



# HORIZON 2020

## Funding & Tenders Portal Paperless Grant Management

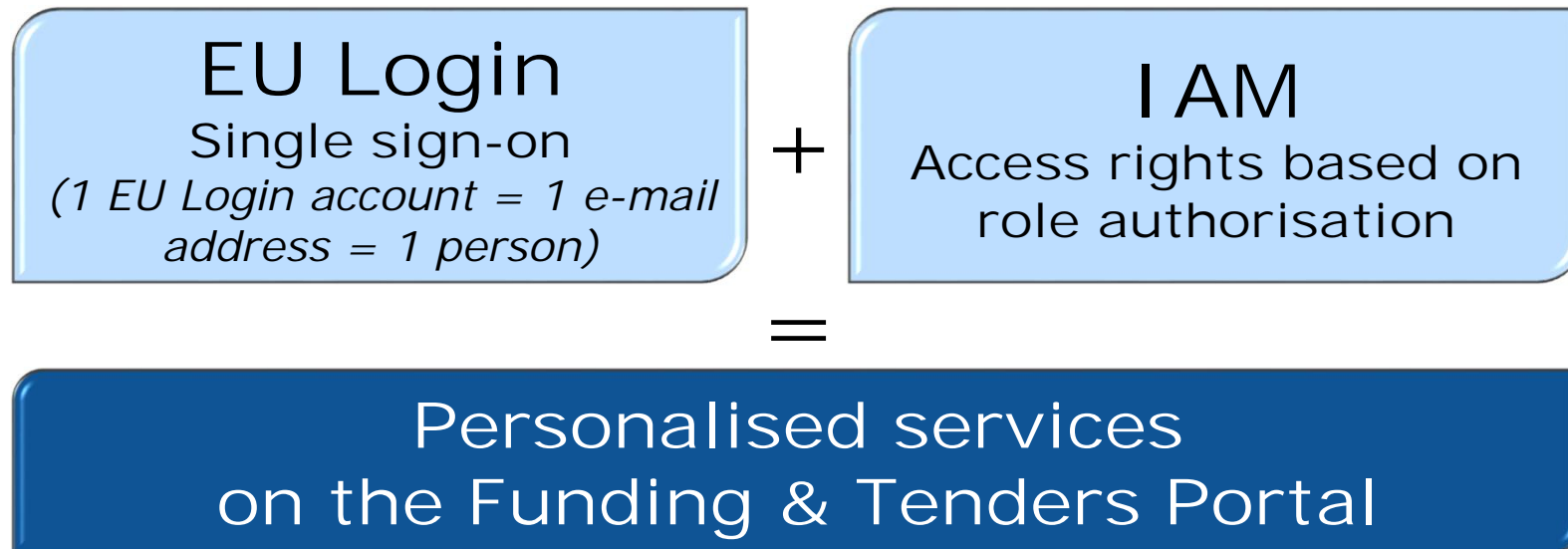
Helsinki, 7 November 2019

Marcos CARVALHO SUZUKI  
Common Service for Business Processes

Research and  
Innovation

## Funding & Tenders Portal: principles

- Single gateway for all exchanges, based on:



- Brings homogeneity, transparency and better service integration for grant management.



## F&T Portal: principles

(cont.)

- **Flexible management of roles & rights:** beneficiary (and coordinator) assigns/revoke most roles
- **Chain of trust:** the formally appointed legal representative [LEAR] of the organisation is validated by the EU. In the Portal, the LEAR appoints a list of persons authorised to sign legal documents or financial statements. Only these persons get access to sign relevant documents for a given project in the Portal's dedicated service.
- **Participant Notification Service (PNS):** all persons/roles that need to know about any action (e.g. e-signature, receipt of documents) are notified and have access to the event (e.g. a signed document)
- **Transparency:** everybody having a role on a project sees the full archive of all exchanges and documents





SEARCH FUNDING &amp; TENDERS

HOW TO PARTICIPATE

PROJECTS &amp; RESULTS

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SUPPORT

select programme



The Funding & Tenders Portal is the entry point (the Single Electronic Data Interchange Area) for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.

Feedback



Find calls for proposals and tenders

Public access

EU Login

Search calls for proposals and tenders by keywords, programmes...

Search

What are calls for proposals?



What are calls for tenders?



How to participate in 5 steps



## Calls for proposals by EU Programme



3rd Health Programme

Asylum, Migration and  
Integration Fund

Consumer Programme

Creative Europe

Erasmus+ Programme

European Maritime and Fisheries  
Fund

HERCULE III

Horizon 2020 Framework  
ProgrammeInternal Security Fund Borders  
and Visa

Internal Security Fund Police

Justice Programme

Pilot Projects and Preparatory  
ActionsProgramme for the  
Competitiveness of Enterprises  
and small and medium-sized  
enterprisesPromotion of Agricultural  
Products

Research Fund for Coal &amp; Steel

Rights, Equality and Citizenship  
ProgrammeUnion Civil Protection  
Mechanism

Previous Framework Programs (FP7 - CIP)

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SEARCH FUNDING &amp; TENDERS HOW TO PARTICIPATE PROJECTS &amp; RESULTS WORK AS AN EXPERT SUPPORT

select  
programme

79

The Funding & Tenders Portal is the entry point (the Single Electronic Data Interchange Area) for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.

Find calls for proposals and tenders

Personalised access  
to the IT toolsPersonalised access  
to the user account

Search calls for proposals and tenders by keywords, programmes...

Search

What are calls for proposals?



What are calls for tenders?



How to participate in 5 steps



## Calls for proposals by EU Programme

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Asylum, Migration and  
Integration Fund

Consumer Programme

Creative Europe

Erasmus+ Programme

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HERCULE III

Horizon 2020 Framework  
ProgrammeInternal Security Fund  
Borders and VisaInternal Security Fund  
Police

Justice Programme

Pilot Projects and  
Preparatory ActionsProgramme for the  
Competitiveness of  
Enterprises and small and  
medium-sized enterprisesPromotion of Agricultural  
ProductsResearch Fund for Coal &  
SteelRights, Equality and  
Citizenship ProgrammeUnion Civil Protection  
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Useful links





# Single sign-on

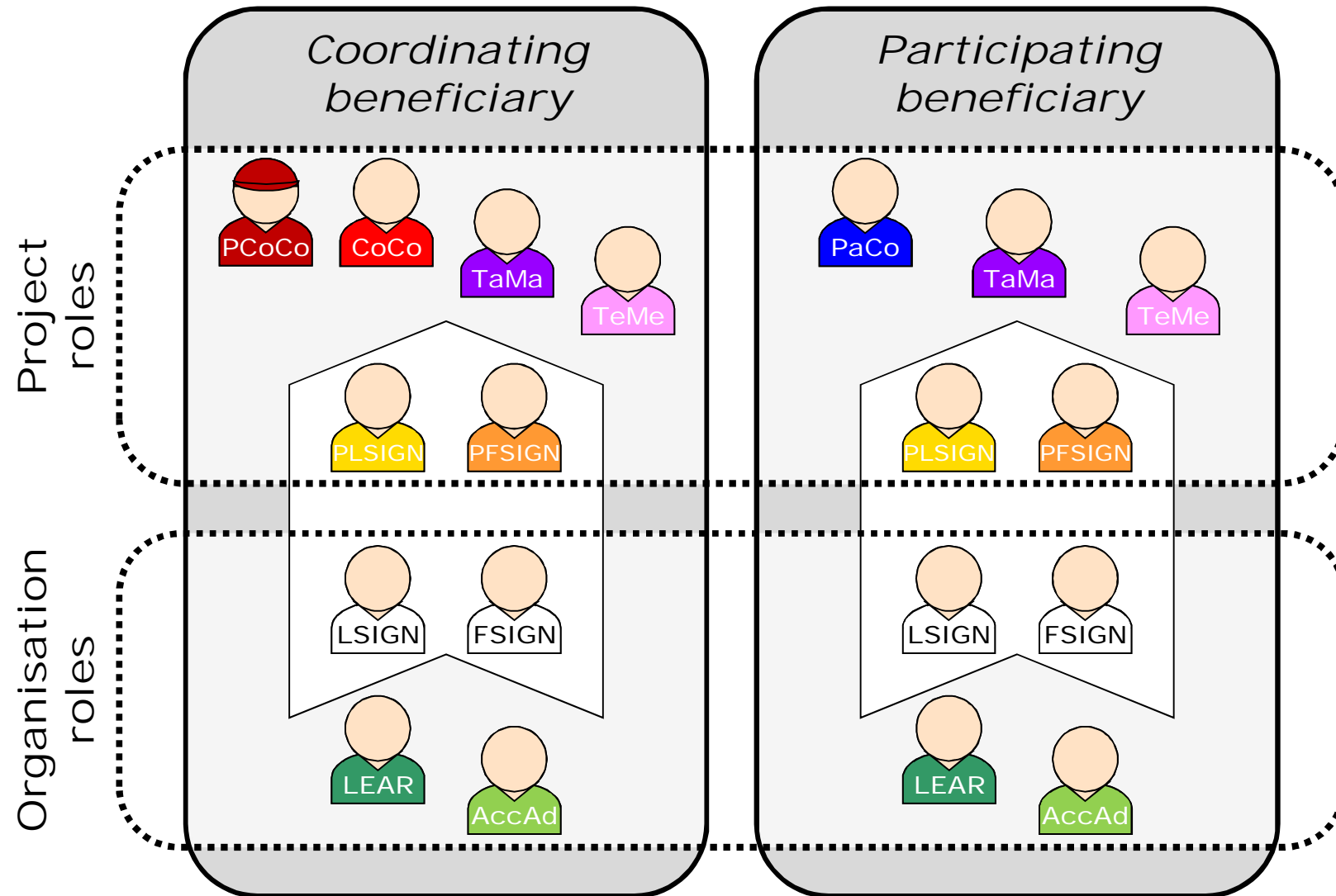
Access to personalised space is based on 3 elements:

- **EU Login Account** – unique identifier for persons, linked to professional e-mail address
- Each EU Login account is linked to one or more **PICs**, the unique identifier of an organisation
- **All roles** that the user has in the projects and/or organisations are linked to the EU Login account. One user can have as many roles as needed.



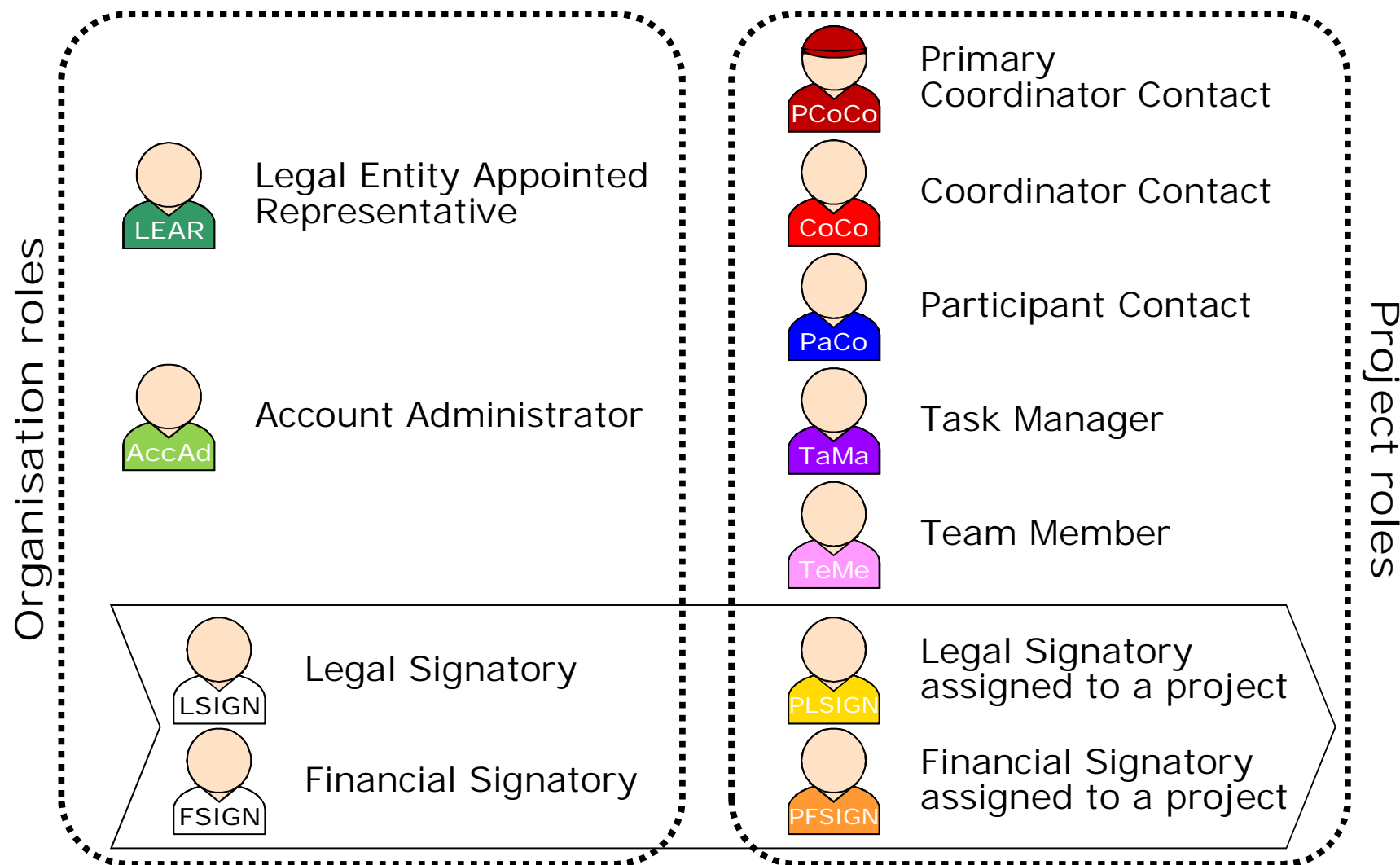
# The Identity and Access Management

European  
Commission





# Roles - Nomenclature

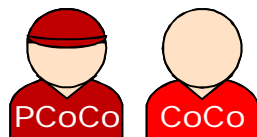




# Access rights



## *Project roles*



- Read all forms
- Write all forms
- Submit all forms to EC



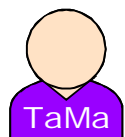
- Read own forms
- Write own forms
- Submit own forms
- Sign and submit own financial forms



- Read own forms
- Write own forms
- Submit own forms (except financial forms)
- Sign own legal forms



- Read own forms
- Write own forms
- Submit own forms to coordinator (except financial forms)

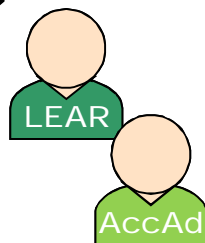


- Read own forms
- Write own forms

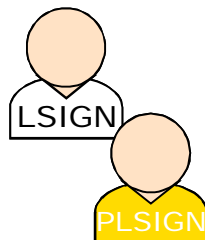


- Read own forms

## *Organisation roles*



- View organisation data
- Modify organisation data
- View lists of organisation's projects, proposals and organisation roles



- View organisation data
- View lists of organisation's projects, proposals and organisation roles



## Important remarks

- No Commission intervention in defining the roles (except for the LEAR and Primary Coordinator Contact)
- The minimum configuration of a consortium is:
  - ✓ The Primary Coordinator Contact
  - ✓ 1 Participant Contact per beneficiary
  - ✓ 1 LEAR per organisation
  - ✓ 1 Legal Signatory per organisation
  - ✓ 1 Financial Signatory per organisation
- One person (= 1 EU Login account) can have as many roles as necessary at the same time  
(e.g. the owner of a one-person SME can be PaCo, LEAR, PLSIGN and PFSIGN)





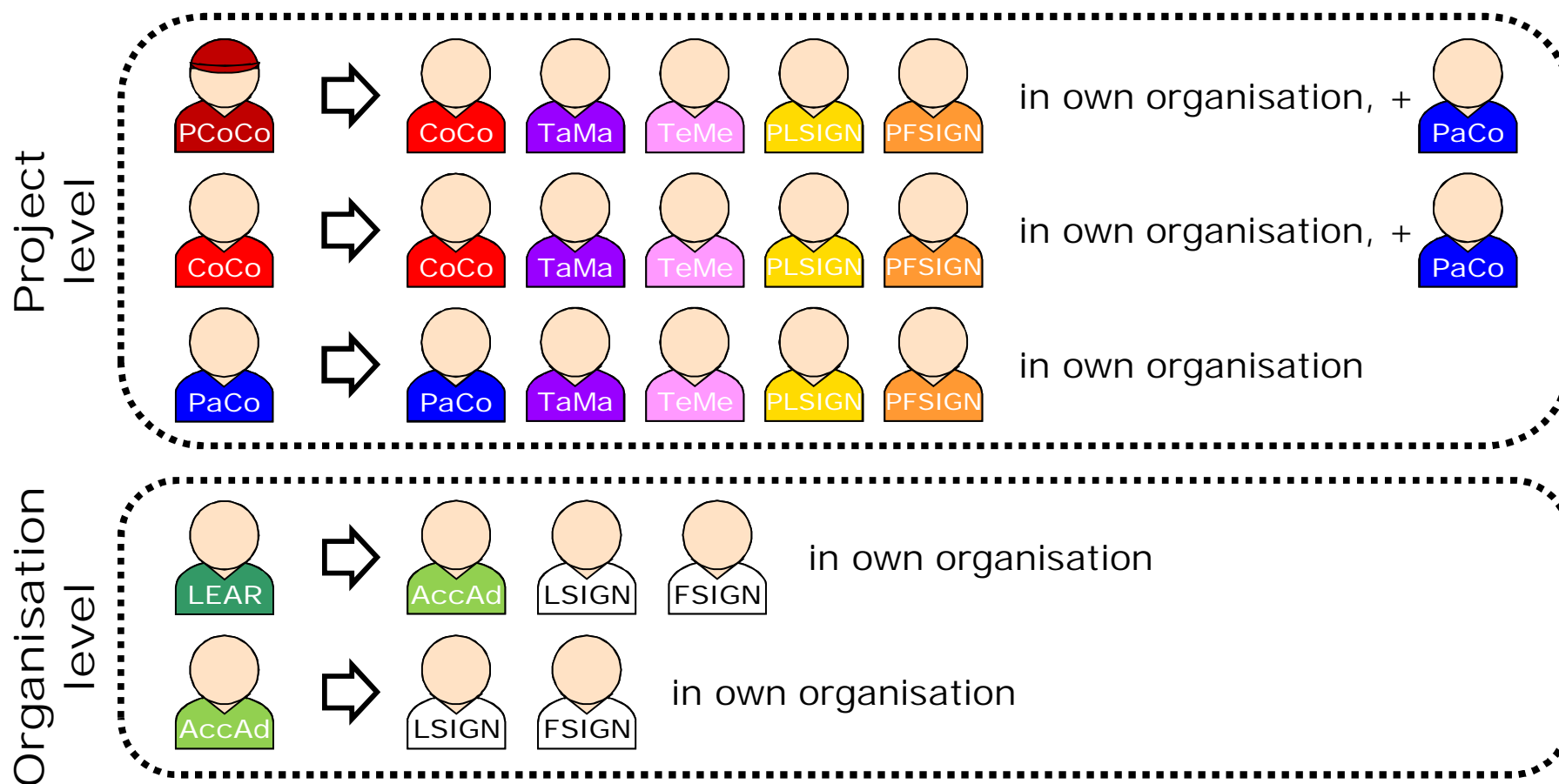
## The nomination process: “Original roles”

Some roles are automatically provisioned in the early stages of the Project (“original roles”) as follows:

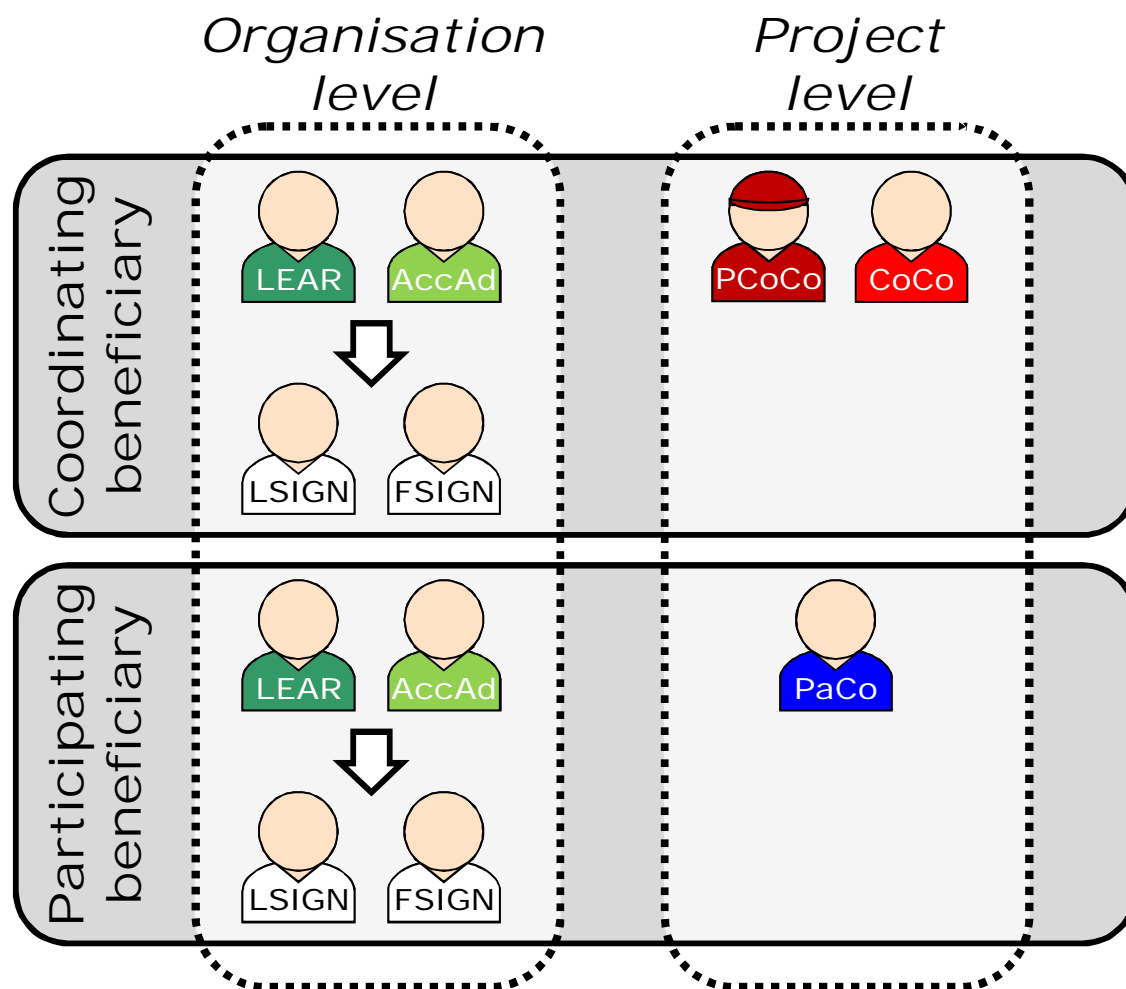
- The **proposal initiator** in the **proposal submission phase** will automatically be recognised by the Commission as the **Primary Coordinator Contact**.
- The “**Main Contacts**” of the participating organisations identified during **proposal submission** will become **Participant Contacts** at the beginning of the grant preparation.
- The **LEAR** is validated by the Commission during the validation process of his/her organisation.



# The nomination/revocation process



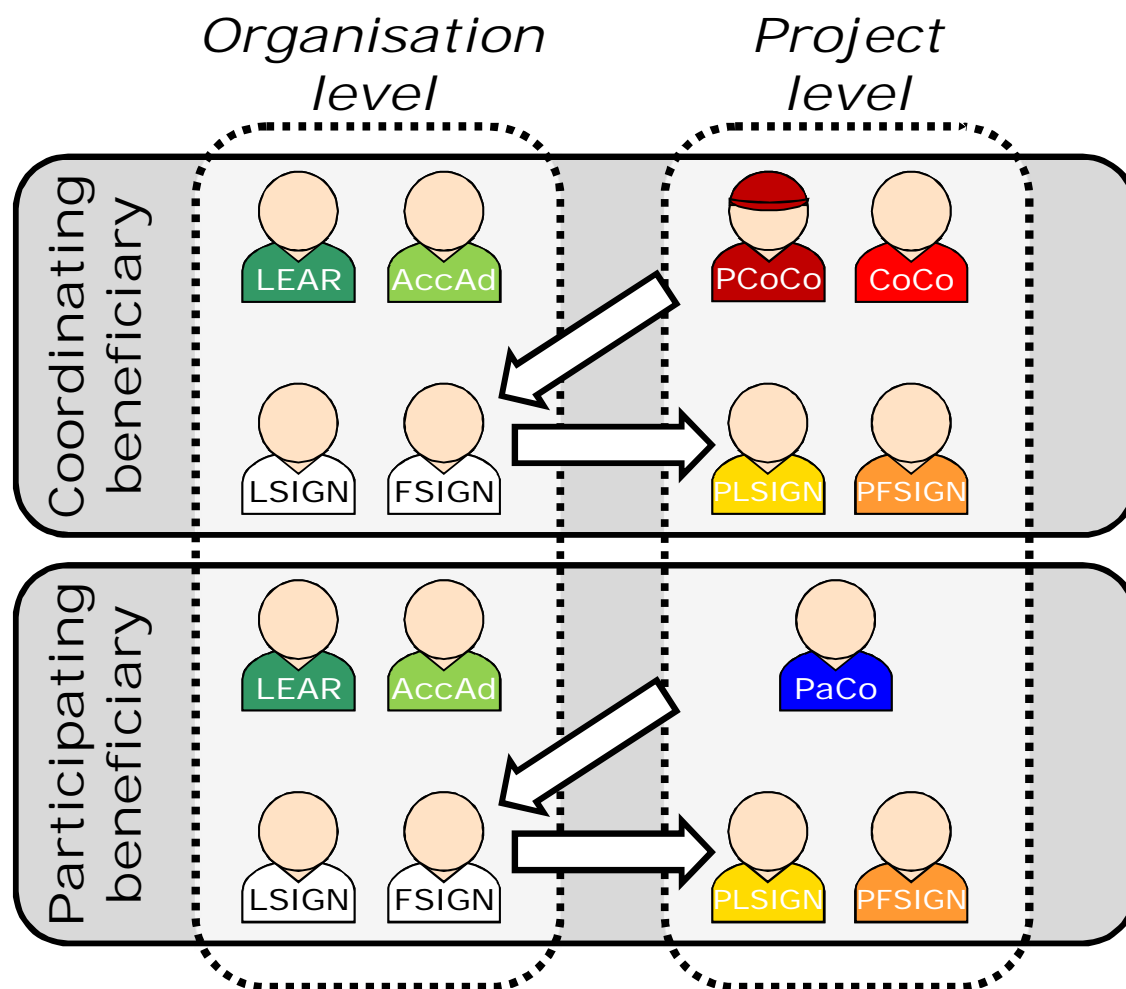
# The nomination process: LSIGN/FSIGN



1. The **LEAR** (or **Account Administrators**) nominate as many LSIGNs/FSIGNs as they want.

At this stage, the FSIGN cannot do anything, while the LSIGN has read-only access to the organisation's data and lists of projects, proposals & roles.

# The nomination process: LSIGN/FSIGN



2. The (Primary) Coordinator Contacts / Participant Contacts need to assign to their project as many LSIGNs/FSIGNs for their own organisation as needed.

The PLSIGN and PFSIGN now have their own access to the tools.



# The nomination/revocation process: how to nominate/revoke someone?

To grant a role, the e-mail address of the "new user" will have to be filled in; **this e-mail address should be the same as the one used for the EU Login account of the "new user".**

**If this "new user" has no EU Login account,** he/she will automatically receive an invitation to create his/her EU Login account.





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My Organisation(s)
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My Proposal(s)
**My Project(s)**
My Formal Notification(s)
My Expert Area

My Project(s)

Results: 42

Download excel list of those projects

Search..

ACRONYM	CALL	PROGRAM	PROJECT	PHASE	ACTIONS
NCP-PLAYGROUND-105-UA	H2020-Adhoc-2014-20	H2020	688925		Actions
NCP-PLAYGROUND-01-BG	H2020-Adhoc-2014-20				Project Consortium Manage Project View Proposal
NCP-PLAYGROUND-02-BE	H2020-Adhoc-2014-20	H2020	685555		Actions
NCP-PLAYGROUND-03-CZ	H2020-Adhoc-2014-20	H2020	685556		Actions
NCP-PLAYGROUND-04-DK	H2020-Adhoc-2014-20	H2020	685493		Actions
NCP-PLAYGROUND-05-DE	H2020-Adhoc-2014-20	H2020	685494		Actions
NCP-PLAYGROUND-06-EE	H2020-Adhoc-2014-20	H2020	685495		Actions
NCP-PLAYGROUND-07-IE	H2020-Adhoc-2014-20	H2020	685497		Actions
NCP-PLAYGROUND-08-EL	H2020-Adhoc-2014-20	H2020	685498		Actions
NCP-PLAYGROUND-09-ES	H2020-Adhoc-2014-20	H2020	685499		Actions

1 2 3 10

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Project roles can be granted/revoked  
in the "My Projects" section

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[My Organisation\(s\)](#)

- GRANTS

[My Proposal\(s\)](#)

[My Project\(s\)](#)

[My Formal Notification\(s\)](#)

[My Expert Area](#)

[SEARCH FUNDING & TENDERS](#) [HOW TO PARTICIPATE](#) [PROJECTS & RESULTS](#) [WORK AS AN EXPERT](#) [SUPPORT](#)[select programme](#) [79](#) My Project:  
**NCP-PLAYGROUND-105-UA**[Download excel list of those projects](#)[Actions](#)[Feedback](#)[Details](#) [Consortium](#)

Project ID: 688925

Programme: **H2020**

Rdg: **RTD**

**COORDINATOR** Organisation - NCP Test Company B

**BENEFICIARY** Organisation - NCP Test University A

**BENEFICIARY** Organisation - NCP Test Company E

[EDIT ROLES](#)

[EDIT ROLES](#)

[EDIT ROLES](#)

View the organisation's basic details and full list of project roles

**Edit roles**  
(only if you are  
Primary Coordinator Contact,  
Coordinator Contact  
or Participant Contact)

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select programme

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Roles for the organisation:  
**NCP Test Company B**

Results: 5

Search..

ROLE	NAME	EMAIL	USERNAME	ACTIONS
Coordinator Contact	Olivier MARGANNE	Olivier.MARGANNE@ext.ec.europa....	margaol	
Coordinator Contact	Noemi Horvath	noemi.horvath@ext.ec.europa.eu	horvano	
Coordinator Contact	Peter HAERTWICH	Peter.Haertwich@ec.europa.eu	hartwpe	
Coordinator Contact	Leonardo Paoli	leonardo.paoli@ec.europa.eu	paoliie	
Primary Coordinator Contact	Piret Noukas	piret.noukas@ec.europa.eu	noukapi	

Go back

Add roles

Enable Lear Access

Disable Lear Access

1

10

Organisation:  
**NCP Test Company B**

PIC: 934525646

EE - Test City  
Test Street 1

Feedback

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Add new role

Revoke existing role

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My Organisation(s)
GRANTS
My Proposal(s)
My Project(s)
My Formal Notification(s)
My Expert Area

My Organisation(s)
More info

Results: 13
Search..

LEGAL NAME	PIC	VAT	STATUS	ACTIONS
NCP Test University F	934187795		VALIDATED	Actions
NCP Test Company E	934187892		VALIDATED	Actions
NCP Test Research Org D			VALIDATED	Actions
NCP test SME C	934188280		VALIDATED	Actions
NCP Test Company B	934525646		VALIDATED	Actions
NCP Test University A	934526519		VALIDATED	Actions
THE BRUSSELS OFFICE SA	958300443	BE0476213184	VALIDATED	Actions
DEBRECENI EGYETEM	999881239	HU17782218	VALIDATED	Actions
UNIVERSITY OF LEEDS	999975426	GB613451470	VALIDATED	Actions
CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE CNRS	999997930	FR40180089013	VALIDATED	Actions

1 2 10

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Organisation roles can be granted/revoked  
in the "My Organisations" section



## Roles and access rights – Chain of trust

- **LEAR** is formally nominated by the legal representative of the organisation
- LEAR appoints a list of persons authorised to **sign legal documents (LSIGN)** and **financial statements (FSIGN)**
- Only these persons get access to sign relevant documents after CoCos/PaCos have appointed them to a given project
- "Sign and submit" triggers the creation of an **eReceipt (digitally-signed PDF document)**
- **Any attempt to modify the content of the eReceipt will lead to a break of the integrity of the electronic signature**
- All persons that need to know about signature are **notified** and have **access** to the signed documents
- Full **audit trail** of all electronic transactions





## Notifications about next steps

- **E-mail notifications** about all the actions that you need to carry out for grant preparation and signature.
- All the notifications that you receive by e-mail are **also available in the "My Notifications" inbox** on PP.
- Notifications are addressed to the role that is to carry out the action. The roles that may need to be aware of this action receive it in CC (**TASK/INFO notifications**)
- Notifications alert you while the **full information** about the action is provided in the **"My Area"** after you have logged in – in **"My Projects"**, click on **"Actions"** → **"Manage Project"**



Manage my area



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## Find calls for proposals and tenders

Search calls for proposals and tenders by keywords, programmes...

Search

View your notifications

What are calls for proposals?



What are calls for tenders?



How to participate in 5 steps



## Calls for proposals by EU Programme

3rd Health Programme

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Horizon 2020 Framework  
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Pilot Projects and  
Preparatory ActionsProgramme for the  
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Enterprises and small and  
medium-sized enterprisesPromotion of Agricultural  
ProductsResearch Fund for Coal &  
SteelRights, Equality and  
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medium-sized enterprisesPromotion  
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Useful links



## My notifications

Total 20



## Participant Portal

Request to get in contact with the self registrant of &lt;915907369 - TEST TEST TEST TEST6&gt;

## Participant Portal

INFO: Role of Coordinator Contact revoked for project NCP-PLAYGROUND-11-HR (685501) in organisation &lt;934187892 - NCP Test Company E&gt;

## Participant Portal

INFO: Allocation of role of Coordinator Contact for project NCP-PLAYGROUND-11-HR (685501) in organisation &lt;934187892 - NCP Test Company E&gt;

## Participant Portal

Lear/account administrator access request for Project NCPPLAYGROUND-111-FO

## Participant Portal

INFO: Role of Account Administrator revoked for your organisation &lt; 934188086 - NCP Test Research Org D &gt;

## Participant Portal

INFO: Role of Account Administrator revoked for your organisation &lt; 934188086 - NCP Test Research Org D &gt;

## Participant Portal

INFO: Role of Account Administrator revoked for your organisation &lt; 934187892 - NCP Test Company E &gt;

## Participant Portal

INFO: Role of Legal Authorized Signatory revoked for your organisation &lt; 934187892 - NCP Test Company E &gt;

## Participant Portal

[View all notifications](#)

Manage my area



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## My Notification(s)

[More info](#)

Inbox

Preferences

Results: **82**

Search..

DATE	SOURCE	SUBJECT	PRIORITY
31-10-2018 11:35:18	Participant Portal	Request to get in contact with the self registrant of <915907369 - TEST TEST TEST TEST6>	HIGH
20-09-2018 17:54:59	Participant Portal	INFO: Role of Coordinator Contact revoked for project NCP-PLAYGROUND-11-HR (685501) in organisation <934187892 - NCP Test Company E>	HIGH
18-09-2018 13:58:46	Participant Portal	INFO: Allocation of role of Coordinator Contact for project NCP-PLAYGROUND-11-HR (685501) in organisation <934187892 - NCP Test Company E>	HIGH
06-09-2018 17:15:55	Participant Portal	Lear/account administrator access request for Project NCPPLAYGROUND-111-FO	HIGH
06-09-2018 14:51:05	Participant Portal	INFO: Role of Account Administrator revoked for your organisation < 934188086 - NCP Test Research Org D >	HIGH
06-09-2018 14:51:05	Participant Portal	INFO: Role of Account Administrator revoked for your organisation < 934188086 - NCP Test Research Org D >	HIGH
06-09-2018 14:49:36	Participant Portal	INFO: Role of Account Administrator revoked for your organisation < 934187892 - NCP Test Company E >	HIGH
06-09-2018 14:49:36	Participant Portal	INFO: Role of Legal Authorized Signatory revoked for your organisation < 934187892 - NCP Test Company E >	HIGH
06-09-2018 14:49:35	Participant Portal	INFO: Role of Account Administrator revoked for your organisation < 934187892 - NCP Test Company E >	HIGH
25-07-2018 15:57:07	Participant Portal	Request to get in contact with the account administrator of <934188280 - NCP test SME C>	HIGH

1 2 3 10

Delete Selected

Mark Selected Read

Mark All Read

Mark Selected Unread

Feedback



## Where to find help?

**Online Manual:** online guide divided by business processes. Provides full information on the process & reference documents, and links to the relevant IT How To sections

[http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index\\_en.htm](http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm)

**IT How To wiki:** screens & step-by-step guidance on the tools, including videos

<https://webgate.ec.europa.eu/funding/display/ECResearchGMS/IT+How+To>

**FAQ database** – searchable by categories and keywords

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/faq>



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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.



Thank you!