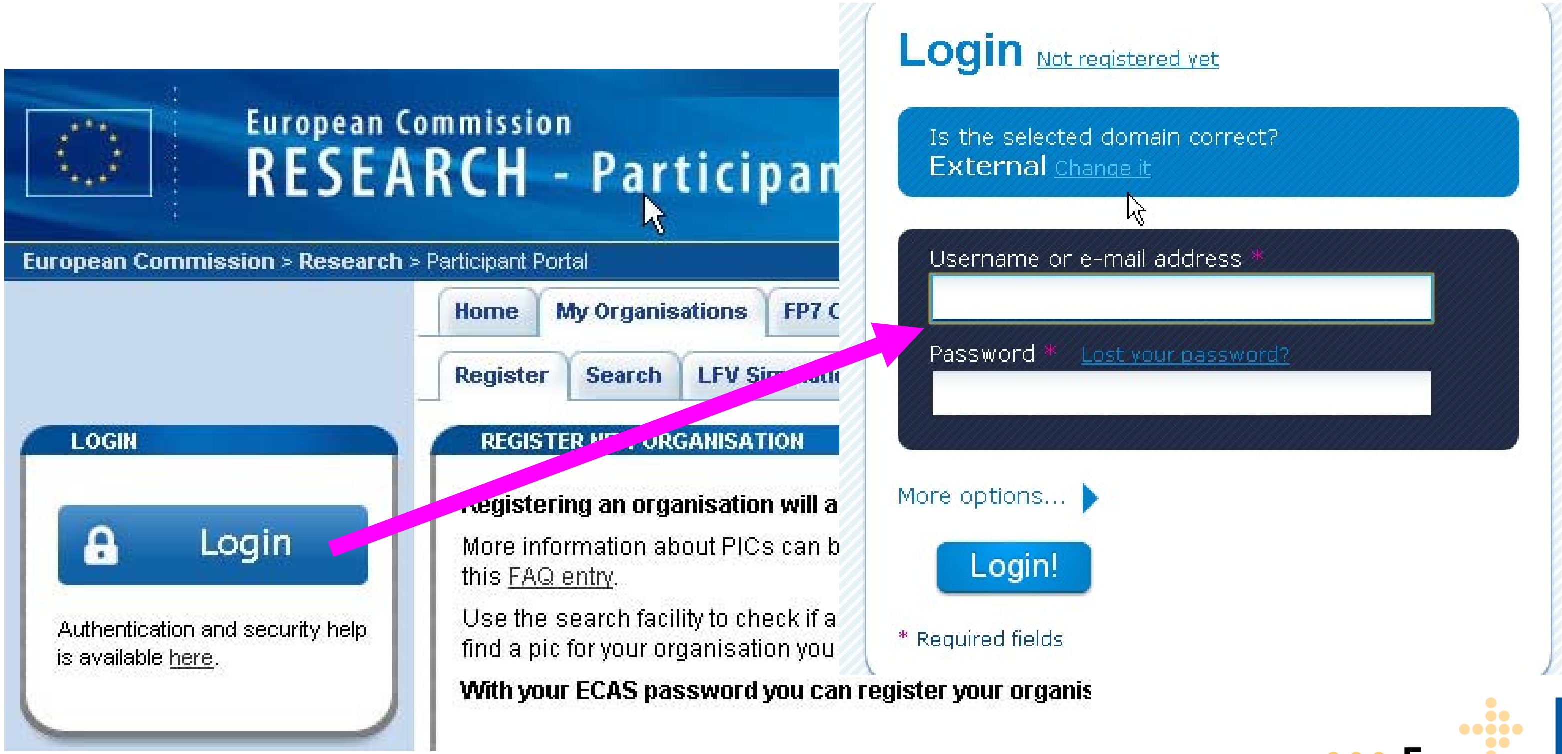
• Access to **legal entity registration**, **negotiation**, **amendments**, **financial and scientific reporting**

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

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

Participant Portal - ECAS

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

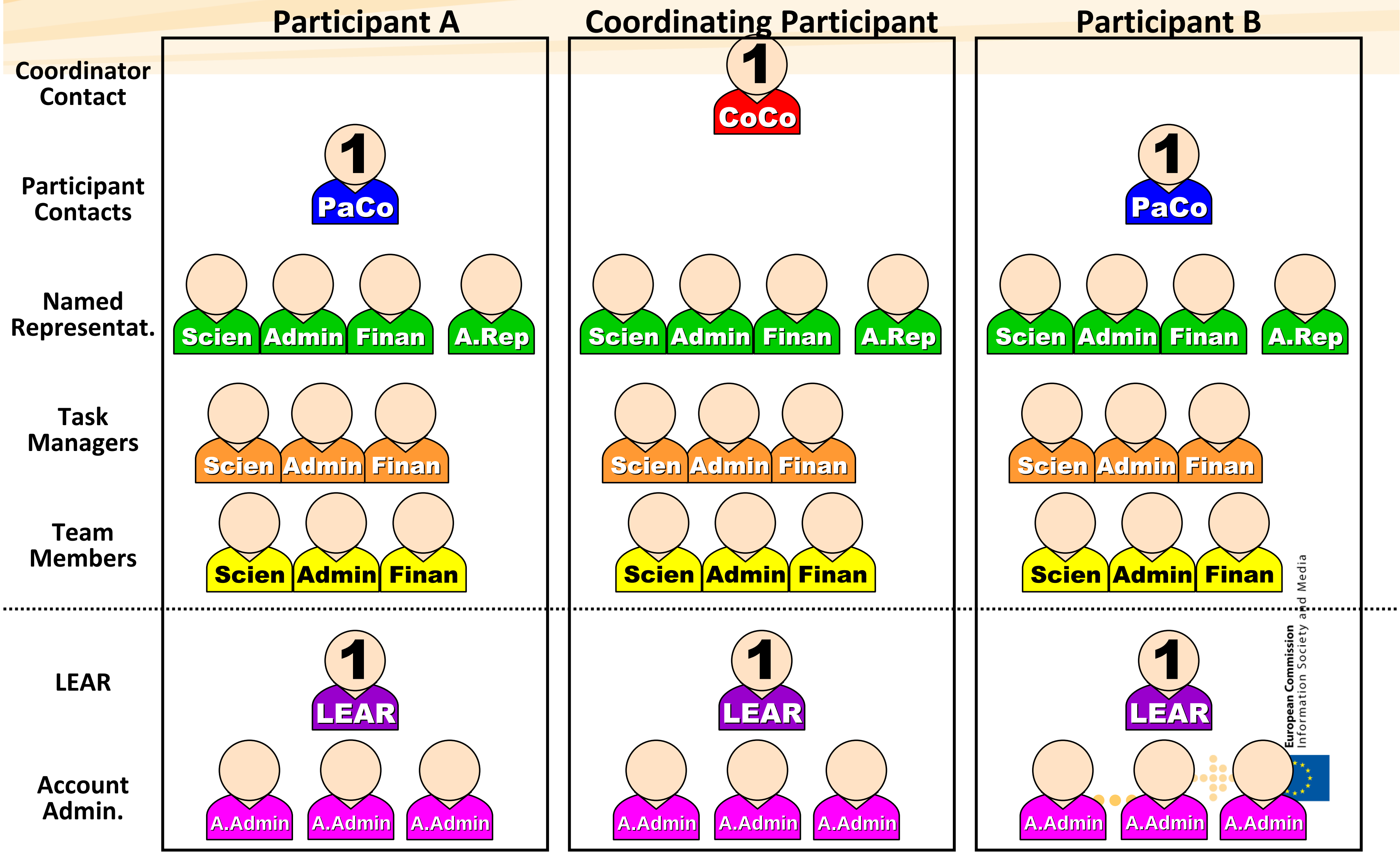


European Commission
Information Society and Media

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



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**:

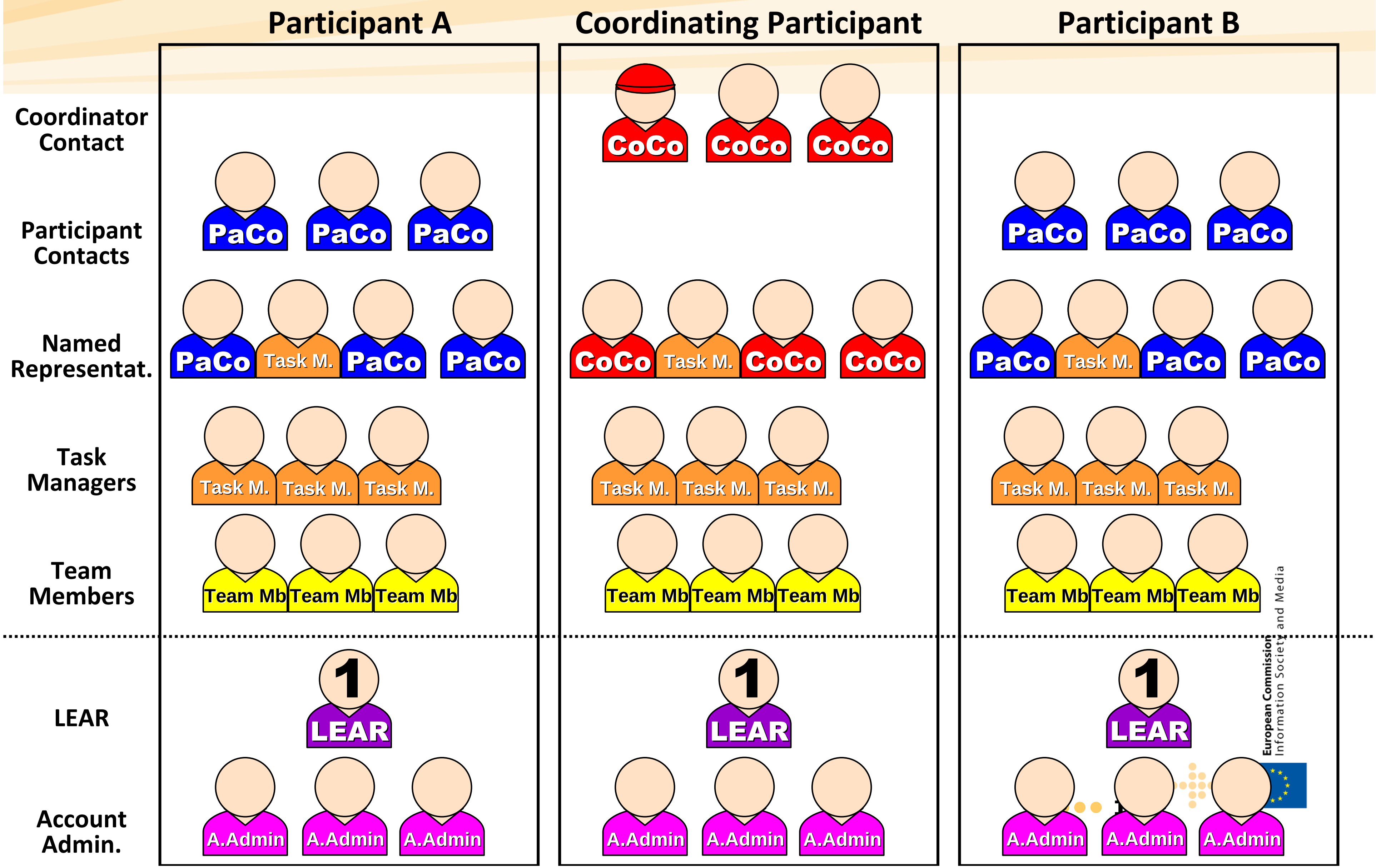
→ Former **Financial and Scientific Named Representatives**, and **Authorised Representatives** automatically become **Participant Contacts** (**Coordinator Contacts** for the Coordinating Participant).

→ 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 10 entries Search:

Acronym	Call	Prog.	Project ID	Roles	Phase	Actions
EnergyTIC		FP7	999995		Negotiation	
PRECISIO		FP7	999996		Negotiation	AN
TEST STIFF 22		FP7	999999		Negotiation	AN
LarkC		FP7	999997		Active	PR AA

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

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.

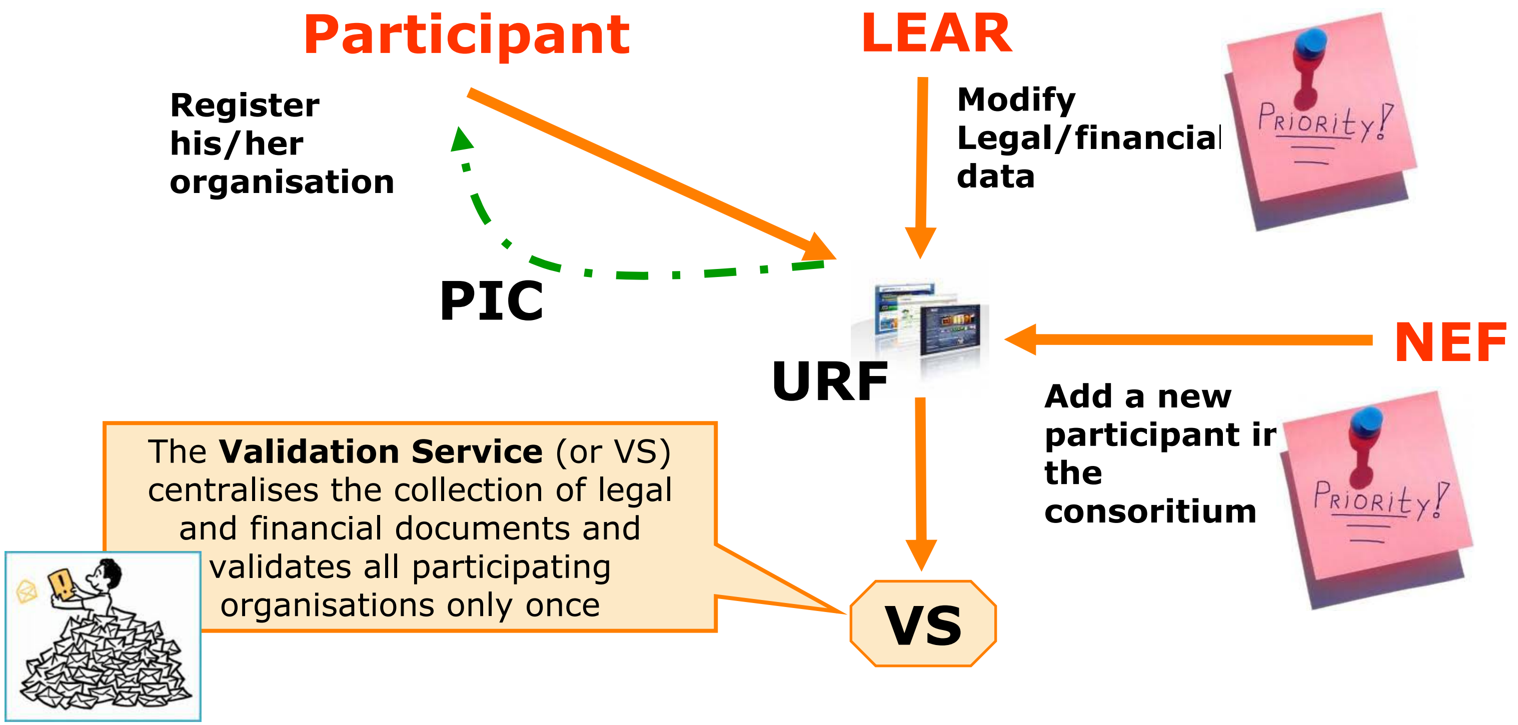
My tasks as a Participant Contact

- 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 will process new requests with a priority:

1) **Following a change done by the LEAR**
2) **Following the addition of a partner in NEF**

European Commission
Information Society and Media

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.

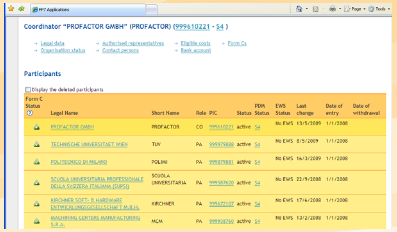
How To Get Help on the Portal ?

- ***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**.

Part 2

NEF
Negotiation
Amendments
CostClaim & Periodic Reporting

European Commission
Information Society and Media



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.

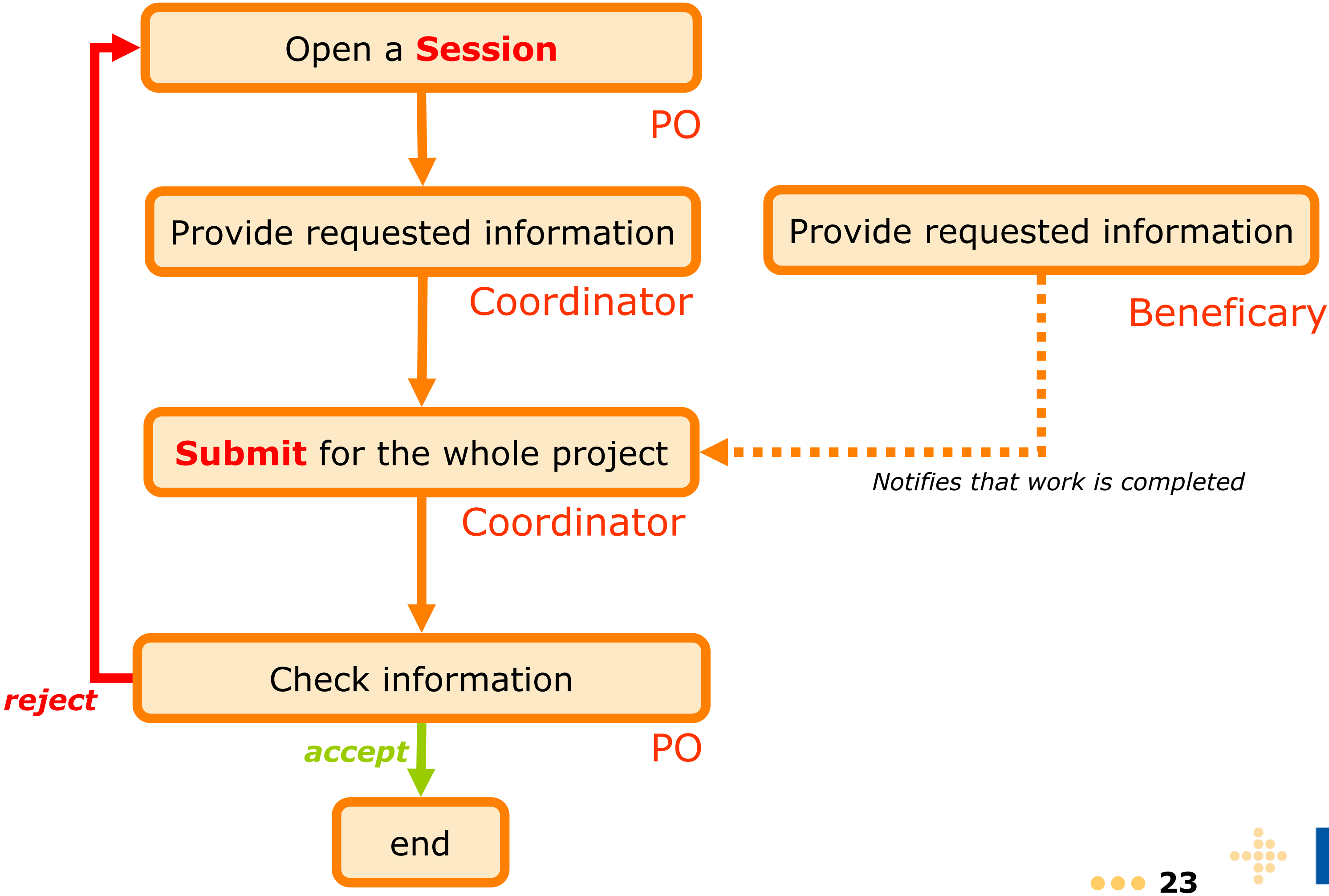
- The **Coordinator contact** has by default full editing access to NEF - own data and data of all participants - via the Participant Portal with the e-mail provided in the proposal.

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

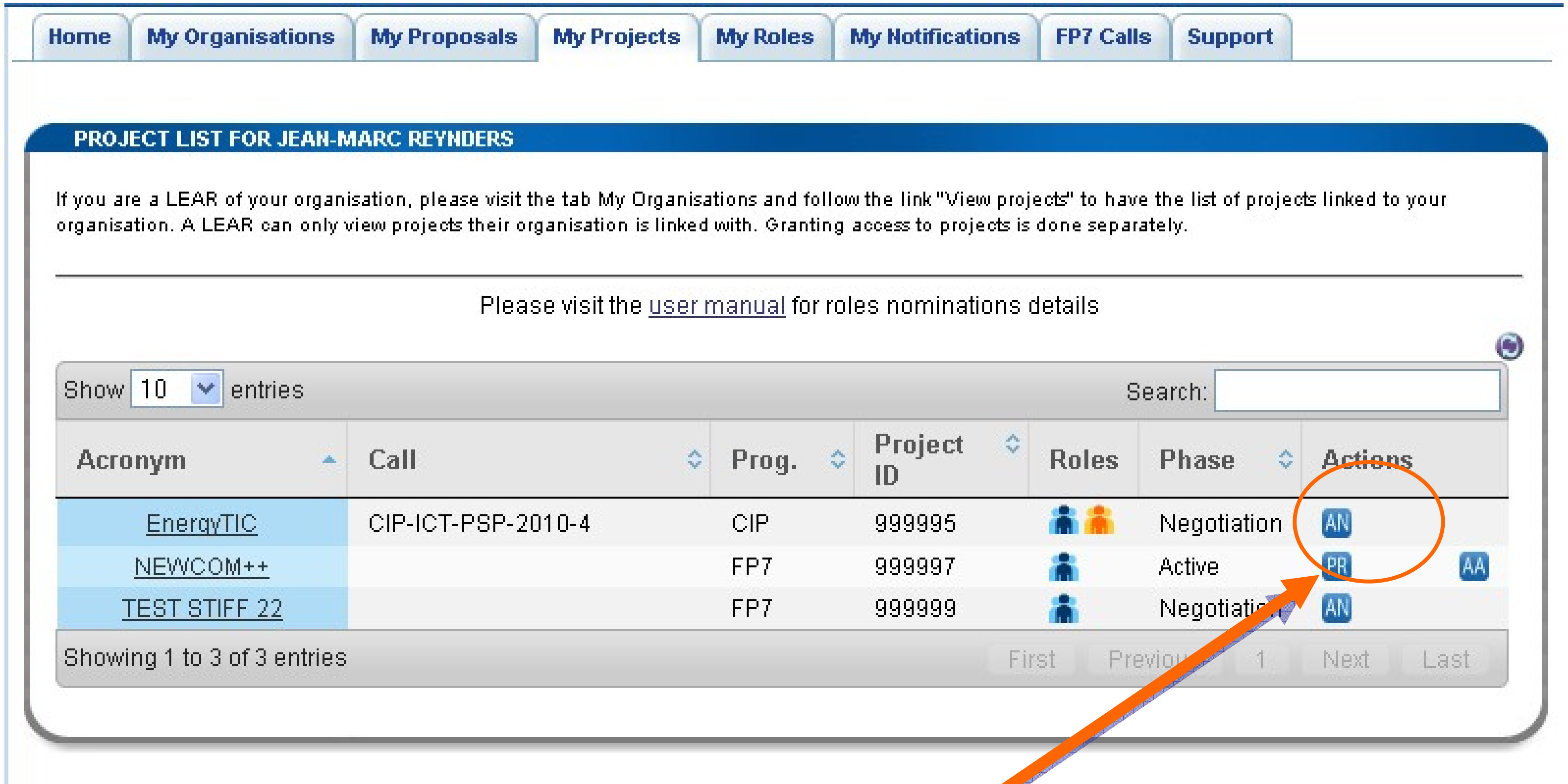
- Only the coordinator can **submit** a NEF session to the Commission.

European Commission
Information Society and Media

Online tool: NEF
Generic behavior



Access your session

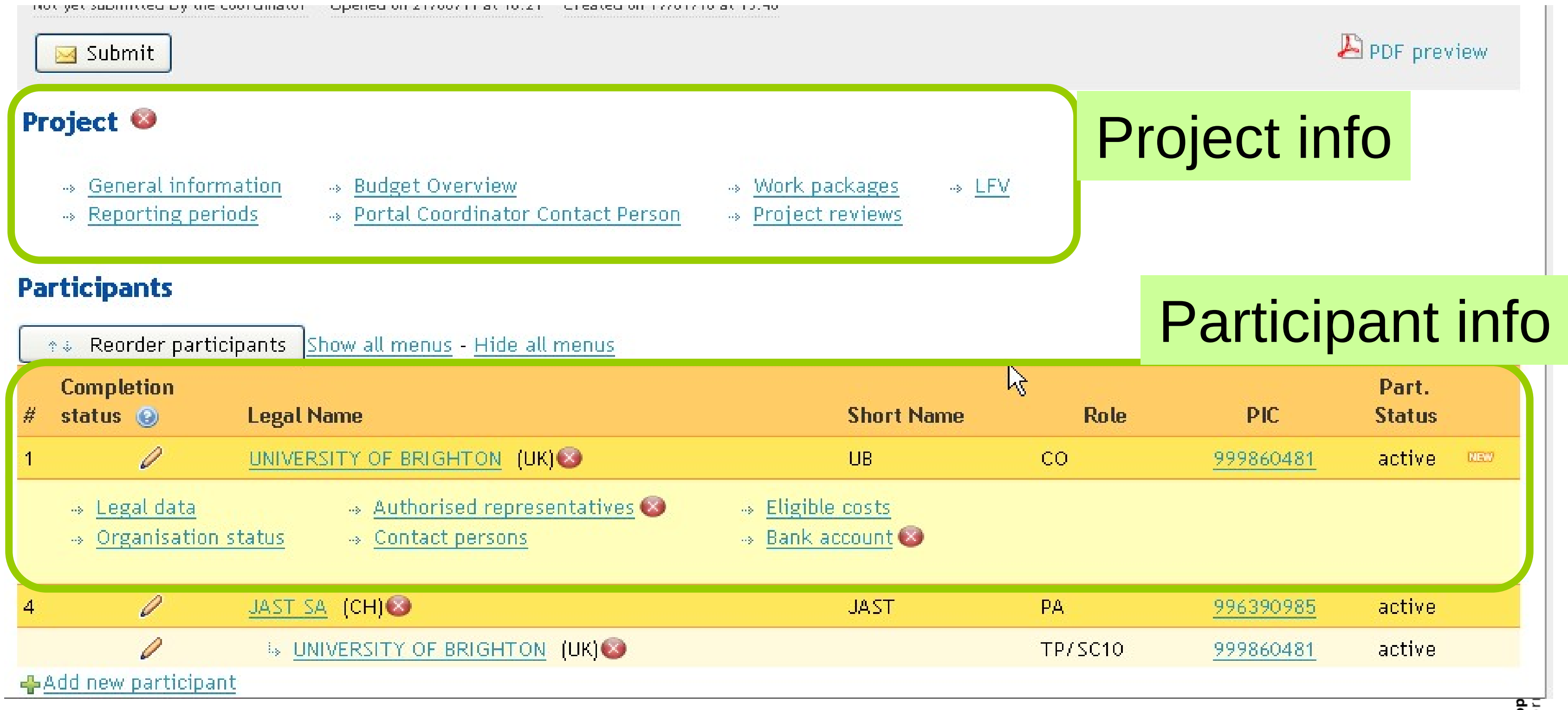


AN : Access Negotiations
AA : Access Amendments
PR : Periodic Reporting

NEGO/AMD

European Commission
Information Society and Media

NEGO / AMD



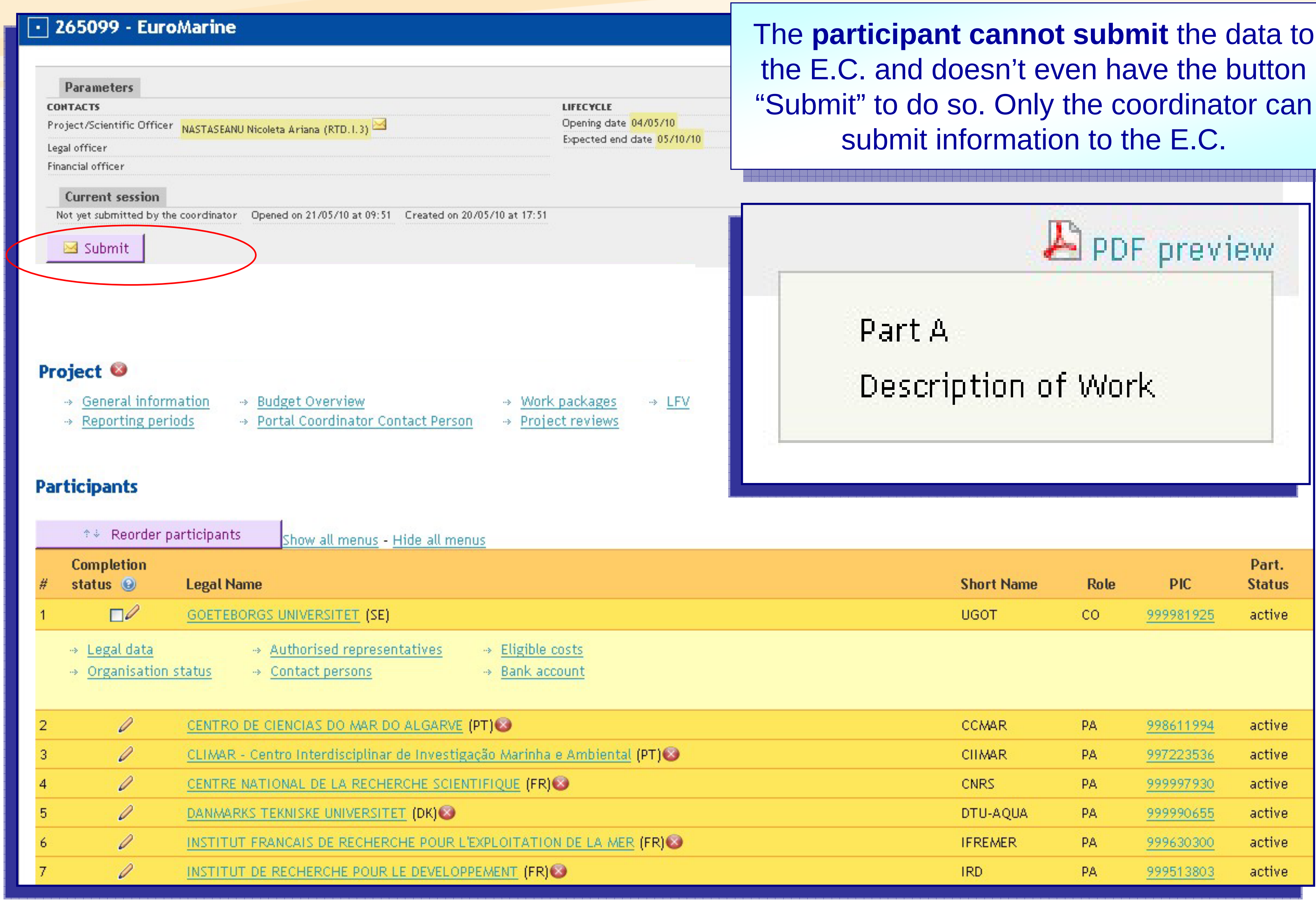
Submit
PDF preview
Project
General information
Budget Overview
Work packages
LFV
Reporting periods
Portal Coordinator Contact Person
Project reviews
Project info
Participants
Reorder participants
Show all menus - Hide all menus
Participant info
Completion status Legal Name Short Name Role PIC Part. Status
1 UNIVERSITY OF BRIGHTON (UK) UB CO 999860481 active NEW
Legal data
Authorised representatives
Eligible costs
Organisation status
Contact persons
Bank account
4 JAST SA (CH) JAST PA 996390985 active
UNIVERSITY OF BRIGHTON (UK) TP/SC10 999860481 active
Add new participant

Good to know…

- In AMD there is **<u>no</u>** 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

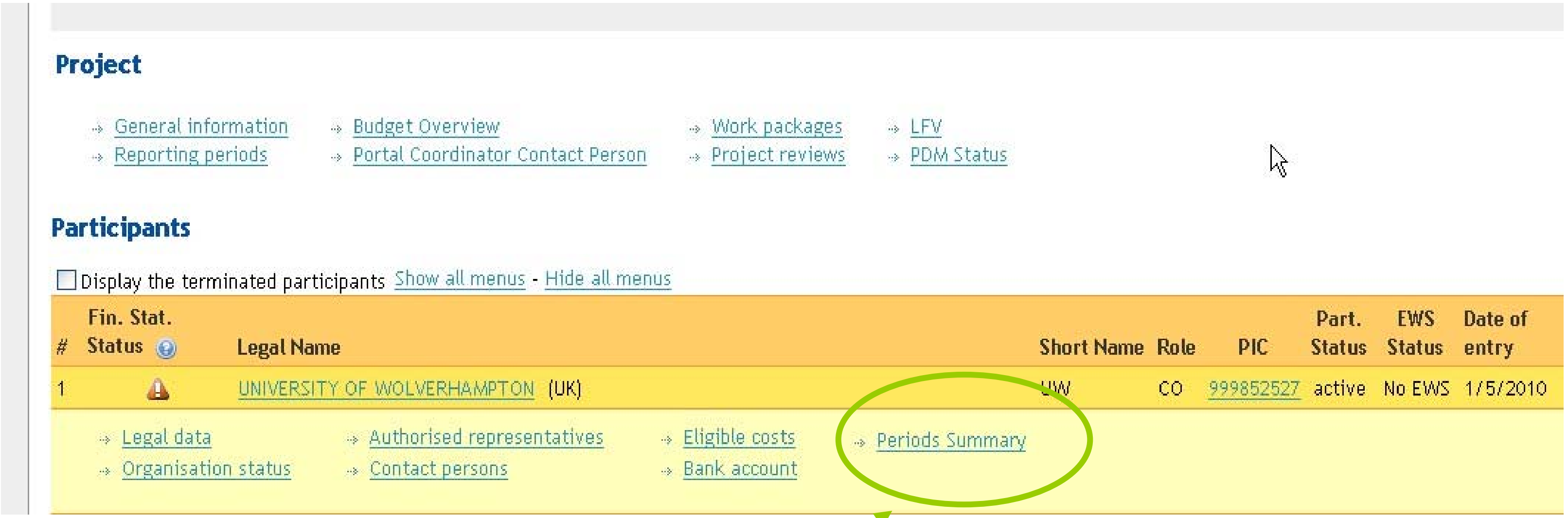
The **participant cannot submit** the data to the E.C. and doesn’t even have the button “Submit” to do so. Only the coordinator can submit information to the E.C.



Periodic Report

European Commission
Information Society and Media

Periodic Reporting



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	Financial Statement FINALIZED		
Submitted in period 2			
Submitted in period 3			

Attached files

File type	Description	File
Publishable summary	CARARE Annual report 2010-11	CARARE Annual report_2010-2011.pdf
Self declaration of the coordinator	Declaration of the coordinator	CARARE declaration by coordinator.pdf
Project objectives, progress and achiev	CARARE Progress report for year 1	CARARE year 1 progress report.pdf
Project management and use of resour	CARARE use of resources for year 1	CARARE-use of resources_Year1_update2.xls

- Publishable summary
- Self declaration of the coordinator
- Project objectives, progress…
- Project management
- \+ any supporting documents

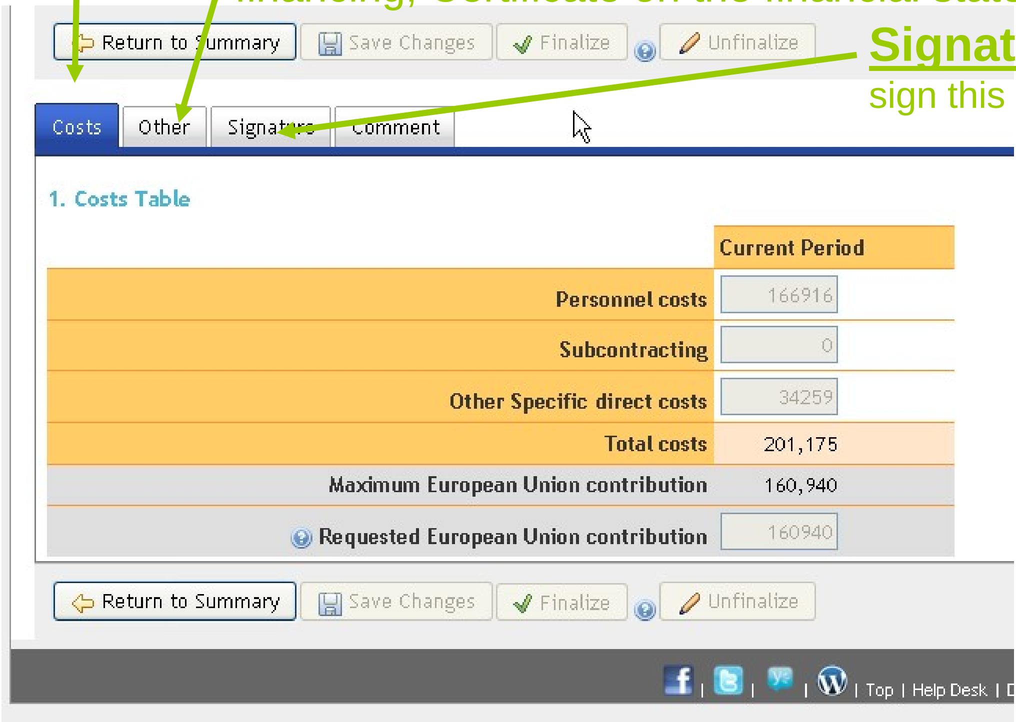
European Commission
Information Society

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

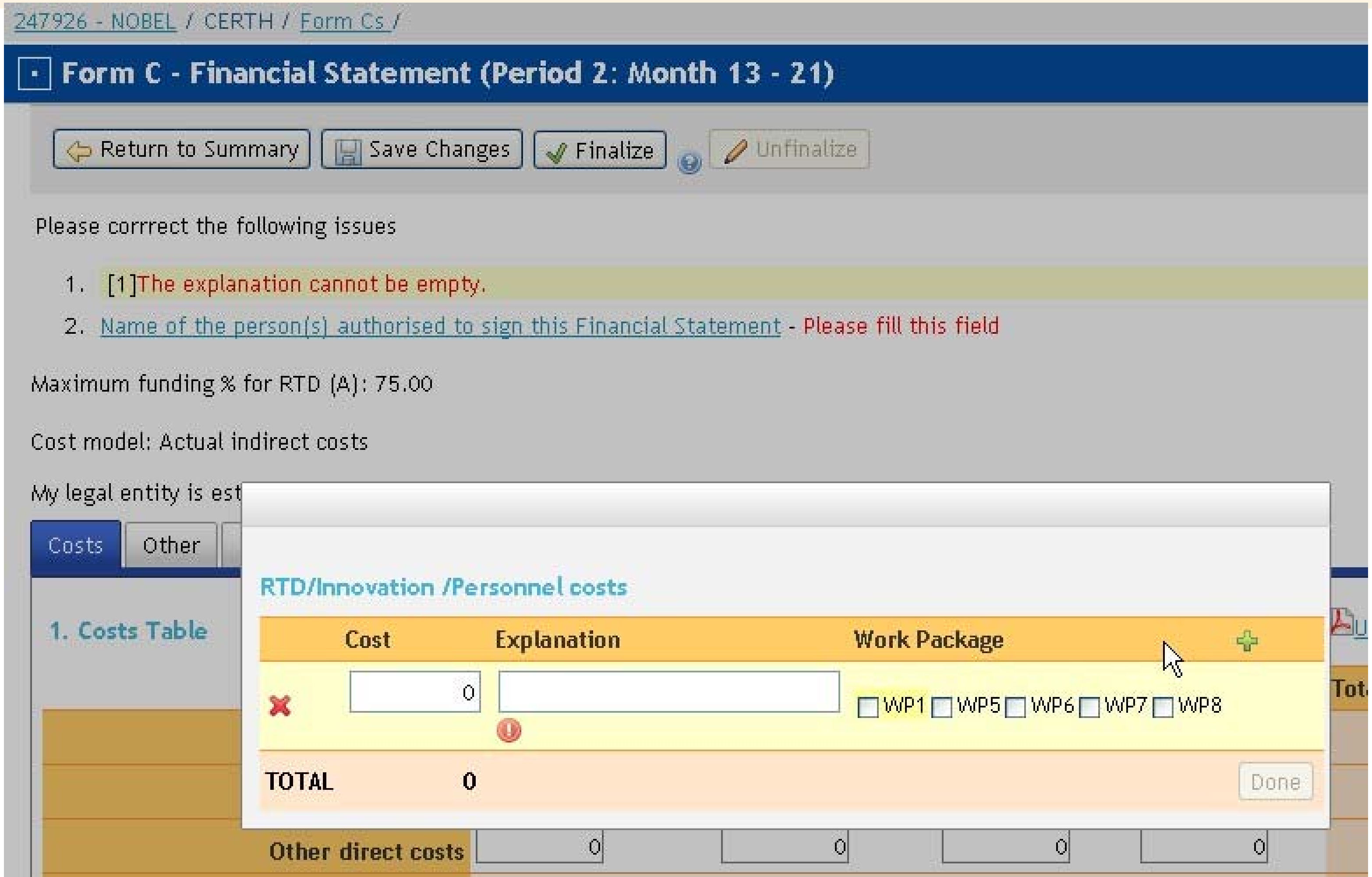
Signature : Name of the person(s) authorised to sign this Financial Statement



	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

European Commission
Information Society and Media

Usage of Resources



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

Social Networks

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

Thanks !

Questions ?

European Commission
Information Society and Media