

Research and Innovation Participant Portal The Participant Portal Services

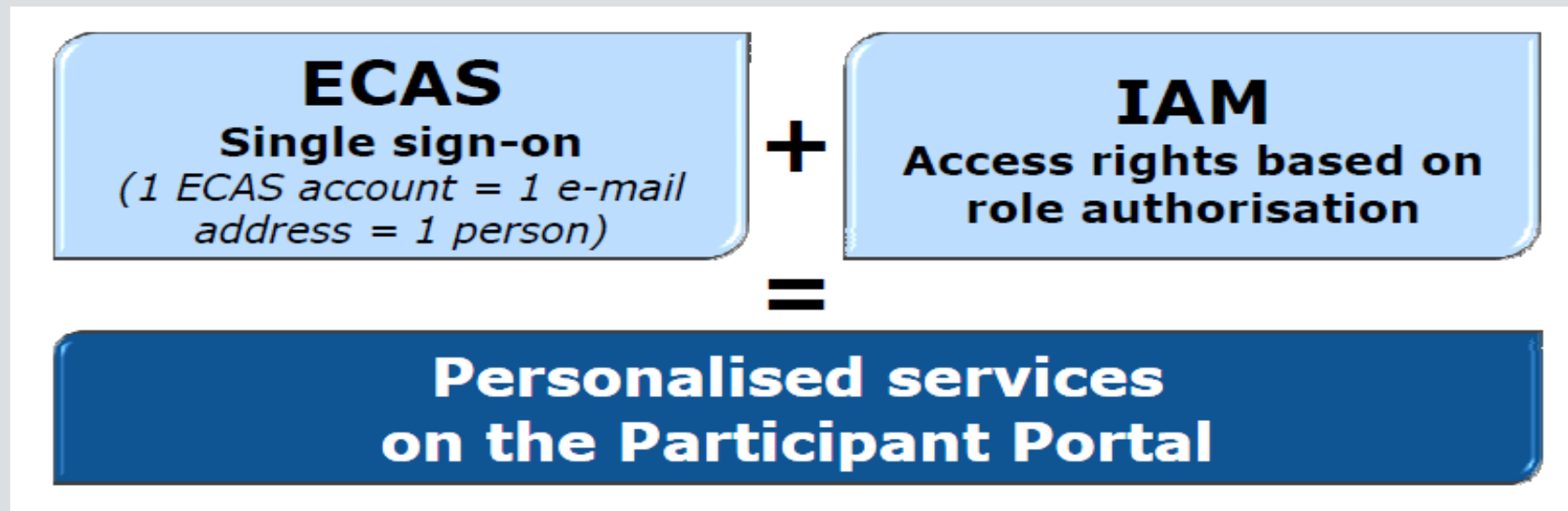
Diana Spiteri - MCST
Mentoring Visit – Croatia
13-14 May 2013



C-ENERGY+ Connecting Energy NCPs.
A Pro-Active Network of National Contact
Points in the Seventh Framework
Programme under the Energy Theme

Research Participant Portal

Offers stakeholders a unique entry point for the interactions with the European Commission or Agencies in handling grant related actions, based on:



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

Participant Portal services: without login

FP7 Calls



Funding opportunities

FP7 Doc



FP7 Documents

My Organisations



Organisation Registration

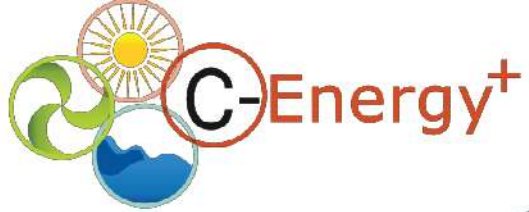
?



Support

Participant Portal services: **after login**

	FP7 Calls	⇒	Funding opportunities
	FP7 Doc	⇒	FP7 Documents
Personalised services	My Organisations	⇒	Organisation-related data
	My Proposals	⇒	Proposals for funding
	My Projects	⇒	Projects-related services
	My Roles	⇒	Managing access rights
	Notifications	⇒	Service messages
	?	⇒	Support



Services without login

Participant Portal services: without login

FP7 Calls



Funding opportunities

FP7 Doc



FP7 Documents

My Organisations



Organisation Registration

?



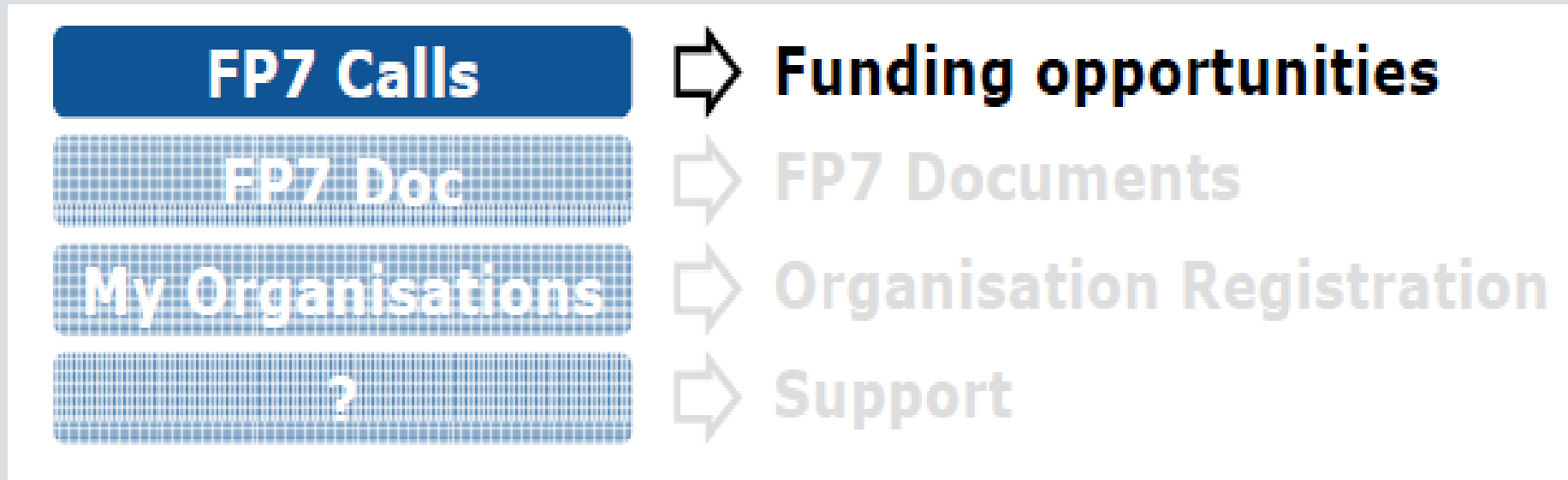
Support

Participant Portal services: without login

FP7 Calls	➔ Funding opportunities
FP7 Doc	➔ FP7 Documents
My Organisations	➔ Organisation Registration
?	➔ Support

1. Finding funding opportunities:
 - Open / closed / forthcoming calls
 - Latest information on published calls
 - Search on the calls' pages (advanced search possibilities)

Participant Portal services: without login



2. Access the electronic proposal submission system:

- Prepare & submit new proposals using EPSS OR the new proposal submission system of the Portal (available on the call page)
- The new proposal sub. sys. is a wizard that will help you create & submit a proposal, while ensuring data confidentiality. This tool is available from call launch to a strict deadline.

Participant Portal services: without login

FP7 Calls	⇒ Funding opportunities
FP7 Doc	⇒ FP7 Documents
My Organisations	⇒ Organisation Registration
?	⇒ Support

2. Access the electronic proposal submission system:

- PIC numbers are required, therefore the organisations need to register before drafting a proposal.
- You can save a draft proposal and submit it later.

You can access existing draft/final proposals - 'My Proposals' (after ECAS login)

Demo

Instrument selection

Pre-registration

Consortium set-up

Submission

Type of Activity	2008-09	2009-10	2010-11	2011-12
Administrative costs (incl. subcontracting in EU)	1000000	1000000	1000000	1000000
Other direct costs (incl. subcontracting in EU)	1000000	1000000	1000000	1000000
Indirect costs (incl. subcontracting in EU)	1000000	1000000	1000000	1000000
Personnel (incl. subcontracting in EU)	1000000	1000000	1000000	1000000
Research (incl. subcontracting in EU)	1000000	1000000	1000000	1000000

Form filling

Forms & documents

Participant Portal services: without login

FP7 Calls	⇒ Funding opportunities
FP7 Doc	⇒ FP7 Documents
My Organisations	⇒ Organisation Registration
?	⇒ Support

1. Browse through FP7 documents

- Legal basis
- Legal documents for implementation
- All work programmes
- Orientation papers 2013 (*until the WP is adopted*)
- Guidance documents for FP7
- Horizontal issues
- Specific guidelines

Participant Portal services: without login

FP7 Calls	⇒ Funding opportunities
FP7 Doc	⇒ FP7 Documents
My Organisations	⇒ Organisation Registration
?	⇒ Support

2. Search specific FP7 documents

- Search documents by title or through a full text search

Participant Portal services: without login

FP7 Calls	⇒ Funding opportunities
FP7 Doc	⇒ FP7 Documents
My Organisations	⇒ Organisation Registration
?	⇒ Support

1. Search for an existing PIC (Participant Identification Code) number
2. Access the financial viability simulation tool

The registration for a PIC number requires an ECAS login.

Participant Portal services: without login

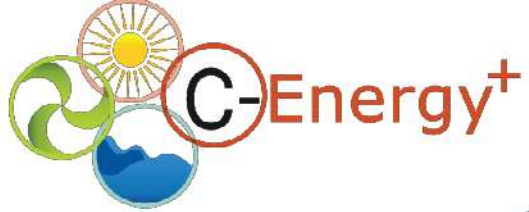
FP7 Calls	⇒ Funding opportunities
FP7 Doc	⇒ FP7 Documents
My Organisations	⇒ Organisation Registration
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1. FAQ

- Browse the FAQ database & find useful information along with additional guidance (user manuals, PPT presentations, etc.)

2. Contact the helpdesk

3. Newest developments (“What’s new” section)



Services after login

Participant Portal services: **after login**

My Organisations



Organisation-related data

My Proposals



Proposals for funding

My Projects



Projects-related services

My Roles



Managing access rights

Notifications



Service messages

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
My Proposals	⇒ Proposals for funding
My Projects	⇒ Projects-related services
My Roles	⇒ Managing access rights
Notifications	⇒ Service messages

1. Register an organisation

- The person registering the data receives online the PIC number for his/her organisation.
- Participants are encouraged to register their organisations as soon as possible before drafting a proposal.

Participant Portal services: **after login**



2. Access / Update organisation-related data - This is only available to the following roles:

- LEAR (Legal Entity Appointed Representative): person authorized to manage the legal data of the organisation online.
- Account Administrator(s): person(s) appointed by the LEAR to assist with the online management of the legal data. (...)

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
My Proposals	⇒ Proposals for funding
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My Roles	⇒ Managing access rights
Notifications	⇒ Service messages

2. Access / Update organisation-related data - This is only available to the following roles:

(...)

- Self Registrant: person who has registered an organisation
- The contact person (given by the self registrant)

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
My Proposals	⇒ Proposals for funding
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Notifications	⇒ Service messages

1. Access your proposals (draft or submitted) made with the new submission system

- Continue preparing a draft proposal
- See the proposals that you submitted

The majority of the calls have used the new submission system from July 2012

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
My Proposals	⇒ Proposals for funding
My Projects	⇒ Projects-related services
My Roles	⇒ Managing access rights
Notifications	⇒ Service messages

2. Access to proposals made with EPSS:

- Access <https://www.epss-fp7.org>
- Login using your user ID and password

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
My Proposals	⇒ Proposals for funding
My Projects	⇒ Projects-related services
My Roles	⇒ Managing access rights
Notifications	⇒ Service messages

1. Access the list of projects the participant is involved in
2. Access the project-related services:
 - Negotiation
 - Amendments
 - Reporting tools
3. View the roles and nominations for a given project

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
My Proposals	⇒ Proposals for funding
My Projects	⇒ Projects-related services
My Roles	⇒ Managing access rights
Notifications	⇒ Service messages

1. Manage the roles and access rights in projects or organisations

- View your role in the project / organisation
- Nominate new persons
- View your previous nominations
- Revoke roles

Participant Portal services: **after login**

My Organisations	⇒ Organisation-related data
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2. “Manage consortium” button

(for Coordinator and Participant Contact roles only)

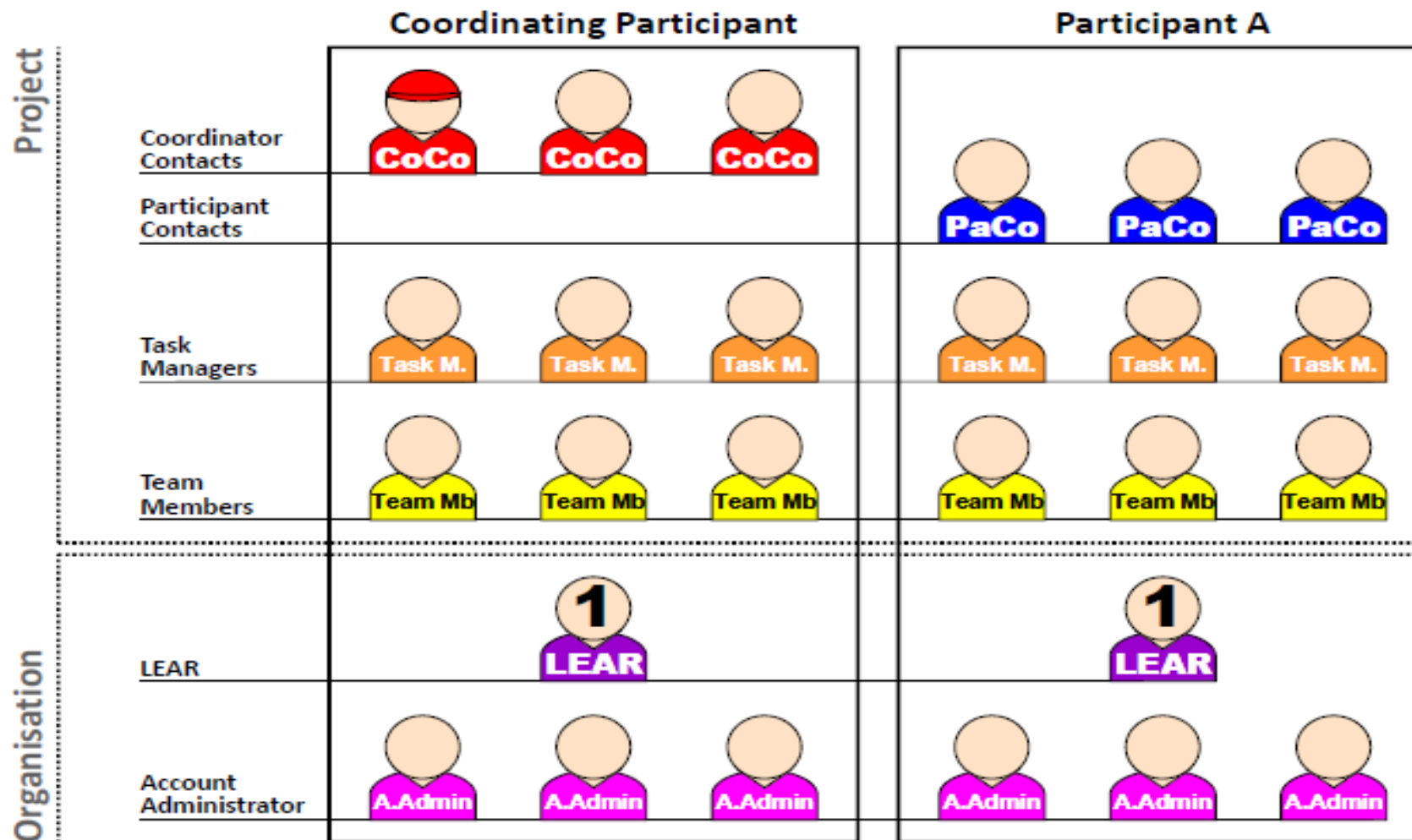
- See the list of all the people in their consortium

Participant Portal services: **after login**

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Notifications	⇒ Service messages

1. View all types of personal notifications for the linked services of the Portal
2. Set notifications for the different services and their frequency
3. Subscribe for e-mail notifications on specific calls

IAM



IAM

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

In that perspective, the following updates took place:

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** in the coordinating organisation per project;
- **more Participant Contacts can be nominated** per participating organisation per project.

IAM

2. Task Managers and Team Members are **no longer restricted to specific scope(s)**.
3. The roles of **Named Representatives** are automatically redistributed:

Financial Named Representative	→ Coordinator/Participant Contact
Scientific Named Representative	→ Coordinator/Participant Contact
Authorised Representative	→ Coordinator/Participant Contact
Administrative/Legal Named Rep.	→ Task Manager
Authorised Signatory	→ Coordinator/Participant Contact

4. Those who register(ed) their organisation to obtain a PIC will have a **self-registrant role**.

FP7 / H2020 Documents:

- **Transfer of the FP7 documents from CORDIS to the Participant Portal**
- **New search function (full-text search)**

Organisation registration:

- **New registration wizard (improved interface)**
- **Automatic search for duplicates in order to avoid unnecessary registrations**
- **Register an organisation on behalf of someone**
- **Manage multiple registrations**

"My Organisations" tab:

- List of proposals visible by the LEAR

"My Proposals" tab:

- Access to the proposals submitted with the new tool
- !! Access to the proposals submitted using the old EPSS:
- !! through <https://www.epss-fp7.org>

Detailed use of resources:

- The explanation on the use of resources has to be entered in financial reporting tool (more coherence, less risk of errors)

"My Roles" tab:

- "Consortium" screen: possibility for the Coordinator Contacts and Participant Contacts to see the list of all the people in their consortium

All tables ("My Organisations", "My Roles", etc.):

- Improved user interface (action buttons)
- Possibility of printing and exporting tables in Excel

A screenshot of a software interface showing a legend and action buttons. The legend includes: AA Access Amendment (green square), AN Access Negotiation (red square), FR Financial Reporting (orange square), PR Periodic Reporting (blue square), and RD Reporting & Deliverables (brown square). Below the legend, there is a "Show 10 entries" dropdown menu, and three buttons labeled "Copy", "Excel", and "Print". A search bar is also visible on the right side of the interface.

"FP7 Calls" tab:

- Search function (full-text search)
- Possibility to download all the documents in a .zip file related to a specific call
- Dynamic agenda of the calls (call publication dates, deadlines, call closure dates) compatible with most electronic agenda applications



Expert services:

- Migration of experts registration (EMI) from CORDIS to the Participant Portal – already took place!

Electronic-only signature of forms C:

- Transition from the paper version toward a full electronic management of forms C

Transfer from CORDIS of information related to participation:

Part of the reorganisation of the 3 portals for Research:

- RESEARCH on EUROPA -> policy context

<http://ec.europa.eu>

- PARTICIPANT PORTAL -> interactions with participants

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

- CORDIS -> dissemination of FP7 project results

<http://cordis.europa.eu>

New guidance for users:

- Focus on procedures

Improved organisation data management:

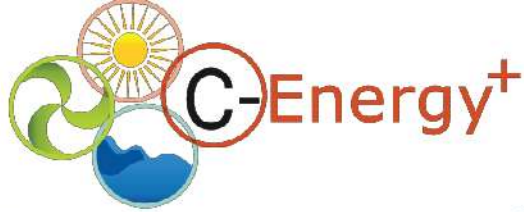
- Aimed at making the process of updating the organisation data more flexible

New layout:

- Improved layout to better integrate the latest changes

Global search:

- One search tool for the whole Participant Portal



More information:

- **FAQ:**

<http://ec.europa.eu/research/participants/portal/page/faq>

- **Presentations:**

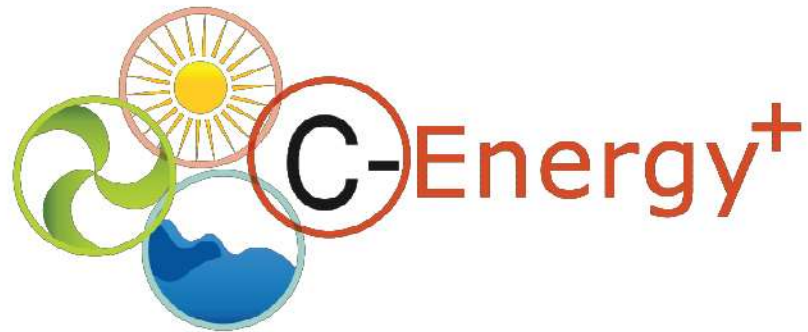
<http://ec.europa.eu/research/participants/portal/page/faq#b8>

- **Contact us:**

<http://ec.europa.eu/research/participants/portal/page/contactus>

- **ECAS help:**

<https://webgate.ec.europa.eu/cas/help.html>



SEP - Submission & Evaluation Platform

Presentation of Submission process

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An idea of the number of Proposals received...

	2007	2008	2009	2010	2011
Calls	76	87	109	120	96
Registrations	35,538	28,341	31,213	32,863	39,349
Submissions	26,641	17,847	21,428	21,769	26,838

What is the SEP Submission?

A wizard to create the Proposal you want to submit!

It includes:

- A list of participants
- A set of structured forms (Legal, financial...)
- A set of documents to attach



Instrument selection



pre-registration



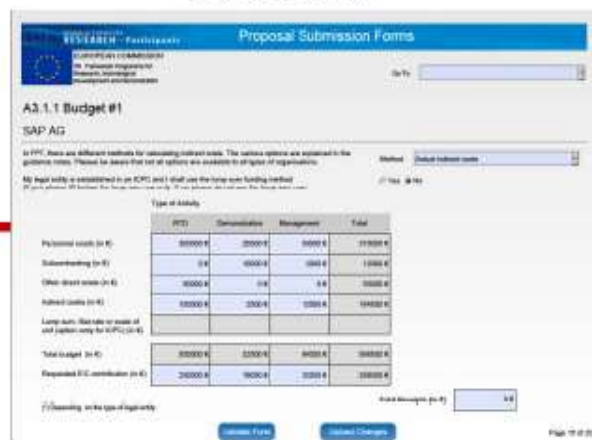
consortia set-up



submission



form filling

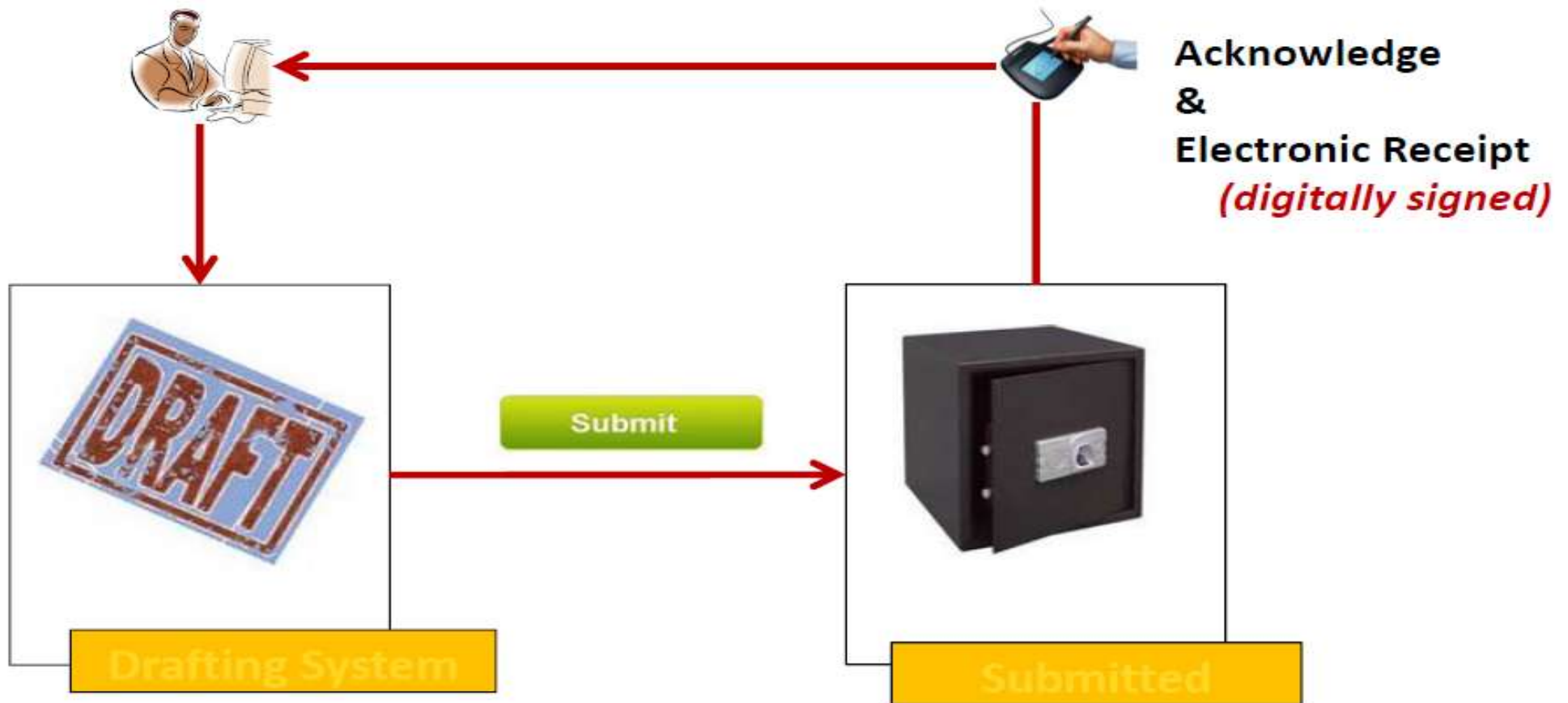


Type of Activity	PTC	Contribution	Management	Total
Personnel costs (in €)	80000 €	20000 €	8000 €	108000 €
Subcontracting (in €)	0 €	6000 €	500 €	6500 €
Other direct costs (in €)	80000 €	0 €	0 €	80000 €
Indirect costs (in €)	0 €	200 €	1000 €	1200 €
Total budget (in €)	160000 €	22000 €	9500 €	191500 €
Requested EU contribution (in €)	30000 €	9000 €	3000 €	42000 €

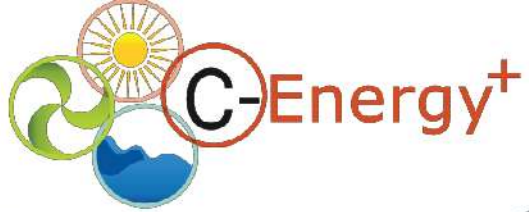
forms & documents



Architecture of Submission



Allow to adapt the drafting system



For more information:

Call the SEP helpdesk:

DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu