



The Funding & Tenders Portal

An overview of the newest features

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Common Support Centre (CSC)
CSC J3 –Common service for business processes

- ❑ 2nd Factor Identification
- ❑ LEAR access to projects & proposals
- ❑ New roles linked to Audits
- ❑ My Audit: new section available under My Area
- ❑ Expert Profile Delegation

2nd Factor Identification



- **Security concerns**

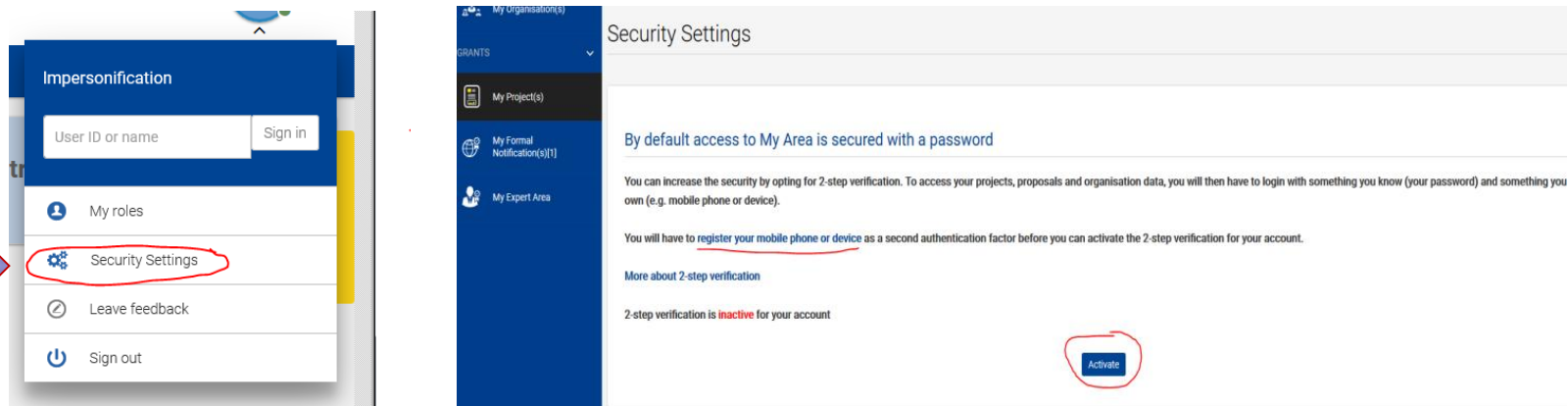
- Users have access to large set of information
- Reduce risk in case passwords would be compromised
- Provide stronger authentication complexity when accessing EU account

- **Solution : 2nd Factor Identification**

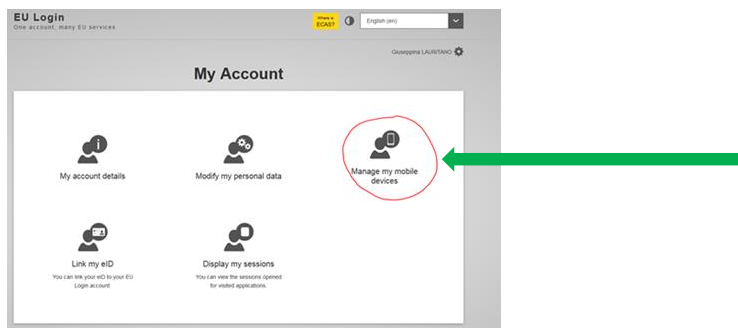
- **2-step verification is an extra security layer to access your EU account**
- **It is optional**
- **You can disable it**

2nd Factor Identification: How to enable 2-step verification

- Log-on to the F&T Portal and select "Security Settings"



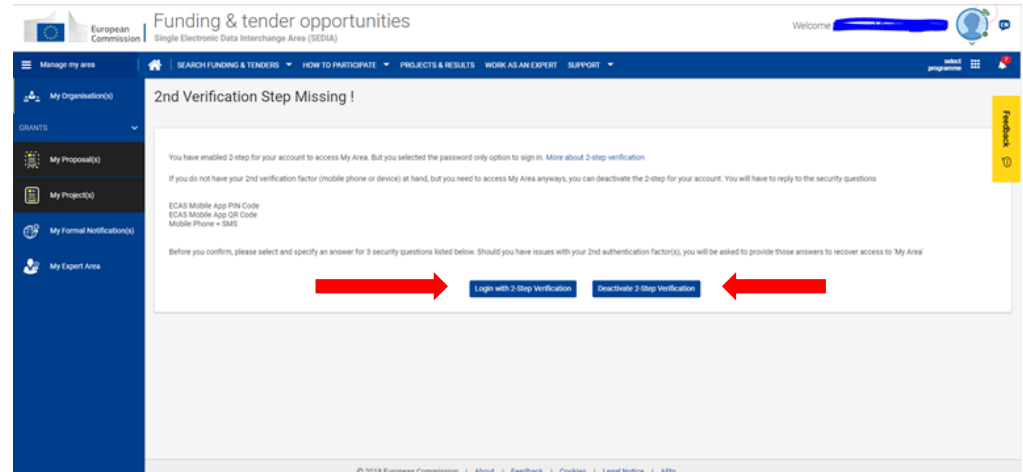
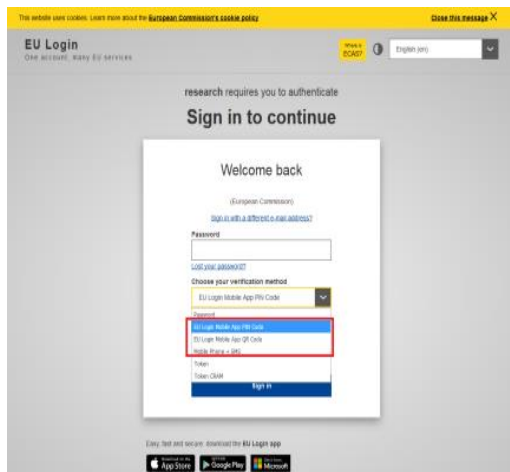
- Register a mobile device of your choice (send SMS or scan a QR code)



- Activate the 2-step verification

2nd Factor Identification: How to use 2-Step verification when activate

- When **2-step verification is active** either:
 - you use it already to log-in to the Portal or
 - if you log-in to the portal with just your password, in My Area, you can choose to sign in or to deactivate the 2-step validation.



- You can **disable 2-step verification** when device is not available

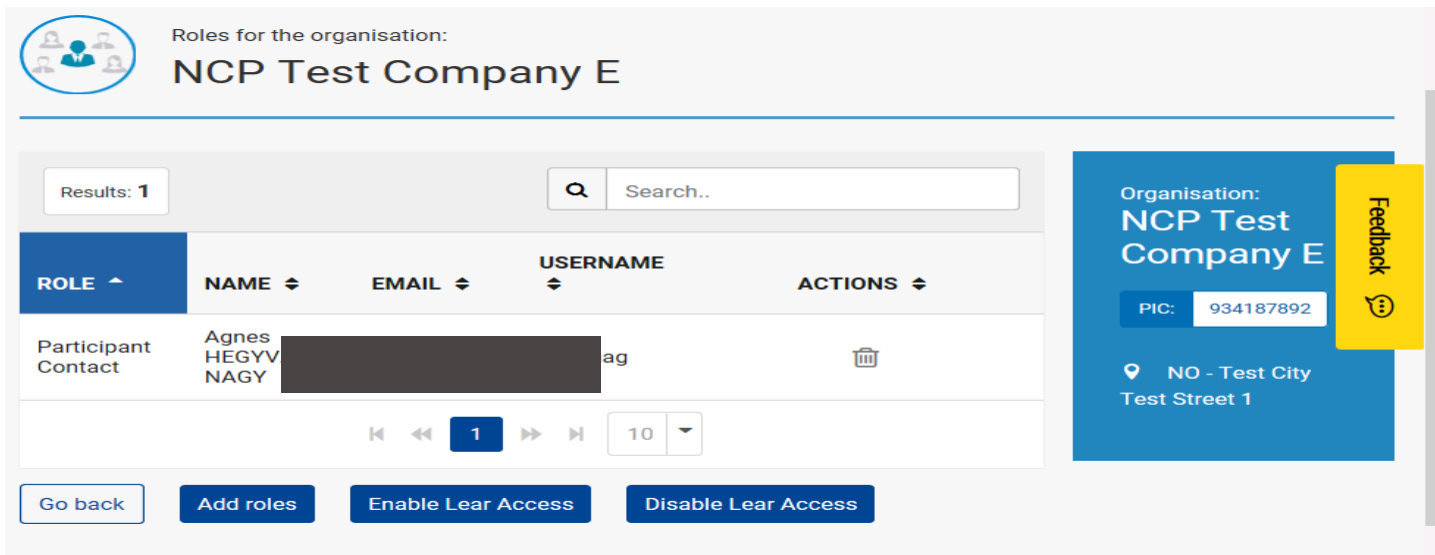
LEAR access to project and proposal

➤ PAST

- By default, the project in which your organisation is participating is visible to you **only** if you have a project role, in addition to your LEAR role.

➤ PRESENT

- With the new functionality you can **request read only access** or **an active role for a project/proposal** in order **to view its details**.



Roles for the organisation:
NCP Test Company E

Results: 1

Search..

ROLE ^	NAME ^	EMAIL ^	USERNAME ^	ACTIONS ^
Participant Contact	Agnes HEGYV NAGY	[REDACTED]	ag	[trash icon]

Navigation: 1 / 10

Buttons: Go back, Add roles, Enable Lear Access, Disable Lear Access

Organisation: NCP Test Company E
PIC: 934187892
NO - Test City
Test Street 1

Feedback

LEAR access to project and proposal

- Requesting access to a project = This applies **only** to organisations where you are **LEAR/Account Adm.**
 - Log-in to F&T and go to **My Organisations**.
 - Click on the **Organisation** and then **Projects** tab
 - Click on the Acronym of a project. If you do not have a project role, a "**Not authorised access message**" gets displayed.
 - Go back to the organisation, then click on the **RA** button to request access (**Tip: Whenever you see a RA button, it means that you do not have a project role for that specific project**) and choose between:
 - active project role (option 1)
 - read access (option 2)
 - When done, a message confirms your choice.

LEAR access to project and proposal

➤ Granting access to a project:

- PCoCo/CoCo or PaCo, receives an email notification informing of the request.
- **The notification contains a link which takes the user to**
 - **Option 1:**
 - Click on **Edit Roles** then **Add Roles**.
 - **Option 2:**
 - Click on **Edit Roles** then choose:
 - **Authorised** to **grant read access** to the LEAR/Account Administrator.
 - **Not Authorised** to **prevent** them from **seeing the project details**.
- A message will confirm the setting.



European
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HORIZON 2020

Audit Management System

*Research and
Innovation*

Introduction

- *H2020 Grant agreement foresees the use of the Portal for all procedures related to grants*
 - **All other grant lifecycle processes pass via the PP**
 - **Ex-post audits is the last one to be incorporated**
- *New features required for audits*
 - **Audit scope is beneficiary centric (& multiple projects)**
 - new Portal scope : Participant Portal Audit Management System (PPAMS)
 - **Provisions of communication mode in MGA**
 - Update made in MGA v4 to extend the use of the portal for closed projects
 - IT solution for acknowledgement and explicit agreement
 - **Audits outsourced by EC has 3 interlocutors/roles**
 - EU service responsible for managing audits : Common Audit Service for H2020
 - Audited organisation : new role created "Audit Contact" (AUCO)
 - Appointed External Audit Firm : new role created (EXAF)

What is PPAMS?

What is PPAMS?

It's the system for managing the ex-post audit process

Who has access?

Audit Contacts (AuCo)

- *nominated by the LEAR of an audited organisation*
- *will carry out all audit related tasks for the audited organisation*

Auditors

- *EU services own audit staff assigned to the audit ("in-house audits")*
- *External auditor firms appointed to carry out the audit ("outsourced audits")*

How will it work?

Same features as other grants processes

*ECAS authentication for all actors; formal tasks are notified;
audit documents stored together; view of the status of process*

When?

Q4 2018 : first audits launched in PPAMS

Phase 1: all formal audit steps are covered (announcement to closure)

Phase 2: enhancements will be deployed

(ex: formal/informal comms; follow up of audit extensions)

"My Audit"

New section available under "My Area"

- A new section is now available under "**My Area**", called "**My Audits**" to be used by **external auditors**.
- An **external auditor** can:
 - launch, via **My Audits**, the corresponding audit process in PPAMS for the organisations to be audited in the given projects.
 - nominate other External Auditor(s).
 - Revoke other External Auditor(s).
 - Read all data and artefacts of the audited projects.
- The **audited firms** access their tasks via "**My Organisations**" and the Audit Management (AM) button.

Online documentation

Online manual - Checks, audits, reviews & investigations

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm

IT How-To - <https://webgate.ec.europa.eu/fpfis/wikis/x/RxIOEQ>

The screenshot shows the 'RESEARCH & INNOVATION Participant Portal H2020 Online Manual' website. The header includes the European Commission logo and the text 'RESEARCH & INNOVATION Participant Portal H2020 Online Manual'. A search bar is located on the left. The main content area features a navigation menu on the left and a grid of buttons for various topics. The button for 'Checks, audits, reviews & investigations' is highlighted with a red box. Below this, the section title 'Checks, audits, reviews & investigations' is displayed, followed by a paragraph explaining the Commission's role. A 'HOW TO' button is also highlighted with a red box. A red line connects this button to a text box at the bottom left of the screenshot.

European Commission

RESEARCH & INNOVATION

Participant Portal H2020 Online Manual

> H2020 Online Manual > Grants > Grant management >

Keeping records | Amendments | Reports & payment requests | Deliverables

Dissemination & exploitation | Communicating your project | Acknowledgement of EU funding | **Checks, audits, reviews & investigations**

Checks, audits, reviews & investigations

The Commission - during the implementation of the project or afterwards - checks, reviews, investigates and audits the proper implementation of the project and its compliance with the grant agreement:

Audits **HOW TO**

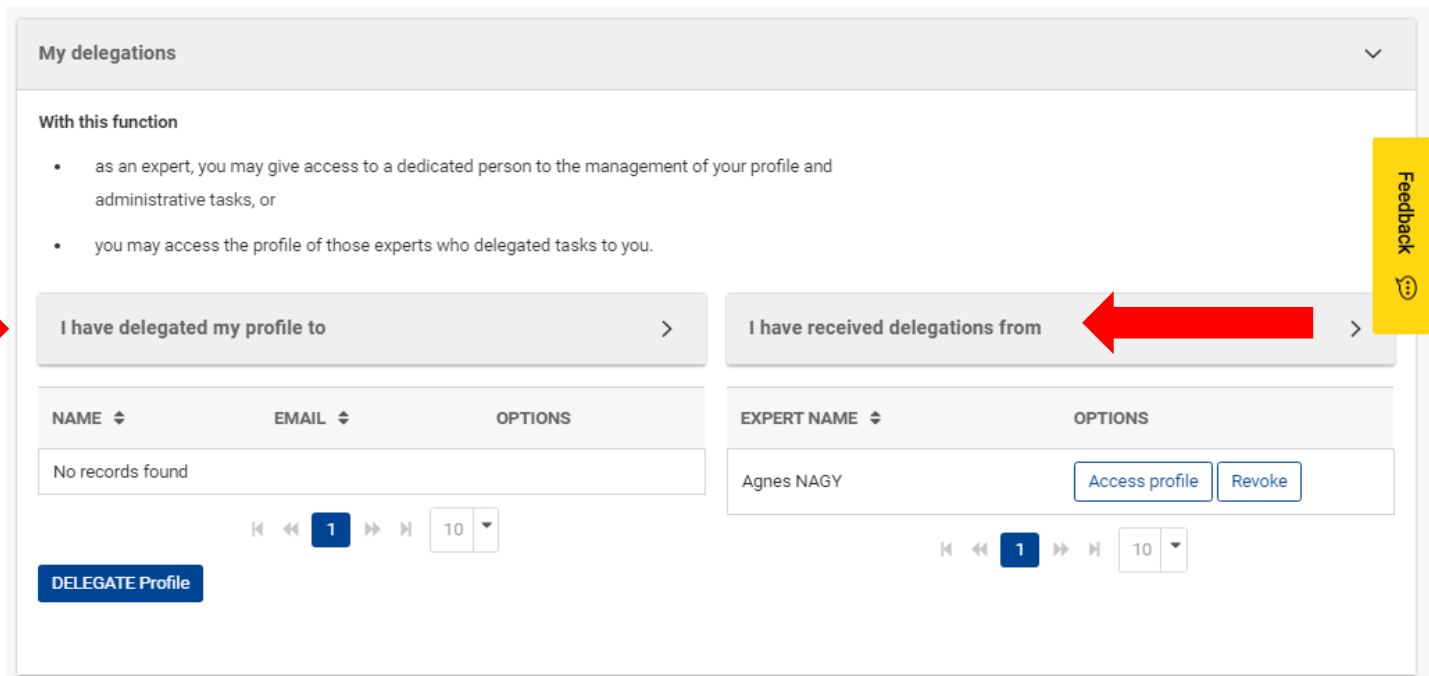
The European Commission may order an audit of your H2020 grant during the project or at any time up to 2 years after the final payment. The Audit can be conducted by the Commission's own staff or outsourced to external persons or bodies appointed by the Commission.

For IT how to:
step by step &
screen shots

My Expert Area: Expert profile delegation

➤ **Experts** will be now able to:

- **delegate** the administration of their expert profile
- **manage their delegations** via the F&T Portal



My delegations

With this function

- as an expert, you may give access to a dedicated person to the management of your profile and administrative tasks, or
- you may access the profile of those experts who delegated tasks to you.

I have delegated my profile to

NAME	EMAIL	OPTIONS
No records found		

DELEGATE Profile

I have received delegations from

EXPERT NAME	OPTIONS
Agnes NAGY	Access profile Revoke

Feedback



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Questions ?