

## [How to add, revoke and edit roles.](#)

## [How to assign the PLSIGN/PFSIGN role](#)

## [Special Roles per Programme/Action](#)

The purpose of this page is to describe the Identity and Access Management (IAM) hierarchy.

The Funding & Tenders Portal allows each user to have access to a 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 allows us to define and/or manage changes of access rights of users of the Portal.

It gives a personalised and secure access to the different services of the Portal.

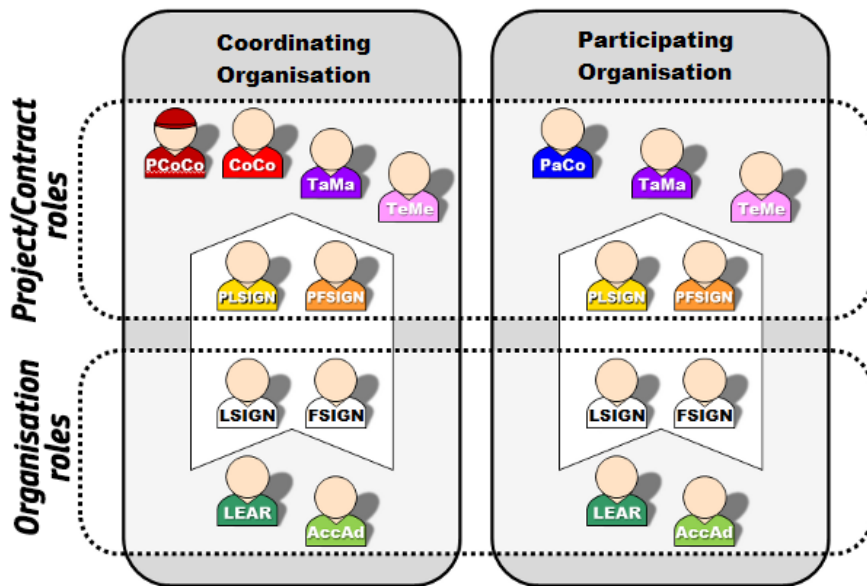
Minimum involvement by the Commission/Agency staff allowing for flexibility in the online management of the consortium.

Any change in the roles of the users is saved to allow a monitoring & tracking service.

The IAM hierarchy is as follows:

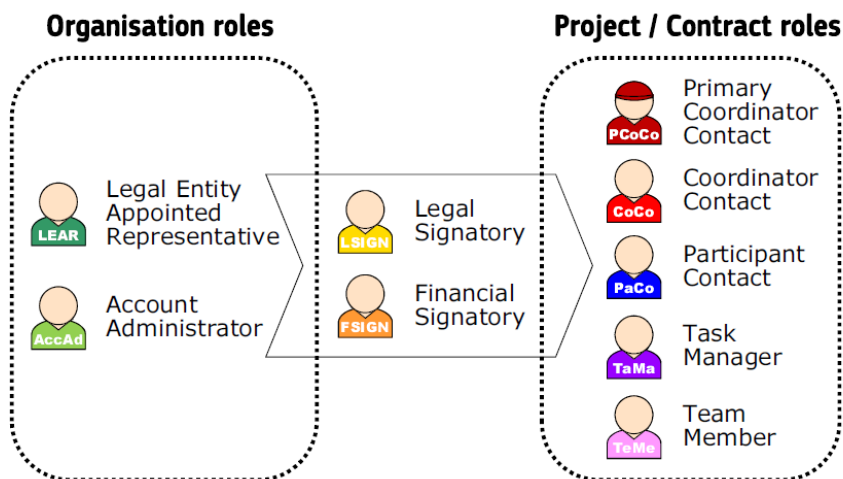
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## Nomenclature

### Nomenclature



## Important Remarks

Only the key roles of the LEAR and Primary Coordinator Contact are defined/modified by the Commission. In the case of the LEAR, the organisation appoints or substitutes the LEAR but it needs to go through a validation process with the Commission. In the case of the PCoCo, the proposal initiator of the coordinating entity is automatically transferred as Primary Coordinator Contact, and only the Commission can change it. The rest is left at the discretion of the consortium.

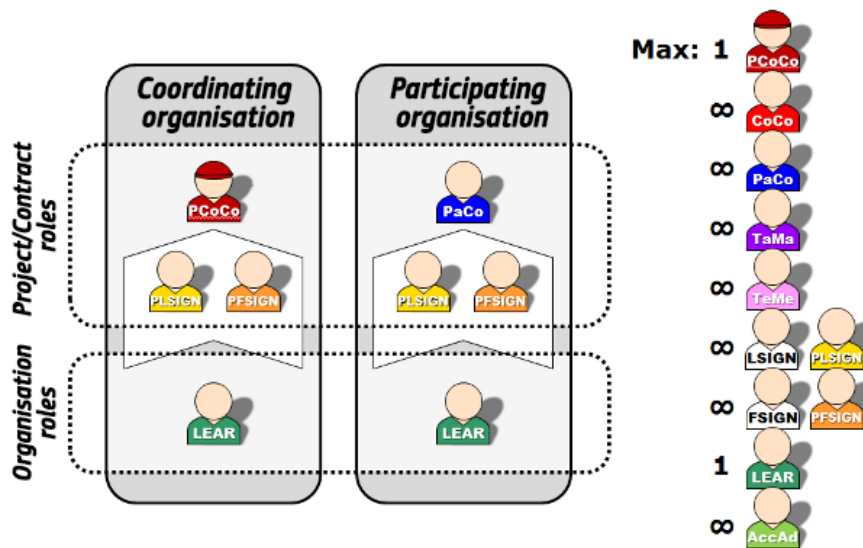
**Note:** you can find information on how a LEAR is appointed [here](#)

re.

One person can have several roles at the same time.  
The complexity of the consortium depends on the participants.  
The minimum configuration is:

- The Primary Coordinator Contact
- Participant Contact per beneficiary
- LEAR per organisation
- Legal Signatory per organisation
- Financial Signatory per organisation

### Minimum Configuration



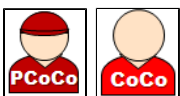
### Access Rights

#### Project Roles

⚠ Regardless of the different write/read rights described below, any document becomes visible to all beneficiaries in the consortium [once that it has been submitted to the EC.](#)

See [Special roles](#) for information about roles not mentioned here.

Primary Coordinator Contact/Coordinator Contact



Can:

Read / write all forms

Submit all forms to EC  
Make changes to project documents

#### Financial Signatory



#### Can:

Read own forms  
Write own forms  
Sign and submit own financial forms

#### Legal Signatory



#### Can:

Read own forms  
Write own forms  
Submit own forms (except financial forms)  
Sign own legal forms

#### Participant Contact



#### Can:

Read own forms  
Write own forms  
Submit own forms to coordinator (except financial forms)  
May submit information directly to EC as laid down in the grant agreement (see [Article 52](#))  
Make changes to project documents

#### Task Manager



## Can:

Read own forms  
Write own forms

Team Member



## Can:

Read own forms

## Organisation Roles

Account Administrator/Legal Entity Appointed Representative



## Can:

View organisation data  
Modify organisation data  
View lists of organisation's projects, proposals and organisation roles.  
LEARs and AccADs need to request access to see the projects and proposals details of their organisation, if needed, as described [here](#).

**⚠ Note:** you can find information on how a LEAR is appointed [here](#).

Legal Signatory



## Can:

View 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:

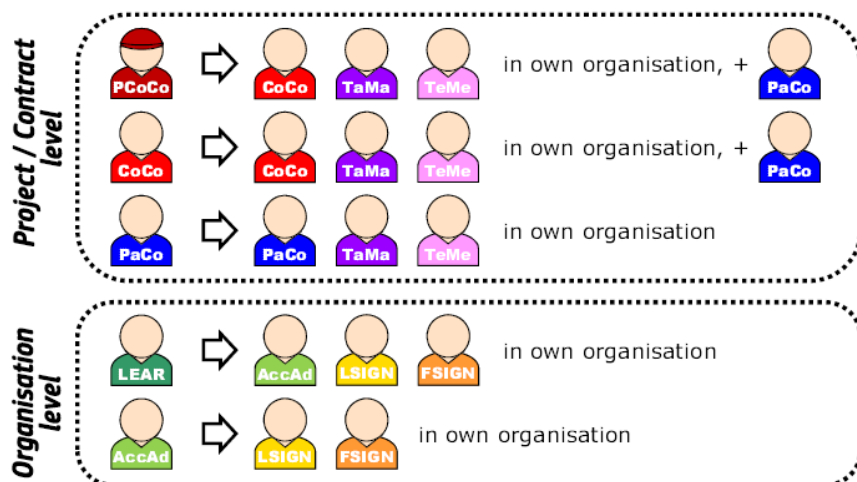
The proposal initiator in the proposal submission phase will automatically be recognised by the Commission as the Primary Coordinator Contact.

The contact persons of the participating organisations identified during proposal submission will become Participant Contacts at the beginning of negotiations.

The LEAR is validated by the Commission during the validation process of his/her organisation.

### The Nomination Process

The nomination process, i.e. who can nominate the various actors, is described in the diagram below for both a project and an organisation.



### How to Nominate/revoke a Role

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".

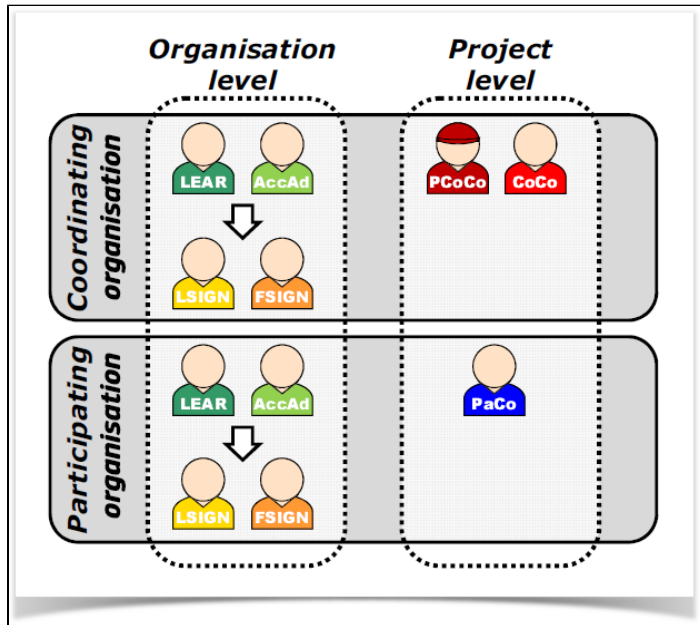
If this "new user" has no EU Login account, he/she will automatically receive an invitation to create his/her EU Login account.

Access [this page](#) for a full description on the steps to undertake.

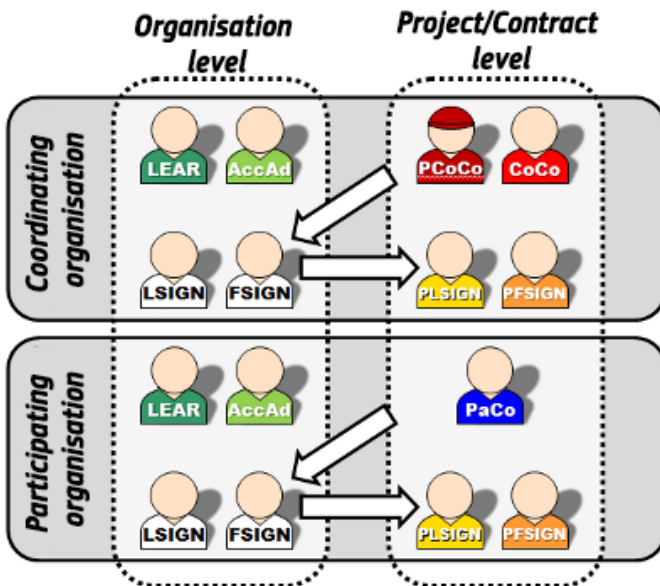
### L-Sign (Legal Signatory) and F-Sign (Financial Signatory)

For the nomination here, please read [here](#).

1. The LEAR (or Account Administrators) nominate as many LSIGNs /FSIGNs as they want. At this stage, the FSIGN cannot do anything, while the LSIGN has read-only access to the organisation's data and lists of projects, proposals & roles.



2. The (Primary) Coordinator Contacts/Participant Contacts need to assign to their project as many LSIGNs/FSIGNs for their own organisation as needed. The LSIGN and FSIGN now have their own access to the tools.



## Audit Roles (Audited organisations)

This description concerns the auditee. For specific information regarding the audit roles for external audit firms, see [AUDIT Firm Roles](#)

### Primary Audit Contact

The LEAR gets assigned the Primary Audit Contact (PAuCo) role when an organisation has been selected for an audit. This role may nominate other Primary Audit Contacts (PAuCo) for the organisation and the Audit Contacts (AuCo) roles for the audits. AuCos will carry out the audit tasks in the Audit Management System (AMS)), once they are assigned to an audit team. PAuCo cannot access the audit unless they are granted the AuCo role and they are added to the relevant audit team.

### Can:

Nominate other Primary Audit Contact(s) for the organisation and the Audit Contact(s) for an audit (in the Funding & Tenders Portal, go to **My Organisations > Actions > View Roles**, click the **Roles** tab). See [How to Assign Roles](#) for further details  
Manage the audit teams in the organisation – i.e. add a new team, assign an audit and an AuCo to a team, or rename a team  
assign – in the Funding & Tenders Portal, go to **My Organisations > Actions > View Roles**, click the **Roles**, rename a team, add a new team or assign an audit to a team  
Revoke other roles  
Submit requested documents for the audit (if it is granted additional Audit Contact role and assigned to a team, see [How to Assign Roles](#) for further details)

### Audit Contact

An assigned Audit Contact (AuCo) performs the audit tasks in the Audit Management System (AMS) for the audit(s) assigned to their relevant audit team(s).

### Can:

Submit requested documents for the audit.  
Exchange communications with the EU services or the external audit firm, depending on whether it is an [In-house audit](#) or an [Out sourced audit](#).



An AuCo can also nominate/revoke other AuCos who are assigned to the same teams as them.

For example, if *AuCo X* is assigned to *team A*, and *audits Y* and *Z* are assigned to the same *team A*, *AuCo X* can assign other AuCos to *team A* who will have access to *audits Y* and *Z*.

An AuCo cannot manage the teams of the organisation (i.e. rename a team, add a new team or assign an audit to a team), since this kind of access is reserved for Primary Audit Contacts.

## List of Roles

⚠ Regardless of the different write/read rights described below, any document becomes visible to all beneficiaries in the consortium [once that it has been submitted to the EC](#).

## The Primary Coordinator Contact



Rights	Can nominate /revoke	Is nominated/revoked by
There can be only one Primary Coordinator Contact per project.	Coordinator	The proposal initiator of the coordinating entity identified in the proposal is automatically transferred as Primary Coordinator Contact.
Is the primary point of contact between the Commission and the Consortium for negotiations.	Contacts, Task Managers and Team Members <u>with in his/her organisation.</u>	Can only be revoked or modified by the Project Officer (PO).
Has read and write access to all the forms of his/her organisation and to the common forms of the consortium.	Assign Financial Signatories to a project <u>within his /her organisation.</u>	<b>Note:</b> If the Primary Coordinator Contact of the project has changed, the LEAR of the coordinating organisation must provide the Project Officer with the first name, last name, email address and EU Login account name of the new PCoCo
Can submit forms to the European Commission.	Participants Contacts <u>for any organisation in the consortium.</u>	

## Coordinator Contacts



Rights	Can nominate/revoke	Is nominated /revoked by
<p>There can be as many Coordinator Contacts as needed per project.</p> <p>Has read and write access to all the forms of his/her organisation and to the common forms of the consortium.</p> <p>Can submit forms to the European Commission.</p>	<p>Other Coordinator Contacts within their organisation; all the nominated Coordinator Contacts have similar rights.</p> <p>Task Managers and Team Members within their organisation.</p> <p>Assign Legal and Financial Signatories to a project within their organisation.</p> <p>Participants Contacts for any organisation in the consortium.</p>	<p>The Primary Coordinator Contact or another Coordinator Contact.</p>

## Participant Contacts



Rights	Can nominate/revoke	Is nominated /revoked by
<p>The Participant Contacts are nominated to represent the organisation within the consortium.</p> <p>There is at least one Participant Contact per organisation.</p> <p>All Participant Contacts have read and write access to their organisation's forms.</p> <p>All Participant Contacts can submit forms to the Coordinator Contacts.</p>	<p>Other Participant Contacts, Task Managers and Team Members <u>within his/her organisation</u>.</p> <p>Assign Legal and Financial Signatories to a project <u>within his/her organisation</u>.</p>	<p>The Primary Coordinator Contact or a Coordinator Contact.</p> <p>Another Participant Contact within their organisation.</p>

## Task Managers



Rights	Can nominate /revoke	Is nominated/revoked by
<p>There may be one or more Task Manager(s) per organisation.</p> <p>Can create, save and update forms of their organisation</p>	<p>N/A</p>	<p>The Primary Coordinator Contact or other Coordinator Contacts (for the coordinating entity).</p> <p>Participant Contacts (for other entities).</p>

## Team Members



Rights	Can nominate /revoke	Is nominated/revoked by
There may be one or more Team Member(s) per organisation.  Have limited access rights: search, read-only.	N/A	The Primary Coordinator Contact or other Coordinator Contacts (for the coordinating entity).  Participant Contacts (for other entities).

## LEAR - Legal Entity Appointed Representative



**Note:** you can find information on how a LEAR is appointed [here](#).

Rights	Can nominate/revoke	Is nominated /revoked by
There can be only one LEAR per organisation.  Access the list of roles/persons representing his/her organisation in Projects and the list of projects and proposals of his/her organisation.  Can request to revoke users from roles <u>within his/her organisation</u> e.g. by asking a Coordinator Contact or a Participant Contact to revoke a role.  Is responsible for the updates of the organisation-related data, can request (online) the modification of such data, and upload supporting documents. Is responsible for nominating a pool of Legal and Financial Signatories in which Project Coordinators can choose to assign LSIGNs/FSIGNs to their project	Account Administrators and Legal and Financial Signatories <u>within his/her organisation</u> .	Can only be revoked or modified by the Commission.

## Account Administrator



Rights	Can nominate /revoke	Is nominated /revoked by
There may be one or more Account Administrator(s) within an organisation.  Access the list of roles/persons representing his/her organisation in Projects and the list of projects and proposals of his/her organisation.  Can request (online) the update of the organisation-related data.  Can request to revoke users from roles <u>within his/her organisation</u> , e.g. by asking a Coordinator Contact or a Participant Contact to revoke a role. Can help in nominating a pool of Legal and Financial Signatories in which Project Coordinators can choose to assign LSIGNs/FSIGNs to their project.	Financial Signatories <u>within his/her organisation</u> .	The LEAR (of his/her entity).

## PLSIGN - Legal Signatory assigned to a project



Rights	Can nominate /revoke	Is nominated/revoked by
<p>There may be one or more Legal Signatory(s) assigned to a project within an organisation. One Legal Signatory can be assigned to multiple projects.</p> <p>Can electronically sign legal documents (and in some cases submit them to the coordinator).</p> <p>Has read and write access to his/her organisation's forms.</p>	N/A	<p>The Primary Coordinator Contact or other Coordinator Contacts (for the coordinating entity).</p> <p>Participant Contacts (for other entities).</p>

## Legal Signatory



Rights	Can nominate /revoke	Is nominated/revoked by
<p>There may be one or more Legal Signatory(s) within an organisation.</p> <p>Has read-only access to organisation's data.</p>	N/A	<p>The LEAR or Account Administrators (of his /her entity).</p>

## PFSIGN - Project Financial Signatories



Rights	Can nominate /revoke	Is nominated/revoked by
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<p>There may be one or more Financial Signatory (s) assigned to a project within an organisation. One Financial Signatory can be assigned to multiple projects.</p> <p>Can electronically sign financial statements (Forms C) and submit them to the coordinator.</p> <p>Has read and write access to his/her organisation's forms.</p>	N/A	<p>The Primary Coordinator Contact or other Coordinator Contacts (for the coordinating entity).</p> <p>Participant Contacts (for other entities).</p>
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## Financial Signatory



Rights	Can nominate /revoke	Is nominated/revoked by
<p>There may be one or more Financial Signatory(s) within an organisation.</p> <p>Has no right as long as not assigned to a project.</p>	N/A	The LEAR or Account Administrators (of his /her entity).

## AUDITS

### Primary Audit Contact



Rights	Can nominate/revoke	Is nominated/revoked by
<p>There may be one or more Primary Audit Contacts.</p> <p>Manages other contacts and the teams for the audits of the organisation.</p>	Primary Audit Contacts for their legal entity and Audit contacts for the audits of their organisation.	<p>The LEAR of an organisation is nominated as Primary Audit Contact (PAuCo) by the Grants System. Then, nominates the audit roles of their organisation via the option <b>View Roles</b> from the <b>Actions</b> drop-down list for the organisation in the Funding &amp; Tenders Portal.</p> <p>Can manage the teams (my organisations, teams tab).</p>

### Audit Contact



Rights	Can nominate/revoke	Is nominated/revoked by
<p>There may be one or more Audit Contacts.</p> <p>Can submit forms in the audit management system for an audit process once assigned to the relevant audit team.</p>	<p>This role can nominate other AuCos, but only for the team they are currently assigned to.</p>	<p>The AuCo is nominated by the primary audit contact of their organisation.</p>

## Roles: Summary

### Project Roles



### Organisation Roles

