

Frequently Asked Questions (FAQ)

3. Roles and access rights

About the role management in general

- **How is access to the personalised information managed in the Participant Portal (PP)?**

- The role management of the Participant Portal assures that its **personalised services after log-in** correspond to each user's, specific roles on organisations, proposals, projects or expert assignments. The "identity and access management" module of the Participant Portal links the ECAS account of each user to a **specified set of roles and access rights**, allowing the presentation of a personalised and dynamically updated Web space.

- **Each user** involved in interactions with the Commission - e.g. registering an organisation for a PIC number, negotiating a grant agreement, preparing a report - has a personalised page, where access to the different tools and services depends on the person's role in the proposal and/or project and/or organisation.

- **I have an ECAS account but how can I acquire roles and access rights for proposals, projects or organisations?**

- The basic principle is that the user having created an asset manages access to this asset for other users. In other words, there is no centrally controlled role and access management. The Commission intervenes only for a few cases (LEAR, Primary Coordinator Contact).

- **For proposals:** The user who created the proposal has a "Primary coordinator contact" role by default and can assign (and revoke) access rights for others. For getting access to an existing proposal under preparation you must contact (offline) the user having created it.
- **For projects:** When a successful proposal becomes a project, users "herit" their existing access rights from the proposal.

These "Coordinator Contacts" and "Participant Contacts" can assign (and revoke) roles and access to other users. Only for assigning and revoking the "Primary Coordinator Contact" the Commission/Agency has to intervene.

- **For organisation data in the beneficiary register:**
Validated organisations have a **Legal Entity Appointed Representative** (LEAR) nominated by the legal representative of the organisation and assigned in the system by the Commission. The LEAR can assign and revoke "Account Administrators" as well as "Legal Signatories" (LSIGNs) and "Financial Signatories" (FSIGNs). For organisations that were not yet validated, only the person having registered the organisation (the "self-registrant") has access. In this stage, no other access can be granted.
- For more details, see the [Roles and access rights section of the H2020 Online Manual](#).
- Check your roles by choosing 'My Roles' under the button with your name in the top right corner.
- **Where can I check my roles and access rights?**
- Go to the "My Roles" menu item under the Account button showing your name (top right corner of the screen).
- **How can I assign/revoke roles and access rights to/from other users?**
- If you have yourself a role allowing to assign/revoke other users, go to the "My Area" section available after you logged in:
 - For adding **project** -related roles go to the "My Projects" menu item, click on the yellow "PC" (Project consortium) button in the table.
 - For adding **organisation** -related roles go to the "My Organisations" menu item, click on the blue "OR" (Organisation Roles) button in the table.

- Give access rights by clicking on the "**Edit Roles**" button and then "Add roles" button, specifying the e-mail and the user name of the person. Revoke a user by clicking on the "**Revoke**" buttons.

- **How does the Financial Signatory (FSIGN) role work?**

- FSIGNs are persons authorised to sign financial statements in EU grants on behalf of their organisation. The LEAR (or an Account Administrators) of the organisation can assign the FSIGN role to as many persons in the organisation as necessary. As part of the assignment, the LEAR may add a comment (e.g. "Mr. X is authorised to sign for all grants in department Y"). This comment is visible to other users in the organisation with roles in projects. Assignment of the FSIGN role is not sufficient for signing financial statements. The FSIGN must first be linked to a particular project (becoming thus a PFSIGN). Linking of FSIGNs (from the list established by the LEAR at the level of the organisation) to a project is made by Primary Coordinator Contacts, Coordinator Contacts or Participant Contacts. More than one FSIGN can be linked to a project. All the FSIGNs assigned to a project will be notified when a financial statement is due for signature but only one of them signs (the one doing it first).
- More information is available in the [H2020 Online Manual](#).

- **How does the Legal Signatory (LSIGN) role for Horizon 2020 grants work?**

- LSIGNs are persons authorised to sign grant agreements, amendments and declarations on honour in EU grants on behalf of their organisation. The LEAR (or an Account Administrators) of the organisation can assign the LSIGN role to as many persons in the organisation as necessary. As part of the assignment, the LEAR may add a comment (e.g. "Mr. X is authorised to sign all grants in department Y"). This comment is visible to other users in the

organisation with roles in projects. Assignment of the LSIGN role is not sufficient for signing grant agreements etc. The LSIGN must first be linked to a particular project (becoming thus a PLSIGN). Linking of LSIGNs (from the list established by the LEAR at the level of the organisation) to a project is made by Primary Coordinator Contacts, Coordinator Contacts or Participant Contacts. More than one LSIGN can be linked to a project All the LSIGNs assigned to a project will be notified when a declaration on honour, grant agreement or amendment is due for signature but only one of them signs (the one doing it first).

- More information is available in the [H2020 Online Manual](#).

Legal Entity Appointed Representative (LEAR) role

- **What is the LEAR?**

- [See glossary definition](#)

- **How can I appoint a LEAR?**

- The LEAR must be appointed by the legal representative of the organisation (CEO, rector, Director-General...). The details are described [H2020 Online Manual](#)

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- **What are the rights and tasks of the LEAR?**

- [Please see the H2020 Online Manual.](#)

- **Who is the appropriate person in my organisation for becoming the LEAR?**

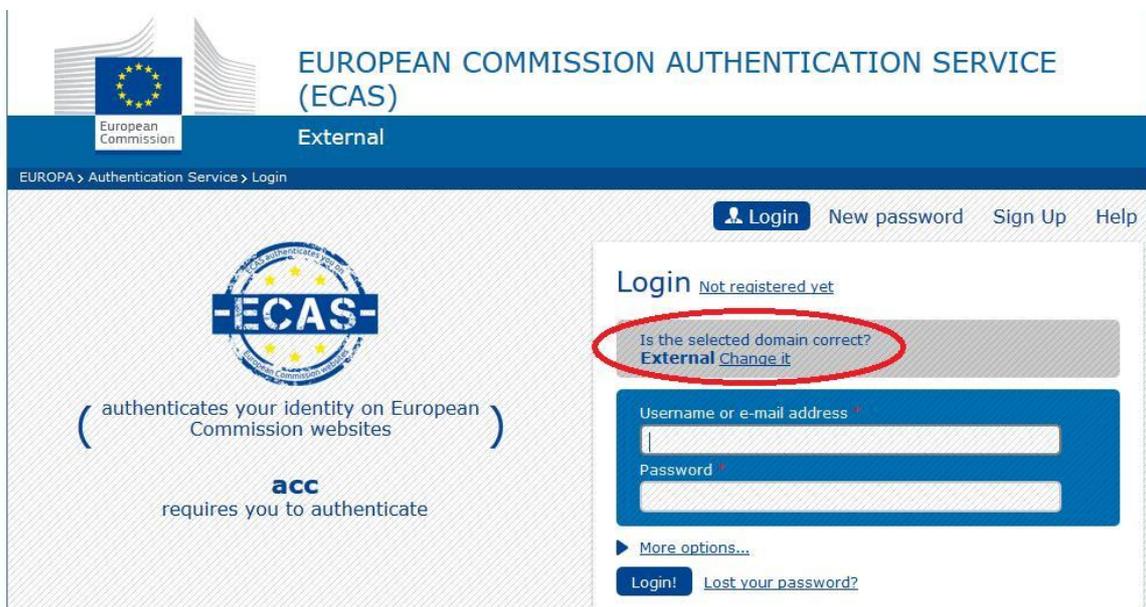
- The LEAR function is typically performed by an administrative staff member in the organisation's central administration. LEARs must be appointed by the legal representative of the organisation.

- **I have sent the LEAR appointment documents. When can I use the beneficiary register of the Participant Portal to modify the data?**

- It might take between 2 and 4 weeks of time before the appointed LEAR is registered. The LEAR will receive a confirmation e-mail stating the next steps for the use of the beneficiary register.

- **When are the modified data in the beneficiary register taken into account during the submission of a proposal?**
- Modified data need to be first validated by the Validation Services. The modification requests sent by LEARs are considered as high priority for validation.
- **I am the LEAR of my organisation and have made an update in the beneficiary register some days ago, but it seems that nothing has been updated.**
- Your request to change information is being processed by the Validation Services (VS). If you modify legal information (e.g. address, VAT number, registration number, status of your organisation, etc.), you must submit supporting documents to the VS. The requested documents should be uploaded via the beneficiary register on the Participant Portal ("My Organisations" menu item after an ECAS login). You can find more information about the validation process in the [H2020 Online Manual](#) .
- **I am the LEAR and I received the letter with the PIN code, but I did not receive the email mentioned in the letter. How can I get it?**
- As the emails from ecas-admin@ec.europa.eu and EC-RESEARCH-IT-HELPDESK@ec.europa.eu are sent with a "private" tag they cannot be seen if using a shared or functional mailbox. To see the emails, you have to login to your shared or functional mailbox using Microsoft Outlook Web Access (OWA) or another web mail access. This way, you will use a password to login through the Outlook Web Access or web mail server, and the system will allow you to see the emails. If you need assistance to determine your type of mailbox or with the web mail access, you might need to contact your IT administrator.
- Further on:
 - The email might have been treated as spam-contact your IT administrator to search for the email from:

- the eH2020 Service Desk Team subject: "Horizon 2020 Programme - User account creation".
- the eH2020Service Desk Team subject: "Horizon 2020 Programme - User account upgrade".
- If your email address in the letter is wrong, you should contact the Validation Services (VS) via the beneficiary register of the Participant Portal and give them the details of your PIC, username and LEAR email address. Please also upload the received LEAR appointment letter.



- If your email address in the letter is correct, then you should contact EC-RESEARCH-IT-HELPDESK@ec.europa.eu and give them the details of your PIC and username. This request can only be submitted from the LEAR email address (as sender) and the LEAR will receive a reply to his email address once the issue has been solved.
- **I am the LEAR and I tried to activate my account by using the link in the email. But when I filled in the username and the PIN code, I received the error message: "Incorrect username or PIN code supplied, please try again".**
 - This problem could be caused by using an incorrect domain in the ECAS service. You should check if your domain is "External"; you can change it in the top right-hand corner of the [ECAS password initialisation page](#) .
 - If it does not solve the problem, then please follow the instructions as indicated [here](#) in order to have the ECAS account verified by the responsible support team.
- **I am the LEAR and I have successfully entered my username and PIN code as requested, but I never received the email that the system should send me.**
 - Contact your IT department to check if the email from the Authentication Service with the Subject: "ECAS Password Initialisation" is not "queuing" in the mail server.
 - The problem could occur if the email is treated as a spam. Ask your IT administrator to remove ecas-admin@ec.europa.eu or the domain ec.europa.eu from the spam filter.
 - 'If it does not solve the problem, then please follow the instructions as indicated [here](#) in order to have the ECAS account verified by the responsible support team. This request can only be submitted from the LEAR email address

(as sender) and the LEAR will receive a reply on his/her email address, once the issue has been solved.

- **My organisation wants to change the LEAR. How should we proceed?**
- You can appoint a new LEAR, simply by following the steps set out in the H2020 Online Manual under "[How to appoint a representative \(LEAR\)](#)". There is no separate procedure specifically for replacing LEARs.
- **I am the LEAR of my organisation and I have changed my email address. How can I change it in the beneficiary register?**
- Choose the menu item **My Organisations** after ECAS login. Therein, you will inform the Validation Services via the messaging option. A new e-mail address will subsequently be updated. Please note that a new e-mail address triggers a new ECAS account meaning you will receive a new PIN code.
- **I am the LEAR, but when logging in the system shows me an error message.**
- You should contact the IT Help-desk EC-RESEARCH-IT-HELPDESK@ec.europa.eu and provide them the details of your PIC, username and LEAR email address, along with the description of your problem.
- **Some functionality seems to have disappeared since my last login. What happened?**
- This can be the result of one of the following:
 - Each user of the Participant Portal is assigned one or more roles in relation to projects and or legal entities. It is possible that your roles have been modified since your last login. Please consult the H2020 Online Manual section on the [Roles and Access Rights](#).

The functionality disappeared since your last login because the life cycle of the asset has evolved and it does not need this functionality anymore.