

Hands-on training on Participant Portal

Oksana Rogalski, DLR

04 March 2015 & Orlando, USA



BILAT USA has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement No 312081.

Outline

- What is the Participant Portal?
- Participant Portal services: without login
- Participant Portal services: after login

What is the Participant Portal?

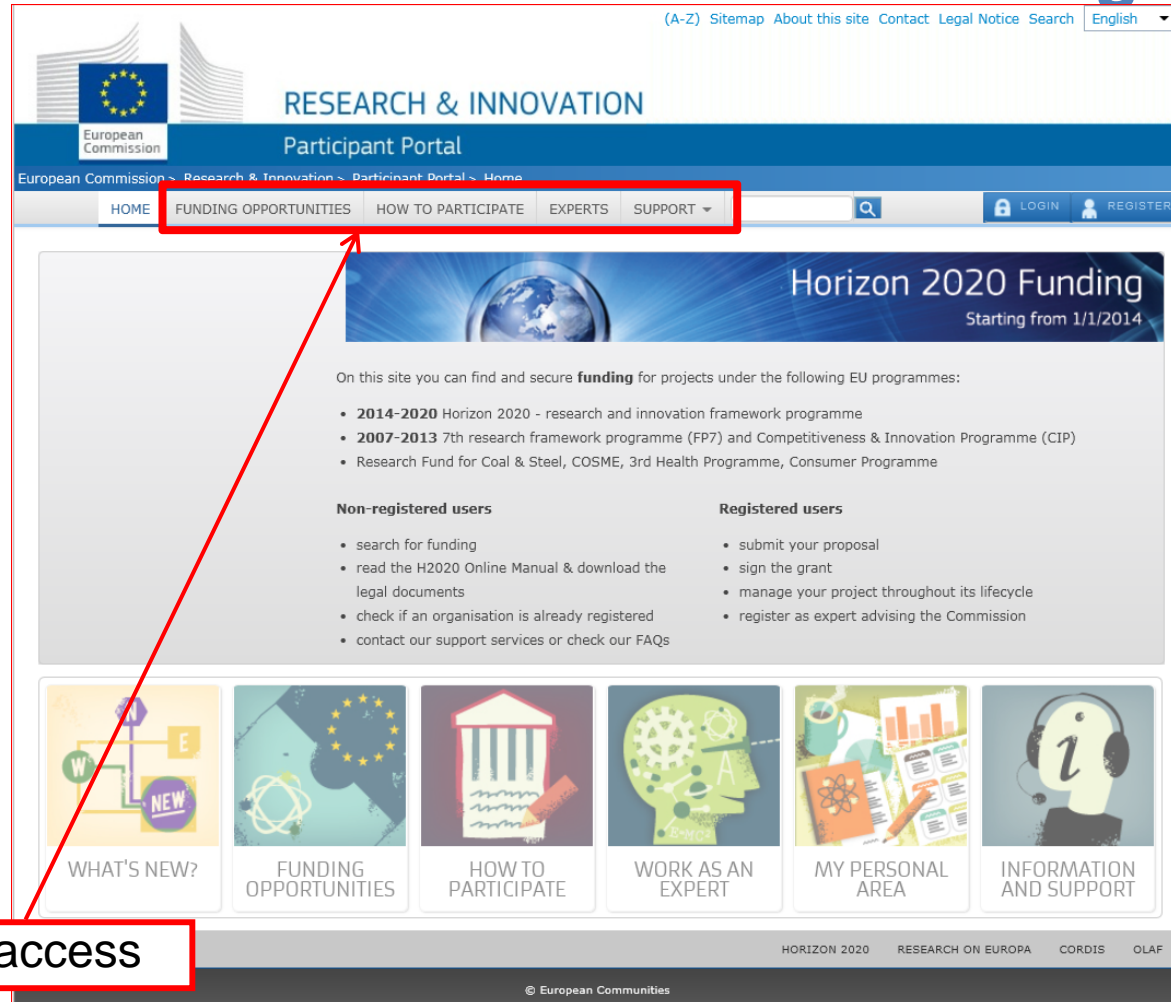
The Participant Portal is the single entry point to funding-related interactions between applicants and the Commission/Agencies.

<http://ec.europa.eu/research/participants/portal/desktop/en/home.html>

You can find here for example:

- calls / documentation / guidance
- Grant Management System
- Services for managing proposals and projects

Participant Portal services: without login



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RESEARCH & INNOVATION
Participant Portal

European Commission

HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT

LOGIN REGISTER

Horizon 2020 Funding

Starting from 1/1/2014

On this site you can find and secure **funding** for projects under the following EU programmes:

- **2014-2020** Horizon 2020 - research and innovation framework programme
- **2007-2013** 7th research framework programme (FP7) and Competitiveness & Innovation Programme (CIP)
- Research Fund for Coal & Steel, COSME, 3rd Health Programme, Consumer Programme

Non-registered users

- search for funding
- read the H2020 Online Manual & download the legal documents
- check if an organisation is already registered
- contact our support services or check our FAQs

Registered users

- submit your proposal
- sign the grant
- manage your project throughout its lifecycle
- register as expert advising the Commission

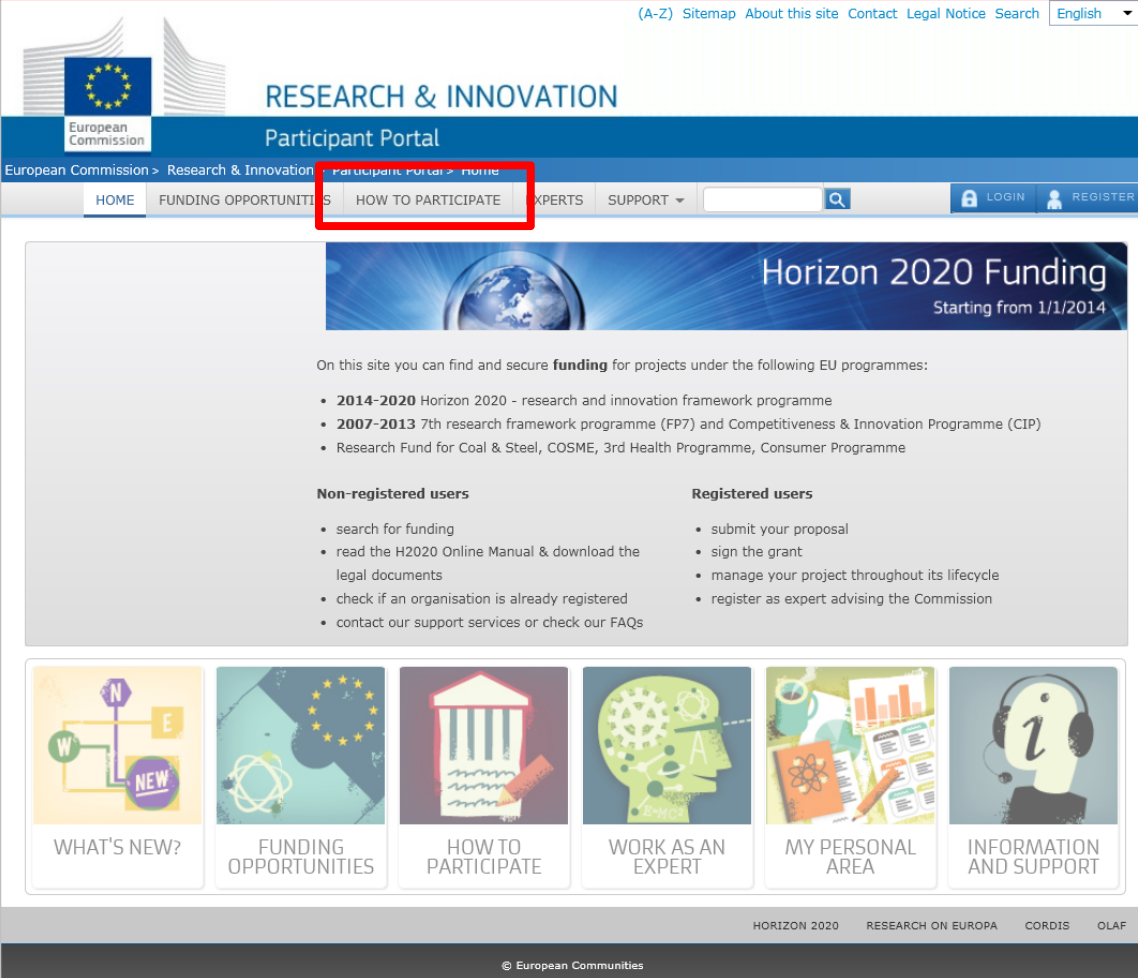
WHAT'S NEW? FUNDING OPPORTUNITIES HOW TO PARTICIPATE WORK AS AN EXPERT MY PERSONAL AREA INFORMATION AND SUPPORT

HORIZON 2020 RESEARCH ON EUROPA CORDIS OLAF

© European Communities

Public access

You need more information?



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RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > home

HOME FUNDING OPPORTUNITIES **HOW TO PARTICIPATE** EXPERTS SUPPORT

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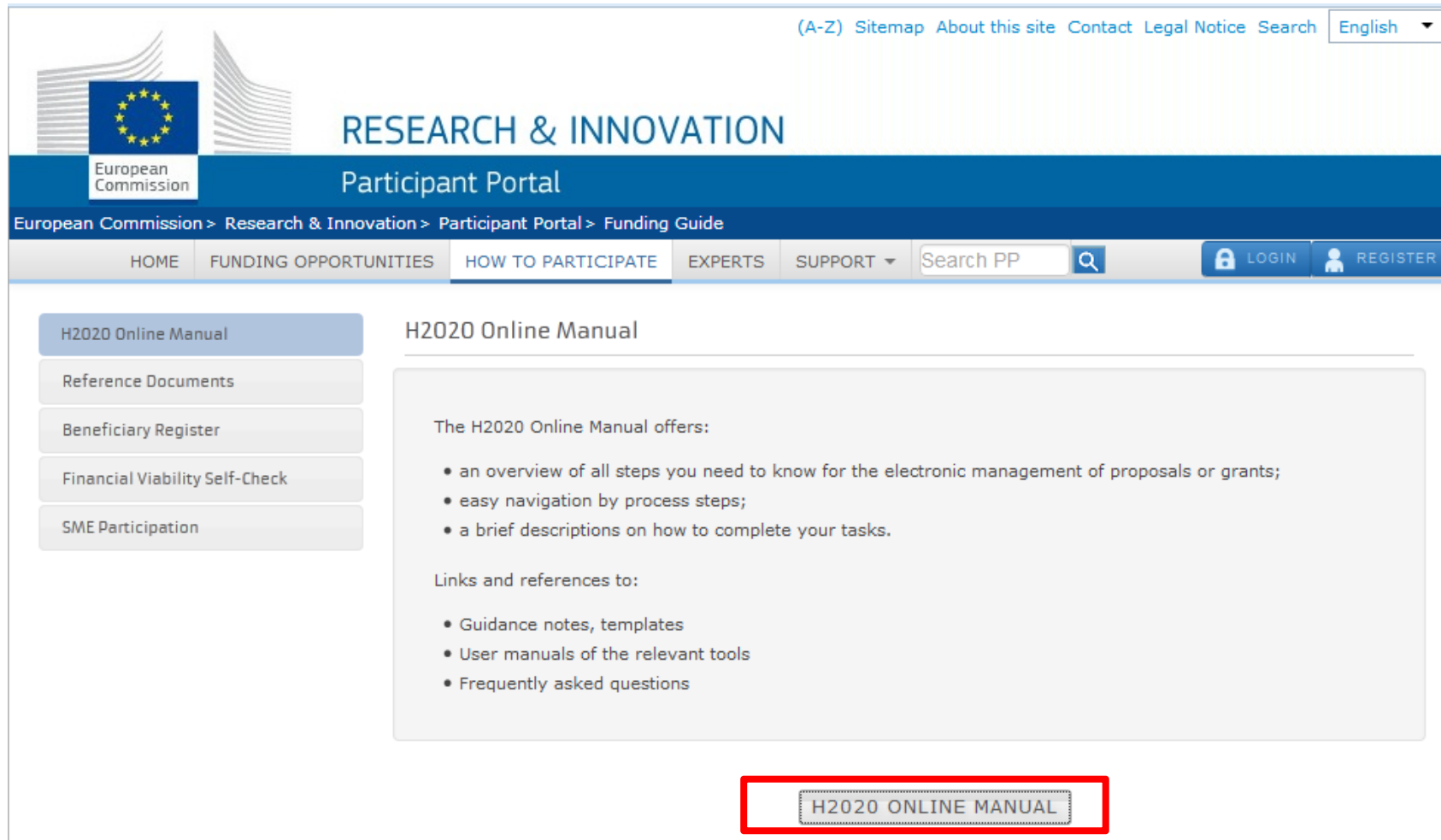
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H2020 Online Manual



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 **RESEARCH & INNOVATION**
Participant Portal

European Commission > Research & Innovation > Participant Portal > Funding Guide

HOME FUNDING OPPORTUNITIES **HOW TO PARTICIPATE** EXPERTS SUPPORT ▾ Search PP

H2020 Online Manual

- Reference Documents
- Beneficiary Register
- Financial Viability Self-Check
- SME Participation

H2020 Online Manual

The H2020 Online Manual offers:

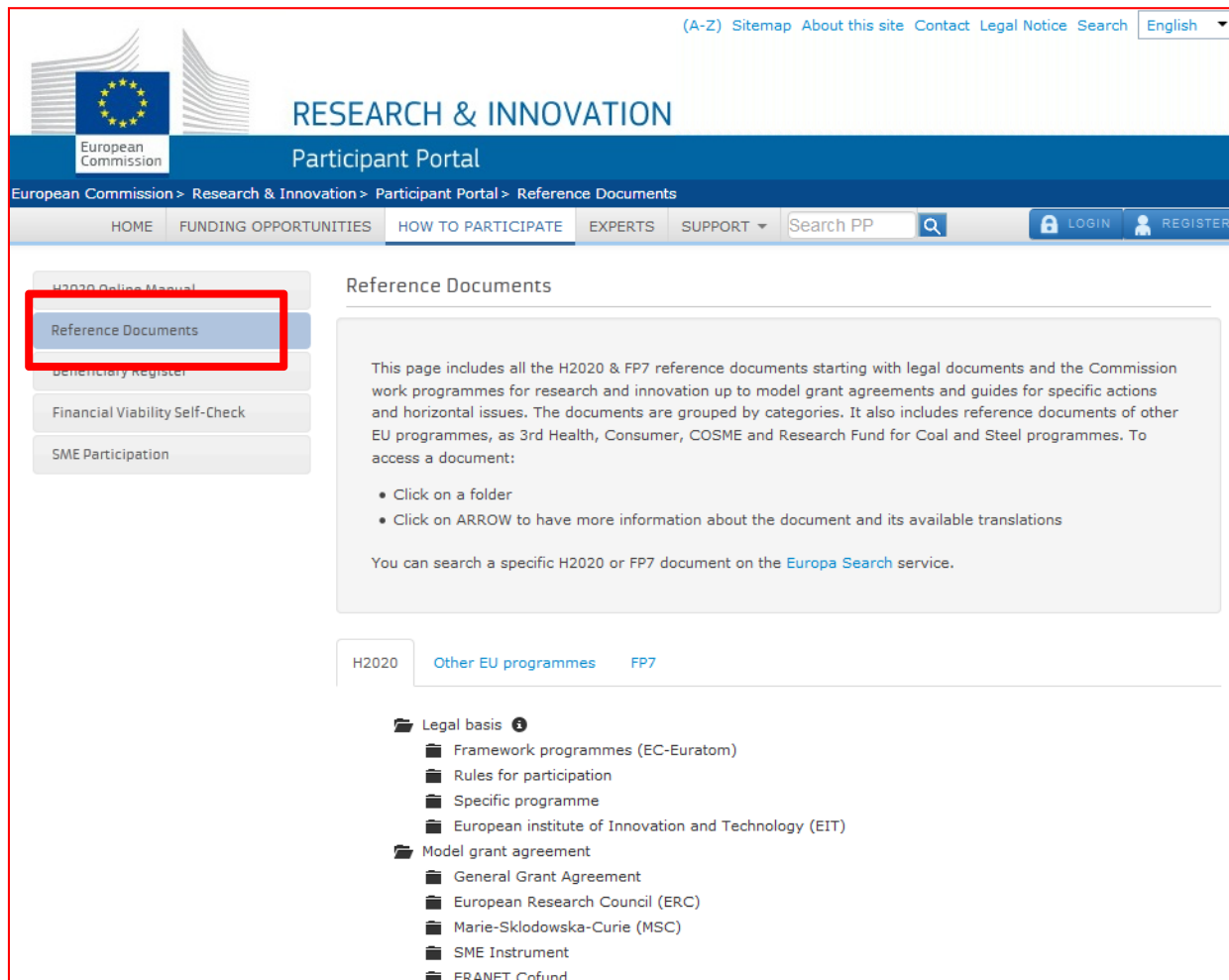
- an overview of all steps you need to know for the electronic management of proposals or grants;
- easy navigation by process steps;
- a brief descriptions on how to complete your tasks.

Links and references to:

- Guidance notes, templates
- User manuals of the relevant tools
- Frequently asked questions

H2020 ONLINE MANUAL

Reference Documents



The screenshot shows the 'Reference Documents' page on the BILAT USA 2.0 Participant Portal. The page is part of the European Commission's Research & Innovation section. A red box highlights the 'Reference Documents' link in the left-hand navigation menu. The main content area provides an overview of the documents available, including H2020 and FP7 reference documents, and offers instructions on how to access them. A list of document categories is provided below, including 'Legal basis' and 'Model grant agreement'.

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RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > Reference Documents

HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP LOGIN REGISTER

Reference Documents

This page includes all the H2020 & FP7 reference documents starting with legal documents and the Commission work programmes for research and innovation up to model grant agreements and guides for specific actions and horizontal issues. The documents are grouped by categories. It also includes reference documents of other EU programmes, as 3rd Health, Consumer, COSME and Research Fund for Coal and Steel programmes. To access a document:

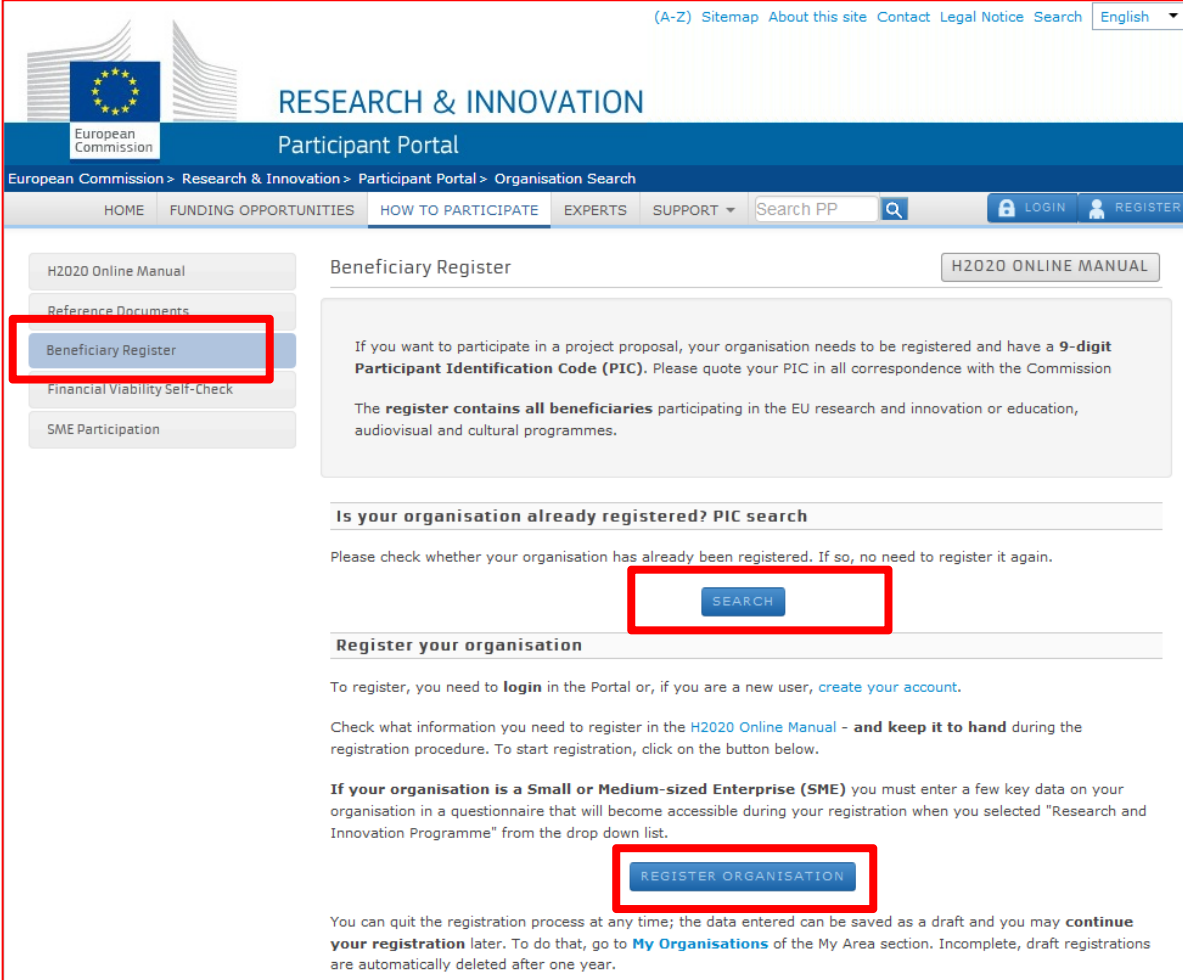
- Click on a folder
- Click on ARROW to have more information about the document and its available translations

You can search a specific H2020 or FP7 document on the [Europa Search](#) service.

H2020 Other EU programmes FP7

- Legal basis 3
 - Framework programmes (EC-Euratom)
 - Rules for participation
 - Specific programme
 - European institute of Innovation and Technology (EIT)
- Model grant agreement
 - General Grant Agreement
 - European Research Council (ERC)
 - Marie-Sklodowska-Curie (MSC)
 - SME Instrument
 - ERANET Cofund

Are your organization registered?



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RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > Organisation Search

HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP LOGIN REGISTER

H2020 Online Manual
Reference Documents
Beneficiary Register
Financial Viability Self-Check
SME Participation

Beneficiary Register H2020 ONLINE MANUAL

If you want to participate in a project proposal, your organisation needs to be registered and have a **9-digit Participant Identification Code (PIC)**. Please quote your PIC in all correspondence with the Commission

The **register contains all beneficiaries** participating in the EU research and innovation or education, audiovisual and cultural programmes.

Is your organisation already registered? PIC search

Please check whether your organisation has already been registered. If so, no need to register it again.

SEARCH

Register your organisation

To register, you need to **login** in the Portal or, if you are a new user, [create your account](#).

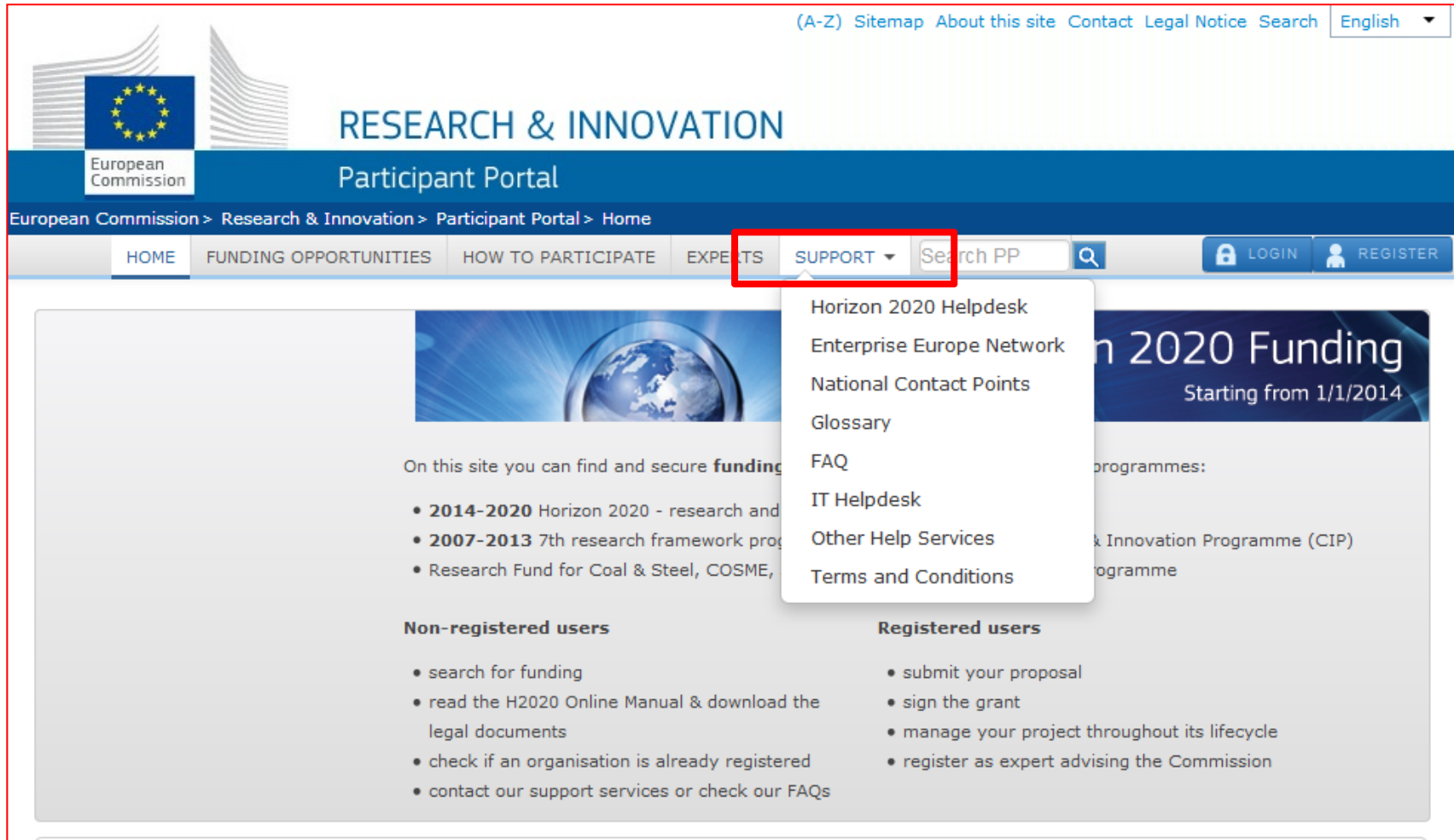
Check what information you need to register in the [H2020 Online Manual](#) - **and keep it to hand** during the registration procedure. To start registration, click on the button below.

If your organisation is a Small or Medium-sized Enterprise (SME) you must enter a few key data on your organisation in a questionnaire that will become accessible during your registration when you selected "Research and Innovation Programme" from the drop down list.

REGISTER ORGANISATION

You can quit the registration process at any time; the data entered can be saved as a draft and you may **continue your registration** later. To do that, go to **My Organisations** of the My Area section. Incomplete, draft registrations are automatically deleted after one year.

Support



The screenshot shows the BILAT USA 2.0 Participant Portal website. The top navigation bar includes links for (A-Z), Sitemap, About this site, Contact, Legal Notice, Search, and English. The main header features the European Commission logo and the text "RESEARCH & INNOVATION Participant Portal". Below the header is a breadcrumb trail: "European Commission > Research & Innovation > Participant Portal > Home". The main navigation menu includes "HOME", "FUNDING OPPORTUNITIES", "HOW TO PARTICIPATE", "EXPERTS", "SUPPORT", and "Search PP". The "SUPPORT" menu is open, displaying a list of links: "Horizon 2020 Helpdesk", "Enterprise Europe Network", "National Contact Points", "Glossary", "FAQ", "IT Helpdesk", "Other Help Services", and "Terms and Conditions". The main content area is divided into sections for "Non-registered users" and "Registered users", each with a list of actions. A "Horizon 2020 Funding" banner is visible on the right side of the page.

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RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > Home

HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP LOGIN REGISTER

Horizon 2020 Helpdesk
Enterprise Europe Network
National Contact Points
Glossary
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IT Helpdesk
Other Help Services
Terms and Conditions

On this site you can find and secure **funding**

- **2014-2020** Horizon 2020 - research and
- **2007-2013** 7th research framework prog
- Research Fund for Coal & Steel, COSME,

Non-registered users

- search for funding
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- submit your proposal
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Horizon 2020 Funding
Starting from 1/1/2014

programmes:
& Innovation Programme (CIP)
programme

Participant Portal services: after login



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 **RESEARCH & INNOVATION**
Participant Portal

European Commission > Research & Innovation > Participant Portal > Home

HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT ▾ Search PP 🔍 **LOGIN**  REGISTER

Horizon 2020 Funding

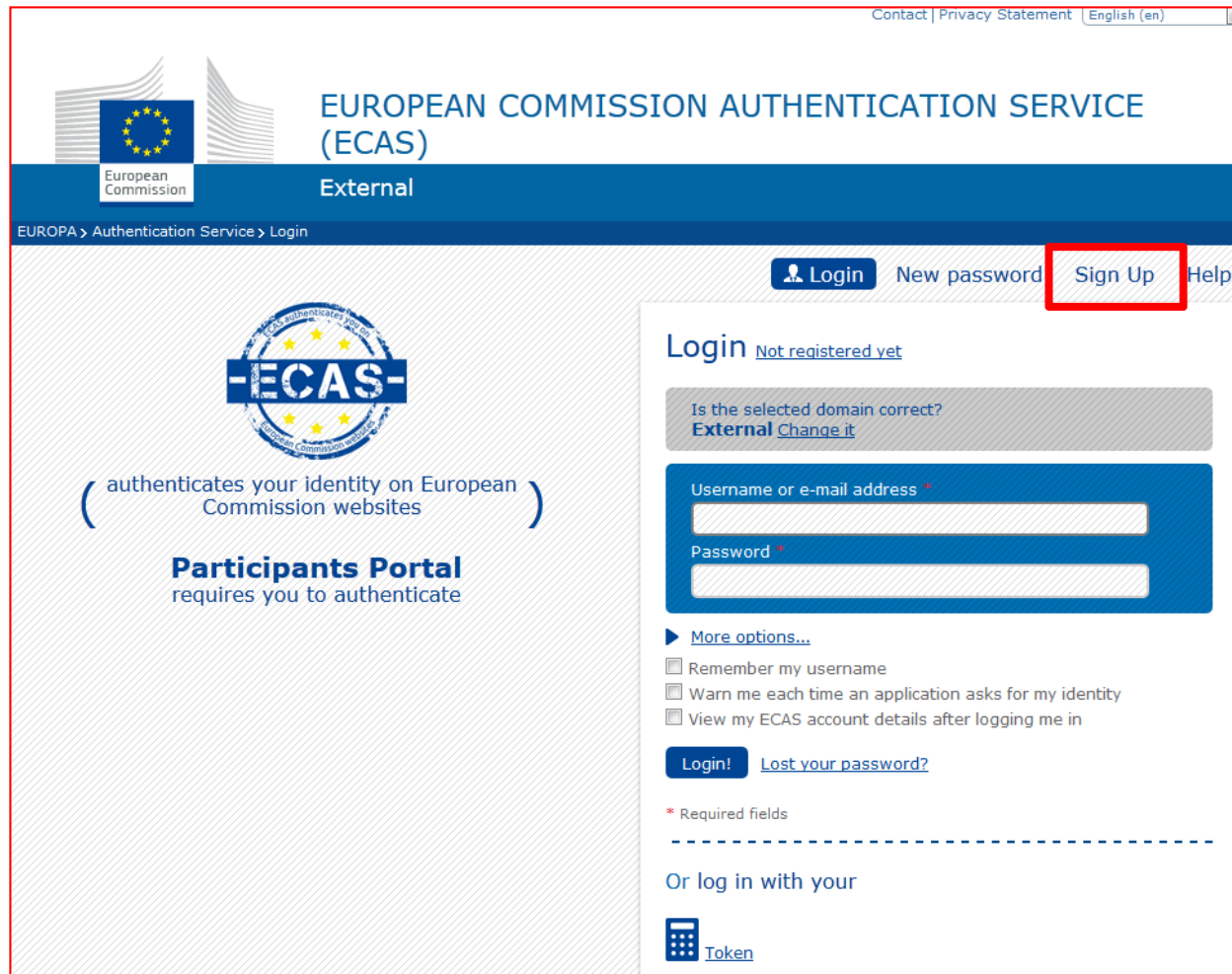
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Non-registered users	Registered users
<ul style="list-style-type: none">• search for funding• read the H2020 Online Manual & download the legal documents• check if an organisation is already registered• contact our support services or check our FAQs	<ul style="list-style-type: none">• submit your proposal• sign the grant• manage your project throughout its lifecycle• register as expert advising the Commission

ECAS account: Login /Create



Contact | Privacy Statement | English (en)

EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS)

European Commission External

EUROPA > Authentication Service > Login

Login New password **Sign Up** Help

ECAS
(authenticates your identity on European Commission websites)

Participants Portal
requires you to authenticate

Login [Not registered yet](#)

Is the selected domain correct?
External [Change it](#)

Username or e-mail address *

Password *

[More options...](#)

Remember my username


Warn me each time an application asks for my identity

View my ECAS account details after logging me in

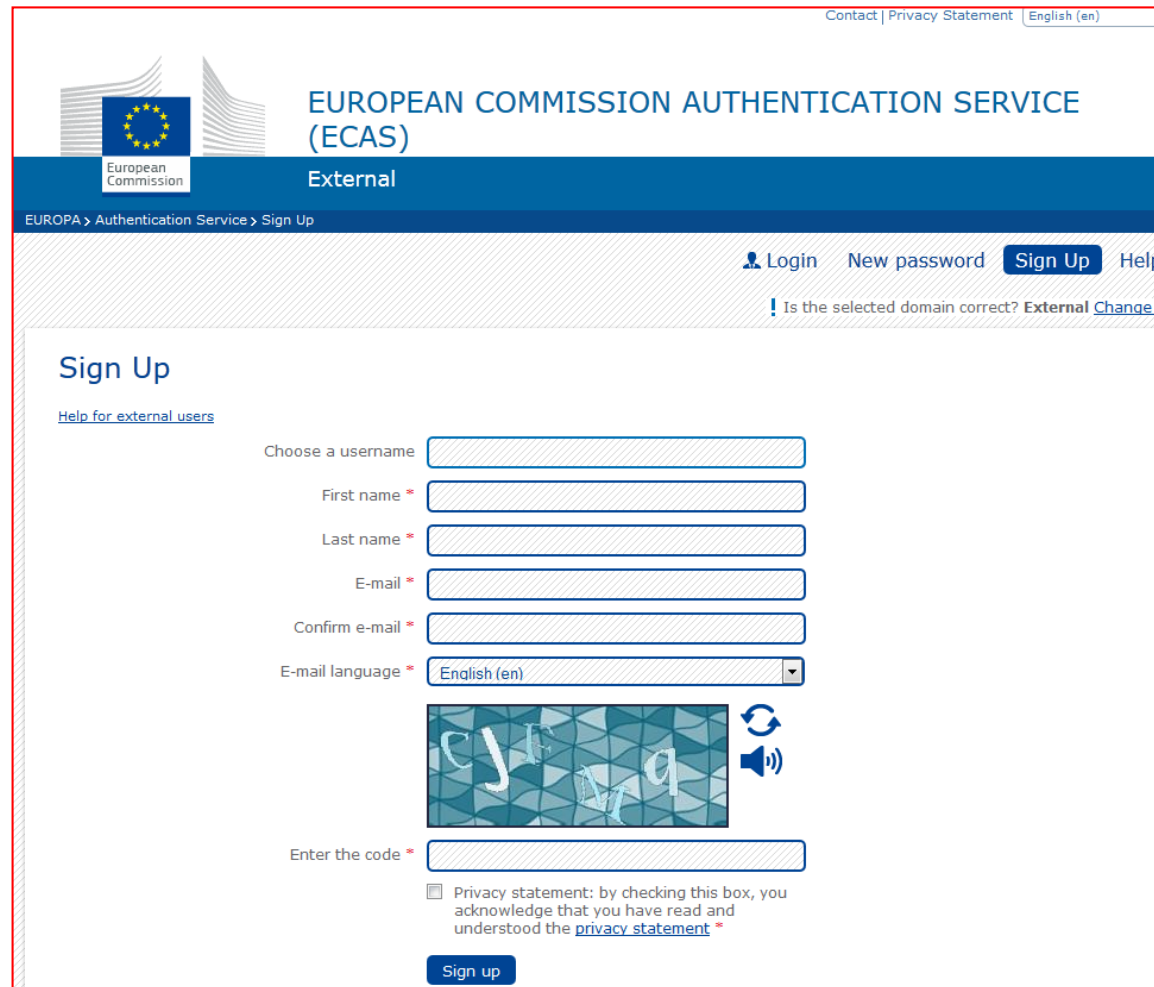
Login! [Lost your password?](#)

* Required fields


Or log in with your

 [Token](#)

ECAS account: Create



Contact | Privacy Statement | English (en)

 EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS)
External

EUROPA > Authentication Service > Sign Up

Login New password **Sign Up** Help

! Is the selected domain correct? External [Change it](#)

Sign Up

[Help for external users](#)

Choose a username




First name *

Last name *

E-mail *

Confirm e-mail *

E-mail language *

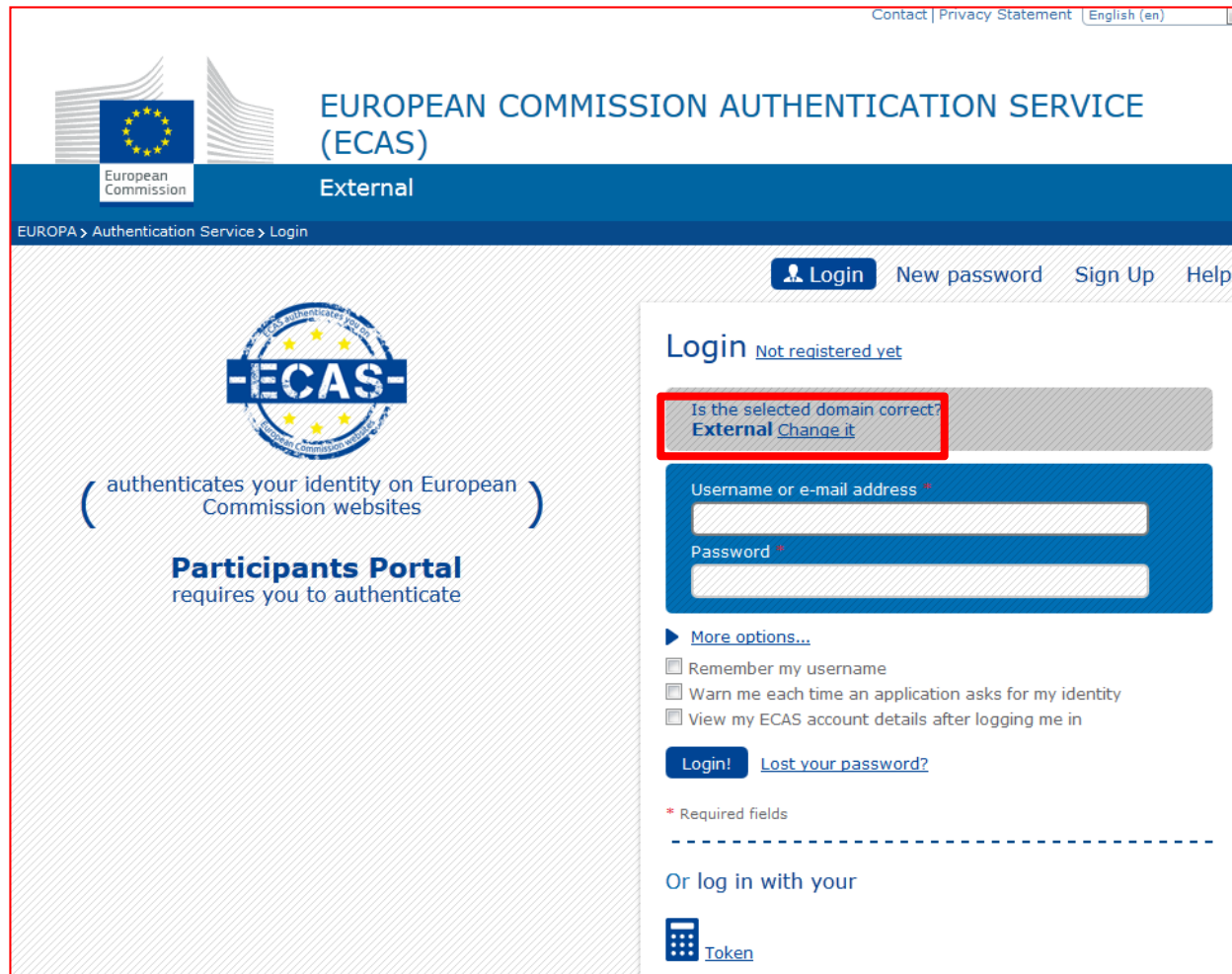
  

Enter the code *

Privacy statement: by checking this box, you acknowledge that you have read and understood the [privacy statement](#) *

Sign up

ECAS account: Login



The screenshot shows the ECAS login interface. At the top, there are links for 'Contact', 'Privacy Statement', and 'English (en)'. The main header features the European Commission logo and the text 'EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS) External'. Below this, a breadcrumb trail reads 'EUROPA > Authentication Service > Login'. The navigation menu includes 'Login', 'New password', 'Sign Up', and 'Help'. The central content area contains the ECAS logo and the text '(authenticates your identity on European Commission websites) Participants Portal requires you to authenticate'. On the right, the login form is titled 'Login Not registered yet'. It includes a dropdown menu for domain selection, currently set to 'External', with a red box highlighting the text 'Is the selected domain correct? External Change it'. Below this are input fields for 'Username or e-mail address' and 'Password', both marked as required. There are checkboxes for 'Remember my username', 'Warn me each time an application asks for my identity', and 'View my ECAS account details after logging me in'. A 'Login!' button and a 'Lost your password?' link are also present. At the bottom, there is a section for logging in with a 'Token'.

ECAS account: My AREA



RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > Home

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP OKSANA ROGALSKI

- My Organisation(s)
- My Proposal(s)**
- My Project(s)
- My Notification(s) **80**
- My Expert Area

Horizon 2020 Funding
Starting from 1/1/2014

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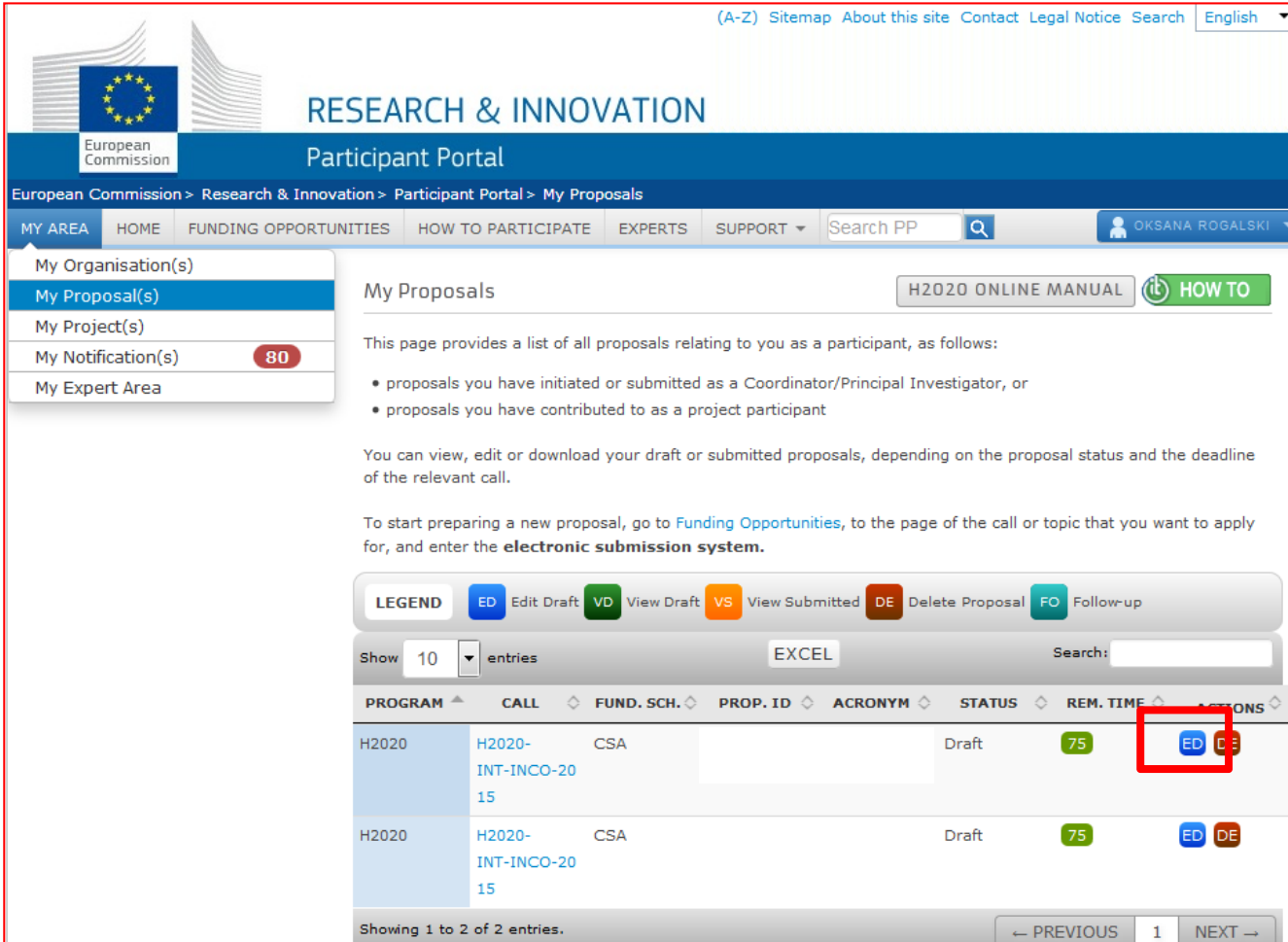
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Registered users

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- register as expert advising the Commission

ECAS account: My Proposal(s)



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RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > My Proposals

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP OKSANA ROGALSKI

My Organisation(s)
My Proposal(s)
My Project(s)
My Notification(s) 80
My Expert Area

My Proposals H2020 ONLINE MANUAL HOW TO

This page provides a list of all proposals relating to you as a participant, as follows:

- proposals you have initiated or submitted as a Coordinator/Principal Investigator, or
- proposals you have contributed to as a project participant

You can view, edit or download your draft or submitted proposals, depending on the proposal status and the deadline of the relevant call.

To start preparing a new proposal, go to [Funding Opportunities](#), to the page of the call or topic that you want to apply for, and enter the **electronic submission system**.

LEGEND ED Edit Draft VD View Draft VS View Submitted DE Delete Proposal FO Follow-up

Show 10 entries EXCEL Search:

PROGRAM	CALL	FUND. SCH.	PROP. ID	ACRONYM	STATUS	REM. TIME	ACTIONS
H2020	H2020-INT-INCO-2015	CSA			Draft	75	ED DE
H2020	H2020-INT-INCO-2015	CSA			Draft	75	ED DE

Showing 1 to 2 of 2 entries. PREVIOUS 1 NEXT

ECAS account: My Proposal(s)

LOGIN FUNDING SCHEME CREATE DRAFT PARTIES EDIT PROPOSAL SUBMIT

Step 5

Edit Proposal

H2020-INT-INCO-2015

Oksana Rogalski

INT-01-2015

CSA

ACRO

SEP-210251289

TUE May 12 17:00:00 Brussels Local Time

75 days left until closure

Configuration OK ✓

You're using Firefox 35 on Windows. **Adobe Reader** (version 11.0.9.29) is installed.

For more information, please consult the [User Guide](#).

Edit Proposals' Forms

In this step you can edit the administrative forms and upload the proposal itself. ?

WARNING: This proposal contains changes that have not yet been submitted...

Administrative Forms

Edit will open the forms in Adobe Reader. ?

[edit forms](#) [view history](#) [print preview](#)

Part B and Annexes

In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments. ?

[download templates](#)

Technical Annex Section 1-3	upload	⊗ ?
Technical Annex Section 4-5	upload	⊗ ?
Optional annex 3: Ethics - Supporting Document(s)	upload	?

<< Step 4 - Parties [validate](#) [submit](#)

ECAS account: My Proposal(s)

Step 4
Manage Your Related Parties

H2020-INT-INCO-2015

Oksana Rogalski
INT-01-2015
CSA
ACRO
SEP-210251289
TUE May 2015 17:00:00 Brussels Local Time
74 days left until closure

Configuration OK

You're using Firefox 35 on Windows. Adobe Reader (version 11.0.9.29) is installed.
For more information, please consult the [User Guide](#).

Parties

In this step you as coordinator should manage and review the participants of your proposal. Only you as coordinator can edit the elements on this screen.

Note: Your changes will be applied only after you click the "Save changes" button.

Number of participants: **Add Partner** ?

1 Coordinator

DLR
DEUTSCHES ZENTRUM FUER LUFT - UND RAUMFAHRT EV

Contact

- Hans-Joerg Staehle - Main contact
- Gerd Rucker - Contact person
- Oksana Rogalski - Contact person
- Nina Schüle - Contact person
- Silke Kraus - Contact person

2 Partner

DEPARTMENT OF INDUSTRY

Contact

- Main contact
- Contact person
- Contact person

3 Partner

AIRG

Contact

- Main contact
- Contact person

4 Partner

ATSE

Contact

- Main contact
- Contact person

Save Changes next >>

ECAS account: My Proposal(s)

LOGIN FUNDING SCHEME CREATE DRAFT PARTIES EDIT PROPOSAL SUBMIT

Step 5

Edit Proposal

NCP_IA

ICT-02-2014

IA

WED 23 April 2014 17:00:00 Brussels Local Time

58 days left until closure

Acronym ID PIC Contact

Acronym
Creative1

Configuration OK

You're using Firefox 17 on Windows. Adobe Reader (version 11,0,5,3) is installed.

For more information, please consult the [User Guide](#).

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Part B and Annexes

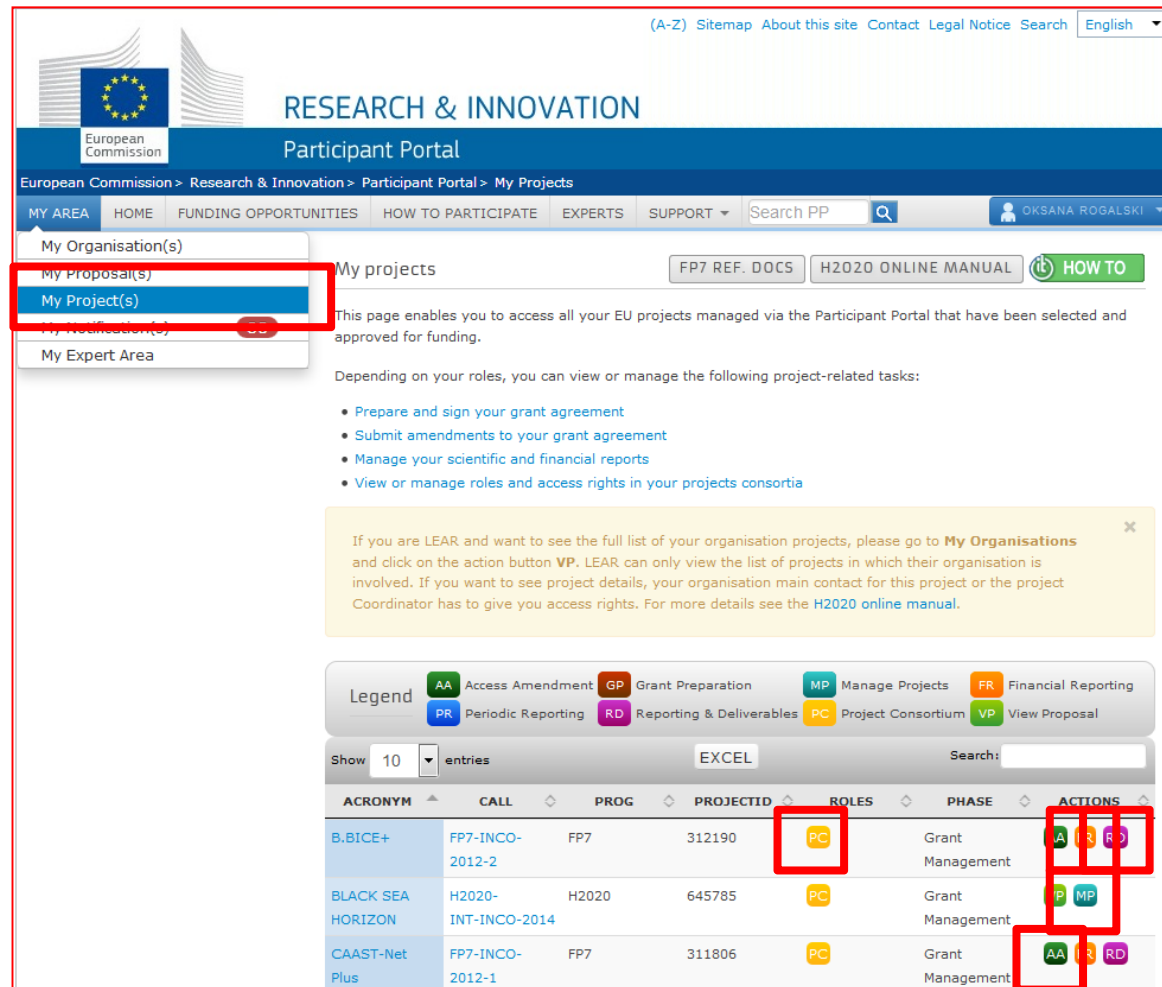
In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments. ?

download templates

Technical Annex Section 1-3	upload	8_Part_B_Template_...section_1-3_-_EDITED.pdf	delete	✓	?
Technical Annex Section 4-5	upload	8_Part_B_Template_...nks_CLEAN_section_4-5.pdf	delete	✓	?

<< Step 4 - Parties validate submit

ECAS account: My Project(s)



RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > My Projects

MY AREA HOME FUNDING OPPORTUNITIES HOW TO PARTICIPATE EXPERTS SUPPORT Search PP OKSANA.ROGALSKI

My Organisation(s)
My Project(s)
My Proposal(s)
My Resubmission(s)
My Expert Area

My projects
FP7 REF. DOCS H2020 ONLINE MANUAL HOW TO

This page enables you to access all your EU projects managed via the Participant Portal that have been selected and approved for funding.

Depending on your roles, you can view or manage the following project-related tasks:

- Prepare and sign your grant agreement
- Submit amendments to your grant agreement
- Manage your scientific and financial reports
- View or manage roles and access rights in your projects consortia

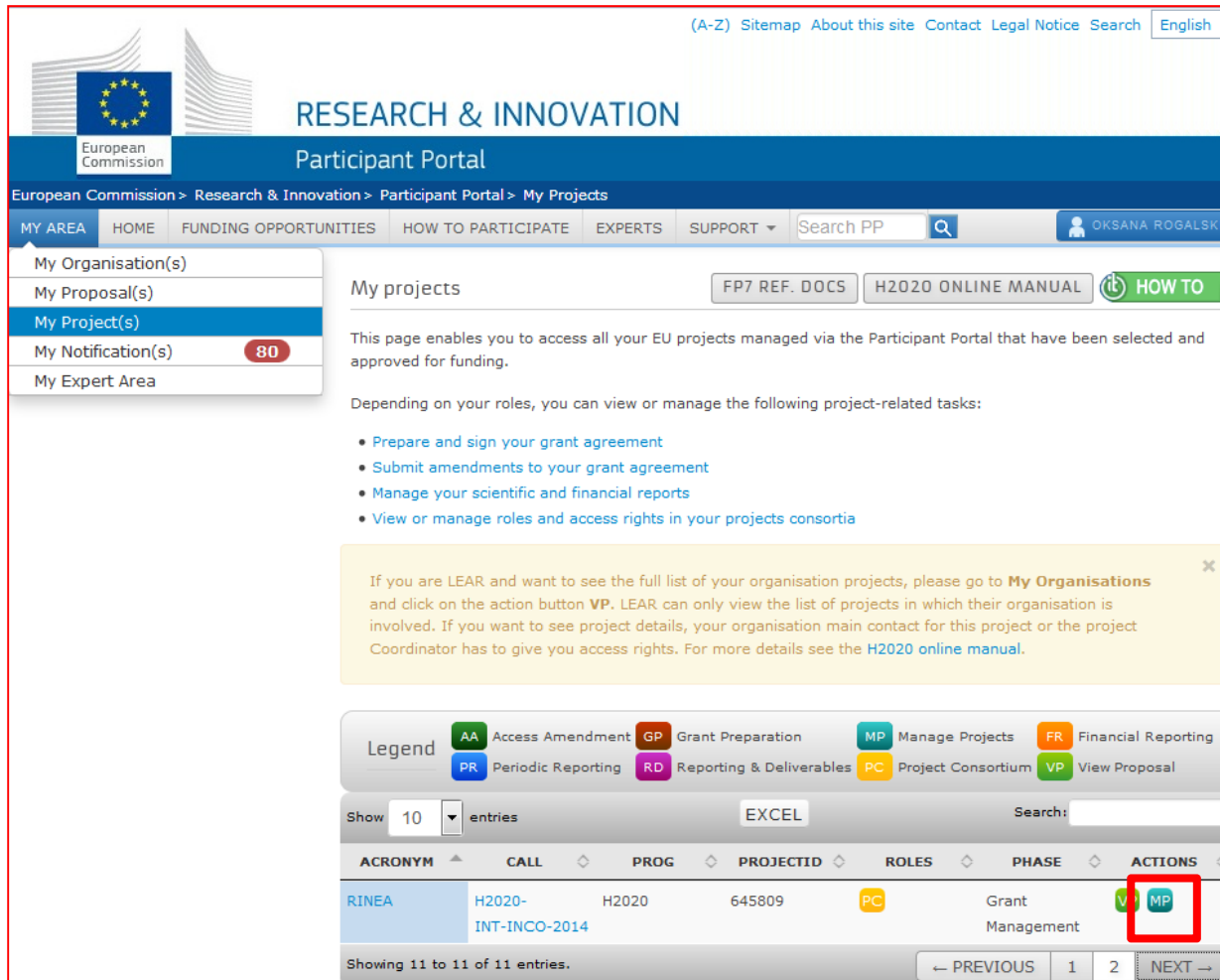
If you are LEAR and want to see the full list of your organisation projects, please go to **My Organisations** and click on the action button **VP**. LEAR can only view the list of projects in which their organisation is involved. If you want to see project details, your organisation main contact for this project or the project Coordinator has to give you access rights. For more details see the [H2020 online manual](#).

Legend
 AA Access Amendment GP Grant Preparation MP Manage Projects FR Financial Reporting
 PR Periodic Reporting RD Reporting & Deliverables PC Project Consortium VP View Proposal

Show 10 entries EXCEL Search:

ACRONYM	CALL	PROG	PROJECTID	ROLES	PHASE	ACTIONS
B.BICE+	FP7-INCO-2012-2	FP7	312190	PC	Grant Management	A R RD
BLACK SEA HORIZON	H2020-INT-INCO-2014	H2020	645785	PC	Grant Management	P MP
CAAST-Net Plus	FP7-INCO-2012-1	FP7	311806	PC	Grant Management	AA R RD

Prepare and sign your Grant Agreement



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RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > My Projects

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Legend

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Show 10 entries EXCEL Search:

ACRONYM	CALL	PROG	PROJECTID	ROLES	PHASE	ACTIONS
RINEA	H2020-INT-INCO-2014	H2020	645809	PC	Grant Management	MP

Showing 11 to 11 of 11 entries. ← PREVIOUS 1 2 NEXT →