

Unique Registration Facility

User's Guide

30/08/2010 (version 4.2.2)

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INTRODUCTION

The Unique Registration Service/Facility (URF) is an online web interface, providing access to the registration service for FP7 participants. Participants should register only once, so the registration process they go through will be unique. URF has been conceived to avoid redundant requests for information and to facilitate keeping the information concerning the participants up-to-date. In order to support this process, URF introduces the notion of the unique Participant Identification Code.

The helpdesk's contact is: EC-FP7-IT-HELPDESK@ec.europa.eu

Before self-registering, you must have an ECAS Password.

A LEAR (Legal Entity Appointed Representative) must also have an ECAS password. Note that the LEAR account can only be created after validation has taken place.

ECAS stands for the European Commission's user Authentication Service. It allows authorized users to login to a wide range of Commission information systems, using a single username and password.

For more information, see ECAS help at <https://webgate.ec.europa.eu/cas/ec/help.jsp>

Benefits of using the URF

- Registering your organisation only ONCE;
- Receiving a Participant Identification Code (PIC), which identifies your organisation (details and status);
- Confirmation and approval of your data based on supporting documents is done by the Validation Services ;
- Using the PIC in the process of electronic proposal submission and negotiation;
- Multiple use of participant's data during all FP7 activities for all Research DG's programmes ;
- Validated information can be available during proposal submission;
- The LEAR can provide relevant legal and financial data via the URF;
- The organisations' data is updated in the relevant IT systems.

Roles

This guide contains the description of the functionalities that allow new participants to self-register an organisation and LEAR to complete or modify the data entered during self-registration.

SELF REGISTRATION IN URF

Self Registration

When you connect the first time to URF (not being a LEAR), you have to self register as a participant.

In your browser you connect to URF, using the following URL: <http://ec.europa.eu/research/participants/portal/>

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European Commission RESEARCH - Participants

European Commission > Research > Participant Portal

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LOGIN


[Login](#)

You don't have an ECAS account yet?
Please [register](#)

ECAS help is available [here](#).

Portal registration demo is available [here](#)

FAQ

The answers to the most frequent questions that are submitted to the [eFP7 service desk](#).

See the [online user manual](#)

Watch the demonstration of the Participant Portal:

- [Introduction](#)
- [For all users](#)
- [For LEARs](#)
- [For Coordinators](#)
- [Getting support](#)

You can consult [FAQs](#)

[>> read more](#)

WHAT'S NEW

Participant Portal V2.0 (11/2009) containing

- the support of the role management
- a reviewed layout of the home page
- a reviewed layout of the My Project tab
- a reviewed layout of the My Roles tab
- a new support tab

[>> read more](#)

QUICK LINKS


[FP7 homepage](#)

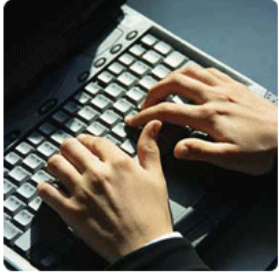
[CORDIS](#)

[Research site of the EC](#)

WELCOME

Welcome to the Participant Portal

The **Participant Portal** will become your single entry point of interaction with the Research Directorates-General of the European Commission. It will host a full range of services that **facilitate the monitoring and the management of your proposals and projects** throughout their lifecycle.



What does it offer today?

- You can **register your organisation's data** in the **Unique Registration Facility (URF)**, avoiding redundant requests for information;
- After registration you will receive a **Participant Identification Code (PIC)** that uniquely identifies your organisation. You can use it to maintain your organisation's details and monitor its status in the processes of electronic proposal submission and negotiation;
- You can also **check whether your organisation has already registered** and if so, retrieve the PIC that has already been assigned;
- The appointed representative of your organisation, called the **LEAR (Legal Entity Appointed Representative)** can **provide and update relevant legal & financial data** via the portal.

Other functionalities are currently implemented as pilot services:

- All visitors may search for **FP7-related support documents**;
- LEARs may access the **list of projects** associated with their organisation, including project details and the status of amendments.

How does it work?

Except for the FP7 documentation and the PIC search function, **access to the Portal and its underlying services** requires an **ECAS account**.

Do you already have an ECAS account?

- Please [log in](#)
- "My organisations" and "My projects" tabs will appear
- Under "My organisations":
 - You may **register your organisation's data** and obtain a PIC
 - LEARs may **update their organisation's data**
 - LEARs may access the **list of projects** of their organisation
- Under "My projects":
 - Coordinators will soon be able to access the list of their projects.

Are you a new user? [Please register](#) on the European Commission Authentication Service (ECAS).
More information about the [ECAS registration](#)?

Should you have any problems with any aspect of using the portal, please [contact our service desk](#)

Figure 1 : Participant Portal - Welcome Page

See the User's Guide for the Participant Portal for information related to the ECAS registration.
The first time you connect to URF, the welcome page will be displayed in your browser.

This page shows that you have not registered any organisation yet. See **Figure 2: URF Self Registration empty** (the "Manage organisation data" arrow is greyed and disabled – the "Register an Organisation" arrow is blue and enabled).

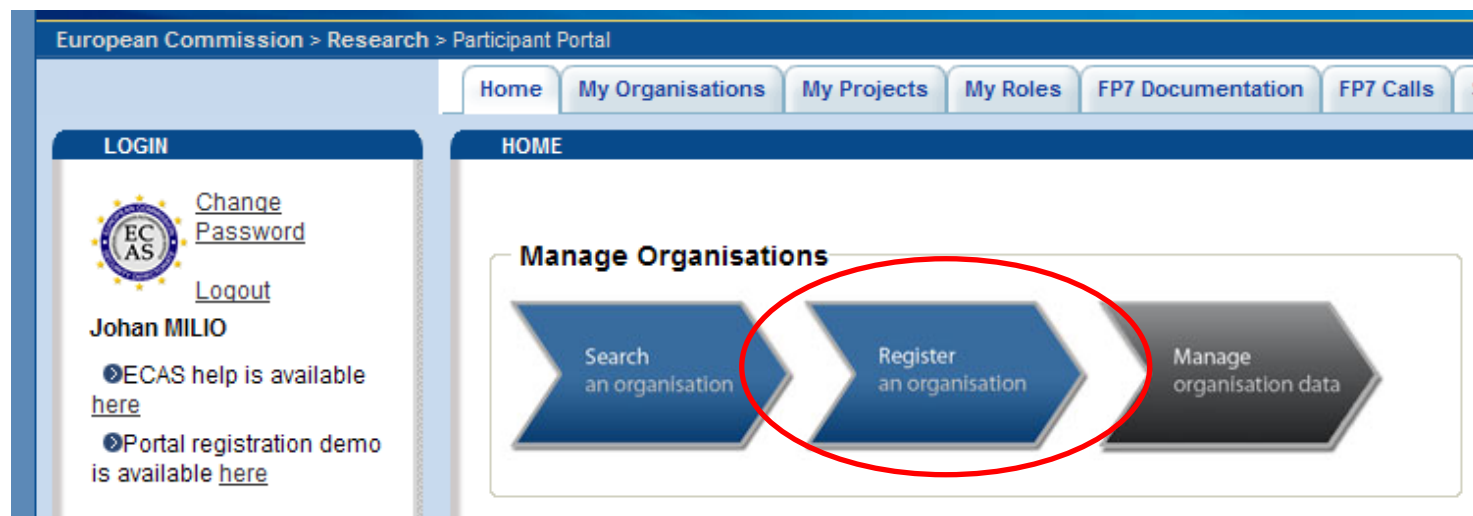


Figure 2: URF Self Registration empty

To self register, just click on the **[Register an Organisation]** arrow.



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Organisations | Register | Search



[Change Password](#)
[Logout](#)

Johan MILIO

ECAS help is available [here](#)

Portal registration demo is available [here](#)

FAQ

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[read more](#)

REGISTER NEW ORGANISATION

Registering an organisation will allow you to receive its Participant Identification Code (PIC). More information about PICs can be found [here](#). Using a PIC for your organisation has several advantages which are fully explained in this FAQ entry.

Use the search facility to check if an organisation has already a PIC. You can check if an organisation has already a PIC [here](#) If you do not find a pic for your organisation you have to first register as ECAS user [here](#).

With your ECAS password you can register your organisation [here](#).

The steps to register your organisation are:

STEP 1: Search

Use the [search](#) facility to check whether your organisation is already registered.

STEP 2: Self-Register your organisation in PP

Register your organisation using your ECAS account details. After providing all the necessary details, press the **[CONFIRM]** button to submit your registration information to the Central Validation Team (CVT). If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the **[Save Draft]** button. You may then resume your registration at any time.

STEP 3: Modify your self Registration

STEP 3a

If you saved your data as draft , it is still possible to [modify or delete](#) your self-registration.

STEP 3b.

If you have already submitted your registration and if CVT has not started the verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR), it is still possible to [modify your self-registration](#) and/or [upload additional documents](#)

STEP 3c.

If CVT has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload additional documents](#)

After identification, the CVT begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents. Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

More info

Upon registering your organisation, you will receive a Participant Identification Code (PIC). Using a PIC for your organisation has several advantages which are fully explained in this FAQ entry.

Figure 3 : Register a new organisation

We can now begin the self registration process itself at Step 2 (Figure 3 : Register a new organisation)

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Self Registration – Organisation data

The first page to be displayed is related to the organisation's data. You have to fill in a set of fields (see table below).

Complete the form with at least all the mandatory fields marked with * in order to proceed to the next screen.

Note that the following buttons are present on all the pages during self-registration:

- **[Next Step] [Previous Step]:** go to next/ previous registration page.
- **[Save Draft]:** save current data in a temporary URF database.
- **[Cancel]:** cancel current work since last saved draft or last login.

Please enter your data here:

1. Organisation data

2. Legal address

3. My contact information

4. Status of organisation

5. Summary of your data

Organisation data of the participant

Participant legal name *

Business name

Official language * --Please Select

2nd Language --None

Name in 2nd Language

Legal form *

VAT number *

Registration number *

Registration authority *

Nace code * --Please Select

Establishment/Registration country * --Please Select

Registration date * (dd-mm-yyyy)

* Mandatory Fields

Next Step

Save Draft

Cancel

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Figure 4: Self Registration - Organisation data

FIELD	COMMENT
* PARTICIPANT LEGAL NAME	<i>Legal name of the organisation as stated in the legal statute or decree establishing the. This field should contain less than 240 characters.</i>
BUSINESS NAME	<i>The official acronym of your organisation. This field should contain less than 40 characters.</i>
* OFFICIAL LANGUAGE	<i>Language used within the organisation for communication.</i>
2nd LANGUAGE	<i>Language used for the translation of the legal name.</i>
NAME IN 2nd LANGUAGE	<i>Translation of the legal name (usually to be provided in English), applicable only if it is a commercial/business name identified in any official document to be provided during registration or if your character set is a non-latin one.</i>
* LEGAL FORM	<i>This is a free text box. Please enter the form under which your organisation is legally registered, as in your organisation's statute. The legal form depends on the type of entity and the country. If your organisation is a private body, your form could be for example LLP, Ltd, PLC, SA, GmbH, etc. Please note that "university" or "public body" are not legal forms. After validation, this field will display the legal form as validated by the European Commission.</i>
* VAT NUMBER	<i>It is the unique number given to organisations that pay Value Added Tax (VAT). In the European Union, the VAT is a general, broadly based consumption tax, assessed on the value added to goods or services.</i> Tips: If you are not sure about your VAT number, check with your financial department. If your organisation does not have a VAT number, you can enter "not applicable".
* REGISTRATION NUMBER	<i>Code usually provided by the Chamber of Commerce of your country.</i> Tips: The registration number, the registration authority and the registration date are usually provided in the same document. Contact your financial department for more information. If your organisation does not have a registration number, you can enter "not applicable".
* REGISTRATION AUTHORITY	<i>The authority by which your organisation was registered, such as e.g. the administration of the city, or region, the Chamber of Commerce, etc.</i> Tips: The registration number, the registration authority and the registration date are usually provided in the same document. If your organisation does not have a registration authority, you can enter "not applicable".
* NACE CODE	<i>The statistical classification of economic activities in the European Community (in French: Nomenclature statistique des activités économiques dans la Communauté européenne), commonly referred to as NACE, is a European industry standard classification system consisting of a 6 digit code.</i>

FIELD	COMMENT
	More info on: http://ec.europa.eu/eurostat/ramon/index.cfm?TargetUrl=DSP_PUB_WELC
* ESTABLISHMENT REGISTRATION COUNTRY	<i>Enter the location of the headquarters of the organisation.</i>
* REGISTRATION DATE	<i>Date when your organisation was registered, for example with the Chamber of Commerce in your country.</i>
	Tips: The registration number, the registration authority and the registration date are usually provided in the same document. Enter 01-01-1900 if not applicable".

Complete the form with at least all the mandatory fields marked with ***** in order to proceed to the next screen.

Self Registration – Legal Address

Please enter your data here:

1 Organisation data

2 Legal address

3 My contact information

4 Status of organisation

5 Summary of your data

Legal Address (Head office)

Street name *

Street number

PO Box

County/Region

Postal code *

CEDEX * (France only)

City *

Country * --Please Select

Internet homepage

Fax

Phone 1 *

Phone 2

Company Email

* Mandatory Fields

Next Step

Previous step

Save Draft

Cancel

User Manual

Figure 5: Self Registration - Legal address

FIELD	COMMENT
* STREET NAME	Street / legal address as stated in the official legal statute (in principle the address of the headquarters, not the address of the subsidiaries/department,etc.).
STREET NUMBER	Number or name of the building on the street (max. 20 alphanumerical characters)- see also above
PO BOX	If the organisation has a postal box
COUNTY / REGION	Enter your county/region
* POSTAL CODE	ZIP CODE of the organisation
* CEDEX	Only for France
* CITY	Official name of the city where the organisation is established
* COUNTRY	Select the country where the organisation is established

FIELD	COMMENT
INTERNET HOMEPAGE	<i>The format should be www.homepage.domain</i>
FAX	<i>Format should be: (international code) and FAX number without space</i>
* PHONE 1	<i>Format should be: (international code) and PHONE number without space</i>
PHONE 2	<i>Format should be: (international code) and PHONE number without space</i>
COMPANY E-MAIL	<i>This e-mail address should be the address via which the Validation Services can contact the organisation if there is a need for clarifications.</i> <i>E-mail addresses beginning with " info@" should be avoided as communications often get lost.</i>

Complete the form with at least all the mandatory fields marked with * in order to proceed to the next screen.

Self Registration – My Contact Information

This person is to be contacted until a person is validated as LEAR for the organisation. For further explanation about LEAR, please see: http://cordis.europa.eu/fp7/pp-lear_en.html

Please enter your data here:

1 Organisation data

2 Legal address

3. My contact information

4 Status of organisation

5 Summary of your data

My Contact Information

Title

Gender *

M

F

Last Name *MILIO

First Name *Johan

Position in organisation *

Department

Contact Country *-- Please Select

Contact street *

Contact street number

PO Box

County/Region

Postal code *

CEDEX *(France only)

City *

Internet homepage

Fax

Phone 1 *

Phone 2

Email 1Johan.MILIO@ext.ec.europa.eu

* Mandatory Fields

Next Step

Previous step

Save Draft

Cancel

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Figure 6: Self Registration – My Contact Information

FIELD	COMMENT
TITLE	<i>The title: Mr., Mrs., Prof., Dr. ...</i>
* GENDER	<i>Specify the gender</i>
* LAST NAME	<i>Automatically filled with the last name registered; the field can be modified</i>
* FIRST NAME	<i>Automatically filled with the first name registered; the field can be modified</i>
* POSITION IN ORGANISATION	<i>The title in your organisation</i>
DEPARTMENT	<i>The department in your organisation</i>
* CONTACT COUNTRY	<i>Select the country where your department is established</i>
* CONTACT STREET	<i>Enter the street name</i>
* CONTACT STREET NUMBER	<i>Fill with the street number</i>
PO BOX	<i>Fill with the PO BOX number</i>
COUNTY / REGION	<i>Enter the county/region</i>
* POST CODE	<i>Enter the ZIP CODE of the address of your department</i>
* CEDEX	<i>Only for France</i>
* CITY	<i>Official name of the city</i>
INTERNET HOMEPAGE	<i>The format should be: www.homepage.domain</i>
FAX	<i>Format should be: (international code) and your FAX number without space</i>
* PHONE 1	<i>Format should be: (international code) and your PHONE number without space</i>
PHONE 2	<i>Format should be: (international code) and your PHONE number without space</i>
E-MAIL 1	<i>This e-mail address should be person specific. Functional mailboxes should be avoided.</i>

Complete the form with at least all the mandatory fields marked with a ***** in order to proceed with the next screen.

Self Registration – Status of the Organisation

In the "Status of the organisation" screen, please select the appropriate status for your organisation. The selected status will need to be demonstrated by your statute and registration document.

For the definitions of the status of organisations, please see below and consult the "REGULATION (EC) No 1906/2006 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 18 December 2006 laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013)".

To access the regulation, follow the link:

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2006:391:0001:0018:EN:PDF>

Please enter your data here:

- 1 Organisation data 2 Legal address 3 My contact information **4. Status of the organisation** 5 Summary of your data

Status of the Organisation

--Please Select  Indirect Cost Method 

- ☐ Natural person 
- ☐ Legal person 
- ☐ Non-profit 
- ☐ Research organisation 
- ☐ Public body 
- ☐ International organisation 
- ☐ International organisation of European interest 
- ☐ Higher or secondary education establishment 
- ☐ Enterprise 
- ☐ SME 

Comment

SME Status data

This section is mandatory for SMEs and optional for other enterprises

--Please Select  Year

 Financial Year date (dd-mm-yyyy) 

Number of employees ☐ < 250

Annual turnover (euro) ☐ < 50M

Annual balance sheet (euro) ☐ < 43M

☐ Autonomous

* Mandatory Fields

Next Step

Previous step

Save Draft

Cancel

User Manual

Figure 7: Self Registration - Status of the Organisation

In the "Status of your organisation" screen, please select the right status for your organisation.

FIELD	COMMENT
Indirect cost model calculation method	The indirect cost calculation method is chosen by the participant. Indirect costs, also called overheads, are all the eligible costs which cannot be identified by the beneficiary as directly attributed to the project, but can be identified and justified by its accounting system as being incurred in direct relationship with the eligible direct costs of the project. The available options for the choice are determined by the legal status of the participant, the status of their accounting system and the history of indirect cost calculation methodologies in previous FP7 participations. The options are described as follows: - o Actual indirect costs: available for all categories of beneficiaries which have an analytical accounting system to identify their indirect costs. A simplified method is also available for all categories of beneficiaries which are unable to perform detailed cost allocation and can aggregate their indirect costs only at the level of the legal entity, unless they used actual indirect costs in previous FP7 participations. The simplified approach must be based on actual costs derived from the financial accounts of the period in question. - o Standard flat rate: available for all categories of beneficiaries, unless they used actual indirect costs or the simplified method in previous FP7 participations. The flat rate is of 20% of its total direct eligible costs, excluding its direct eligible costs for subcontracting and the costs of reimbursement of resources made available by third parties which are not used on the premises of the participant. - o Specific flat rate of 60%: (or' transitional flat rate of 60%') available for non-profit public bodies, secondary and higher education establishments, and non-profit research organisations and SMEs, which are unable to identify with certainty their real indirect costs and unless they used actual indirect costs or the simplified method before. The legal entity may opt for the specific flat rate of 60% when participating in funding schemes which include research and technological development activities. This flat rate is of 60% of its total eligible costs excluding its direct eligible costs for subcontracting and the costs of reimbursement of resources made available by third parties which are not used on the premises of the participant. If these participants change their status during the life of a project, flat rate of 60% shall still be applied for the whole duration of the project. ATTENTION: If your organisation already participated in the 6th Framework Programme and used the Full Cost (FC) model, this implies that your organisation

FIELD	COMMENT
	has an analytical accounting system and would therefore not be eligible for the Specific flat rate of 60% in FP7. Potential ex-post audits might reveal the non-eligibility for Specific flat rate of 60% with all the potential consequences. The participant shall apply the same indirect cost calculation method in all grant agreements under the Seventh Framework Programme. However, any beneficiary that has opted for flat rate in a grant agreement funded under the Seventh Framework Programme may opt in a subsequent one for the actual or simplified method above described. However, it must then use that method in all subsequent grant agreements established under the Seventh Framework Programme In case of evolution in the accounting system of the organisation (see art. II.15. 3 of the GA) or change in the legal status, the new ICM should be applicable only for the future grant agreements to be concluded, not for the running ones (except in case of mistake in the establishment of the ICM while registering the organisation in the EC database). Tips: View the financial guide page 52 to 61 for explanation of the method of calculation of indirect costs: ftp://ftp.cordis.europa.eu/pub/fp7/docs/financialguide_en.pdf
Natural Person	A "natural person" is a citizen (to be distinguished from "legal persons", which refer to corporations). Natural persons always have legal personality and are therefore legal entities without other proof being required than their identification papers. Individuals who are registered as free-lance professionals and have a VAT number, are also legal persons. Please note, that citizens who are freelance-professionals and want to be validated as FP7 participants, have to choose whether they want to apply as "natural person" or as "legal person".
Legal person	A legal person has a legal personality, can act on its own name, exercise rights and be subject to obligations . For a "legal person" to exist, an act of incorporation and usually also a registration is required. A legal person exercises rights and is subject to obligations with regard to the national law of its place of establishment, community law or international law. A legal person can group other legal entities (natural or legal), or contain only possessions (e.g. foundation).
Non profit	A legal entity is qualified as a "non-profit organisation", when considered as such by national or international law (international organisations as well as any specialized agency set up by international organisations). Generally, as a consequence, any possible profits have to be reinvested within the organisation itself and cannot be distributed. The quality of being a non-profit organisation

FIELD	COMMENT
	<i>has to be proven by your statute.</i>
Research organisation	<i>"Research organisation" means a non-profit organisation which carries out scientific or technical research as its main objective. The quality of being a research organisation has to be stated in your statute.</i>
Public body	<i>"Public body" means any legal entity established as such by national public law, and international organisations.</i> <i>"Established" signifies that the legal entity either has to be incorporated as a public body in the formal act or, governed by public law (usually both).</i> <i>Criteria such as the direct supervision of a legal entity by the State, the public financing or the public service mission are no longer sufficient to define an entity as a public body</i>
International organisation	<i>"International organisation" means an intergovernmental organisation, other than the European Community, which has legal personality under international public law, as well as any specialized agency set up by such international organisations.</i>
International organisation of European interest	<i>"International organisation of European interest" means an international organisation, the majority of whose members are Member States or Associated Countries, and whose principal objective is to promote scientific and technological cooperation in Europe.</i>
Higher or secondary education establishment	<i>It is an organisation which has as main objectives training and education, and delivers state recognized diplomas.</i>
Enterprise	<i>Any entity engaged in an economic activity, irrespective of its legal form. This includes commercial companies, but also self-employed persons and family businesses engaged in craft or other activities, as well as partnerships or associations regularly engaged in an economic activity.</i>
SME	<i>"SMEs" are micro, small and medium-sized enterprises within the meaning of Recommendation 2003/361/EC in the version of 6 May 2003.</i> <i>Tips: To determine what type of SME your organisation is, see http://ec.europa.eu/research/sme-techweb/index_en.cfm</i>
Year	<i>Enter the year related to your information below. This information must be related to your balance sheet.</i>
Financial Year Date	<i>Date of the financial year</i>
Number of employees	<i>Enter the number of employees for the year</i>
Number of employees < 250	<i>This check box, in read-only mode, is checked if your organisation has less than 250 employees</i>
Annual turnover	<i>Enter the annual turnover in €.</i>
Annual turnover <50M	<i>This check box, in read-only mode, is checked if the</i>

FIELD	COMMENT
	<i>annual turnover is less than € 50 millions</i>
Annual balance sheet	<i>Enter the annual balance sheet in €.</i>
Annual balance sheet <43M	<i>This check box, in read-only mode, is checked if the annual balance sheet is less than € 43 millions</i>
Autonomous	<i>Click the check box if your organisation is autonomous</i>

Self Registration – Summary of your data

The final screen summarises all the values entered in the previous screens.
You are still able to provide corrections by selecting the **[Edit]** buttons for each section.

Summary of your data:

1 Organisation data

2 Legal address

3 My contact information

4 Status of organisation

5. Summary of your data

PRINT SUMMARY

Organisation data | Edit Organisation Data

- Participant legal name: **Chicken Company**
- Business name: **KotKot**
- Official language: **English**
- Name in 2nd Language:
- 2nd Language: **French**
- Legal form: **SPRL**
- VAT number: **BE124578**
- Registration number: **RC BE124578**
- Registration date: **17-02-2006**
- Registration authority: **VAT office**
- Nace code: **85.2 []**
- Establishment/Registration country: **Belgium**

Legal Address | Edit Legal Address

- Street name: **Egg Street**
- Street number: **23**
- PO Box:
- County/Region:
- Postal code: **1000**
- CEDEX:
- City: **Brussels**
- Country: **Belgium**
- Internet homepage:
- Phone 1: **027545684**
- Phone 2:
- Fax:
- Company Email:

Main Contact Person | Edit Main Contact Person

- Title:
- Gender: **M**
- Last Name: **MILIO**
- First Name: **Johan**
- Position in organisation: **Director**
- Department:
- Contact Country: **Belgium**
- Contact street: **Egg Street**
- Contact street number: **25**
- PO Box:
- County/Region:
- Postal code: **1000**
- CEDEX:
- City: **Brussels**
- Internet homepage:
- Phone 1: **025875554**
- Phone 2:
- Fax:
- Email 1: **Johan.MILIO@ext.ec.europa.eu**

Status of the Organisation | Edit Organisation Status

- Indirect Cost Method:
- Is Natural Person? **Y**
- Is Legal Person?
- Is a Non profit?
- Is a Research organisation?
- Is Public body?
- Is International Organisation?
- Is International Organisation of European Interest?
- Is a Higher or secondary education establishment?
- Is an Enterprise?
- Self declare SME Status?
- SME year?
- Financial year date?
- Number of employees?
- Is number of employees below 250?
- Annual turnover?
- Is annual turnover below 50M?
- Annual balance sheet?
- Is annual balance sheet below 43M?
- Is autonomous?
- Your comments:

Submit Save Draft Cancel

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Figure 8: Self Registration - Summary of your data

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After verification and when the data provided is correct, select the **[Submit]** button to submit the information to the Validation Services. Once the information has been submitted, you will not be able to correct the organisation data in URF until it has been processed by the Validation services. Upon completion of the validation, the Legal Entity Appointed Representative (LEAR) can be appointed and validated (see below). If the validation services have not yet started the validation process, it is still possible to modify the data and to upload documents (see below).

If you wish to suspend your verification, you can do so by clicking the **[Save Draft]** button. Then the data is saved and the pop-up is closed.

While your data will be under validation by the Validation services, you will be able to upload up to 10 Mb of documents. Once uploaded, these documents cannot be downloaded, except by the LEAR, after he/she has been appointed and validated.

Self Registration - Confirmation

After you have submitted your data, the confirmation page will be displayed. **See Figure 9: Self Registration - Confirmation**

Note: Your Participant Identification Code (PIC number) will be displayed on the page.

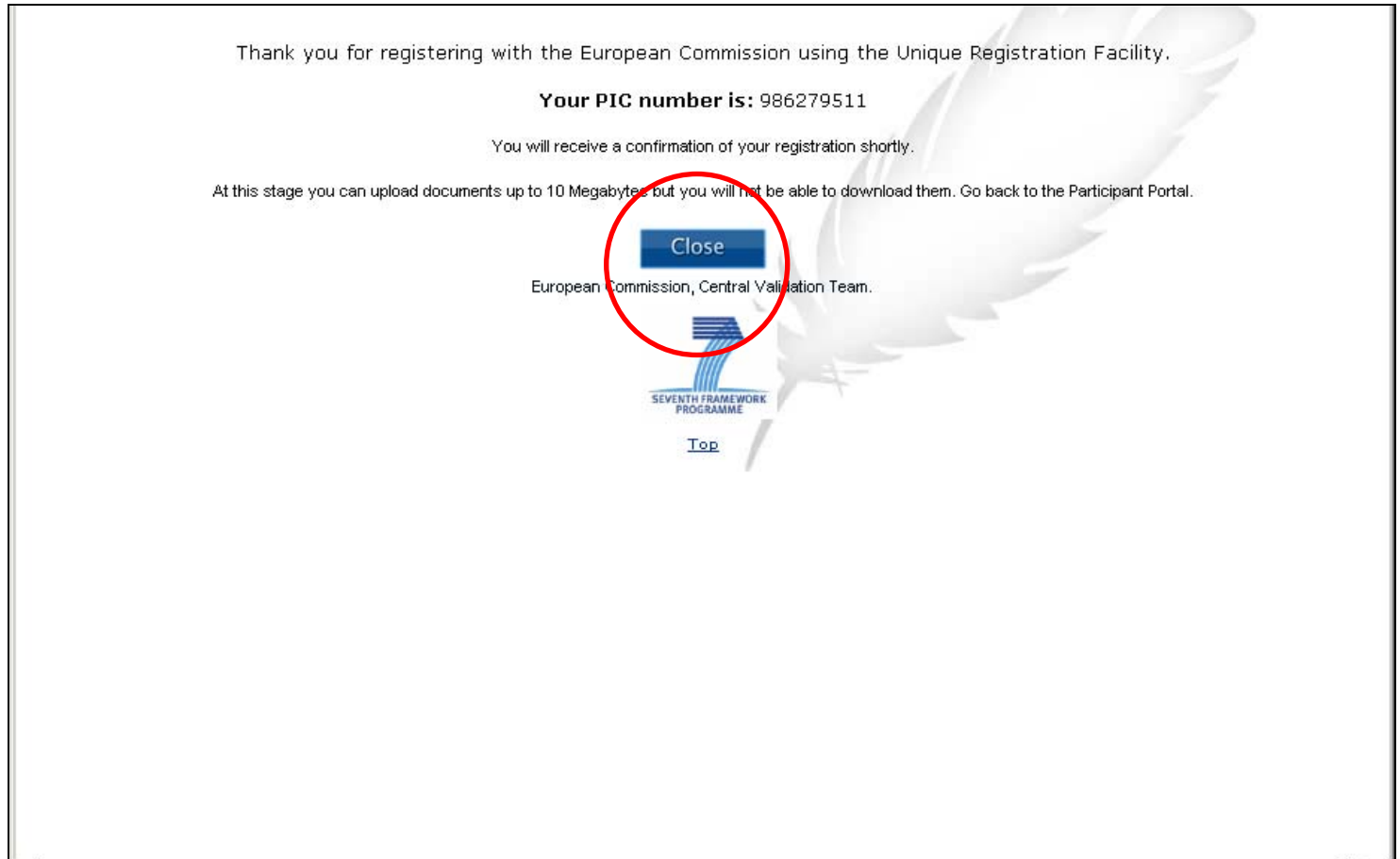


Figure 9: Self Registration - Confirmation

Immediately after the data has been submitted for validation, you will receive an e-mail with the data you entered, and a Participant Identification Code (PIC) will be provided to you.

This is an example of the confirmation e-mail:

From: *fp7-urf-noreply@ec.europa.eu fp7-urf-noreply@ec.europa.eu*

To: *your_email_registered*

Subject: *Your registration at PDM/URF*

Dear Mr. / Mrs. John Doe,

The Research Directorates-General of the European Commission thank you for having registered your legal entity in our database of participants.

The record has been successfully created. The Participant Identification Code (PIC) for the legal entity you have registered is 123456789.

If you intend to use your PIC for proposal submission, please note that there is a delay of 48 hours before the associated data is visible to EPSS.

This time constraint effectively prevents you from using the above-mentioned PIC when submitting a proposal to a call closing within the next two days.

If you have registered because your organisation is currently negotiating a grant agreement, please provide us as soon as possible with the supporting documents so that your organisation can be validated.

On the link - http://cordis.europa.eu/fp7/urf-valid_en.html - you can find downloadable forms and instructions for the submission of supporting documents. Please note that the validation could result in a possible change of the PIC.

If you are negotiating a grant agreement, you are also kindly invited to launch the process of appointment of the Legal Entity Appointed Representative (LEAR) within your organisation.

The LEAR will be the responsible for updating in URF the legal and financial data of your organisation.

On the link - http://cordis.europa.eu/fp7/urf_en.html - you can find downloadable forms and instructions for the appointment of the LEAR. You will find as well some additional information regarding the PIC usage and the LEAR.

The Central Validation Team

Below is the summary of your entered data:

Organisation Data

=====

Legal name : xxxxxxxx

Business name : xxxxxxxx

Official language : xxxxxxxx

Translated name : xxxxxxxx

Translated language : xxxxxxxx

Legal form : xxxxxx

VAT number : xxxxxxxxxx

Registration number : xxxxxxxxxx

Registration date : xxxxxxxxxx

Registration authority : xxxxxxxxxx

NACE Code : xxxxxxxxxx

Registration country : xxxxxxxx

Legal Address

=====

Street name : xxxxxxxx

Street number : 12345789

PO box : 123456789

Region/County :

Postal code : 123456789

CEDEX :

City : xxxxxxxx

Country : xxxxxxxx

Internet homepage : www.myorganisationwebpage.domain

Fax : +123 1234567890

Phone1 : +123 1234567892

Phone2 : +123 1234567891

Email1 : youremailaddress@domain.name

Main Contact Person

=====

Contact Title : XXXXX

Contact Gender : X

Contact Position in organisation : XXXXXXXX
Contact Department : XXXXXXXX
Contact Last name : XXXXXXXX

Contact First name : XXXXXXXX
Contact Country : XXXXXXXX
Contact Street : XXXXXXXX
Contact Street number : 123456
Contact PO box :123456
Contact Region/County : XXXXXXXXX
Contact Postal Code : 123456
Contact CEDEX : 123
Contact City : XXXXXXXXXX
Contact Internet homepage : www.XXXXXX.XXX
Contact Fax : +123 123456789
Contact Primary phone : +123 1234568788

Contact Secondary phone: +123 12345787

Contact E-mail: XXXXX@XXXXX.XX

Status of the Organisation

=====

Indirect Cost Method: Standard Flat Rate
Is it a Natural Person? X
Is it a Legal Person? X
Is it a Non profit? X
Is it a Research organisation? X
Is it a Public body? X
Is it an International Organisation? X
Is it an International Organisation of European Interest? X
Is it a Higher or secondary education establishment? X
Is it an Enterprise? X
Self declared SME Status? X
Is the number of employees below 250? X
Is the annual turnover below 50M? X
Is the annual balance sheet below 43M? X
Is it autonomous? X
Your comments:

XXXXXXXXXXXXXXXXXXXXX

Modify Self-registration data (Draft Mode)

During Self registration, if you have saved your data by using the **[SAVE DRAFT]** button, you can modify your registration data by clicking on the "modify or delete" link in the "Register" tab: **Figure 10: Self Registration - Modify draft data.**

The steps to register your organisation are:

STEP 1: Search

Use the search facility to check whether your organisation is already registered.

STEP 2: Self-Register your organisation in PP

Register your organisation using your ECAS account details. After providing all the necessary details, press the **[CONFIRM]** button to submit your registration information to the Central Validation Team (CVT). If you wish to suspend the registration process at any point, the data entered may be saved as a draft by clicking the **[Save Draft]** button. You may then resume your registration at any time.

STEP 3: Modify your self Registration

STEP 3a

If you saved your data as draft , it is still possible to modify or delete your self-registration.

or

STEP 3b

Figure 10: Self Registration - Modify draft data

Then you will have access again to the different pages described above.

The data is editable. See **Figure 11 : Self-Registration - Data Modifications**

Please enter your data here:

1. Organisation data

2. Legal address

3. My contact information

4. Status of organisation

5. Summary of your data

Organisation data of the participant

Participant legal name * Chicken Company

Business name KotKot

Official language * English

2nd Language French

Name in 2nd Language

Legal form * SPRL

VAT number * BE124578

Registration number * RC BE124578

Registration authority * VAT office

Nace code * Veterinary activities

Establishment/Registration country * Belgium

Registration date * 17-02-2006 (dd-mm-yyyy)

* Mandatory Fields

Next Step

Save Draft

Delete Draft

Cancel

[User Manual](#)

Figure 11 : Self-Registration - Data Modifications

View Self-Registration data

During self-registration you can modify your data (data which is not confirmed yet, but saved as draft).

After your data have been submitted you are still able to modify it until the Validation Services start the validation process.

Just click in the "[modify your self-registration](#)" link in the 'Register' tab (see **Figure 12: Self Registration - Data Submitted**)

STEP 3: Modify your self Registration

STEP 3a

If you saved your data as draft , it is still possible to [modify or delete](#) your self-registration.

or

STEP 3b.

If you have already submitted your registration and if CVT has not started the verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR), it is still possible to [modify your self-registration](#) and/or [upload additional documents](#)

or

STEP 3c.

If CVT has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload additional documents](#)

After identification, the CVT begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents. Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

Figure 12: Self Registration - Data Submitted

When the Validation Services have started the validation,, your registered data can then be seen in read-only mode (see **Figure 13: Self Registration - View data under validation (Organisation data)**)

Your Request (read-only mode):

Organisation data

Legal Address

Status of the organisation

Balance sheet

Entreprise data

Document management

Organisation data of the participant

PIC 991355812

Participant legal name * Chicken Company

Business name KotKot

Official language * English

Name in 2nd Language

2nd Language French

Legal form * SPRL

Legal form free text

VAT number * BE124578

Registration number * RC BE124578

Registration date * 17-02-2006 (dd-mm-yyyy)

Registration authority * VAT office

Nace code * Veterinary activities

Establishment/Registration
country * Belgium

Close

User Manual

Figure 13: Self Registration - View data under validation (Organisation data)

Self Registration – Upload Documents

Once your data is submitted from your self-registration, you still have access to URF through the "Register" tab of the Participant Portal. (see **Figure 14 : Register tab – link to upload documents**).

In this page, you can activate the upload document facility by clicking the "[upload additional documents](#)" link.

The total file size is limited to 10 Mb for upload and no further download is available.

▣ STEP 3: Modify your self Registration

▣ STEP 3a

If you saved your data as draft , it is still possible to [modify or delete](#) your self-registration.

or

▣ STEP 3b.

If you have already submitted your registration and if CVT has not started the verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR), it is still possible to [modify your self-registration](#) and [or upload additional documents](#)

or

▣ STEP 3c.

If CVT has already started the verification process, you can no longer modify your self-registration data but you are still able to [upload additional documents](#)

After identification, the CVT begins a verification process that will eventually lead to the appointment of a Legal Entity Appointed Representative (LEAR). During this period, the data that you have declared about your organisation can no longer be modified. You will however still be able to upload up to 10 Mb of additional supporting documents. Once uploaded, these documents cannot be withdrawn or modified, except by the validated LEAR.

When your data has been validated by the CVT, you, as self registrant, will no longer be able to edit the data related to your organisation. From this point on, the organisation data may be maintained only by the LEAR.

Figure 14 : Register tab – link to upload documents

File name	Size	Date	Description	Origin
-----------	------	------	-------------	--------

Your remaining upload space for this stage is 10240 KB

Upload **Close**

[User Manual](#)

Figure 15 : Self Registration - Upload Document Page

On Figure 15 : Self Registration - Upload Document Page, the document list is empty.
To upload a new document, just click on the [**Upload**] button.

Upload Document



Disclaimer : Please note that participants should ensure that any supporting documents supplied are free of viruses or any other data which may cause harm to the systems of users.
Participants should always be sure of the quality of the supporting documents provided to the European Commission.
Where possible you should use an antivirus tool before submitting your documents.

Browse Document

Browse...

Document Properties

Author:

Description:

Original: ☐

Upload

Cancel

User Manual

Figure 16 : Self Registration - Upload New Document Page

In the Document properties page (see **Figure 16 : Self Registration - Upload New Document Page**) click on the **[Browse]** button, in order to select the file to upload.

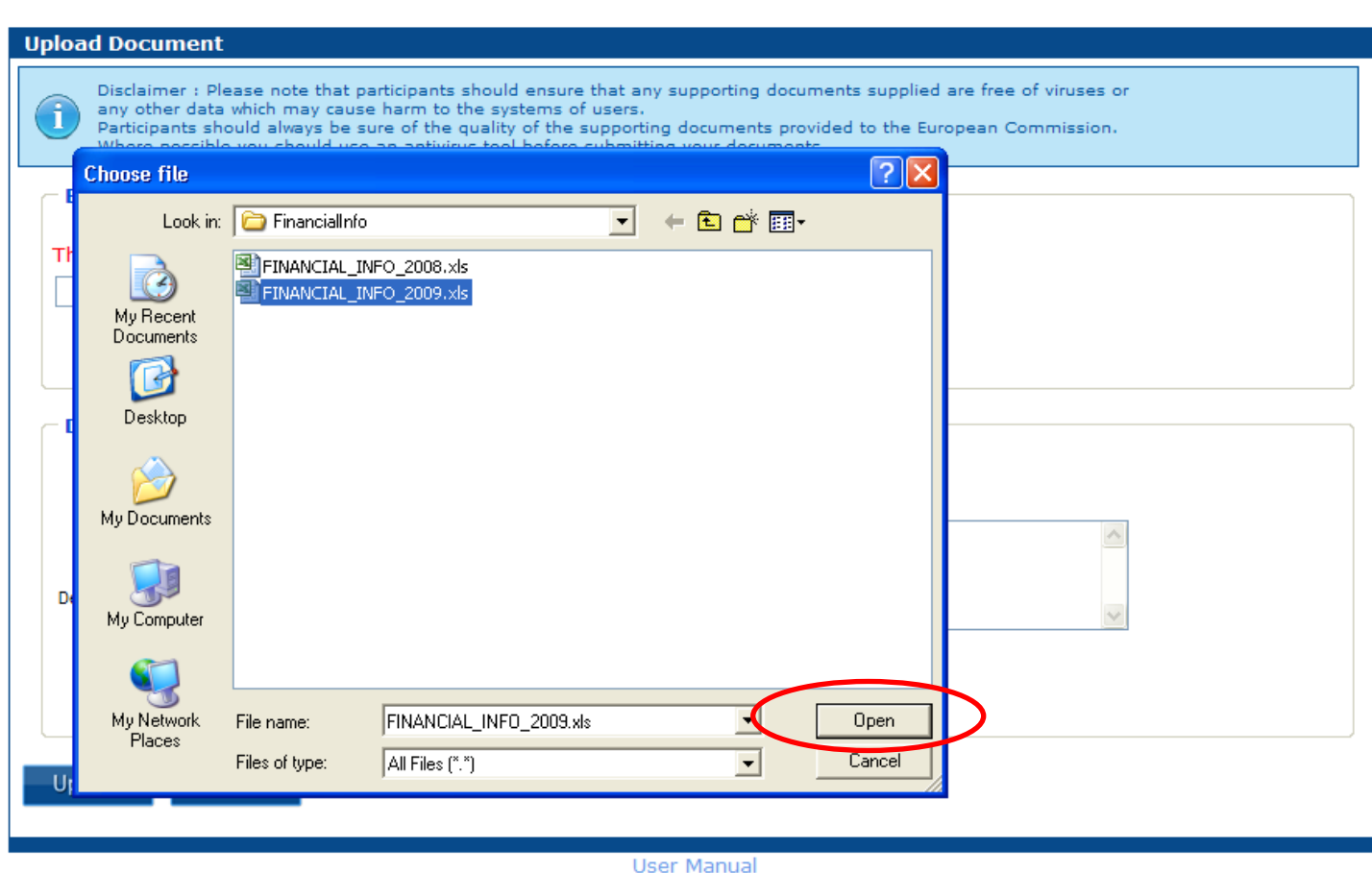


Figure 17 : Self Registration - Upload Document – Browse

Select your file and click the **[Open]** button (see **Figure 17 : Self Registration - Upload Document – Browse**).

Upload Document



Disclaimer : Please note that participants should ensure that any supporting documents supplied are free of viruses or any other data which may cause harm to the systems of users.
Participants should always be sure of the quality of the supporting documents provided to the European Commission.
Where possible you should use an antivirus tool before submitting your documents.

Browse Document

The file exceeds size limit! Maximum remaining upload size for this phase is 1024 KB.

Document Properties

Author:

Description:

Original: ☐

[User Manual](#)

Figure 18 : Self Registration - Upload Document - Fill Meta data

In the Document Properties page, enter the Author name and the file description, these fields are mandatory... Check the 'Original' check box if your file is the original one.

Finally, click on the **[Upload]** button to save your data and to upload your file (see **Figure 18 : Self Registration - Upload Document - Fill Meta data**).

	File name	Size	Date	Description	Origin
	FINANCIAL_INFO_2009.xls	910 KB	17-02-2010	Balance Sheet 2009	☐

Your remaining upload space for this stage is 9330 KB

[Upload](#)
[Close](#)

[User Manual](#)

Figure 19 : Self Registration - Uploaded Document List

In the Document List page, you can now see your file. You can either upload another document by clicking on the **[Upload]** button or quit this page by clicking on the **[Close]** button. See **Figure 19 : Self Registration - Uploaded Document List**.

LEAR ROLE IN URF

The Legal Entity Appointed Representative (LEAR) is the person chosen by the organisation itself in order to ease the communication with the European Commission and avoid double registrations. The LEAR can only be nominated after completion of the validation process and is the only person who may request changes to his/her organisation's data and submit legal documents through URF.

He/She is going to be the only contact person of the organisation with the URF.

The LEAR is not necessarily the authorized legal representative of the legal entity

LEARs can submit requests for update of their:

- Legal Data (Name, address, registration number etc.)
- FP7 account (SME, Public private, educational etc.)
- Balance sheet data

And they can upload supporting documents in URF to support their requests.

More information on the LEAR and the documents required to appoint him/her are available in the FAQ section of the Participant Portal:

http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=fag#LEAR

Note : In the Participant Portal, LEARs are authorized to nominate Account Administrators that have the same rights but cannot revoke the LEAR.

LEAR Nomination - Mails

This login is to be used by the persons who have been validated as LEAR (Legal Entity Appointed Representative) of their organisations.

As a LEAR you will connect to the URF by using your ECAS account:

- If your organisation has nominated you as a LEAR, you will first receive by email your username and an explanation on how to activate your account.

Subject: 7th Framework Programme - User account creation

Dear John Doe,

In the context of the 7th Framework Programme, you have recently been nominated as the LEAR for your organisation. In order to access the Unique Registration Facility (URF), the web application that allows you to manage the data of your organisation, an account has been created for you by the European Commission. Once activated, this account can be used to access initially the Unique Registration Facility (URF) and subsequently, it may be possible for you to access other Commission sites.

Your user name is: nnnnnnnn

(Note: you can also use your registered email address instead of the username to access your account).

You will soon receive by letter (and if possible, by phone) your personal identification number (PIN) required to activate your account.

When you receive the PIN, please visit [this link](#) and follow the instructions on screen to activate your account. Please make sure that the domain that is selected in ECAS is "External", not European Commission.

You will be asked to provide your user name and PIN. Then, you will be offered the opportunity to choose a password of your liking. Please choose your password wisely in accordance to the instruction provided on the pages. When you have completed these steps, your account will be automatically activated.

If the above mentioned link does not work, you can copy the following address (without any line break) and paste it in your browser address bar: <https://webgate.ec.europa.eu/ecas/init/PINCode.do?domain=external>

Once your account has been activated, you can visit the URF application at the following address:
<http://ec.europa.eu/research/participants/urf>

If you believe that this message has reached you in error or should you require any further assistance, please do not hesitate to contact our eFP7 Service Desk using the co-ordinates provided below.

The eFP7 Service Desk Team
E-mail: digit-efp7-support@ec.europa.eu
Phone: +352 4301 31570
Fax: +352 4301 33099

-
- For the LEARs that self registered, the received mail is different because they already have an ECAS account.
-

From: DIGIT CED CUD SUPPORT
Sent: Thursday, February 19, 2009 5:27 PM
To: John.Doe@nowhere.com
Subject: 7th Framework Programme - User account upgrade
Importance: High
Sensitivity: Private

Subject: 7th Framework Programme - User account upgrade

Dear John Doe

In the context of the 7th Framework Programme, you have recently been nominated as the LEAR for your organisation. In order to access the Unique Registration Facility (URF), the web application that allows you to manage the data of your organisation, you can use the existing user account that was previously created for you by the European Commission. Nevertheless, you are required to upgrade this account.

Your user name is: username

(Note: you can also use your registered email address instead of the username to access your account).

In order to start using the system, your account must be upgraded. You will soon receive by letter (and if possible, by phone) your personal identification number (PIN) required to upgrade your existing account.

When you receive the PIN, please visit [this link](#) and follow the instructions on screen to activate your account. **Please make sure that the domain that is selected in ECAS is "External", not European Commission** (see the attached file).

You will be asked to provide your user name and PIN. Then, you will be offered the opportunity to choose a password of your liking. Please choose your password wisely in accordance to the instruction provided on the pages. When you have completed these steps, your account will be automatically activated.

If the above mentioned link does not work, you can copy the following address (without any line break) and paste it in your browser address bar: <https://webgate.ec.europa.eu/ecas/init/PINCode.do?domain=external>

Once your account has been activated, you can visit the URF application at the following address:
<http://ec.europa.eu/research/participants/portal/>

We regret that, for technical reasons, you will be unable to use your existing account for access to any Commission information system until your account has been upgraded. Please contact us if you have an urgent need for access but have not yet received your PIN.

If you believe that this message has reached you in error or should you require any further assistance, please do not hesitate to contact our eFP7 Service Desk using the *details* provided below.

The eFP7 Service Desk Team
E-mail: digit-efp7-support@ec.europa.eu
Phone: +352 4301 31570
Fax: +352 4301 33099

The LEARS would also receive a letter with their PIN code:



EUROPEAN COMMISSION
DIRECTORATE-GENERAL
INFORMATICS
Directorate B - Information systems
e-Commission, Interoperability, Architecture and Methods



Dear **John DOE**,

Re: your nomination as Legal Entity Authorised Representative (LEAR)

The European Commission's Unique Registration Facility is a web-based application for participating organisations in the Seventh Research Framework Programme. This online service allows registered users to view and update their organisation's legal and financial data.

According to our records, you are the Legal Entity Authorised Representative (LEAR) for the above-mentioned organisation. The European Commission Authentication Service (ECAS) has therefore created a user account for you to access the Unique Registration Facility and manage your organisation's data.

An email was sent to your registered email address: **aaaa.bbbb@aba** It explains how to activate your new user account using a PIN code. Please follow the instructions carefully.

Your activation PIN is: **xxxxx**

Your user account is **strictly personal** and will allow you in future to access other online services the European Commission is currently developing for the Seventh Research Framework Programme and the Competitiveness and Innovation Programme.

Please contact the eFP7 Service Desk if any of the information about yourself or your organisation contained in this letter is inaccurate or if you have any problem activating your account.

Yours sincerely,

Figure 20 : ECAS Password initialisation for LEAR

As a LEAR, after login in the Participant Portal, you can see the following home page (**Figure 21 : Participant Portal Home Page**).

When you are the LEAR of a validated organisation, the "Manage organisation data" arrow is enabled and blue. Click on it to see the tab dedicated to your organisation. You can also click on the "My Organisations" tab

Figure 21 : Participant Portal Home Page



European Commission

RESEARCH - Participants

A to Z | Sitemap | Search | About this site | Contact | Legal Notice
English (en)

European Commission > Research > Participant Portal

Home
My Organisations
My Projects
My Roles
FP7 Documentation
FP7 Calls
Support

Organisations
Register
Search



Change Password

Logout

Johan MILIO

ECAS help is available [here](#)

Portal registration demo is available [here](#)

FAQ

The answers to the most frequent questions that are submitted to the [eFP7 service desk](#)

See the [online user manual](#)

Watch the demonstration of the Participant Portal:

Watch the demonstration of the Participant Portal:

- [Introduction](#)

- [For all users](#)

MY ORGANISATIONS

Organisation(s) as LEAR or Account Administrator.

Chicken Company

PIC : 991355812

VAT : BE124578

NACE : 85.2

Contact Information

Email :

Phone : 027545684

Fax :

Web :

Postal Address

Street : Egg Street Number : 23

Post Code : 1000 City : Brussels

Country : BE

[Organisation's Data](#)

[View Projects](#)

[Roles](#)

Figure 22 : My Organisations

This page shows you some info concerning your organisation. Three links are located on the right of this page:

- [Organisation's Data](#): all info about the data and requests related to the organisations you are involved in. (see **Figure 24: My Organisation's data**).
- [View Projects](#): info about the projects which your organisation is involved in (see Participant User's guide for more info).
- [Roles](#): the different roles of the users involved in your organisation (see **Figure 23 : The roles in my organisation**) - (see Participant User's guide for more info).

The data under the "My Organisations" area are most recently validated ones.

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European Commission > Research > Participant Portal

Home My Organisations My Projects My Roles FP7 Documentation FP7 Calls Support

Organisations Register Search

LOGIN

 [Change Password](#)
[Logout](#)

Johan MILIO

- ECAS help is available [here](#)
- Portal registration demo is available [here](#)

FAQ

- The answers to the most frequent questions that are submitted to the [eFP7 service desk](#)
- See the [online user manual](#)
- Watch the demonstration of the Participant Portal:
- Watch the demonstration of the Participant Portal:
 - [Introduction](#)
 - [For all users](#)
 - [For LEARs](#)
 - [For Coordinators](#)
 - [Getting support](#)
- You can consult [FAQs](#)

[read more](#)

WHAT'S NEW

Participant Portal V2.0 (11/2009) containing

- The support of the role management
- A reviewed layout of the home page
- A reviewed layout of the My Project tab
- A reviewed layout of the My Roles tab
- A new support tab

[read more](#)

MY ORGANISATIONS

Organisation(s) as LEAR or Account Administrator.

Chicken Company

PIC : 991355812 VAT : BE124578 NACE : 85.2	Contact Information Email : Phone : 027545684 Fax : Web : Postal Address Street : Egg Street Number : 23 Post Code : 1000 City : Brussels Country : BE	Organisation's Data View Projects Roles
---	---	---

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company

PIC : 991355812 Status :	Organisation Legal Address Street : Egg Street Number : 23 Post Code : 1000 City : Brussels Country : BE	Active LEAR Title : Mr First : Johan Name Last : MILIO Name Phone : 0257798324 Email : johan.milio@ext.ec.europa.eu Fax :	View Update
---	---	---	--

Request History

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Date ↕	Organisation Name ↕	Type ↕	Status ↕	Action ↕
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View

Figure 24: My Organisation's data

The data under the "Data of the organisation <my organisation>" area is the most recently validated data.

Below, the request history lists all the chronological changes on the data, the last one being the self registration itself.

Modify data

As a LEAR, you are able to modify your data (when the **[Update]** button is enabled in the page above - **Figure 24: My Organisation's data**).

The modifications page (**Figure 25: LEAR - Modifications of the validated data**) contains 6 tabs:

- Organisation data
- Legal address
- Status of the organisation
- Balance Sheet, this tab can be modified only when requested by NEF. It is normally in read-only mode.
- Enterprise data
- Document management

In these different tabs, an **[UPDATE YOUR DATA]** button is present. This button saves all the data from **ALL** tabs and closes the window.

You can open any tab by clicking on its title and then modify any data or create new enterprise data or new balance sheets (only if requested by NEF – see below) or upload new documents.

Remark : If all or any of the following attributes (see below) are updated then the request will update the record directly in the registry **without the need for validation** by CVT. Any combination of one of those attributes and any out of the following list means that, if any other attribute is also updated, then the request for update will follow the existing preparation and validation process.

From Organisation data tab

- Business name

From Legal Address tab

- Internet homepage
- Fax
- Phone1
- Phone2
- Email1

Organisation data

In this tab, you must choose the update reason in the list box.

If the participant legal name is modified, then the 'effective date' field becomes active and you have to enter the date of entry into force of this modification (for grant amendment reason).

Your Organisation data (edit mode):

Organisation data

Legal Address

Status of the organisation

Balance sheet

Entreprise data

Document management

Organisation data of the participant

Update reason *

--Please Select

PIC

991355812

Participant legal name *

Chicken Company

Effective date

Business name

KotKot

Official language *

English

Name in 2nd Language

2nd Language

French

Establishment/Registration country *

Belgium

Legal form *

SOCIETE PRIVEE A RESPONSABILITE LIMITEE(SPRL)

Legal form free text

VAT number *

BE124578

Registration number *

RC BE124578

Registration date *

08-02-2005

(dd-mm-yyyy)

Registration authority *

VAT office

Nace code *

Veterinary activities

* Mandatory Fields

Update your data

Cancel

User Manual

Figure 25: LEAR - Modifications of the validated data (Organisation Data)

Legal Address

If significant fields are modified in the legal address then the 'effective date' field becomes active and you have to specify the date of entry into force of this modification (for grant amendment reason).

Your Organisation data (edit mode):

Organisation data

Legal Address

Status of the organisation

Balance sheet

Entreprise data

Document management

Legal Address (Head office)

Effective date

(dd-mm-yyyy)

Street name *

Egg Street

Street number

23

PO Box

County/Region

Postal code *

1000

CEDEX *

(France only)

City *

Brussels

Country *

Belgium

Internet homepage

Fax

Phone 1 *

027545684

Phone 2

Company Email

* Mandatory Fields

Update your data

Cancel

User Manual

Figure 26: LEAR - Modifications of the validated data (Legal Address)

Status of the Organisation

The certification data and the data on the indirect cost method are in read-only mode. Only the CVT can modify them.

Each status of the organisation is now associated with an effective date. For each modified flag, the effective date field is enabled and you will have to enter the date of entry into force of this modification. This date can not refer to future changes. All the changes requested must be already effective modifications.

Your Organisation data (edit mode):

Organisation data

Legal Address

Status of the organisation

Balance sheet

Entreprise data

Document management

FP7 data

Certification type

Certification start date

Certification end date

Indirect cost method *

Standard Flat Rate

Effective date

Status of the Organisation

☐ Natural person

☒ Legal person

☐ Non-profit

☐ Research organisation

☐ Public body

☐ International organisation

☐ International organisation of European interest

☐ Higher or secondary education establishment

☐ Enterprise

Effective date

Effective date

Effective date

Effective date

Effective date

Effective date

Effective date

Effective date

Comment

* Mandatory Fields

Update your data

Cancel

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Figure 27: LEAR - Modifications of the validated data (Status of the Organisation)

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Balance sheet

In this tab, you can modify existing balance sheets (by clicking on the year number) or create a new balance sheet only when requested by NEF (see below).

NEF is the electronic negotiation tool used for the negotiation of Grant Agreements, and it may prompt you to submit some additional information via the URF tool. In this tab, you can modify existing balance sheets (by clicking on the year number) or create a new balance sheet only when requested by NEF

In the figure below (**Figure 28: LEAR – Balance Sheet tab disabled for LEAR update request**), you are not allowed to create/modify balance sheet data. This is the case when the LEAR manage a normal change request.



Figure 28: LEAR – Balance Sheet tab disabled for LEAR update request

In the figure below (**Figure 29: LEAR Balance sheet tab enabled for Financial Request**), the LEAR is requested to provide financial info, so the balance sheet tab is enabled : the [newYear] button is visible and active(allowing to ceate a new balance sheet data set). The existing yearly balance sheet data are represented by a button per year and can be modified.

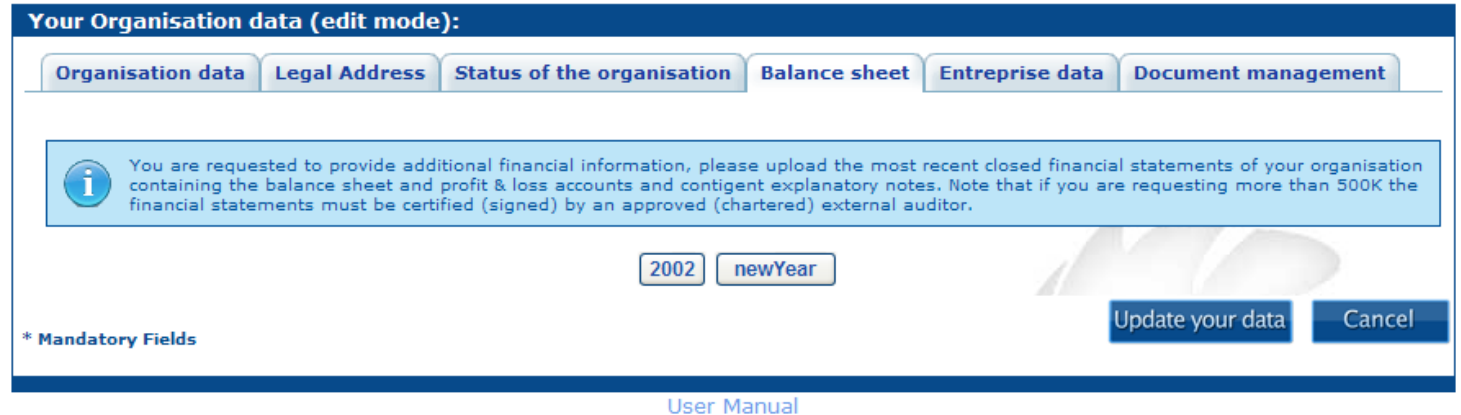


Figure 29: LEAR Balance sheet tab enabled for Financial Request

Please, see below § **NEF Requirement – Balance Sheet** for the description of the balance sheet data entry due to a financial info requested by NEF

Enterprise data

In this tab, you can modify existing enterprise data (by clicking on the year number) or introduce the enterprise data for a new year (by clicking on the [newYear] button).

You can also modify the global SME flag (and effective date, as well).

The screenshot shows a web interface titled "Your Organisation data (edit mode):". It has a horizontal menu with tabs: "Organisation data", "Legal Address", "Status of the organisation", "Balance sheet", "Enterprise data", and "Document management". The "Enterprise data" tab is active. Below the tabs, there is a section for "SME" with a checkbox and a text input field for "Effective date". A button labeled "newYear" is circled in red. At the bottom right, there are two buttons: "Update your data" and "Cancel". A link for "User Manual" is at the bottom center. A note "* Mandatory Fields" is on the left.

Figure 30: LEAR - Modifications of the validated data (Enterprise Data)

When the year is entered, then click on [**Submit**] in order to create a new yearly enterprise data set.

This screenshot is similar to Figure 30, showing the "Your Organisation data (edit mode):" interface with the "Enterprise data" tab selected. In this view, a dropdown menu for the year is visible, showing "2008". The "Submit" button is circled in red. The "newYear" button is no longer visible. The "Update your data" and "Cancel" buttons remain at the bottom right, and the "User Manual" link is at the bottom center. The "* Mandatory Fields" note is also present.

Figure 31 Add New Year for Yearly Enterprise data

Your Organisation data (edit mode):

Organisation data Legal Address Status of the organisation Balance sheet **Enterprise data** Document management

SME ☐ Effective date

2008 newYear

Enterprise data

Enterprise status: UNDER CONSTRUCTION

Action: **Validate** Delete enterprise data

Financial year date * 31-12-2008 (dd-mm-yyyy)

Number of employees * 25 ☒ < 250

Annual Turnover * 58900000 euro ☐ < 50M

Annual Balancesheet * 410000 euro ☒ < 43M

Autonomous ☐

* Mandatory Fields

Update your data Cancel

User Manual

Figure 32: LEAR - Modifications of the validated data (Enterprise Data - Yearly values)

You have to enter the financial date, the number of employees, the annual turnover and balance sheet amount in EURO.

Your Organisation data (edit mode):

Organisation data Legal Address Status of the organisation Balance sheet **Enterprise data** Document management

SME ☐ Effective date

2008 newYear

Enterprise data

Enterprise status: VALID

Action: **Edit** Delete enterprise data

Financial year date * 31-12-2008 (dd-mm-yyyy)

Number of employees * 25 ☒ < 250

Annual Turnover * 58900000 euro ☐ < 50M

Annual Balancesheet * 410000 euro ☒ < 43M

Autonomous ☐

* Mandatory Fields

Update your data Cancel

User Manual

Figure 33 : Validated Yearly Enterprise data

If you want to modify an existing yearly enterprise data set that has been validated, then you have to click first on the **[EDIT]** button to enable the data fields.

It is still possible to add a new yearly data set by clicking on the **[NewYear]** button

Document management

For uploading documents related to the organisation, the LEAR will follow the same procedure as described in the section: Self Registration – Upload Documents.

The LEAR can upload up to 20 Mb of documents. Please refer to **Self Registration – Upload Documents** paragraph above.

Furthermore any modification related to legal status, whenever introduced by the LEAR **after** the validation of the legal entity need also to be supported by the relevant official/legal document to be uploaded by the LEAR together with their request"

Your Organisation data (edit mode):

Organisation data

Legal Address

Status of the organisation

Balance sheet

Entreprise data

Document management

Upload

Existing Documents

	File name	Size	Date	Description	Original
	 FINANCIAL_INFO_2009.xls	910 KB	17-02-2010	Balance Sheet 2009	☐

* Mandatory Fields

Update your data

Cancel

[User Manual](#)

Figure 34: LEAR - Document Management

Validate your modifications

In all the different tabs, the **[Update your data]** and **[Cancel]** button are present (see below, **Figure 35 : Update/Cancel buttons located in all the tabs**).



Figure 35 : Update/Cancel buttons located in all the tabs

The **[Cancel]** button closes the window/URF but without saving changes).

The **[Update your data]** button saves all the data from **ALL** tabs.

Once this button is clicked, a confirmation page appears. You are then asked to confirm or cancel your modifications (see **Figure 36: LEAR- Confirmation of modifications**).

Figure 36: LEAR- Confirmation of modifications

If you click on the **[Cancel]** button, the you are redirected to the previous screen, your change are still present and you can introduce new changes

When you confirm your modifications by clicking on the **[SUBMIT]** button, your modifications are saved and the window closes.

You can then logout or return to the Participant Portal (see **Figure 37: LEAR - Organisation page with new request**)

You can see that the "Data of the Organisation" area has changed in the Request history SECTION:

- The first request is now in read-only: only the **[VIEW]** button is enabled;
- Your submitted modifications are displayed in the second request. While the CVT (Central Validation Team) has not yet set the request status to 'UNDER VALIDATION' (**Figure 38 : Data of the organisation during validation by CVT**), you will be able to update or delete your request. In this case,

the buttons [View] [Update] [Delete] are enabled (Figure 37: LEAR - Organisation page with new request (top of the list)).

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company

PIC : 991355812

Status :

Organisation Legal Address

Street : Egg Street Number : 23

Post Code : 1000 City : Brussels

Country : BE

Active LEAR

Title : Mr

First : Johan

Name

Last : MILIO

Name

Phone :

0257798324

Email : johan.milio@ext.ec.europa.eu

Fax :

View

Request History

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Date ↕	Organisation Name ↕	Type ↕	Status ↕	Action ↕
18/02/2010	Chicken Company	LEAR UPDATE	CREATED	View Update Delete
18/02/2010	Chicken Company	LEAR UPDATE	DELETED	View
18/02/2010	Chicken Company	LEAR UPDATE	VALIDATED	View
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View

Figure 37: LEAR - Organisation page with new request (top of the list)

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company

There is currently a request in "UNDER VALIDATION" status so you cannot update organisation data until the end of this validation.

PIC	Organisation Legal Address	Active LEAR	View
: 991355812	Street : Egg Street Number : 23	Title : Mr	
Status :	Post Code : 1000 City : Brussels	First : Johan	
	Country : BE	Name	
		Last : MILIO	
		Name	
		Phone :	
		0257798324	
		Email : johan.milio@ext.ec.europa.eu	
		Fax :	

Request History	PAGE 1 OF 1	FIRST / PREVIOUS	NEXT / LAST		
Date	Organisation Name	Type	Status	Action	
18/02/2010	Chicken Company	LEAR UPDATE	UNDER VALIDATION	View	
18/02/2010	Chicken Company	LEAR UPDATE	DELETED	View	
18/02/2010	Chicken Company	LEAR UPDATE	VALIDATED	View	
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View	

Figure 38 : Data of the organisation during validation by CVT

DATA OF THE ORGANISATION: CHICKEN COMPANY

Chicken Company

PIC : 991355812

Status :

Organisation Legal Address

Street : Egg Street Number : 23
Post Code : 1000 City : Brussels
Country : BE

Active LEAR

Title : Mr
First : Johan
Name
Last : MILIO
Name
Phone :
0257798324
Email : johan.milio@ext.ec.europa.eu
Fax :

[view](#)

[Update](#)

Request History

PAGE 1 OF 1 FIRST / PREVIOUS NEXT / LAST

Date ↕	Organisation Name ↕	Type ↕	Status ↕	Action ↕
18/02/2010	Chicken Company	LEAR UPDATE	VALIDATED	View
18/02/2010	Chicken Company	LEAR UPDATE	DELETED	View
18/02/2010	Chicken Company	LEAR UPDATE	VALIDATED	View
17/02/2010	Chicken Company	SELF REGISTRATION	VALIDATED	View

Figure 39 : Data of the Organisation after validation by CVT

NEF Requirement – Balance Sheet

During negotiation, NEF may request some financial info from the LEAR in order to complete the financial viability check of the organisation. A mail is sent to the LEAR by NEF for this purpose.

In URF, a reminder is displayed in the Status Page (see **Figure 40: Status Page with NEF reminder**): "You are requested to provide additional financial information in order to complete the negotiation of your grant for proposal <Proposal Id>".

DATA OF THE ORGANISATION: EUROPEAN COMMUNITY SHIPOWNERS ASSOCIATIONS

EUROPEAN COMMUNITY SHIPOWNERS ASSOCIATIONS

You are requested to provide additional financial information in order to complete the negotiation of your grant for proposal 12345689.

PIC : 995510031	Organisation Legal Address	Active LEAR	View
Status : VALIDATED	Street : RUE DUCALE str	Number : 67/B2	Update
	Post : 1000	City : BRUXELLES	
	Code		
	Country : BE		
		Title : Mr	
		First : Jean	
		Name	
		Last : Dupont	
		Name	
		Phone : 0032545465	
		Email : GNFHNPY@ZDRVXHPM.SEN	
		Fax :	

Figure 40: Status Page with NEF reminder

Your Organisation data (edit mode):

Organisation dataLegal AddressStatus of the organisationBalance sheetEntreprise dataDocument management

You are requested to provide additional financial information, please upload the most recent closed financial statements of your organisation containing the balance sheet and profit & loss accounts and contingent explanatory notes. Note that if you are requesting more than 500K the financial statements must be certified (signed) by an approved (chartered) external auditor.

2002newYear

Update your dataCancel

* Mandatory Fields

User Manual

Figure 41 : Balance sheet tab when NEF info requested

To satisfy the NEF request, you have to update the most recent closed financial data and open the 'Balance sheet' tab.

The [newYear] button is present and enabled. Click on it.

Your Organisation data (edit mode):

Organisation data Legal Address Status of the organisation **Balance sheet** Enterprise data Document management

i You are requested to provide additional financial information, please upload the most recent closed financial statements of your organisation containing the balance sheet and profit & loss accounts and contingent explanatory notes. Note that if you are requesting more than 500K the financial statements must be certified (signed) by an approved (chartered) external auditor.

2000 ▼

Submit **Cancel**

* Mandatory Fields

Update your data **Cancel**

[User Manual](#)

Figure 42 : Submit a new year for balance sheet data

To create a new balance sheet, choose a year and click on the [**Submit**] button.

The first information to enter is the closing date of your balance sheet, its duration and the currency that will be used for the values below. The indicative final date of validity (facultative) show the limit date until the financial data are valid. This field is clearly labelled as a 'self declared' field; it will not be validated in any way by the CVT. It is simply a one way statement by the LEAR.

The first set of values is related to assets.

The second set of values is related to liabilities.

Warning: Total value of assets and liabilities must be equal.

The last set of values concerns profit and loss account. Note that calculations are performed 'on line' after your validation of the data.

Your Organisation data (edit mode):

[Organisation data](#)
[Legal Address](#)
[Status of the organisation](#)
[Balance sheet](#)
[Entreprise data](#)
[Document management](#)



You are requested to provide additional financial information, please upload the most recent closed financial statements of your organisation containing the balance sheet and profit & loss accounts and contingent explanatory notes. Note that if you are requesting more than 500K the financial statements must be certified (signed) by an approved (chartered) external auditor.

2000

2001

newYear

Organisation data of the participant

Balance sheet status: UNDER CONSTRUCTION

Action:

Validate

Delete Balance Sheet

Closing date (dd-mm-yyyy)

01-01-2001

Indicative final date of validity (self declared) (dd-mm-yyyy)

Duration (Month)

Currency

EUR-EURO

Balance Sheet

ASSETS

1. Subscribed capital unpaid 0

2. Fixed assets

2.1 Intangible fixed assets 0

2.2 Tangible fixed assets 0

2.2 Financial assets 0

3. Current assets

3.1 Stocks 0

3.2.1 Debtors due within the year 0

3.2.2 Debtors due after the year 0

3.3 Cash at bank and in hand 0

3.4 Other current assets 0

TOTAL ASSETS

LIABILITIES

4. Capital & reserves

4.1 Subscribed capital 0

4.2 Reserves 0

4.3 Profit and loss brought forward 0

4.4 Profit and loss brought for the financial 0

5. Creditors

5.1.1 Long term non-bank debt 0

5.1.2 Long term bank debt 0

5.2.1 Short term non-bank debt 0

5.2.2 Short term bank debt 0

TOTAL LIABILITIES

Figure 43 : Balance sheet (part 1)

Profit and loss account

	Turnover	
+	Variation in stocks +/-	
+	Other operating income	
=	Operating income	0
-	Costs of material & consumables	
-	Other operating charges	
-	Remuneration and charges(Staff costs)	
=	Gross operating Profit or Loss	0
-	Depreciation and value adjustments on non-financial assets	
=	Net operating profit	0
+	Financial income and value adjustments on financial assets	
-	Interest paid	
-	Similar charges	
=	Profit/loss on ordinary activities	0
+	Extraordinary income	
-	Extraordinary charges	
-	Taxes on profits	
=	Profit/loss for financial year	0

Financial Viability Simulation

Ratio's Results				Analysis	
Indicators	Value	Qualification	Quote	Concise	More-in-depth
Quick Ratio					
G.O. Profit Ratio					
Profitability (1)					
Profitability (2)					
Solvency					
Noteworthy value's Results					
Equity Flags					

* Mandatory Fields

Update your data

Cancel

User Manual

Figure 44 : Balance Sheet (part 2)

When you validate your data, by clicking on the [VALIDATE] button, the legal financial viability (LFV) simulation is performed.

Your Organisation data (edit mode):

Organisation data Legal Address Status of the organisation Balance sheet **Entreprise data** Document management

2008

newYear

Organisation data of the participant

Balance sheet status: **UNDER CONSTRUCTION**

Action: **Validate** **Delete Balance Sheet**

Closing date (dd-mm-yyyy)

31-12-2008

Indicative final date of validity (self declared) (dd-mm-yyyy)

01-01-2011

Duration (Month)

12

Currency

EUR-EURO

Balance Sheet

ASSETS

1. Subscribed capital unpaid	0
2. Fixed assets	906893
2.1 Intangible fixed assets	906893
2.2 Tangible fixed assets	0
2.2 Financial assets	0
3. Current assets	1064479
3.1 Stocks	0
3.2.1 Debtors due within the year	943800
3.2.2 Debtors due after the year	0
3.3 Cash at bank and in hand	120679
3.4 Other current assets	0
TOTAL ASSETS	1971372

LIABILITIES

4. Capital & reserves	343238
4.1 Subscribed capital	0
4.2 Reserves	275738
4.3 Profit and loss brought forward	0
4.4 Profit and loss brought for the financial	67500
5. Creditors	1628134
5.1.1 Long term non-bank debt	0
5.1.2 Long term bank debt	0
5.2.1 Short term non-bank debt	1620634
5.2.2 Short term bank debt	7500
TOTAL LIABILITIES	1971372

Profit and loss account

Turnover	2374199
+ Variation in stocks +/-	0
+ Other operating income	115622
= Operating income	2489821
- Costs of material & consumables	2649910
- Other operating charges	0
- Remuneration and charges(Staff costs)	0
= Gross operating Profit or Loss	-160089
- Depreciation and value adjustments on non-financial assets	29556
= Net operating profit	-189645
+ Financial income and value adjustments on financial assets	2649910
- Interest paid	0
- Similar charges	0
= Profit/loss on ordinary activities	2460265
+ Extraordinary income	0
- Extraordinary charges	0
- Taxes on profits	0
= Profit/loss for financial year	2460265

Figure 45 : Balance sheet with data entered

Financial Viability Simulation

Ratio's Results				Analysis	
Indicators	Value	Qualification	Quote	Concise	More-in-depth
Quick Ratio	0.65	Acceptable	1	1	1
G.O. Profit Ratio	-1.0	Weak	0	Weak	Weak
Profitability (1)	0.0	Weak	0		
Profitability (2)	0.0	Weak	0		
Solvency	-1.0	Weak	0		
Noteworthy value's Results					
Equity Flags	-1.0				

Update your data

Cancel

Mandatory Fields

Figure 46 : Balance sheet - Financial Viability Simulation

The results of the LFV simulation are then displayed at the bottom of the page.

If you want to modify an existing balance sheet, you must first click on the **[EDIT]** button to enable the data fields

When you submit financial info, you are also required to upload financial documents. See message in **Figure 47 : Document management during a financial request** below.

Your Organisation data (edit mode):

[Organisation data](#)
[Legal Address](#)
[Status of the organisation](#)
[Balance sheet](#)
[Entreprise data](#)
[Document management](#)

There were errors in your submission. See the individual errors below or in the other tabs.

You are requested to provide additional financial information, please upload the most recent closed financial statements of your organisation containing the balance sheet and profit & loss accounts and contingent explanatory notes. Note that if you are requesting more than 500K the financial statements must be certified (signed) by an approved (chartered) external auditor.

[Upload](#)

Existing Documents

	File name	Size	Date	Description	Original
	 LFVSimulation.PNG	115 KB	23-04-2010	fdgfdgfd	☐
	 upload docs.msg	22 KB	29-04-2010	test	☐

*** Mandatory Fields**

[Update your data](#) [Cancel](#)

[User Manual](#)

Figure 47 : Document management during a financial request

In the Organisation tab of the Participant Portal you can see a new request type : **Financial**.

DATA OF THE ORGANISATION: TEST DIGIT B MAHIEU TEST 2010 14APR

Test DIGIT B Mahieu test 2010 14apr

There is currently at least one request "UNDER VALIDATION" so you cannot update organisation data until the end of this validation.

You are requested to provide additional financial information in order to complete the negotiation of your grant for proposal 123456.

PIC : 996719815	Organisation Legal Address	Active LEAR	View
Status : VALIDATED	Street : Rue de la Loi Number : 38	Title : Mr	
	Post Code : 1000 City : Bruxelles	First : mahiebe first name	
	Country : BE	Name	
		Last : mahiebe last name	
		Name	
		Phone : 1111111111	
		222222222	
		Email : QCRCUWHT@XARLRVJX.QTT	
		Fax : 33333333	

Request History

PAGE 1 OF 2 FIRST / PREVIOUS NEXT / LAST				
Date ↕	Organisation Name ↕	Type ↕	Status ↕	Action ↕
06/05/2010	Test DIGIT B Mahieu test 2010 14apr	FINANCIAL	UNDER VALIDATION	View

Figure 48 : Data of the Organisation during CVT validation of balance sheet info (requested by NEF)

GLOSSARY

Term	Definition
CIP	Competitiveness and Innovation Programme
Coordinator	The participant designated as the coordinator in a consortium and in the grant agreement
ECAS	European Commission's user Authentication Service
EC Officer	European Commission's Project/Scientific Officer or Administrative Officer representing the European Commission during the negotiations.
FP7	7 th Framework Programme of Research and Technological Development of the European Commission
LEAR	A legal signatory of each legal entity will be asked by the Commission to appoint one person (the so-called LEAR - Legal Entity Appointed Representative) for being the correspondent towards the Commission on all issues related to the legal status of the entity. The LEAR provides the Commission with up-to-date legal and financial data (including supporting documents, where necessary) and commits to maintain the account so that it is up-to-date enabling future use for grants and other transactions between the entity and the Commission research (and other) programmes. This person is chosen by the organisation itself in order to ease the communication with the European Commission and avoid double registrations. Only the LEAR may introduce a Change request (of his organisation's data) through URF and submit legal documents through URF.
NEF	The negotiation process is supported by the online Negotiation Facility tool (NEF), an electronic implementation of the negotiation forms used to exchange information between the participants and the European Commission. NEF provides the main channel for interactive communication between the Consortium and the EC Project Officer as all necessary administrative and financial data about the projects and the participants is collected and agreed through NEF.
Negotiation	The negotiation is a process during which the details about the proposal are agreed between the participants and the European Commission.
Negotiation session	A period during which the coordinators are allowed to provide changes on their proposals.
Participant	Any legal or natural person, that has some dealings with FP or CIP programmes. For example: Legal Entity as partner to a grant agreement, department or institute of such, person working in participating organisation and relevant to the programmes, expert. Participants are external to the Commission. In order to structure this participant concept into further details, a clear distinction should be made between: The "<i>executing participant</i>" proposing and executing an action (e.g. a department within a university or an independent expert) The "<i>participating legal entity</i>" endorsing the responsibility of this proposition and execution (e.g. a university or the expert as a legal natural person). "A participating legal entity is any Legal Entity that has participated, participates, or

Term	Definition
	will participate in the programmes of FP and CIP, whether in Grant Agreements, contracts or proposals only" (List of Agreements PDM/URF WG, as of 14th January 2007). "Contacts" by the executing participants and participating legal entities for exchange of information (e.g. a professor within the university department, the financial officer of the university, an expert him/herself, etc.). Contacts typically play roles within participating entities and may have a specific address. It is worth to notice that the "executing participant" and the "participating legal entity" can be the same entity (e.g. a private company) or that several legal entities could collectively endorse the responsibility for a single executing participant (case of a consortium).
Participant Portal	The Participant Portal hosts services that facilitate the monitoring and the management of the participants proposals and projects. It is a secure Internet site that ensures adequate authentication and confidentiality mechanisms, based on the European Commission Authentication Service (ECAS).
PIC (Participant Identity Code)	Participant Identity Code is a unique ID of an organisation. The PIC is a 9 digits code obtained through URF registration and used in each step of the process to identify an organisation. The PIC received during registration needs to be validated by the CVT, and will then become permanent.
SME	Small and Medium sized Enterprise
Status of validation	Indication that data provided in a form have been validated by the Commission
URF	Unique Registration Facility: a service providing unique registration for participants in the Framework Programmes at proposal and contract stages. It encompasses a set of rules for data acquisition and validation.

Functional Mailboxes

You can use our functional mailboxes in order to communicate to our services :

- **Validation** - REA URF VALIDATION : REA-URF-VALIDATION@ec.europa.eu;
- **Lear validation** - REA LEAR VALIDATION : REA-LEAR-VALIDATION@ec.europa.eu
- **Financial Validation** - REA FVC : REA-FVC@ec.europa.eu