



# Funding & Tenders Portal Introduction



# 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)

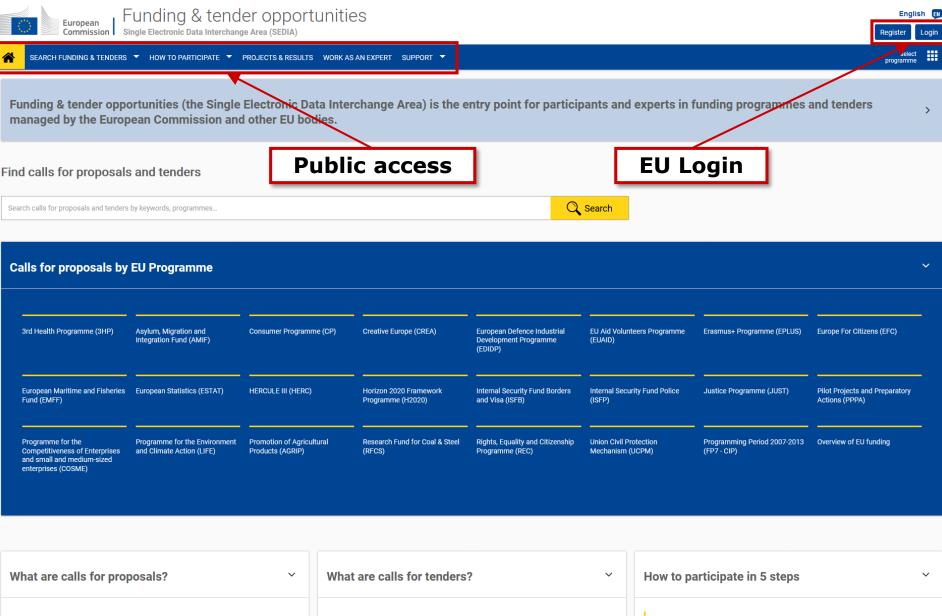


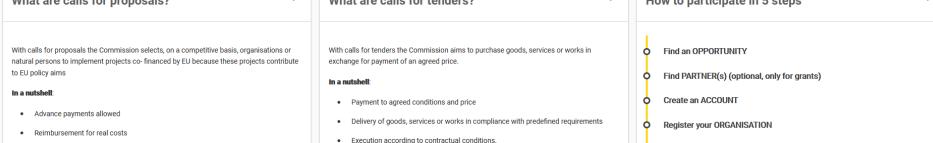
### IAM

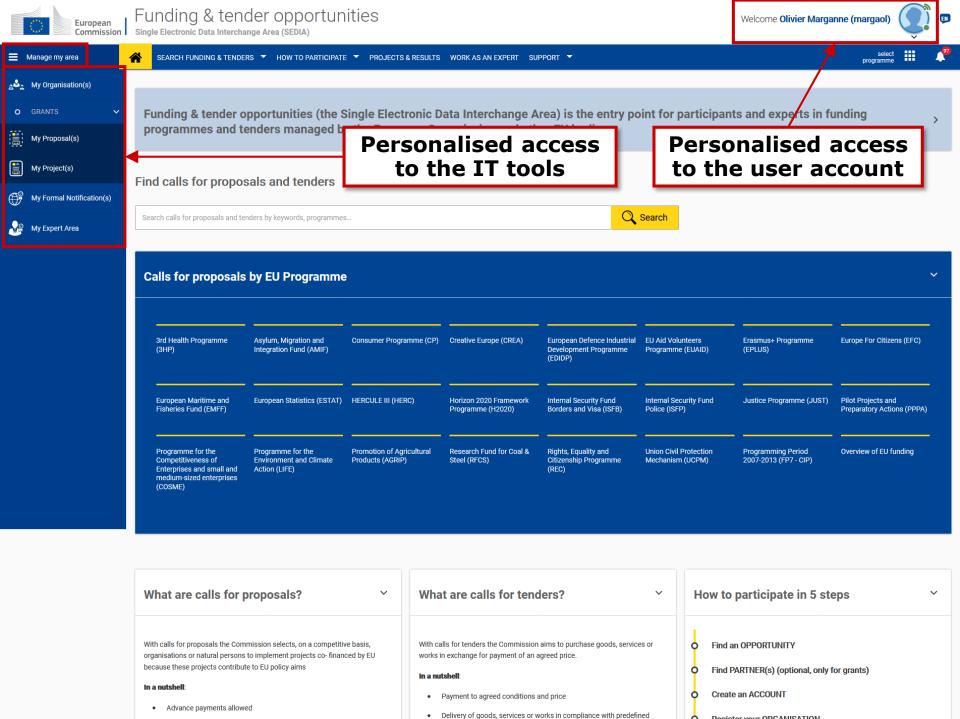
Access rights based on role authorisation



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









# **Funding & Tenders Portal services: overview**

**Search Funding & Tenders** 

**How to Participate** 

**Projects & Results** 

**Work As An Expert** 

**Support** 

My Organisation(s)

My Proposal(s)

My Project(s)

My Notification(s)

**My Formal Notification(s)** 

**My Expert Area** 

Personalised services



# Funding & Tenders Portal services: without login

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-toparticipate/reference-documents;programCode=HERC

#### 1. Guidance & Manuals

- Access the Online Manual (guide for business processes)
- Access the IT How To wiki (guide for IT processes)

### 2. FAQ

FAQ database with search engine

### 3. Helpdesks

IT Helpdesk to report bugs & incidents, etc.

The support section is also **Programme-based**; some specific helpdesks & guidance documents will only be available for a dedicated Programme.



# **Services after login:**

# The Identity and Access Management (IAM)



### **Personalised services**

The Funding & Tenders Portal allows each user to have access to a secure and personalised space, based on 3 main elements:

- Each user is supposed to have a unique EU Login account, which is the unique identifier for persons (linked to their professional email address).
- Each EU Login account is linked to one (or more) PIC number(s), which are the unique identifier for organisations.
- Each EU Login account is linked to all the roles that the user has in projects and/or organisations through IAM.
   One user can have as many roles as necessary.













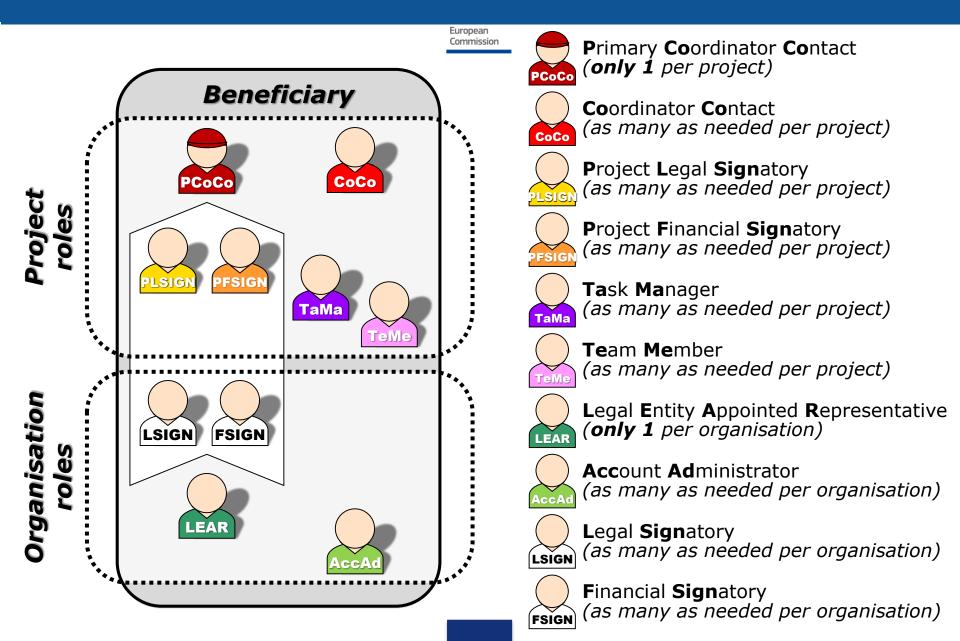








# The Identity and Access Management





# **Important remarks**

Only the key roles of the LEAR and Primary
 Coordinator Contact are defined/modified
 by the Commission.
 The rest is left at the discretion of the coordinator.





- One person can have several roles at the same time.
- Any change in the roles of the users is saved to allow a monitoring & tracking service.
- The minimum configuration for mono-contract grant is:
  - ✓ 1 Primary Coordinator Contact per project
  - √ 1 LEAR by beneficiary
  - ✓ 1 Legal Signatory by beneficiary
  - √ 1 Financial Signatory by beneficiary



# **Access rights**

### Project roles





📭 Read all forms



Write all forms





Submit all forms to EC





Read own forms



Write own forms





Sign and submit own legal/financial forms





Read own forms



Write own forms





Read own forms

### Organisation roles









Modify organisation data





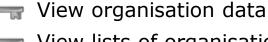
View lists of organisation's projects, proposals and organisation roles

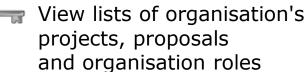


















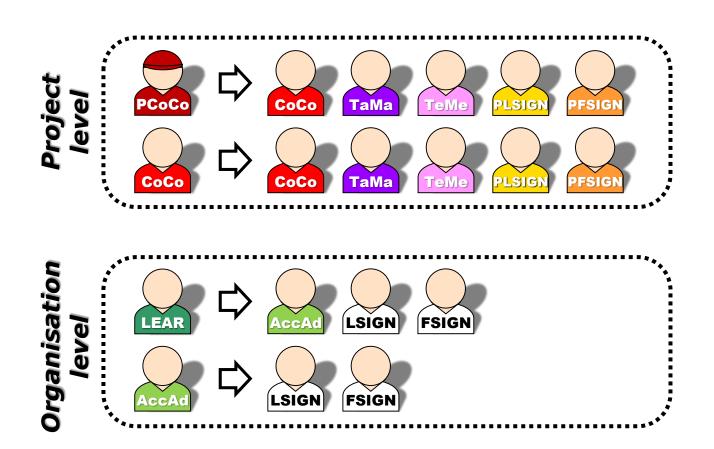
# The nomination process: "Original roles"

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.

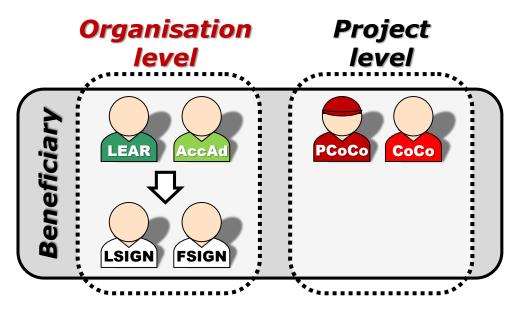


# The nomination/revocation process





# The nomination process: LSIGN/FSIGN

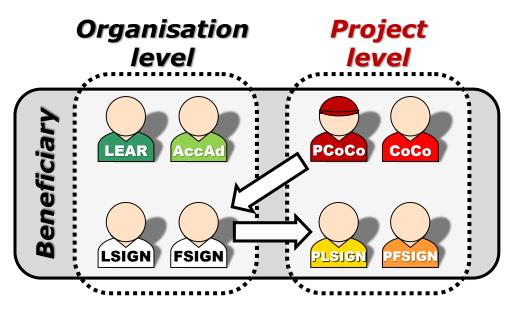


1. The **LEAR (or Account Administrators)** nominate as many LSIGNs/FSIGNs as they want.

At this stage, the FSIGNs cannot do anything; the LSIGNs have read-only access to the organisation's data and lists of projects, proposals & roles.



# The nomination process: LSIGN/FSIGN



2. The (**Primary**) Coordinator Contacts need to assign to their project as many LSIGNs/FSIGNs as needed.

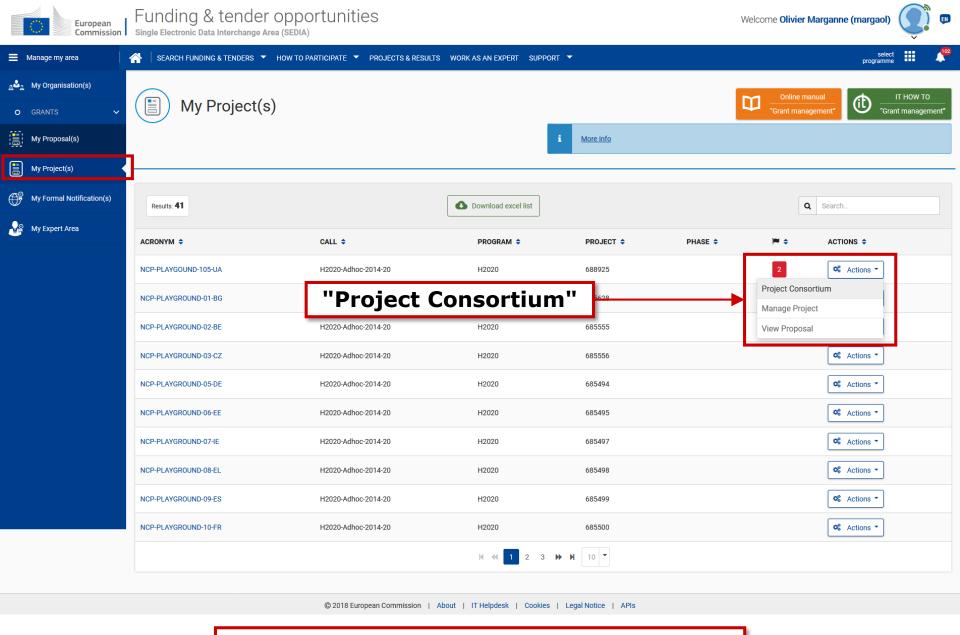
The PLSIGNs and PFSIGNs now have their own access to the tools.



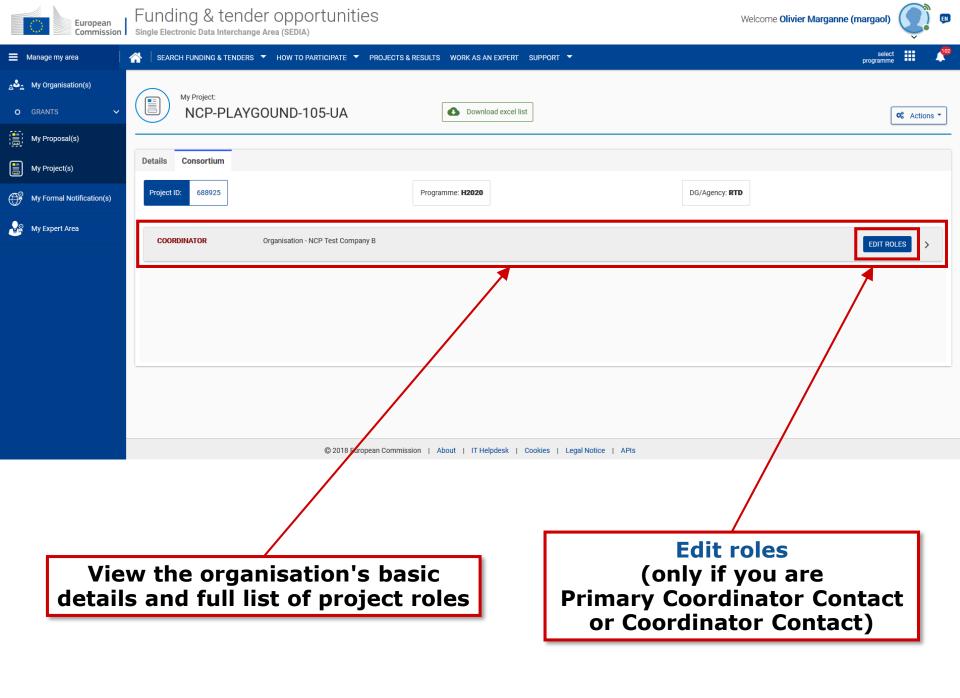
# The nomination/revocation process: how to nominate/revoke someone?

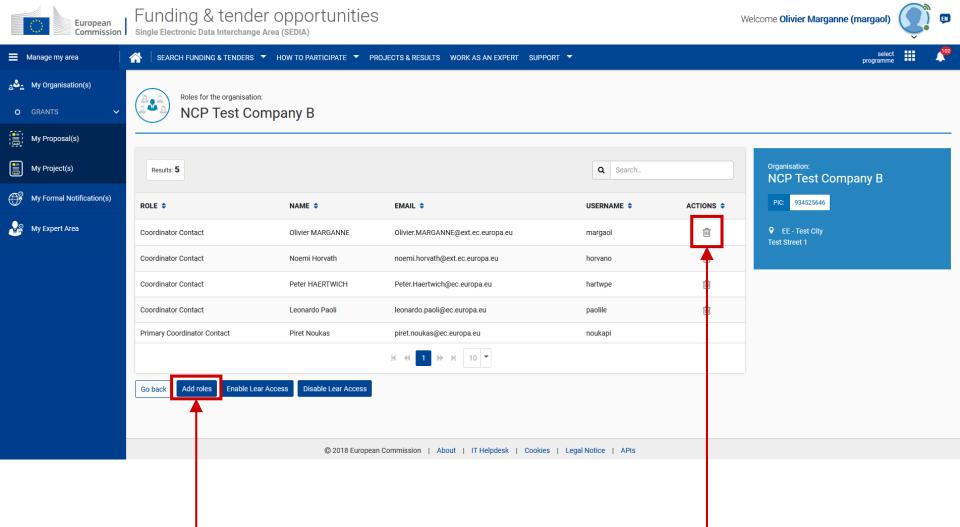
To grant a role, the e-mail address of the "new user" will have to be filled in; this e-mail address should be the same as the one used for the EU Login account of the "new user".

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



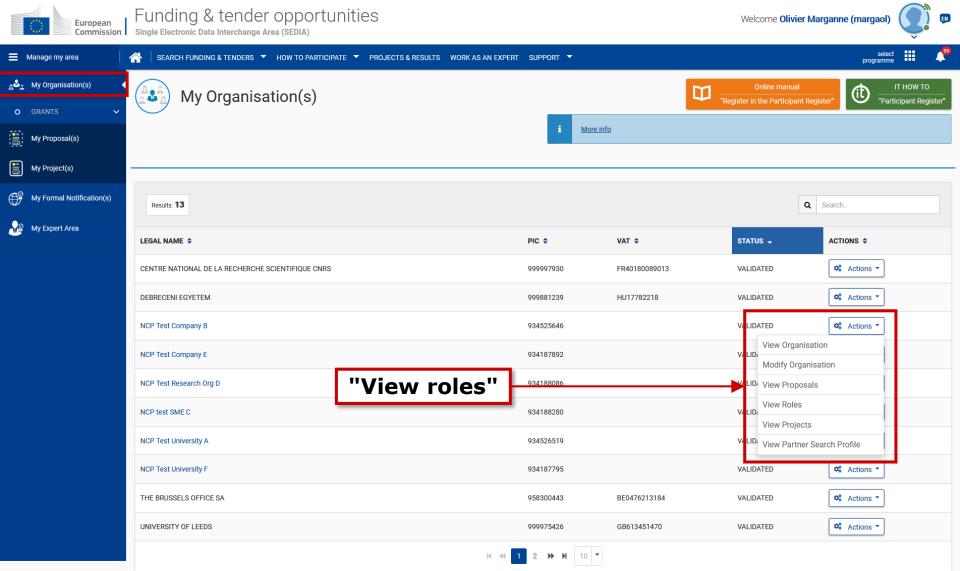
Project roles can be granted/revoked in the "My Projects" section



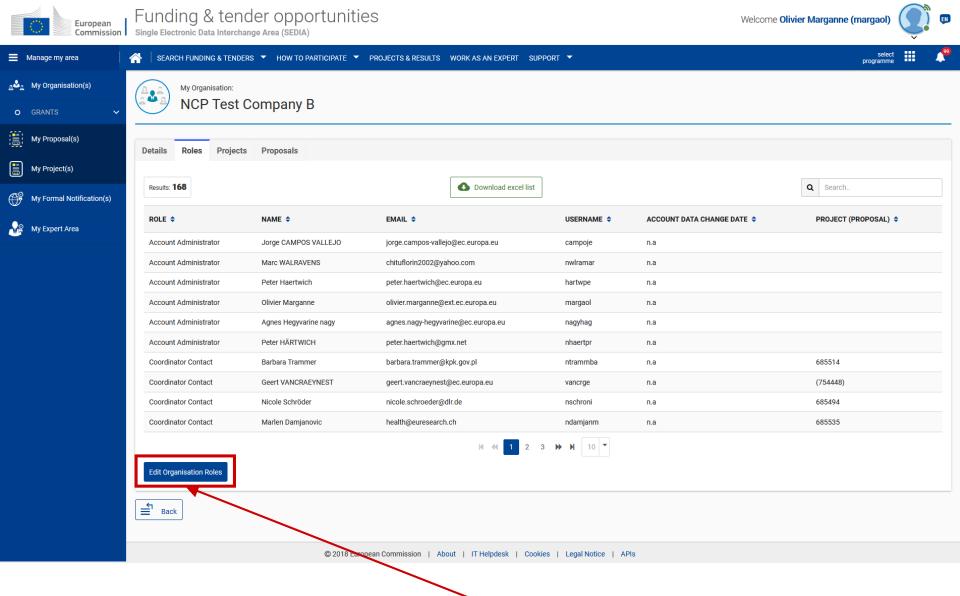


Add new role

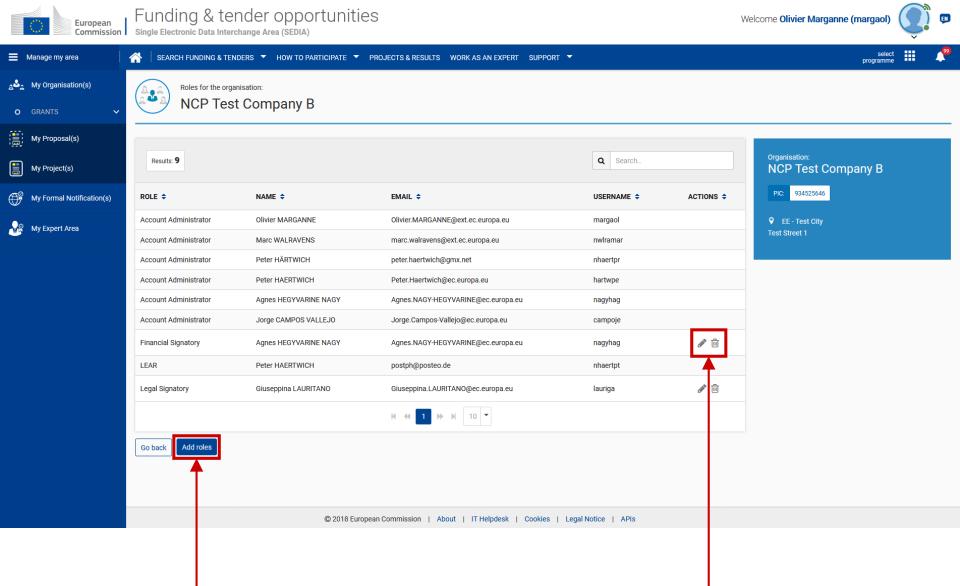
Revoke existing role







Edit Organisation Roles
(only if you are LEAR or Account Administrator)



Add new role

**Edit/Revoke existing role** 



# Services after login



### My Organisation(s)

### 1. Registration of organisations

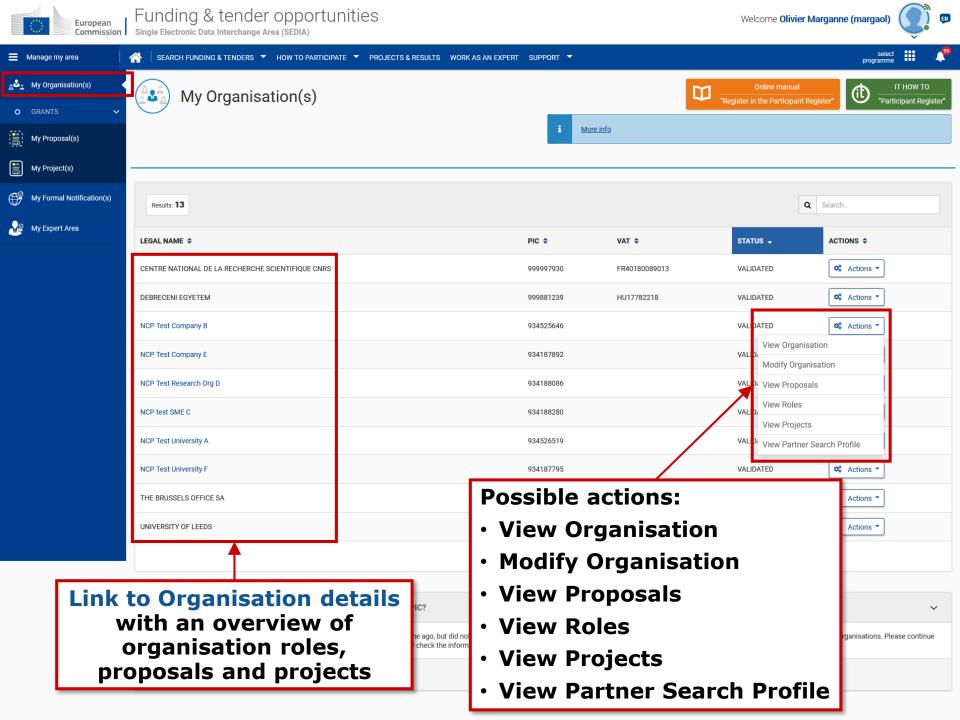
- The person registering the data receives online the PIC number for his/her organisation.
- Participants are encouraged to register their organisations as soon as possible before drafting a proposal.
- Possibility to register an organisation on behalf of someone else.
- Management of multiple PICs is possible.
- 2. Read-only access to organisation-related data
- 3. Contact the organisation's LEAR



My Organisation(s)

The LEAR and Account Administrator have access to extended options:

- 2. Update of the organisation's data (Participant Register)
- 3. Read-only access to the organisation's list of all roles, proposals and projects
- 4. Nominate/revoke organisation roles
- 5. Manage public organisation profile and published "partner search" requests





My Proposal(s)

### 1. Access to the list of draft and submitted proposals

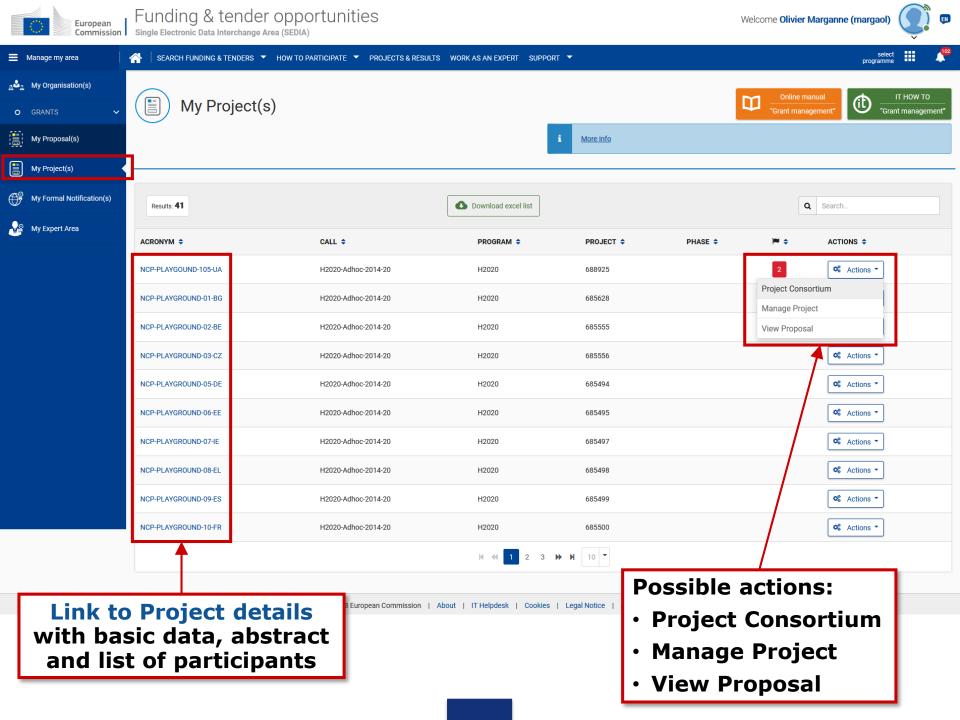
The proposal submission service is available on the topic's page (it will require to login).

**Draft proposals can be saved** and submitted later.



### My Project(s)

- 1. Access to the list of projects the user is involved in
- 2. Access to the project-related services:
  - Grant preparation
  - Amendments
  - Reporting tools
- 3. View the roles for all beneficiaries of a given project
- 4. Grant/revoke roles for a given project (provided the user has the authorisation to do so)





# **Paperless submission**

- LEAR nominates a list of persons authorised to sign legal & financial statements
- Only these persons get access to the "Sign and submit" function in the tool
- "Sign and submit" triggers the creation of an eReceipt that is stored in the electronic project archive
- All persons needing to know (including the LEAR) are notified on the transaction and have access to the eReceipt



# Value of the eReceipt

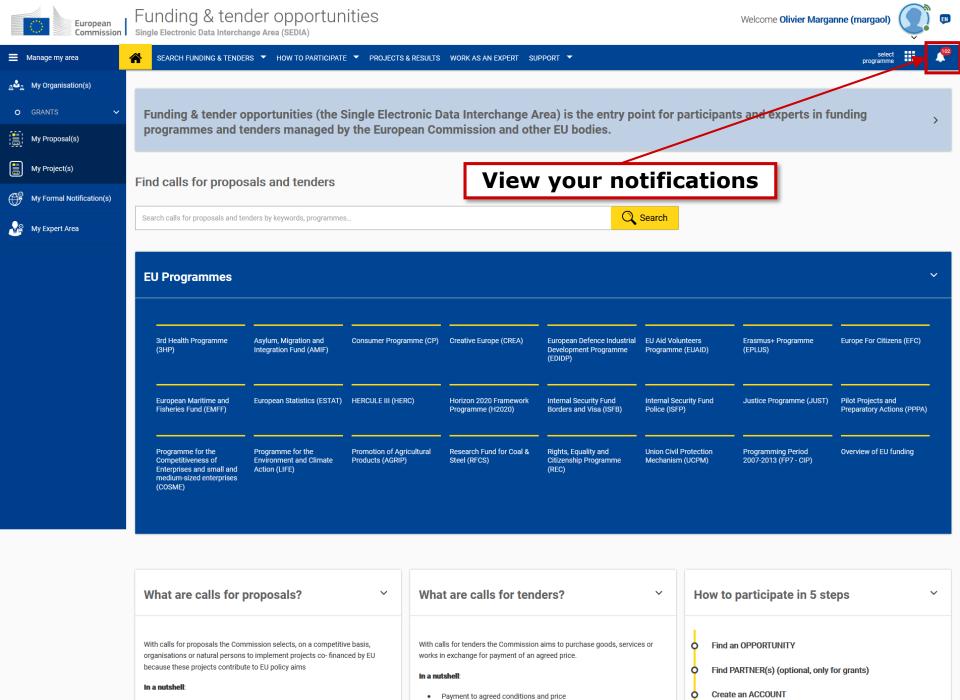
- Electronic receipt = digitally signed PDF version of the submitted document.
- Both the content of the document and a set of metadata (time stamp, EU Login credentials of submitter) are digitally sealed.
- The digital signature mechanism, using a public-private key pair mechanism, uniquely binds the eReceipt to the transaction and ensures its full integrity. Therefore a complete digitally-signed trail of the transaction is available both for the beneficiaries and the Commission.
- Any attempt to modify the content will lead to a break
   of the integrity of the electronic signature, which can be verified
   at any time by clicking on the signature in the PDF document.
- The eReceipt is stored in the project archive where it can be downloaded at any time by any actor in the project and stored on other electronic media.



My Notification(s)

# 1. View all personal notifications for the services of the Funding & Tenders Portal

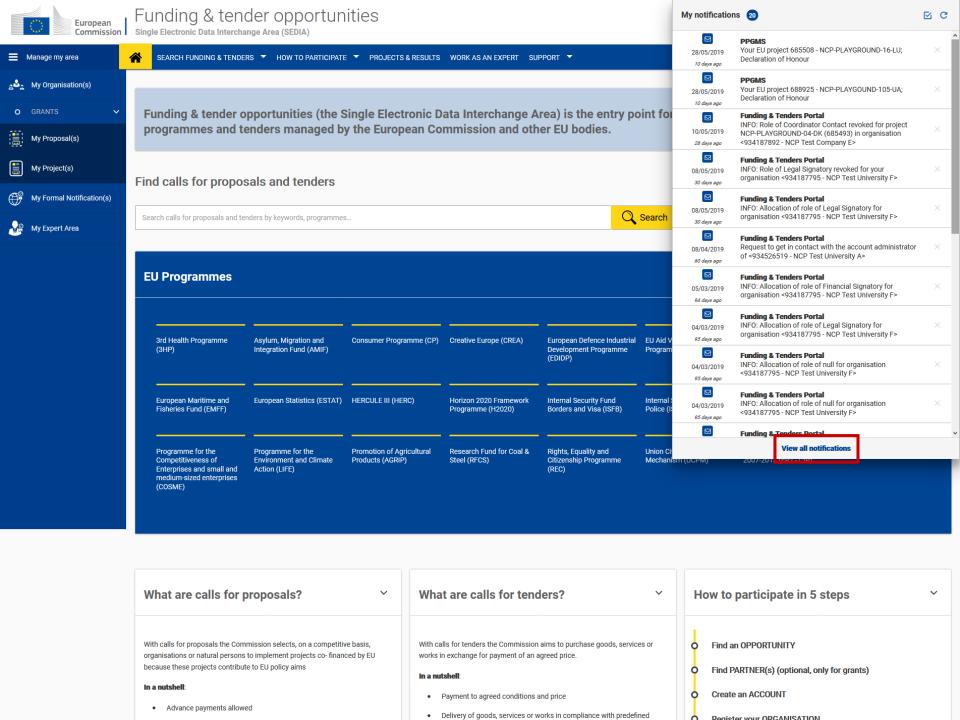
 Examples: change of roles, forms ready to be signed, availability of e-receipts, etc.



Delivery of goods, services or works in compliance with predefined

Dogistor your ODCANICATION

· Advance payments allowed

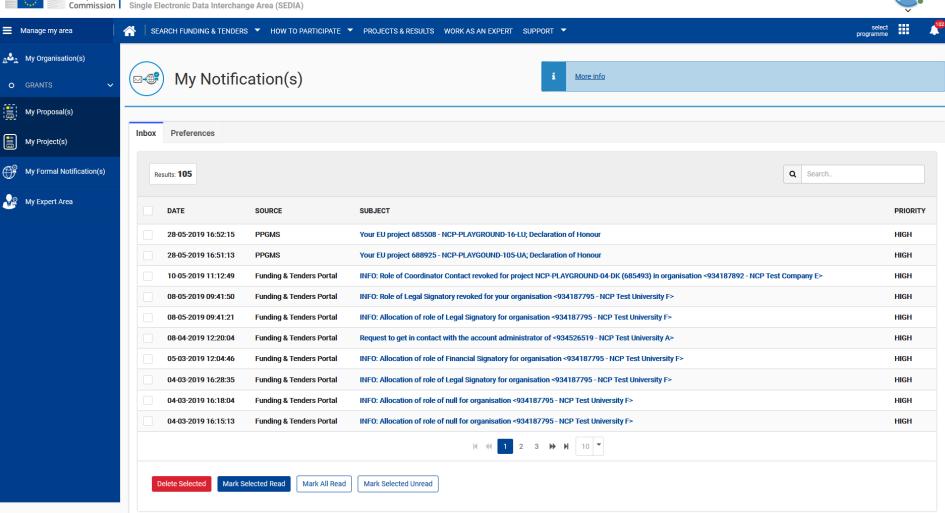




### Funding & tender opportunities

Welcome Olivier Marganne (margaol)







**My Formal Notification(s)** 

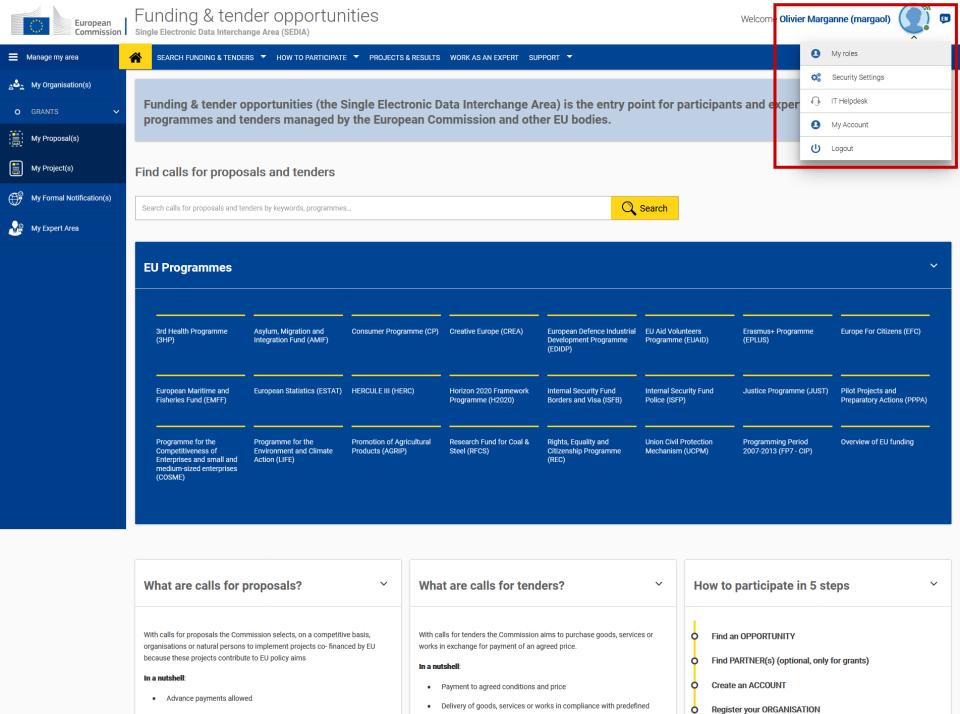
- 1. View all formal notifications for the services of the Funding & Tenders Portal
  - Can be used ONLY for correspondence requiring acknowledgement of receipt

Examples: termination of a grant, etc.

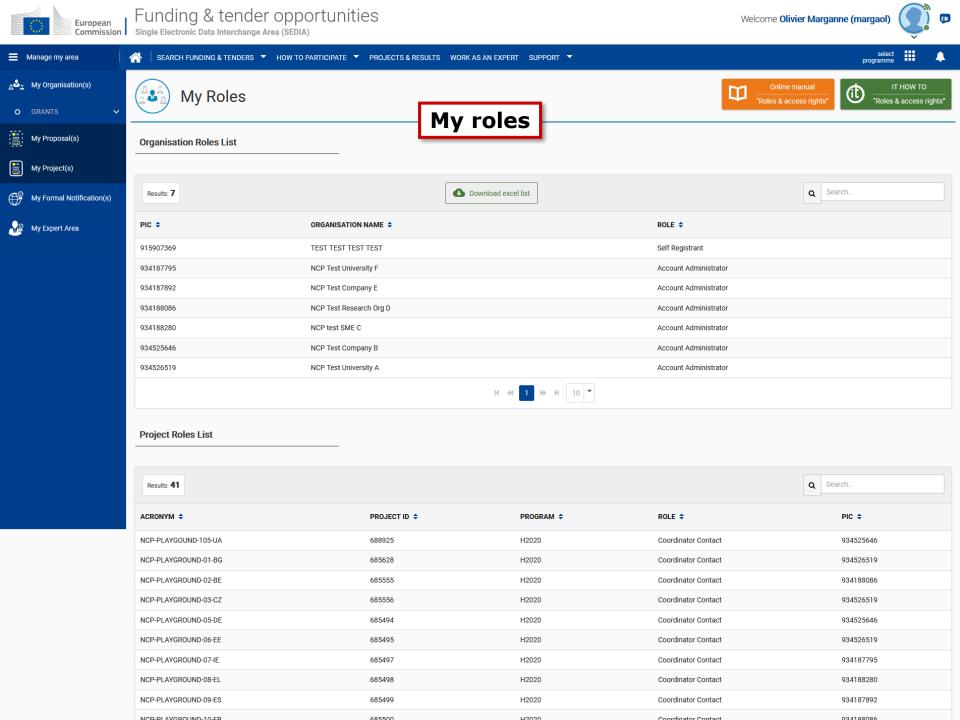


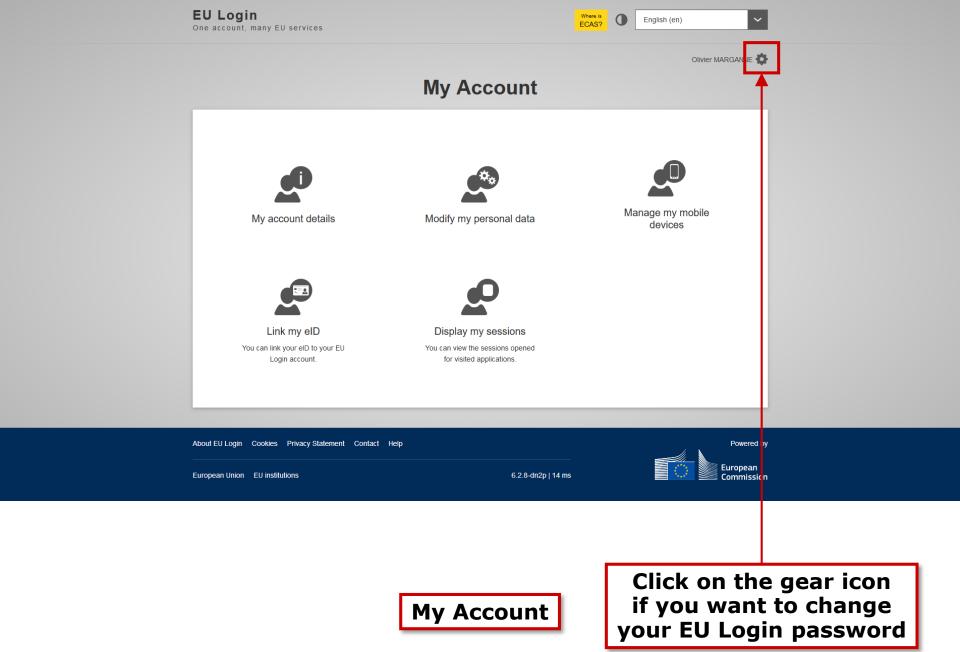
### **My Account**

- 1. My roles: list of all the roles linked to the EU Login account
- 2. Security Settings: you can activate the 2-step verification by registering your mobile device
- 3. IT Helpdesk
- 4. My Account: information about your EU Login account
- 5. Logout



Reimbursement for real costs







# Thank you!