

Participant Portal 'Quick info'

Changes of the identity and access management on the Participant Portal

March 2014

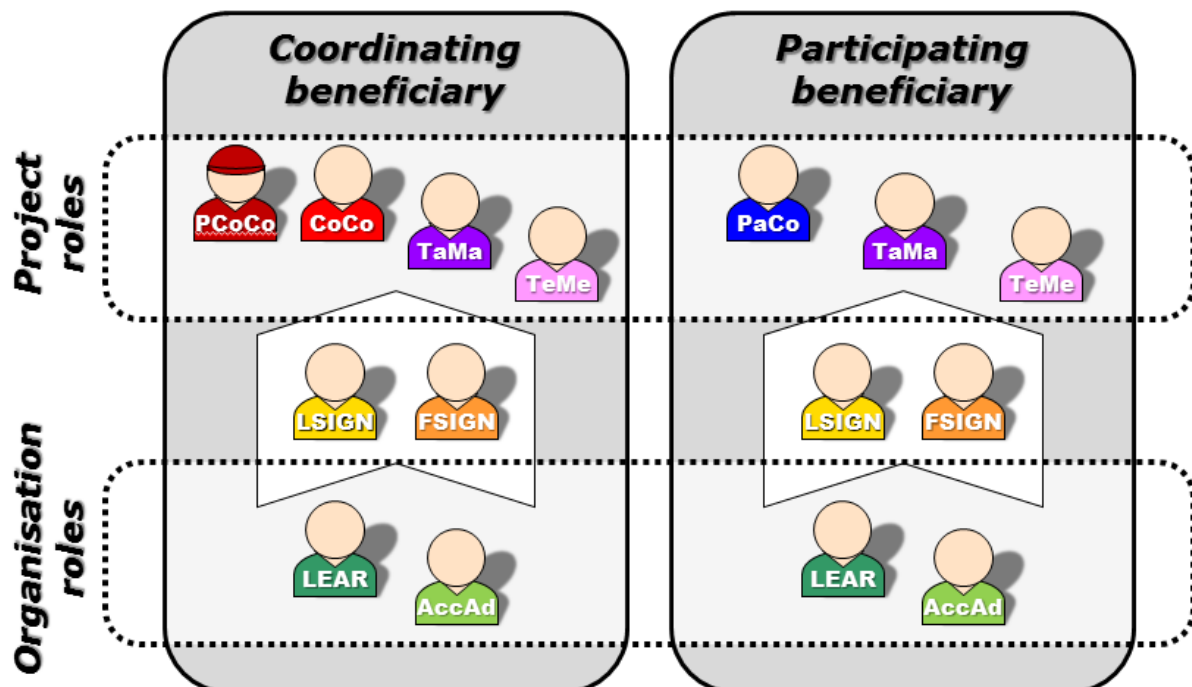
The new release of the [Participant Portal](#) offers **flexibility** in the management of access rights and roles in the projects, and introduces a new role that allows users to submit their financial statements in an electronic-only way.

The main principles of the identity and access management (IAM) do not change:

- Access rights of a person are based on an **ECAS account** (European Commission Authentication System); the **unique identifier for a physical person** is the **professional e-mail address** used for the creation of the ECAS account.
- The unique identifier of the **organisations** is the 9-digit **PIC number**.
- The Commission/Agency only approves/modifies the 'top' roles within the consortium, but the **granting of access rights to projects** and **provisioning of roles** within a project is delegated to **the members of each consortium**.
- Access can be granted to the project-related actions such as negotiations, amendments and/or financial and scientific reporting following a multi-level "pyramid" of rights.

The roles of a user can be checked after logging in to the ECAS account on the Participant Portal under the "My Roles" button (under the button bearing the name of the user).

Roles in the Participant Portal after February 2014.



New role: Legal Signatory

With the introduction of the electronic-only exchange of documents (no need for blue ink signatures any longer), a **new role** has been created to identify the persons authorised to sign documents legally binding for their organisation: the **Legal Statement Authorised Signatory (LSIGN)**.

To appoint LSIGNs, the procedure is the same as for FSIGNs:

- The LSIGN has to be nominated by someone having an organisation role (LEAR, Account Administrators);
- The LSIGN must then be appointed to one or several project(s) by someone having a project role (Primary Coordinator Contact, Coordinator Contacts or Participant Contacts) in said project(s).

See the [Participant Portal FAQ page](#) for more information.

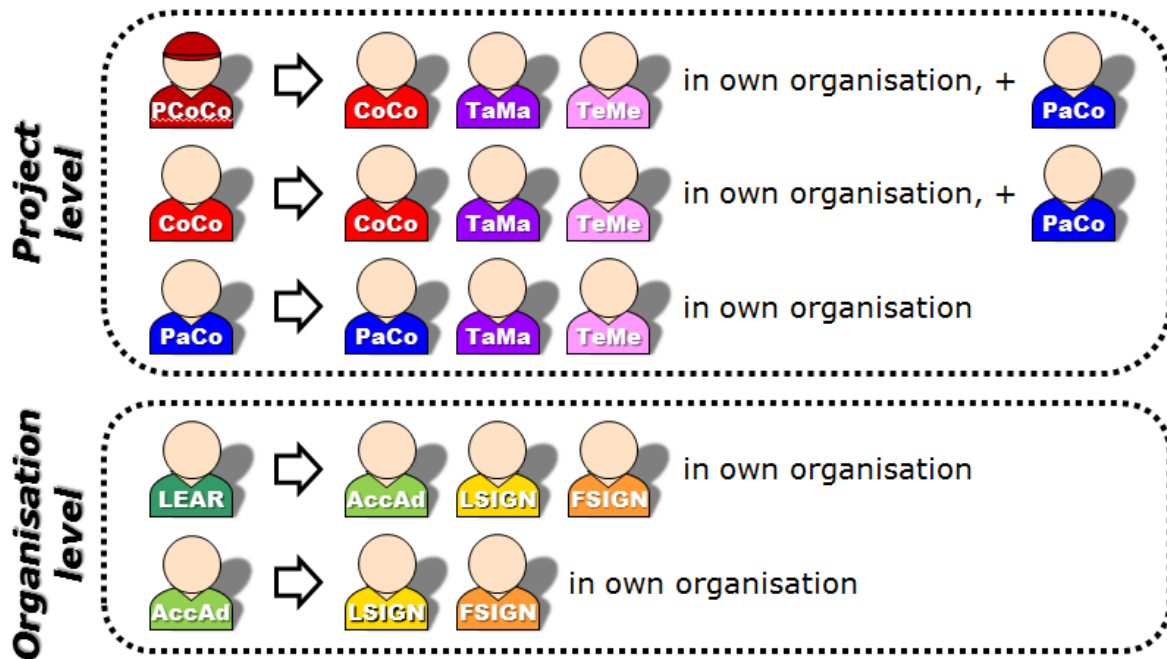
Main roles and access rights:

- a. **The Primary Coordinator Contact** of a project is a unique role, set/modified by the Commission/Agency. All Primary Coordinator Contacts have full, read/write access to their own and the consortium's common e-forms, and can submit to the Commission/Agency via the Participant Portal.
- b. More **Coordinator Contacts** can be nominated by the Primary Coordinator Contact. All Coordinator Contacts have full, read/write access to their own and the common e-forms, and can submit to the Commission/Agency via the Participant Portal.
- c. More **Participant Contacts** can be nominated either by the Primary Coordinator Contact or by Participant Contacts. All Participant Contacts can submit e-forms to the Coordinator Contacts via the Participant Portal. They have read/write access to their own forms and read-only rights to certain common forms.
- d. **Task Managers** can read, modify and save their own entity's forms.
- e. **Team Members** have read-only rights to the entity's own forms.
- f. **Financial Statement Authorised Signatory (FSIGN)** is the person authorised to sign Forms C for their organisation. The FSIGN is nominated by the LEAR or an Account Administrator under the "My Organisations" tab > "RO" icon (consequently the nomination of LEARs is now mandatory). An unlimited number of FSIGNs can be nominated for an organisation. Then it's up to the Primary Coordinator Contacts, the Coordinator Contacts and Participant Contacts to assign FSIGNs to specific projects. An unlimited number of FSIGNs can be assigned to a project.

How to add or revoke roles in the Participant Portal?

Except for the **Primary Coordinator Contact** and the **LEAR**, every role must be **modified** by the **Participants**.

Each user can be nominated or revoked by another user, as follows:



- The **Primary Coordinator Contact** can nominate/revoke Coordinator Contacts, Task Managers and Team Members of the coordinating entity, Participant Contacts of other participating organisations, and assign LSIGNs and FSIGNs to a project.
- **Coordinator Contacts** can nominate/revoke other Coordinator Contacts, Task Managers and Team Members of the coordinating entity, and assign LSIGNs and FSIGNs to a project.
- **Participant Contacts** can nominate/revoke other Participant Contacts, Task Managers and Team Members of their own entity, and assign LSIGNs and FSIGNs to a project.
- The **Legal Entity Appointed Representative (LEAR)** can nominate Account Administrators, LSIGNs and FSIGNs for his/her own entity.
- **Account Administrators** can nominate LSIGNs and FSIGNs for his/her own entity.

Important links:

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

European Commission Authentication Service (ECAS): <https://ecas.ec.europa.eu/cas/login>

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

Participant Portal Frequently Asked Questions:

<https://ec.europa.eu/research/participants/portal/desktop/en/support/faq.html>

Technical helpdesk of Participant Portal:

<https://ec.europa.eu/research/participants/api/contact/index.html>