Funding & Tenders Portal: principles

- Single gateway for all exchanges, based on:

  **EU Login**
  Single sign-on
  (1 EU Login account = 1 e-mail address = 1 person)

  +

  **IAM**
  Access rights based on role authorisation

  =

  **Personalised services**
  on the Funding & Tenders Portal

- Brings homogeneity, transparency and better service integration for grant management.
F&T Portal: principles

- **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
Personalised access to the IT tools
Personalised access to the user account
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
Roles - Nomenclature

Organisation roles:
- Legal Entity Appointed Representative (LEAR)
- Account Administrator (AccAd)

Project roles:
- Primary Coordinator Contact (PCoCo)
- Coordinator Contact (CoCo)
- Participant Contact (PaCo)
- Task Manager (TaMa)
- Team Member (TeMe)

Signatory roles:
- Legal Signatory (LSIGN)
- Financial Signatory (FSIGN)
- Legal Signatory assigned to a project (PLSIGN)
- Financial Signatory assigned to a project (PFSIGN)
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

**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

**Project level**
- PCoCo
- CoCo
- TaMa
- TeMe
- PLSIGN
- PFSIGN
- PaCo

In own organisation, +

**Organisation level**
- LEAR
- AccAd
- LSIGN
- FSIGN

In own organisation

- AccAd
- LSIGN
- FSIGN
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.
Project roles can be granted/revoked in the "My Projects" section

"Project Consortium"
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)
Add new role

Revoke existing role
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**"
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

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

View your notifications
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Find calls for proposals and tenders

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

What are calls for proposals?  What are calls for tenders?

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
- Internal Security Fund: Borders and Visa
- Internal Security Fund: Police
- Justice Programme
- Pilot Projects and Preparatory Actions
- Programme for the Competitiveness of Enterprises and small and medium-sized enterprises
- Pronaiva Programme
- Union Civil Protection Mechanism
- Previous Framework Programmes (FP7-CIP)
- Overview of EU funding

News

Useful links

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### My Notification(s)

**Inbox: Preferences**

*Results: 82*

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<thead>
<tr>
<th>DATE</th>
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<th>SUBJECT</th>
<th>PRIORITY</th>
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<td>31-10-2018 11:25:18</td>
<td>Participant Portal</td>
<td>Request to get in contact with the self registrant of &lt;915907369&gt; - TEST TEST TEST TEST</td>
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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

**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
Terms of use

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!