

Roles and access rights

Roles and access rights restrict the information a user can view and the tasks they can perform.

For instance, only a person with the coordinator role can delete a draft project proposal.

Access rights are linked to a user's 'roles' in the electronic exchange system (which are in turn linked to their functions within their organisation or in relation to a particular grant).

How Are Access Rights Managed?

Roles are divided into 2 main sections:

- **"Organisation roles"** are linked to the whole entity and its data (but without any access to the projects)
- **"Project roles"** are defined project by project and cover all possible cases for allowing access to a project's data (read/write/submit)

One user can have several roles at the same time.

HOW ARE THE ROLES ASSIGNED?

Most of these roles can be freely assigned and managed by the organisations and consortia, according to their needs:

- you can start creating a proposal yourself
- you can be invited by other users - who have created a proposal - to join their proposal
- persons in your organisation can give you (and revoke) access to roles of your organisation
- persons involved in on-going grants can give you (and revoke) access to roles in their grants

All access rights are linked to the user's ECAS account.

EXCEPTIONS

The Commission needs to intervene in the assignment of the following 2 key roles:

1. LEAR (Legal Entity Appointed Representative) - *organisation role*

The LEAR serves as a trusted administrative contact for the Commission, providing reliable information at the level of the organisation (not at the level of individual grants). Usually LEARs are administrative staff members in the central administration of the organisation. The LEAR handles all the organisation-related data on the Participant Portal and appoints representatives within their organisation to electronically sign grant agreements or financial statements for project costs.

There can only be one LEAR per organisation.

LEARs are validated by the Validation Services of the Commission as part of the [organisation registration process](#). Learn more about the [detailed procedure for appointing the LEAR](#).

2. Primary Coordinator Contact - *project role*

This is the main person responsible for a project. As such, they can submit requests, reports and notifications to the Commission on behalf of the consortium.

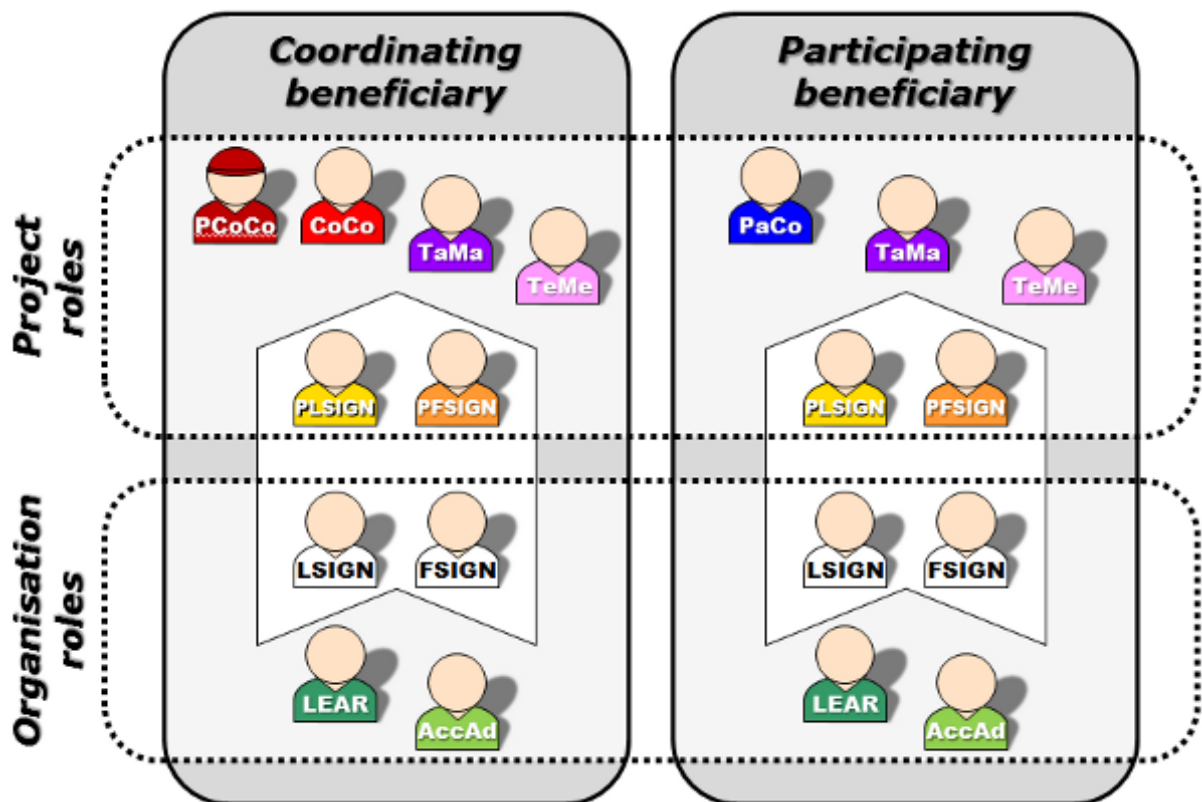
There can only be one PCoCo per project.

TIPS:

[Exceptionally - and only until a LEAR has been appointed - self-registrants have certain roles \(that were not assigned by any of the other users listed above\).](#)

Roles - Overview

The picture below shows all the roles involved in managing projects and organisational data on the Participant Portal.



ORGANISATION ROLES

1. Legal Entity Appointed Representative (LEAR)

LEAR is the main administrative contact between an organisation and the Commission appointed by an organisation.

LEARs have system rights to:

- update their organisation's data on the Participant Portal
- appoint (/revoke) representatives of their organisation to electronically sign a grant agreement
- appoint (/revoke) representatives of their organisation to electronically sign financial statements for project costs
- appoint (/revoke) Account Administrators within their organisation to help LEARs in their work

TIPS:

The LEAR does not assign the Legal Signatories and Financial Signatories to a particular grant. This is done by that grant's Coordinator Contact (CoCo) or Participant Contact (PaCo).

2. Self-registrant

Self-registrant is a person who first registers an organisation in the Commission [Beneficiary Register](#).

Before the [LEAR is validated](#) by the Commission, Self-registrants can provide the Commission with requested information and documents about their organisation.

Once the LEAR has been formally validated by the Commission (normally after the organisation has been validated as a legal entity), the role of Self-registrant is revoked and replaced by the LEAR.

3. Account Administrator

The LEAR may delegate tasks to one or more Account Administrators. Though the LEAR keeps the full responsibility, Account Administrators can fulfil tasks for their LEAR. An organisation can have an unlimited number of Account Administrators.

If the organisation nominates a new person as its LEAR, the existing Account Administrators remain and can be revoked by the new LEAR.

4. Legal Signatory (LSIGN)

LSIGNs must be nominated for an organisation by the LEAR or an Account Administrator (see figure 3). After that, they can be assigned to a particular project by a Coordinator or a Participant Contact (see figure 5). An organisation can have an unlimited number of LSIGNs.

5. Financial Signatory (FSIGN)

FSIGNs must be nominated for an organisation by the LEAR or an Account Administrator (see figure 3). After that, they can be assigned to a particular project by a Coordinator or a

Participant Contact (see figure 5). An organisation can have an unlimited number of FSIGNS.

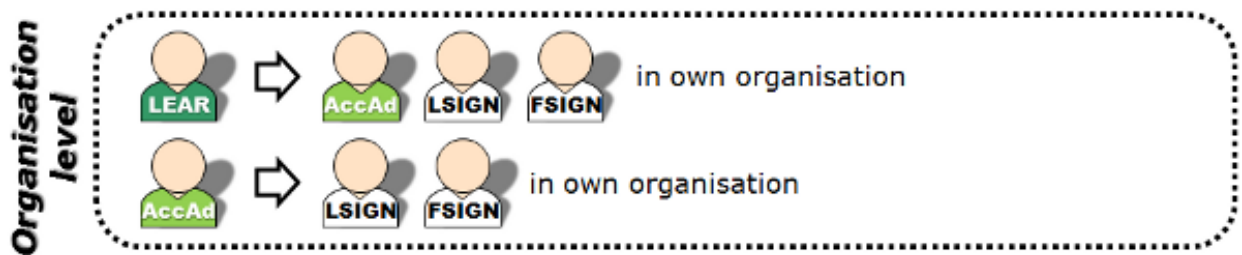


Figure 2 - Who can appoint and revoke organisation roles?

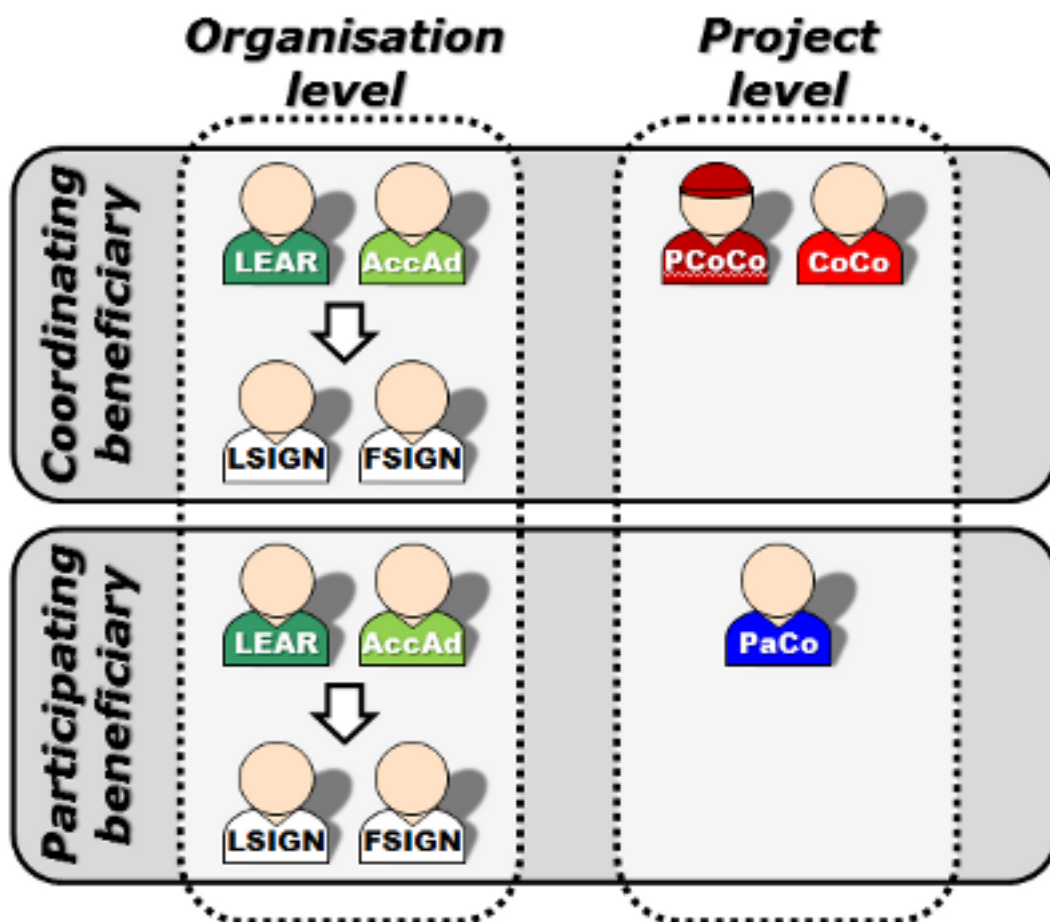


Figure 3 - Nomination of LSIGNS and FSIGNS

TIPS:

When nominating Financial or Legal Signatories, the **LEAR** can add comments that help project participants select the right FSIGN or LSIGN for their project. e.g.

"Mr Smith can sign for projects run by Department X from 1 February 2014."

These optional comments are useful for defining the scope of responsibilities or duration of FSIGNs or LSIGNs in large organisations with different departments or institutes.

PROJECT ROLES

Depending on your project roles you can have read-only, read-write or read-write-submit rights to information, documents and forms.

1. (Primary) Coordinator Contact (PCoCo/CoCo)

The Primary Coordinator Contact is nominated for each project as the main contact point between the consortium and the Commission for a particular grant. By default this is the proposal initiator in the submission phase.

The PCoCo can nominate or revoke an unlimited number of Coordinator Contacts (CoCos), who will then have the same rights - except the right to revoke the PCoCo.

All Coordinator Contacts can:

- nominate/revoke Participant Contacts for other organisations in the consortium
- **Coordinator - for this reason, it is important to give all your partner organisations access to the proposal on the Participant Portal as soon as possible.**
- nominate/revoke Task Managers and Team Members in their own organisation
- assign Legal and Financial Signatories in their organisation to their projects
- make changes to project documents on the Participant Portal
- submit proposals and project documents to the Commission

2. Participant Contact (PaCo)

This is a representative of any other organisation in the consortium that is not the coordinating organisation. An organisation can have an unlimited number of PaCos per project, and each will be able to:

- nominate/revoke other PaCos in their organisation
- assign Legal and Financial Signatories in their organisation to their projects
- submit their work to the Coordinator
- nominate/revoke Task Managers and Team Members in their own organisation
- make changes to project documents on the Participant Portal
- submits information directly to the Commission (if laid down in the grant agreement, see [Article 52](#) of the Annotated General Model Grant Agreement)

3. Task Manager (TaMa)

TaMas can perform some restricted actions like creating, updating and uploading documents about their organisation's participation, completing, modifying and deleting project information in the administrative web forms of the organisation. An organisation can have an unlimited number of TaMas per project. They cannot nominate or revoke anybody and submit information to the Coordinator or Commission. This role is not used during the proposal submission phase.

4. Team Member (TeMe)

TeMes have limited access rights: search and read-only functions.

5. Project Legal Signatory (PLSIGN)

Person who has the right to sign grant agreements and amendments on behalf of the organisation. An organisation can have one or more LSIGNs per project.

Once appointed by the LEAR, LSIGNs can be assigned to a particular project by a Coordinator or a Participant Contact (see figure 5). Only after becoming a PLSIGN in this way can an LSIGN appointed to a project sign a grant agreement for a particular project.

Same rights as CoCos/PaCos for grant information. Cannot assign/revoke any roles.

6. Project Financial Signatory (PFSIGN)

Person who has the right to sign financial statements (Forms C) for grants on behalf of the organisation managed through the electronic exchange system. An organisation can have an unlimited number of FSIGNs per project.

Once appointed by the LEAR, FSIGNs can be assigned to a particular project by a Coordinator or a Participant Contact (see figure 5). Only after becoming a PFSIGN in this way can an FSIGN appointed to a project sign a financial statement.

Same rights as CoCos/PaCos for grant information. Cannot assign/revoke any roles.

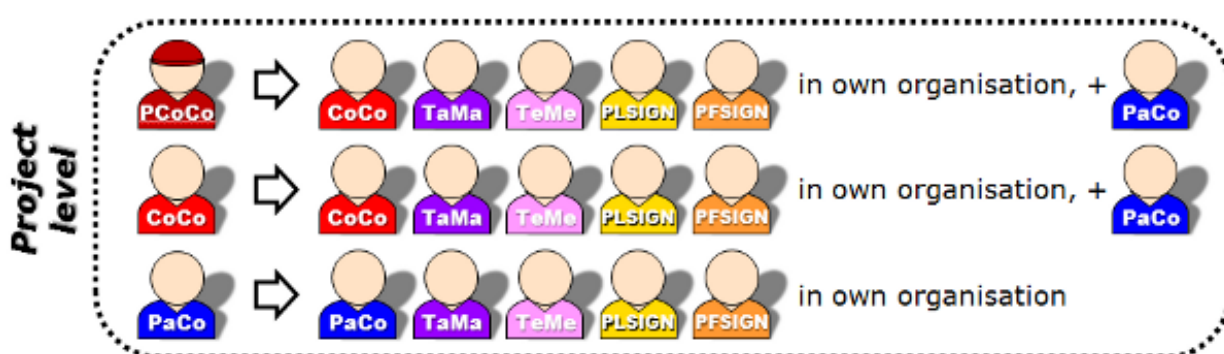


Figure 4 - Who can appoint and revoke project roles?

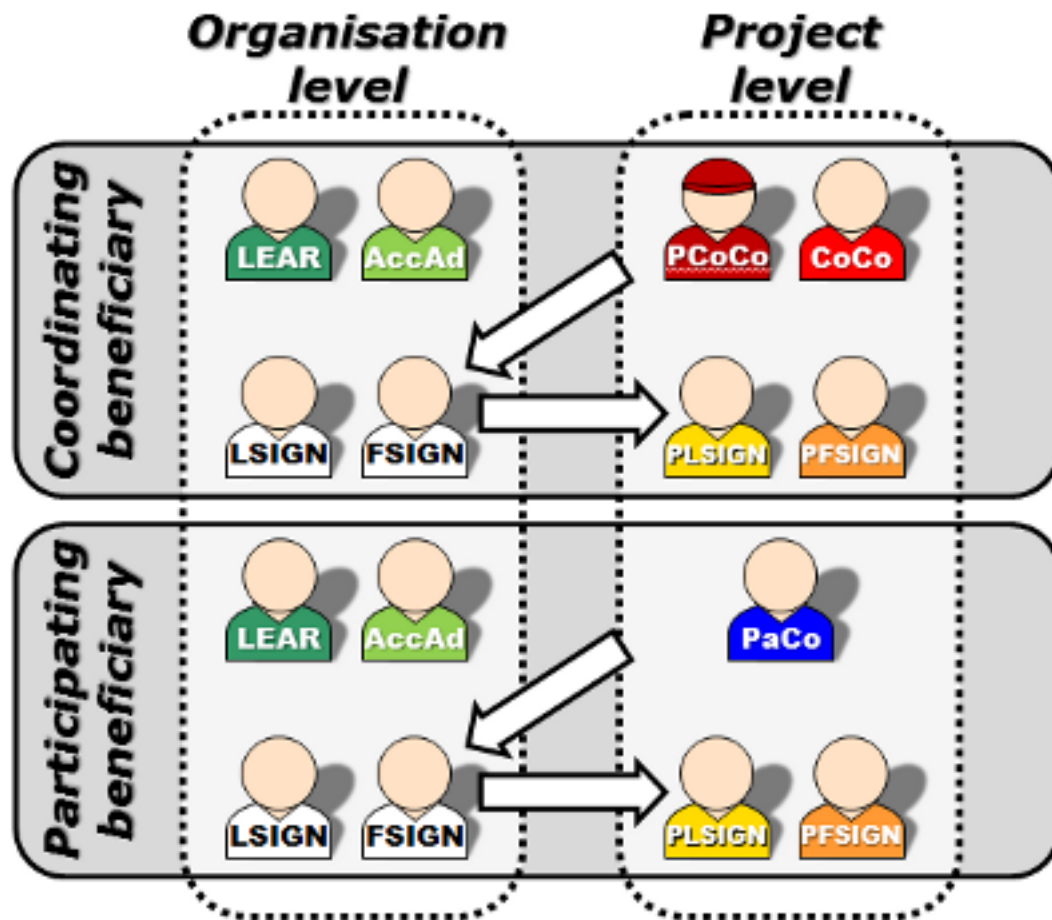


Figure 5 - Appointment of LSIGNs and FSIGNs to a specific project

SUMMARY - RIGHTS ASSOCIATED WITH ROLES

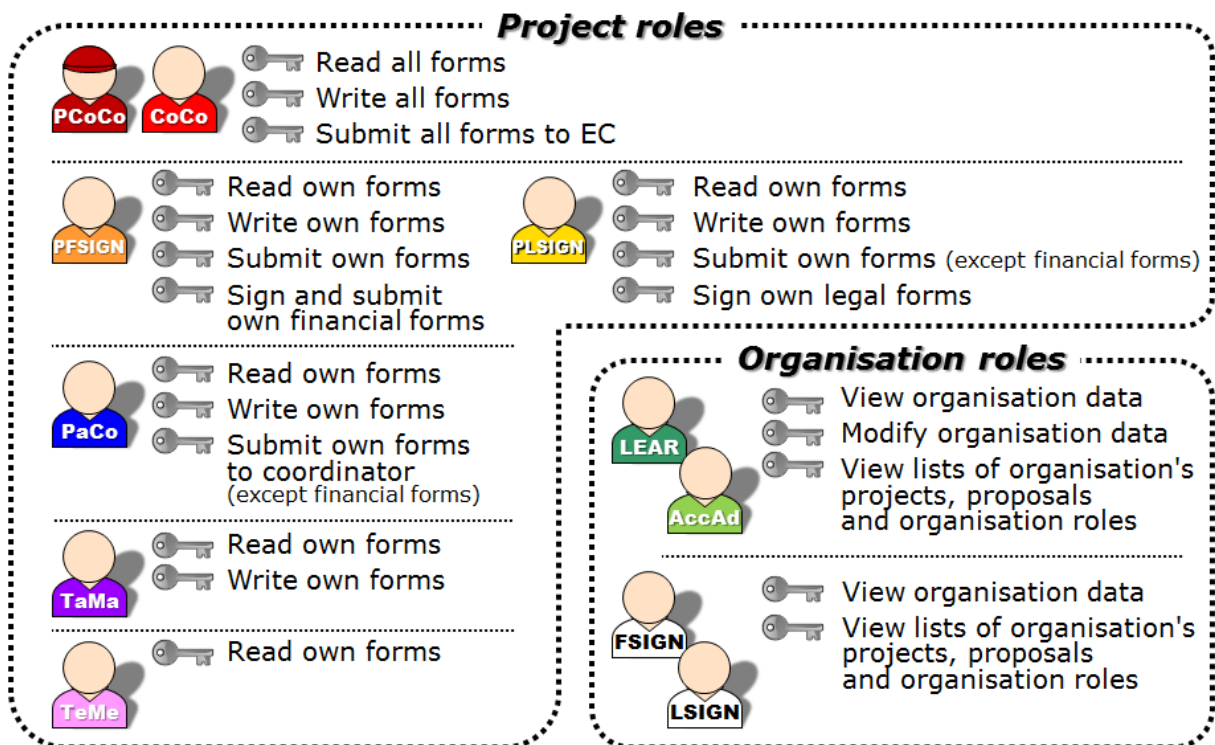


Figure 6 - Which roles can perform which actions?

Nomination Process

Some roles are automatically appointed, based on the information in your proposal:

- The proposal initiator will become the Primary Coordinator Contact.
- The main contact persons in the participating organisations will become Participant Contacts.
- Persons with read-only access to the proposal will become Team Members.

TIPS:

Once your organisation is validated by the Commission, it is important that you appoint a LEAR to manage your organisation's legal and financial information in the Participant Portal.

How to nominate/revoke someone

To grant a role, you must enter the user's e-mail address. It must be the same as the address they used to open their ECAS account.

If the user does not already have an ECAS account, they will automatically receive an invitation to create one.

• **Project roles** - to grant/revoke, go to:

- My Projects
- select the orange button "*PC (Project Consortium)*"

• **Organisation roles** - to grant/revoke, go to:

- My Organisations
- select the blue button "*OR (Organisation Roles)*"

How many different roles are needed in a consortium?

This depends on the participants. A user's ECAS account can carry any combination of roles. Thus, a user can acquire a differentiated set of access rights to functions for managing grants or organisation data.

TIPS:

For small organisations or beneficiaries who are individuals (natural persons), this means that one single person can combine all the access rights needed to manage their grants (i.e. LEAR, PaCo (or CoCo if they are the coordinator), PLSIGN and PFSIGN).

The **minimum configuration** is:

- ✓ 1 Primary Coordinator Contact
- ✓ 1 Participant Contact per beneficiary
- ✓ 1 LEAR per organisation
- ✓ 1 Project Legal Signatory per organisation assigned to project(s)
- ✓ 1 Project Financial Signatory per organisation assigned to project(s)

One person can have several roles at the same time.

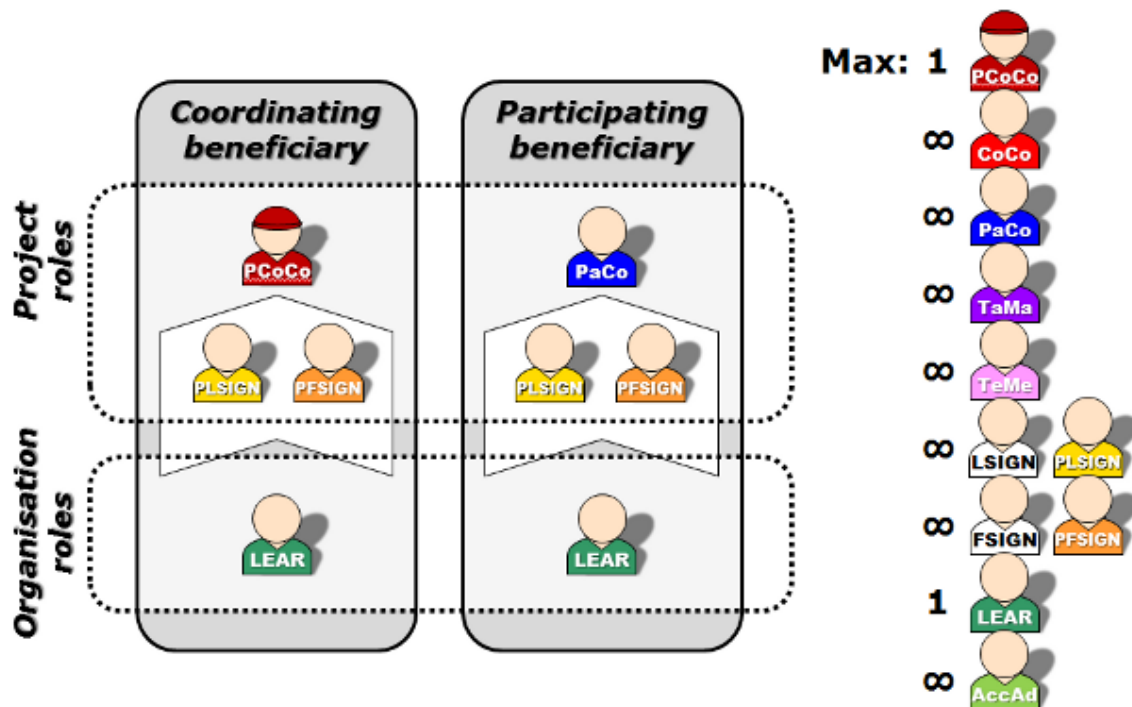


Figure 7 - What is the minimum configuration of roles to run a project?

Specific Roles For European Research Council (Erc)

ERC projects have some specific roles, as beneficiaries are not organised into consortia. In general ERC grants support research projects managed by a single Principal Investigator, under the responsibility of a host institution organisation.

1. Principal Investigator

Proposal submission phase

The Principal Investigator is the researcher who wants to apply for the ERC grant. On the Participant Portal, they are considered to be the proposal coordinator, as they are the person preparing the proposal.

After proposal submission

Once the proposal has been selected, the Principal Investigator is no longer proposal coordinator, but their host

institution assigns them a project role with specific access rights in the Participant Portal. The role can be:

- **Coordinator Contact** - enables the Principal Investigator to perform all administrative project tasks and submit any reports to the ERC Executive Agency (ERCEA)
- **Team Member** - this carries more limited rights (search and read-only) on the Participant Portal. Communication with the ERCEA is handled by the host institution.

2. Main Host Institution Contact

This is the primary contact person for the ERCEA in the institution hosting the research project initiated by a Principal Investigator. They have the full access rights of a [Coordinator Contact](#).

Because the grant agreement is signed between the host institution and the ERCEA, it is the host institution that is responsible for reporting on project activities.

At its discretion, the host institution can assign the Principal Investigator full access rights or only limited access rights (search and read-only - as described above).

3. Contact person

Usually a team member or any other project participant or third party who needs access to the proposal data. A contact person can be granted full access (as a [Coordinator Contact](#)) or read-only access (as a [Team member](#)) to the proposal data.

Specific Roles In Marie Skłodowska-Curie Actions

(Msca)

MSCA projects have some specific roles as they are not necessarily organised into consortia. In general Marie Curie

grants support research projects managed by a researcher under the responsibility of an organisation, such as a fellow doing a research project in a host institute.

1. Fellow

Proposal submission phase

The fellow is a researcher who wants to apply for a Commission grant. On the Participant Portal, they are considered to be the proposal coordinator, as they are the person preparing the proposal.

After proposal submission

Once the proposal has been selected, the fellow is no longer proposal coordinator, but their host institution assigns them a project role:

- **Coordinator Contact** - enables the fellow to perform any project preparation tasks and submit project documentation to the Commission
- **Task Manager or Team Member** - this carries more limited rights on the Participant Portal ([see descriptions above](#)). Communication with the ERCEA is handled by the host institution.

2. Main Host Institution Contact

This role is responsible for hosting a fellow's research project. It has the rights of a Coordinating organisation, and can assign the fellow either all rights or limited access only. Because the grant agreement is signed between the host institution and the Commission, it is the host institution that is responsible for reporting on project activities.