User's Guide of the **Unique Registration Facility** (**URF**) and **Participant Portal** for Education, Audio-visual, Culture, Citizenship and Volunteering

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INTRODUCTION

The **Unique Registration Facility** (**URF**) is an online web interface that provides access to the registration service. It is a European Commission service producing unique identification for organisations and, in certain cases, natural persons, required to apply to several European Programmes as **Erasmus+**, Creative Europe, Europe for Citizens, EU Aid Volunteer, Horizon 2020, FP7, CIP,COSME, etc

Access to URF is provided through asingle-entry point, the**Participant Portal**. The Participant Portal for the Education Programme **Erasmus+**, Audio-visual, Culture, Citizenship and Volunteering can be found here:

http://ec.europa.eu/education/participants/portal/desktop/en/home.html

Main Features and requirements

URF enables potential applicants to perform two main types of actionspertaining to the process of registration of an organisation:

- the **organisation registration** itself (registration of your own organisation or registration on behalf of another organisation), and

- the **update of organisation data**.

Registration. The registration procedure is performed intheURF Registration Wizard – a step-by-step, user-friendly tool for entry of all the information required for an organisation to be registered. TheURF Registration Wizard is invoked from the Participant Portal page when a new registration is started or when a draft (partially completed and saved) registration is resumed. The URFRegistration Wizard uses a heuristic method of detection of organisation duplicates during the registration process.

Data Update. The updating of organisation datais mainly managed from theURF Update Panel that contains the relevantorganisation details pages. The URF Update Panel is accessed from the Participant Portal page and covers options for updating core, common, and specific data as well as facilities for management of supporting documents.

As a participant, you are only required to register once – URF then assigns you a unique **Participant Identification Code (PIC)** that you can usefor all future communication and interactions with the European Commission and its Agencies for the given organisation. The use of a PIC for each organisation helps to avoid redundant requests for information and facilitatesthe effort to keep participant-related information up-to-date.

The ECAS Prerequisite

Before you start using URF, note the following about **ECAS** (the **E**uropean **C**ommission's user **A**uthentication **S**ervice) and URF:

- **ECAS** enables authorised users to log in to a wide range of Commission information systems, using a single username and password.

- You must have an **ECAS** (**E**uropean **C**ommission's user **A**uthentication **S**ervice) account to be able to start the initial registration procedure.

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

Contact & Support

For technical issues related to URF or the Participant Portal please send an email to the following address:EC-RESEARCH-IT-HELPDESK@ec.europa.eu

All questions concerning Erasmus+ actions managed by National Agencies should be addressed to your local National Agencies as they play a key role in the practical implementation of the Programme and can reply in your language.The list and contact information of National Agencies can be found at the Participant Portal (SUPPORT / Contact) or directly at the following address:

http://ec.europa.eu/education/participant-portal/support/contact

All questions concerning Erasmus+ actions managed by the Education, Audiovisual and Culture Executive Agency (EACEA) and questions concerning Creative Europe, Europe for Citizens and EU Aid Volunteers should be addressed to the EACEA Helpdesk:

EACEA-PORTAL-ERASMUSPLUS@ec.europa.eu

EACEA-PORTAL-CREATIVE-EUROPE@ec.europa.eu

EACEA-PORTAL-EUROPE-FOR-CITIZ@ec.europa.eu

EACEA-PORTAL-EU-AID-VOLUNTEER@ec.europa.eu

URF REGISTRATION PROCESS

The **Unique Registration Facility** (**URF**) is responsible for the organisation registration and data update but it is also important for keeping a unified registration method and consistent organisation data.

Overview

There are two main scenarios in URF usage – the registration of a new organisation, and the post-registration modification of organisation data. Outside URF, some additional activities add to the registration process, such as the preliminary ECAS registration.

The following diagram illustratessome basic steps in the URF workflow:
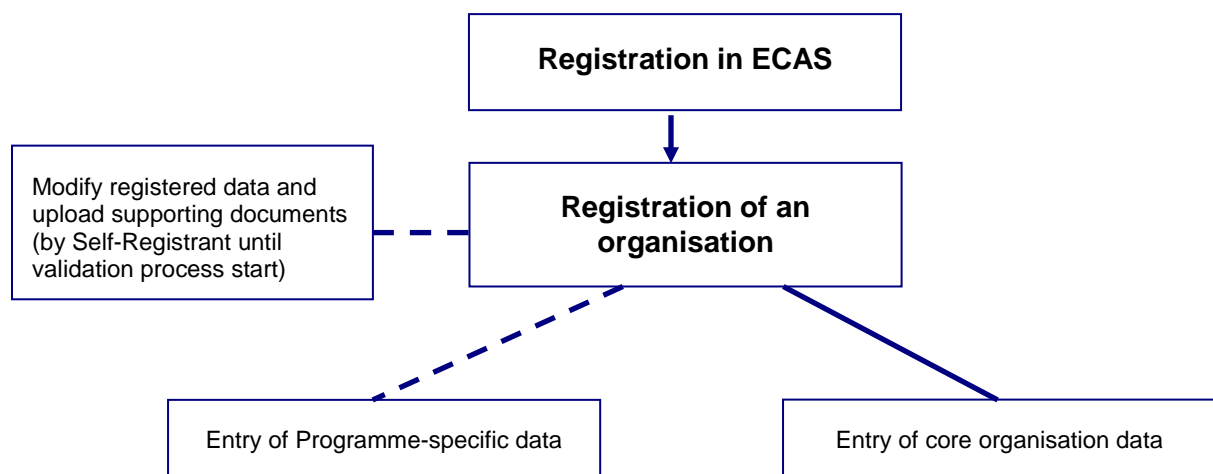
TheRegistration Process

In URF, you can register:

- your own organisation (an organisation you work for, or to which you are involved in a close business relationship) – when you self-register, or

- a different organisation -when you register "on behalf of another organisation" (an option in the registration wizard).

The process for both variants is identical, the only difference being in the Contact page whereyou are prompted if you register on behalf of another organisation and if so, you must refer a relevant Contact Person for the organisation being registered.The Contact Person must be formally associatedwith the organisation.

The initial registration process involves the use of the Registration Wizard – a series of data input fields and selection lists are organised thematically across several pages where you

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are prompted to provide information about the organisation as well as additional related data. The last step enables you to provide programme-specific information to better identify your organisation as a future participant.

The Registration Wizard contains a preliminary step (the Welcome page) in order to check whether the organisation that is to be registered already exists in the database. If the organisation data matches an existing legal entity, URF will offer you a list of "similar" organisations that you could choose to use.

Saving a Draft and Resuming Registration

After you complete the initial step in the registration process, you are enabled to save a draft of the registration data submitted up to that point and resume the registration at a later time.

You can save your draft using the Save Draft button available on each page from Step 2 onwards.

When you save a registration draft, you will receive an automatically generated notification email to the email address provided during ECAS registration.

You can delete your draft using the Delete Draft button.

URF will keep your draft for up to 12 months as of the latest draft save. If you do not resume the registration within a year's time, your draft data will be automatically deleted.

Organisation Data Modification& Updates

You can modify your organisation's data from the "My Organisations" tab (by clicking the "OD" button next to the respective organisation) in the main menu.

When you modify organisation data, URF presents the data in the same structure as during the registration and validation processes:

- Core organisation data updates

- Common organisation data updates

- Specific organisation data updates–legal organisation status information, programme-specific data modifications, and so on.

See section **DATA MODIFICATIONS AND UPDATES** further in this document.

Document Management

As a self-registrant, you can upload supporting documents for an organisation and modify their metadata.

You can also read and download all the uploaded documents for the respective organisation. However, you cannot delete a document once uploaded in the system, even if you uploaded it.

Message and Error Management

Messages: Communication to Self-Registrant

The Message management facility in the Update Panel allows users, associated with the organisation, to create and send custom messages concerning the organisation, as internal or external communication to other parties dealing with this organisation.

Error Messages

URF will display an error message whenever the data entered is incorrect, incomplete or missing.

Error messages are displayed on the left-hand side of the respective page of the Registration Wizard and the problematic entry field is highlighted.

Roles

When you submit the organisation data as a new participant, you are assigned the Self-registrant role as the actively logged-in user in ECAS. The Self-registrant role is also assigned to the Contact Person if the contact provided in the Registration Wizard is a different person and not the actively logged-in user.

When you register your organisation the Self-registrant role is also assigned in IAM (Identity and Access Management) to the Contact Person. IAM is synchronized with ECAS soOn the next synchronisation between IAM and ECAS, ECAS will automatically send an invitation to the Contact Person's email address if it does not have this account registered.

Viewing Organisation Details

To view the details of an organisation you are linked to, log in to the Participant Portal and open the 'My Organisations' tab. From the 'Organisations' tab page, you can view a list of your organisations – click the button next to an organisation to view its details.

To view the details of any organisation registered in URF, use the Search where you can search for an organisation by its unique PIC number or by other search criteria.

REGISTRATION IN URF

Registration:Access to ECAS& URF

Registration in URF is the registration of an organisation from the Participant Portal page.

You can register:

- your own organisation as a participant - i.e. an organisation you are part of or are associated with in business terms, or

- on behalf of an organisation different than your "own" one - for example, if you are a Project Coordinator for a project involving a Consortium of several organisations.

Any ECAS user can register an organisation. To self-register in URF, you must first log in to ECAS from the Participant Portal page.

Follow the procedure below to perform the preparatory steps – logging in to ECAS and accessing the URF registration wizard:

1. In your browser, open the Participant Portal page at
   http://ec.europa.eu/education/participants/portal/

2. Log in to ECAS – click the**Login** button as indicated in the visual example in **Figure 1: Participant Portal - Welcome Page** below.
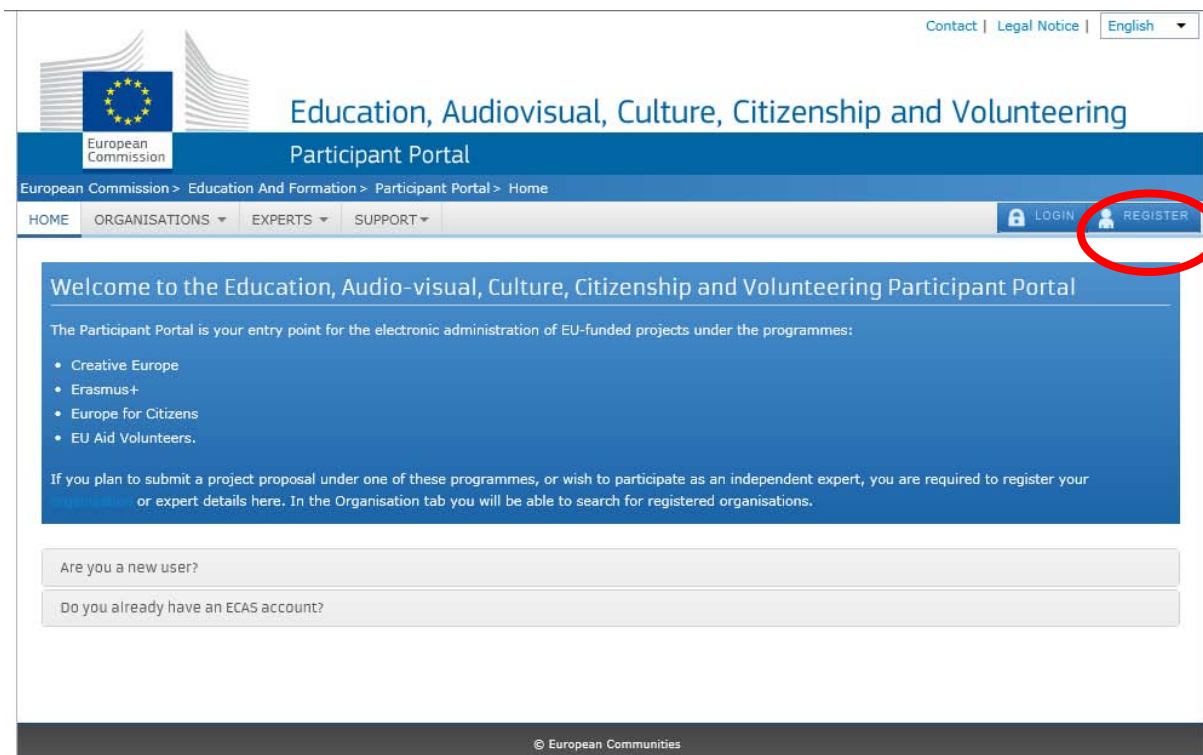
Figure 1: Participant Portal - Welcome Page

If you are not registered in ECAS yet, please make a new registration by clicking on **Register**, as shown on **Figure 2: Participant Portal - Registration on ECAS**.

For more information on the ECAS registration process see ECAS help at: https://webgate.ec.europa.eu/cas/help.html.
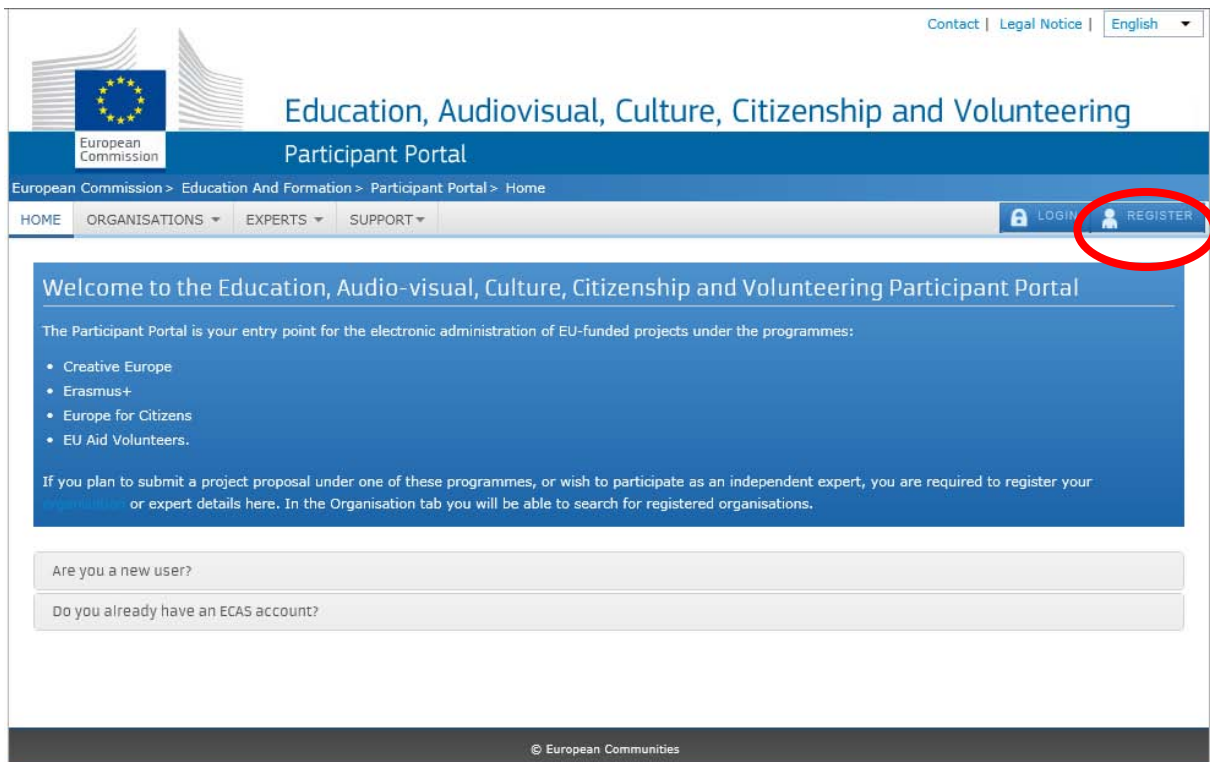
Figure 2: Participant Portal - Registration on ECAS

Once you log in, the Welcome page of the Participant Portal will open –see**Figure 3: Participant Portal - page after log in**Σφάλμα! Το αρχείο προέλευσης της αναφοράς δεν βρέθηκε..
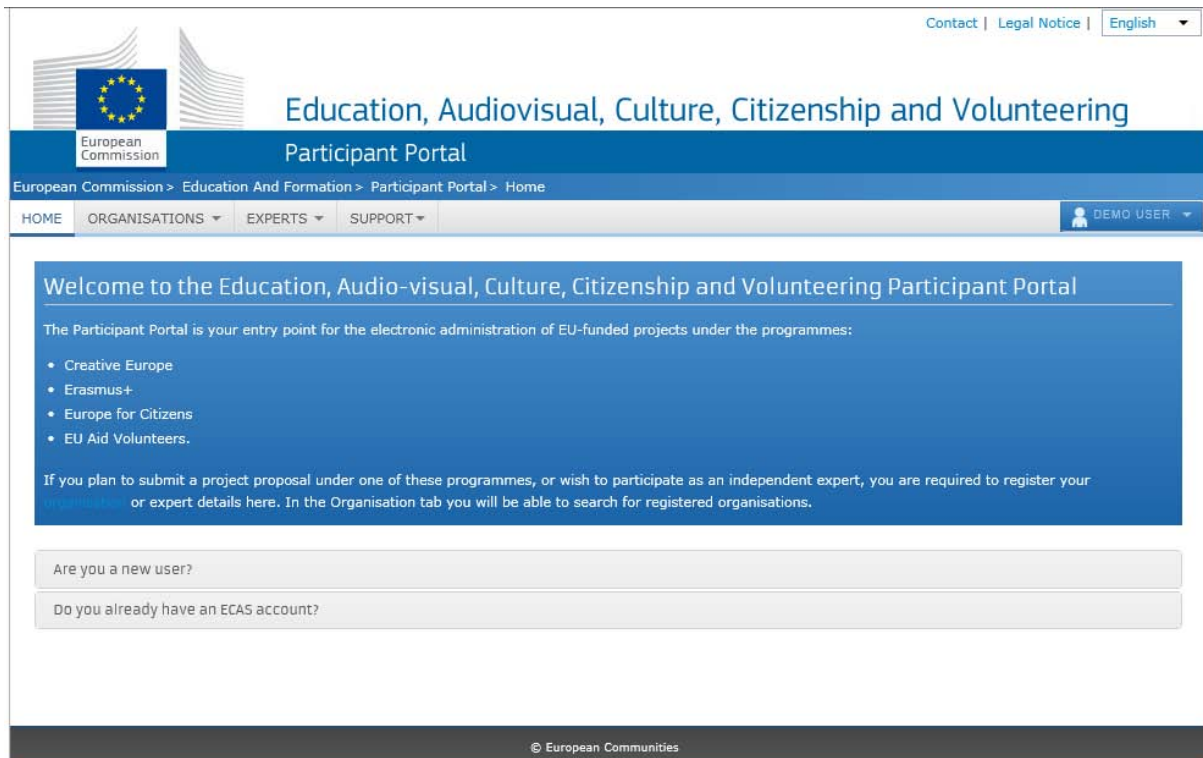
Figure 3: Participant Portal - page after log in

3. Click **Organisations** tab and then **Register**to open a registration page(**Figure 4: Participant Portal - Register anOrganisation**).

Figure 4: Participant Portal - Register anOrganisation

4. Click the **RegisterOrganisation**link to proceed to the actual organisation registration process:

Note: If you have performed some of the registration steps before and you have then saved your draft registration click Resume Registration there.
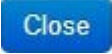
Registration: The Registration Wizard

The URF Registration Wizard provides an easy step-by-step procedure for initial registration, including a preliminary check for an organisation duplicate in the system.

Note that the following buttons are available in all pages of the Registration Wizard:

- Click Next > / < Back to go to the next/ previous registration page; note that you can browse this way only if you have completed the mandatory fields in the currently open page.

- Click Save Draft to save your current data in a temporary URF database. This option is available from the **Registration Wizard: ORGANISATION Data** page onwards.

Save Draft & Resume Registration for more information.

- Click **Delete Draft** to delete your registration draft if you have saved one. This button is read-only when no draft exists.

- Click **Close** to exit the Registration Wizard without saving the data entered sinceyour last saved draft (if any) or since your last login (when no draft exists).

- Most of the entry fields and selection drop-down lists provide additional help tips via the ⓘ buttons – hover with the mouse on the respective button to display useful information about the required entry.

Registration Wizard: WELCOME (Preliminary Check)

On the Welcome page of the Registration Wizard, URF performs a registrationduplicate check prior to the actual registration process, in case the same organisation has already been registered in the system in the past.

In the Welcome page (see **Figure 5: Registration – Welcome**), perform the following steps:

1. Enter the legal name of the organisation.

Figure 5: Registration – Welcome

2. Enter the legal name of the organisation.

3. Provide the VAT number of the organisation, if available:

- if the organisation has a VAT number, click **[Yes]** and enter the number in the entry field that appears next to the button row;

- else, click **[No]** and proceed to the next step.

4. Provide the business registration number of the organisation, if available:

- if the organisation has a business registration number, click **[Yes]** and enter the number in the entry field that appears next to the button row; If there is any national identification of the organisation, different from PIC and VAT numbers, it can be entered here.

- else, click **[No]** and proceed to the next step.

5. Provide the address of the website of the organisation, if available:

   - if the organisation has an official website , click **[Yes]** and enter the website address in the entry field that appears next to the button row;

   - else, click **[No]** and proceed to the next step.

6. Click **[Next]** to proceed to the next screen or click **[Close]** to cancel the registration at this time.

   Note: During this step you cannot save a draft of the registration data.

   The system will display a list of any"similar"organisations matching (or close to) the criteria you have entered. Organisation status can vary ('DECLARED', 'VALIDATED', etc.),as shown on**Figure 6: Matching organisations** below**:**
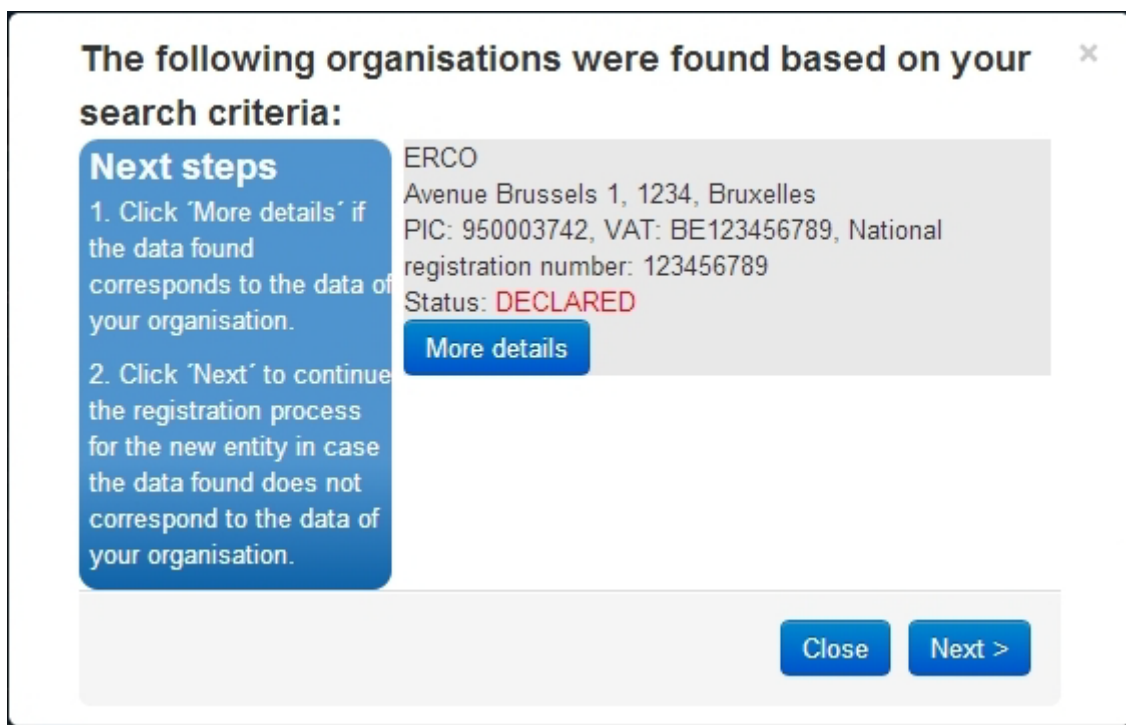
Figure 6: Matching organisations

- If you cannot find your organisation in the list, click [Next >] to start the registration procedure.

- If your organisation is displayed in the list, then it has already been registered in URF. Click [More details] for the respective organisation to start using this organisation as a participant and to view available information about it (see **Figure 7: Previously registered organisation**).
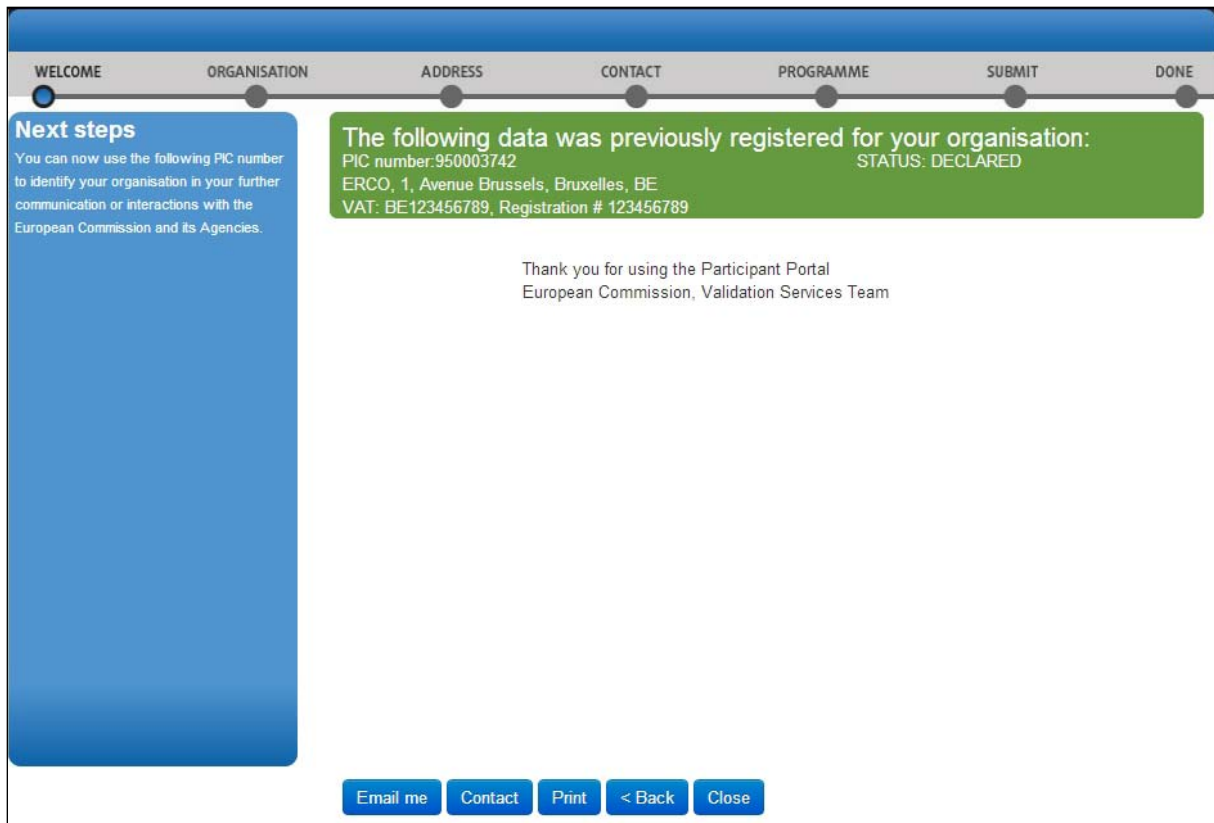
Figure 7: Previously registered organisation

In the Done page, you have the following options:

- Click [Contact] to send anemail to the contact person for the "similar" organisation - see**Figure 8: Explanatory email to thecontact personof a similar organisation.** The objective of such communication could be, for example, to formally check with the contact person if the organisation is the correct one to useor not (so you can proceed with the registration of a new entity).

- Click [Email me] to receive a mail containing some data of the 'similar' organisation. See image below.
  Note: This option is not available when a new organisation is being registered.

- Click [Print] to print a summary of the data of the organisation.

- Click [< Back] to go back to the fresh registration page.

- Click [Close] to go back to quit the Registration Wizard and return to the Participant Portal page.
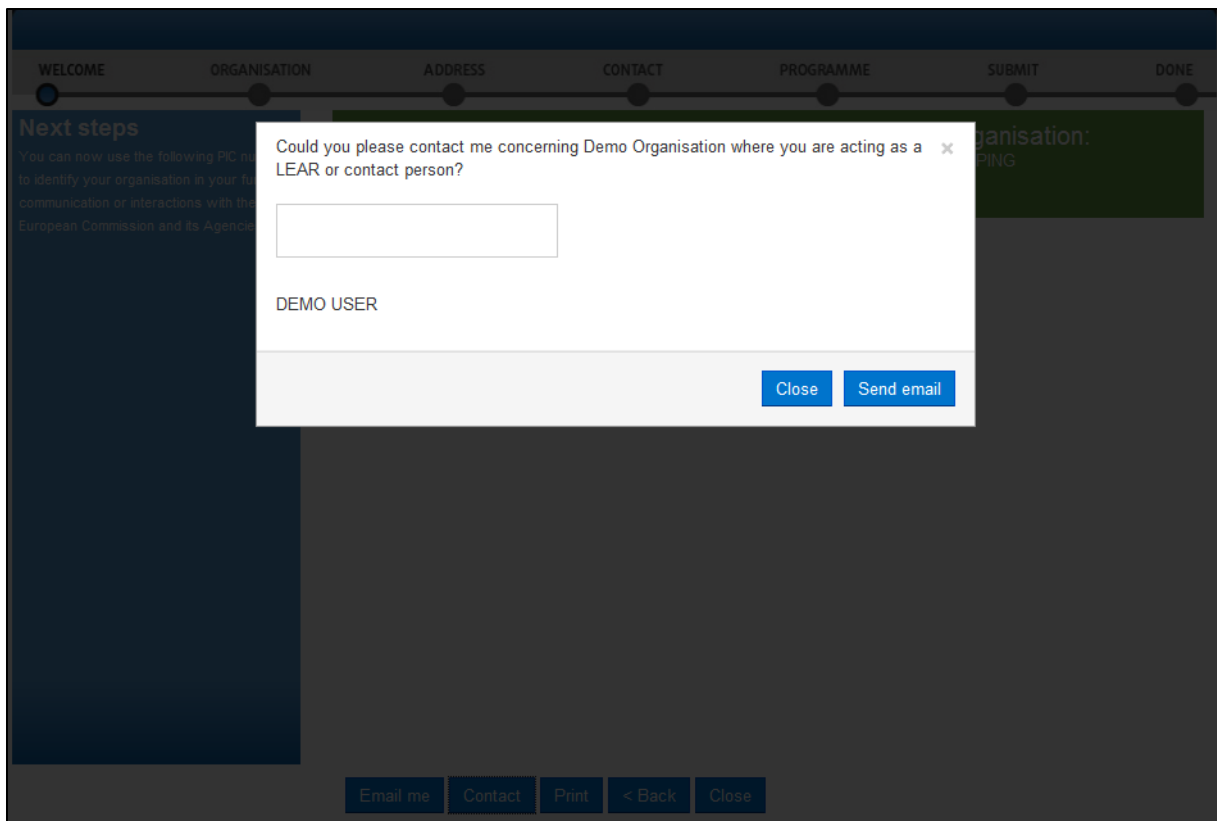
Figure 8: Explanatory email to thecontact personof a similar organisation

Enter the content of your email to the contact of the organisation and click [Send email] to send the email, or click [Close] to cancel.

Registration Wizard: ORGANISATION Data

On the **ORGANISATION** page of the Registration Wizard, URF will prompt you for the core data of your organisation, such as – legal name, business registration number and authority, and more. You are required to fill in all the mandatory entry fields (marked with an asterisk *) and it is recommended to provide as much information as possible in all other input prompts.

In the Organisation page (see**Figure 9: Registration –Organisation coredata**), perform the following steps:

1. In the first prompt, 'Do you register on behalf of another organisation?', select 'Yes' if you are registering on behalf of another organisation. The default value is 'No'.Any ECAS user can register on behalf of an organisation different than their own one – for example, a Project Coordinator.

   Note: If you are registering on behalf of another organisation, the Participant Identification Code (PIC) that is assigned at the end of the registration process will be associated with that other organisation, so in the next stages of registration you will be required to provide contact data that is relevant to that organisation, including a Contact Person who will be requested to provide supporting documents during the process of validation of the data.

Figure 9: Registration –Organisation coredata

2. In the next four prompts, specify the type of the organisation you are registering.

FIELD	COMMENT
Legal Person	A Legal Person has a legal personality, can act on its own name, exercise rights and be subject to obligations. A 'Legal Person' is established on the basis of 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).
Natural Person	A 'Natural Person' is a citizen (to be distinguished from a 'Legal Person', which refers to corporations, etc.).**For informal groups of young people, one member of the group should register, as anatural person, in the Organisation tab, on behalf of the group.**Natural Persons always have legal personality and are therefore legal entities without other proof being required than their identification papers. Please note that an individual who is registered as a freelance professional and has a VAT number, can also be considered a 'Legal Person', in addition to being a 'Natural Person'. As a result, a citizen who is a freelance professional must choose whether to apply as a 'Natural Person' or as a 'Legal Person'.
Non-ProfitOrganisation	A legal entity is qualified as a 'Non-Profit Organisation' when it is considered as such by national or international law (international organisations as well as any specialised agency set up by international organisations). As a general consequence, any possible profits have to be reinvested within the organisation itself and may not be distributed. The quality of being a Non-Profit Organisation has to be proven by your statute.

FIELD	COMMENT
Public Body	*A 'Public Body' stands for any legal entity established as such by national public law, and international organisations.* *Established' signifies that the legal entity must be either incorporated as a Public Body in the formal act and/or governed by public law (usually both are required).* *To define a legal entity as a Public Body, more criteria are required than just the direct supervision of a legal entity by the State, the public financing or the public service mission.*
NGO	*A 'Non-Government Organisation' (NGO) stands for a legally constituted corporation created by natural or legal persons that operate independently from any form of government. The term normally refers to organisations that are not a part of a government and are not conventional for-profit businesses. In the cases in which NGOs are funded totally or partially by governments, the NGO maintains its non-governmental status by excluding government representatives from membership in the organisation. NGOs are typically non-profit organisations..*

3. Enter the 'Business name' of the organisation (optional). The Business Name can be the official acronym of your organisation. This field can also be used to enter the name of the organisation in "latin characters" when the legal name is written in a different alphabet. This will facilitate the communication across Europe. It can be up to 40 characters long.

4. Enter your 'Business registration number' of the organisation (if available). This is usually a unique code identifying your organisation, usually provided by the Chamber of Commerce of the country of registration/establishment of the organisation. 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. Any other national identification of the organisation, different from PIC and VAT numbers, can be entered here. If your organisation does not have a Business Registration Number, you can enter "not applicable".

5. Enter the 'Registration date' when the organisation was established/registered. The Registration Date is the date when your organisation was established or registered as such - for example, with the Chamber of Commerce in your country.

Figure 10: Registration – Organisation core data (scroll down)

6. Enter the 'Registration authority' under which the organisation was established/registered.The Registration Authority is the authority that your organisation was registered before - for example, the administrative body of the city/region, the Chamber of Commerce, and so on.

7. Select the 'Establishment/Registration Country' of the organisation from the drop-down list. Usually this is the location of the headquarters of the organisation.

8. Select the 'Region/County' where the organisation was established/registered. Even if marked as "optional" this information is essential for the Education Programme. It is strongly suggested to fill the region.

9. Enter the 'Legal Name' of the organisation. The Legal Name must correspond to the official legal name in the statute of the organisation. This field can be up to 240 characters long.

10. Select the 'Official Language' for the organisation. This is the language officially used for communication within the organisation.

11. Provide the 'VAT number' of the organisation (if available) – click 'Yes' and enter the VAT number in the field that is will appear next to the button. The VAT number is a unique number given to every organisation that pays Value Added Tax (VAT).

12. Provide the 'NACE code' of the organisation (if applicable). 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 using a 6-digit code format. For more information: http://ec.europa.eu/eurostat/ramon/index.cfm?TargetUrl=DSP_PUB_WELC

13. Specify the 'Legal form' of your organisation – expand the drop-down list and select the option that best corresponds to the legal registration form of your organisation. Select 'OTHER' if you cannot find a suitable legal form in the list. The legal form is usually noted in the registration act/statute of the organisation. It depends on the type of the legal entity and the country of registration. For example, if your organisation is a private body, its legal form could be LLP, Ltd, PLC, SA, GmbH, etc. After validation of the organisation data, the Legal Form field will be shown as validated by the European Commission.

Note: 'University' and 'Public Body' are not valid legal forms.

14. Click Next >.

Registration Wizard:Legal ADDRESS Data

On the **ADDRESS** page of the Registration Wizard, URF will prompt you for the legal address of your organisation and for other data related to this – such as, internet address, phone numbers, etc.

You are required to fill in all the mandatory entry fields (marked with an asterisk *) and it is recommended to provide as much information as possible in all other input prompts.

In the Address page (see**Figure 11: Organisation Legal Address related information**), perform the following steps:

1. Enter the 'Street name' as part of the Legal Address, as stated in the official legal statute of the organisation (in most cases this is the address of the headquarters, not the address of subsidiaries, departments, and so on).

Figure 11: Organisation Legal Address related information

2. Enter the 'Street number' or the name of the building on the street in the organisation's Legal Address (can be up to 20 alphanumerical characters long).

3. Enter the 'P.O. Box'number if the organisation has a postal box.

4. Enter the 'Postal code' - the Postal/ZIP Code of the organisation's Legal Address.

5. Enter the 'CEDEX' code - only applicable for France.

6. Select the 'City' of the organisation's Legal Address from the list. This is the official name of the City where the organisation was established.

7. Specify the 'Region/County' where the organisation was established.

8. Select the 'Country' of the organisation's Legal Address from the list. This is the official name of the Country where the organisation was established.

9. Specify the 'Main phone' number for official communication with the organisation. Use the following format, without any spaces: +CCCNNNNNNNNNNNNNNxBBBBB : international code -C- (1-3 digits, no zeros) followed by your phone number -N- (max 14 digits), followed by extension -B- ("x" char + max 5 digits; optional).

10. Enter the 'Fax' number for official communication with the organisation. Use the following format, without any spaces: +CCCNNNNNNNNNNNNNNxBBBBB : international code -C- (1-3 digits, no zeros) followed by your phone number -N- (max 14 digits), followed by extension -B- ("x" char + max 5 digits; optional).

11. Specify the 'Secondary phone' number for official communication with the organisation. Use the following format, without any spaces: +CCCNNNNNNNNNNNNNNxBBBBB : international code -C- (1-3 digits, no zeros) followed by your phone number -N- (max 14 digits), followed by extension -B- ("x" char + max 5 digits; optional).

12. Specify the 'Internet address' for official communication with the organisation. The format must be www.homepage.domain - for example, www.mycompany.com.

13. Click Next > to proceed to the next step.

Registration Wizard:CONTACT Data

On the **CONTACT** page of the Registration Wizard, URF will prompt you to enter the contact information of the person who will be the official point of contact for this organisation. If you are registering on behalf of another organisation, the Participant Identification Code (PIC) that is assigned at the end of the registration process will be associated with that other organisation, so please provide contact data that is relevant to that legal entity, including a Contact Person who will be requested to provide supporting documents during the process of validation of the data.

You are required to fill in all the mandatory entry fields (marked with an asterisk *) and it is recommended to provide as much information as possible in all other input prompts.

In the Contact page (see**Figure 12: Registration –Contact Information**), perform the following steps:

1. Enter the 'Title' of the Contact Person (Mr., Mrs., Prof., Dr., etc.).

Figure 12: Registration –Contact Information

2. Enter the Contact Person's 'Position in the organisation'.

3. Enter the organisation 'Department' / division where the Contact Person sits.

4. Enter the official 'Professional e-mail' address of the Contact Person. It must belong to the Contact Person and not to a function/team/group in the organisation.

5. Specify the 'Gender' of the Contact Person.

6. Enter the 'Last name' of the Contact Person. The system automatically displays the last name of the self-registrant - modify it if the Contact Person is different.

7. Enter the 'First name' of the Contact Person. The system automatically displays the first name of the self-registrant - modify it if the Contact Person is different.

8. In the Address section, click 'Yes' if you want to use the previously entered address information for the Legal Person. This option will automatically copy the address data provided in the previous step.

   If you leave the option to 'No' (default), please provide new address information as follows.

   a. Enter the 'Street name' of the Contact Person's address.

   b. Enter the 'Street number' or the name of the building on the street in the Contact Person's address (can be up to 20 alphanumerical characters long).

   c. Enter the 'P.O. Box'number if the Contact Person has a postal box.

Figure 13: Registration – Contact Information (scroll down)

   d. Enter the 'Postal code' - the Postal/ZIP Code of the Contact Person.

   e. Enter the 'CEDEX' code - only applicable for France.

   f. Select the 'City' of the Contact Person's address from the list.

g. Specify the 'Region/County' of the Contact Person's address.

h. Select the 'Country' of the Contact Person's address

9. In the 'Phones' section, select 'Yes' if the phone numbers of the Contact Person are the same as previously entered for the Legal Person. This option will automatically copy the phone data provided in the previous step. If you leave the option to 'No' (default), please provide new phone number information as follows.

   a. Specify the 'Main phone' number of the Contact Person. Use the following format, without any spaces: +CCCNNNNNNNNNNNNNNNxBBBBB : international code -C- (1-3 digits, no zeros) followed by your phone number -N- (max 14 digits), followed by extension -B- ("x" char + max 5 digits; optional).

   b. Enter the 'Fax' number of the Contact Person. Use the following format, without any spaces: +CCCNNNNNNNNNNNNNNNxBBBBB : international code -C- (1-3 digits, no zeros) followed by your phone number -N- (max 14 digits), followed by extension -B- ("x" char + max 5 digits; optional).

   c. Specify the 'Secondary phone' number of the Contact Person. Use the following format, without any spaces: +CCCNNNNNNNNNNNNNNNxBBBBB : international code -C- (1-3 digits, no zeros) followed by your phone number -N- (max 14 digits), followed by extension -B- ("x" char + max 5 digits; optional).

10. Click Next > to proceed to the next step.

Registration Wizard:PROGRAMME-Specific Data

On the **PROGRAMME** page of the Registration Wizard, you have completed the first part of the registration process. Before clicking on"Finish your registration"please provide programme-specific information about your organisation related to the Programme you intend to apply for.

Figure 14: Programme specific information – select a programme

In the case of "Erasmus+" and once the programme selection is chosen, you will see a page similar to presented below.

Figure 15: Programme specific information page

Select your organisation type from the list provided. If none of the options is relevant for your organisation, select "OTHER" and add a short description of your organisation in the "Organisation description" field.

Once you finish, click [Save and Return] to continue to the previous page.

Next, click [Finish your registration] to see a summary of your organisation you are registering.

Figure 16: Finishing registration

Registration Wizard:SUBMIT (Summary)

On the SUBMIT page, you can review and verify all the data that you have submitted during the registration process (**Figure 17: Registration - Summary of your data**).

Figure 17: Registration - Summary of your data

Perform one of the following actions:

- To print a summary of your data, click Print.

- To suspend the verification of the data, click Save Draft to save a registration draft. Then the data is saved and the pop-up is closed.

- To delete your saved registration draft (if any), click Delete Draft.

- If you find a mistake or you want to make a correction for any other reason, click the relevant button on the top of the page (Organisation, Address, Contact or Programme) to go to the respective page that needs some of its data modified.

- When you check all your data and ensure that it is correct and consistent, click [Confirm] to submit the information.

When you submit your registration data, the Registration Wizard will display its final confirmation page (**Figure 18: Registration - Confirmation**) with the newly assigned PIC number of your organisation.

Registration Wizard: CONFIRMATION

The confirmation page shows a quick summary of your organisation legal data and displays your newly assigned PIC number -see**Figure 18: Registration - Confirmation.**

Figure 18: Registration - Confirmation

At this point URF will immediately send a confirmation e-mail containing the data you have submitted and the Participant Identification Code (PIC) of the organisation.The email will be sent to the emails of the self-registrant (as defined by their ECAS account) and to the Contact Person (using the Professional email provided in the Contact page).

An example of a confirmation e-mail follows below, including Erasmus+ programme-specific information:

From: fp7-pdm-noreply@ec.europa.eu

Subject: Your registration in the E.C. Unique Registration Facility (URF)

Dear Mr./Mrs. DEMO USER,

The Education and Culture Directorate-General and the Education, Audiovisual and Culture Executive Agency of the European Commission thank you for having registered a legal entity in our database of participant

organisations.

The record has been successfully created. The TEMPORARY Participant Identification Code (PIC) for the legal entity you have registered is 949701296.

You can now use your PIC in order to submit a proposal for the EAC/EACEA programmes If your organisation is selected for the projects managed by EACEA then your organisation will need to pass a Legal Entity validation and your organisation will have to provide supporting documents.

Please find downloadable forms and instructions on
http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm#fr
In case your organisation is applying for the projects managed by the national agencies (hyperlink to the list of NAs and list of projects (actions) managed by NA), your organisation should then provide the supporting documents as requested in the Guide for applicants and by your National Agency (this can be done by uploading the supporting documents in URF).

Please note that the validation could result in a possible change of the PIC (if e.g. the validation reveals that the same legal entity already exists under another PIC).

The Validation Service

You can find below a summary of the entered data:

Organisation Data
===================
Legal name: Demo Organisation
Business name: DEMO Organisation
Registration country: Belgium
Official language: English
NACE code: Computer programming, consultancy and related activities
Legal form: UNKNOWN
Legal form free text:
VAT number: BE123456789
Registration number: 123456789
Registration date: 01-01-1990
Registration authority: Demo Authority

Legal Address
===================
Street name and house number: Rue Demo

PO box: 1

Region/County: Arr. Admin. Bruxelles-Capitale - Admin. Arr. Brussel hoofdstad

Postal Code: 1000

CEDEX:

City: Bruxelles

Country: Belgium

Internet homepage: www.demo.com

Fax:

Main Phone: +322123456

Secondary Phone:

Main Contact Person

==================

Contact title: Mr

Contact gender: M

Contact position in organisation: CEO

Contact department:

Contact last name: USER

Contact first name: DEMO

Contact country: Belgium

Contact street: Rue Demo

Contact street number:

Contact PO box: 1

Contact region/county: Arr. Admin. Bruxelles-Capitale - Admin. Arr. Brussel hoofdstad

Contact postal code: 1000

Contact CEDEX:

Contact city: Bruxelles

Contact fax:

Contact primary phone: +322123456

Contact secondary phone :

Contact e-mail: demo@demo.com

EAC/EACEA related info

==================
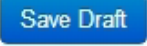
Organisation type: Other
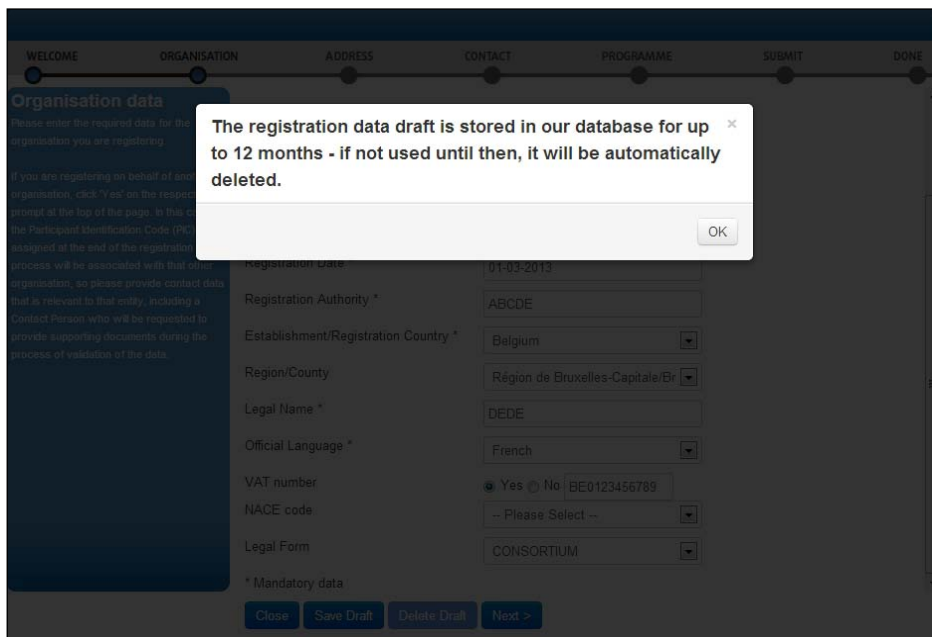
Organisation scope:

Organisation description: other organisation

Save Draft & Resume Registration

After you complete the initial step in the registration process, you are enabled to save a draft of the registration data you have entered up to that point, and resume the registration at a later time.

To save a draft,click the **Save Draft** button available on each page from**Registration Wizard: ORGANISATION Data** onwards.URF will display two notification messages on the screen, as shown on **Figure 19: Registration – Save Draft notification 1** and **Figure 20: Registration – Save Draft notification 2**.

Figure 19: Registration – Save Draft notification 1

Figure 20: Registration – Save Draft notification 2

Each time you save a registration draft, you will receive an automatically generated notification email to the email address provided during ECAS registration.

To resume the registration from a saved draft, log in and click the Resume Registration link inthe 'Resume a draft registration' area in the 'Register' tab - see **Figure 21: Registration – Resume a draft registration** below:

Figure 21: Registration – Resume a draft registration

Note: The system will only resume registration from your latest draft – you cannot keep more than one registration draft at a time.

Note: The Resume Registration link is only available if you have an existing draft saved.

The Registration Wizard will open the page where you last saved your draft sothat you can complete any remaining registration steps and modify/verify your current data from the respective pages- see**Figure 22: Registration- Data Modifications**.

Figure 22: Registration- Data Modifications

You can delete your draft using the [Delete Draft] button available on each page (read-only if no draft has been saved). The Registration Wizard will close.

Note: URF will keep your draft for up to 12 months as of the latest draft save. If you do not resume the registration within a year's time, your draft data will be automatically deleted.

Modifying the Registered Data

After submitting your registration datayou can modify the registered data from the 'Organisations' > 'My Organisations' tab. To do so,click the button next to the organisation – see **Figure 23: Registered organisations**below.
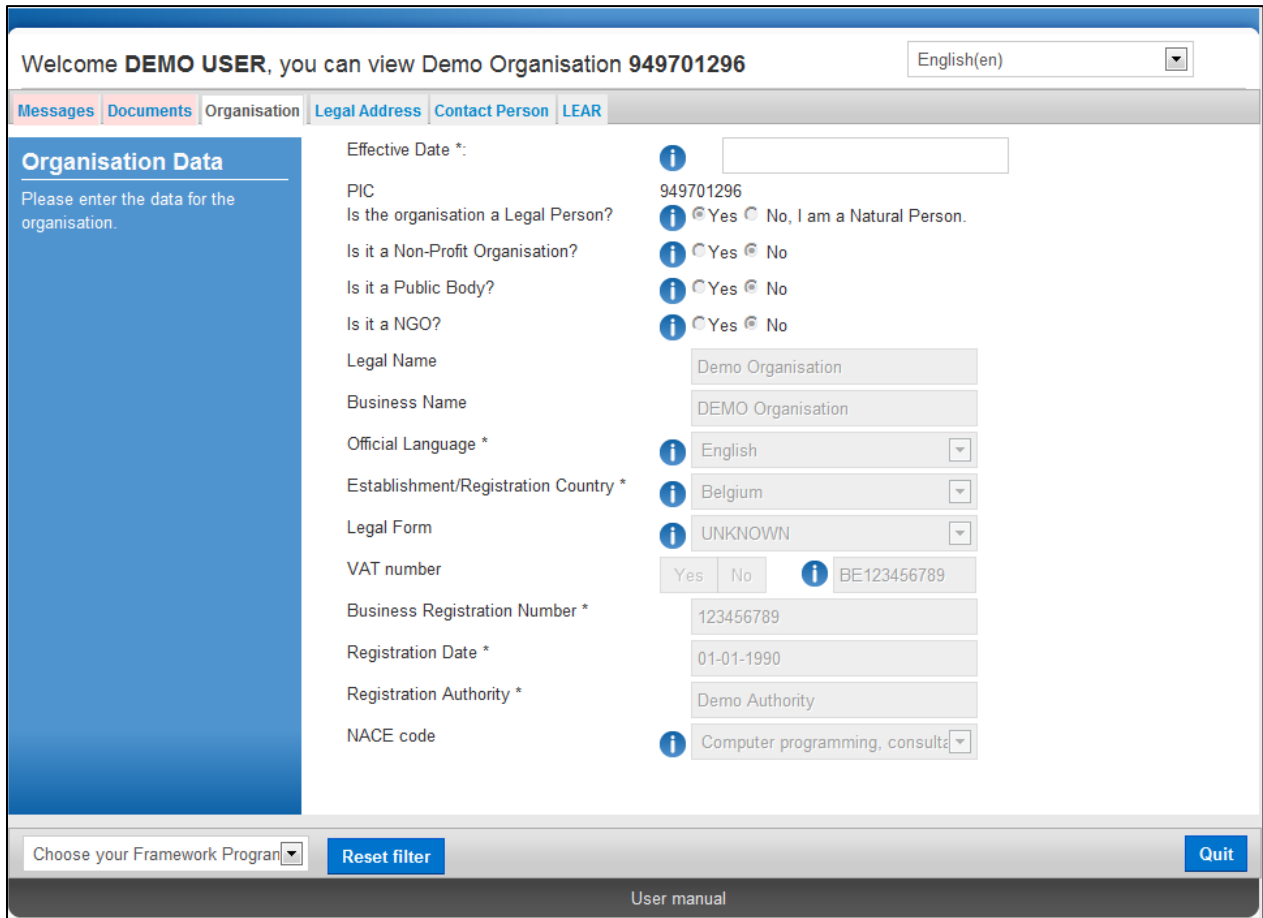

Figure 23: Registered organisations

For more information, see section **Modifying Organisation Data.**

Viewing the Registered Data

To view your registration data as a self-registrant, after submitting it but prior to the start of its validation, go to the 'Organisations' > 'My Organisations' tab and click the button next to the respective organisation.

The 'My Organisation' tab page in the organisation data update panel will open by default. You can view the organisation, legal address, and contact person details from the respective tab pages (see**Figure 24: Registration - Data Submitted**).

Figure 24: Registration - Data Submitted

Uploading Supporting Documents

You are able to upload additional documents up to 6 MB per document file. Once uploaded, these documents cannot be withdrawn or modified.

IMPORTANT: For full details about Document Management in URF, see section **DOCUMENT MANAGEMENT**. The current section only provides a step-by-step procedure for uploading documents as a Self-Registrant.

To access the Document Management facility, click go to the'My Organisations' > 'Organisations' tab in the main menu of the Participant Portal, then click the **VO** button next to the organisation for which you want to upload documents.

The 'Organisation' tab page inthe URF Update Panel will open by default. To upload a document, go to the Documents tab, as shown in **Figure 25: Registration - Documents Page**.
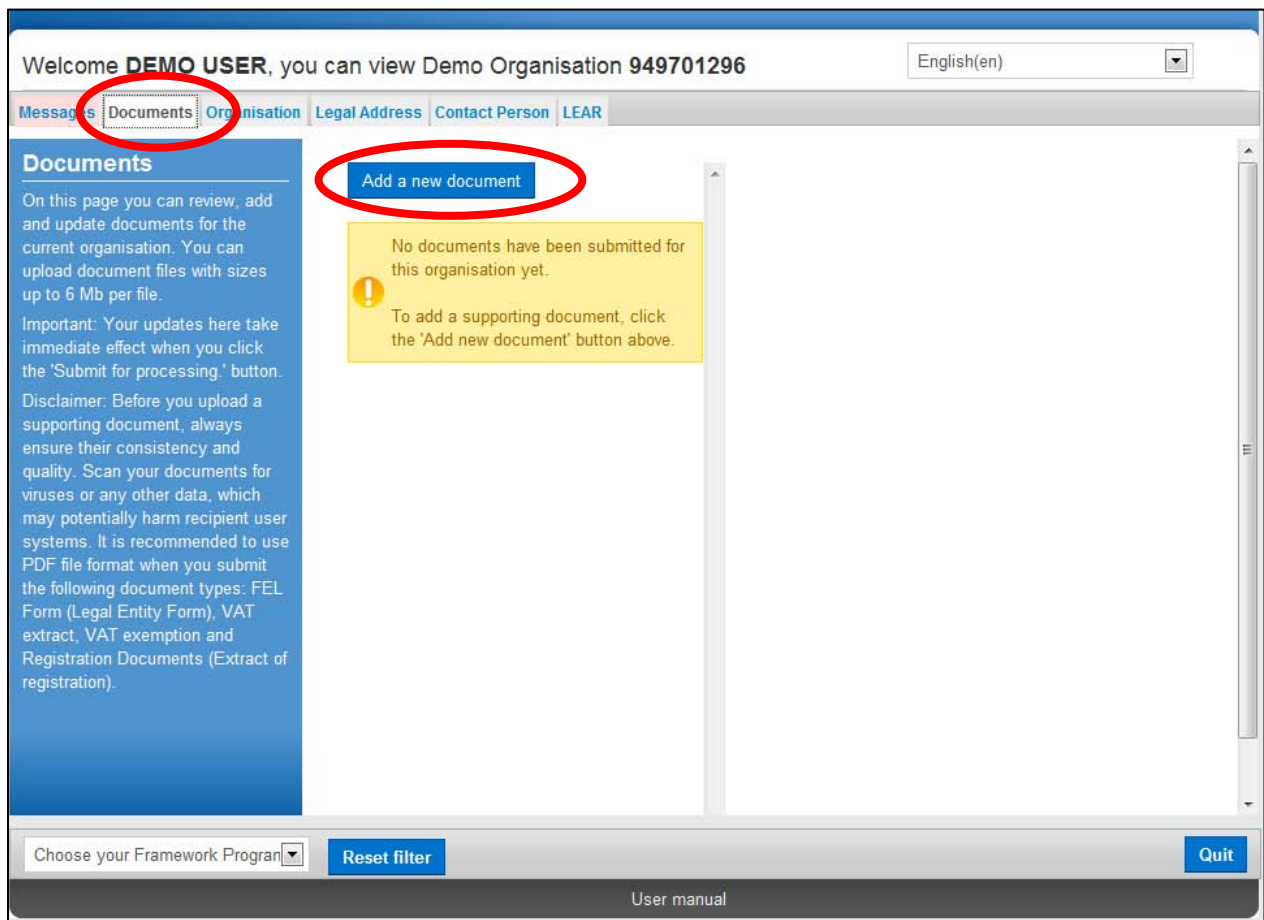

Figure 25: Registration - Documents Page

Note: The Update Panel, where the Document Management Facility is located, will show additional tabs when a specific programme is selected from the drop-down list at the bottom left corner of the page.

To upload a new document, perform the steps below:

1. Click **Add new document** and the document properties pane will appear on the right-hand side of the page:
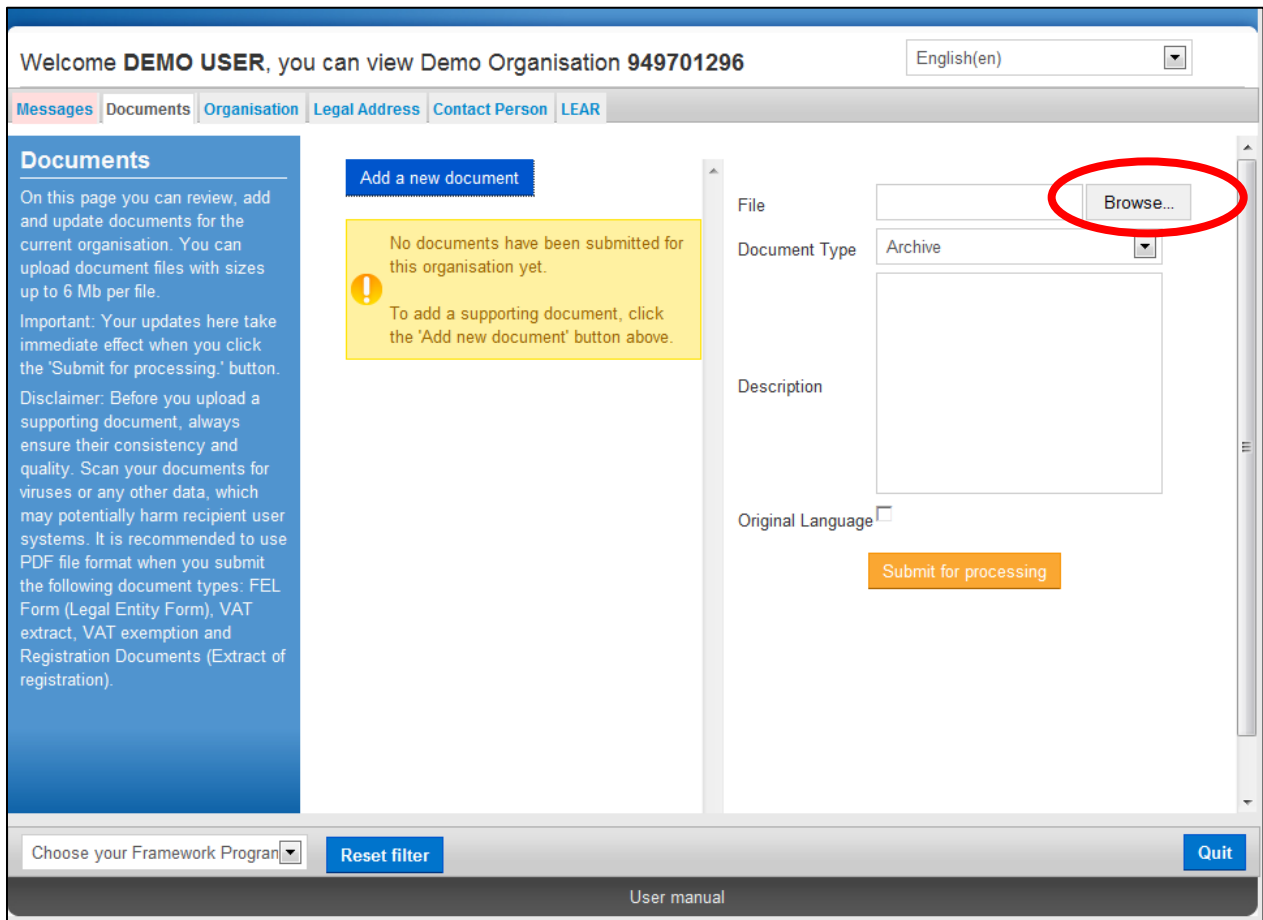

Figure 26: Registration - Upload New Document Page

2. Click **Browse...** to browse for the file you want to upload.

3. Select the desired document file and click **Open**

4. Select the Document Type from the drop-down list (**Figure 27: Registration - Upload Document – Document Type**):
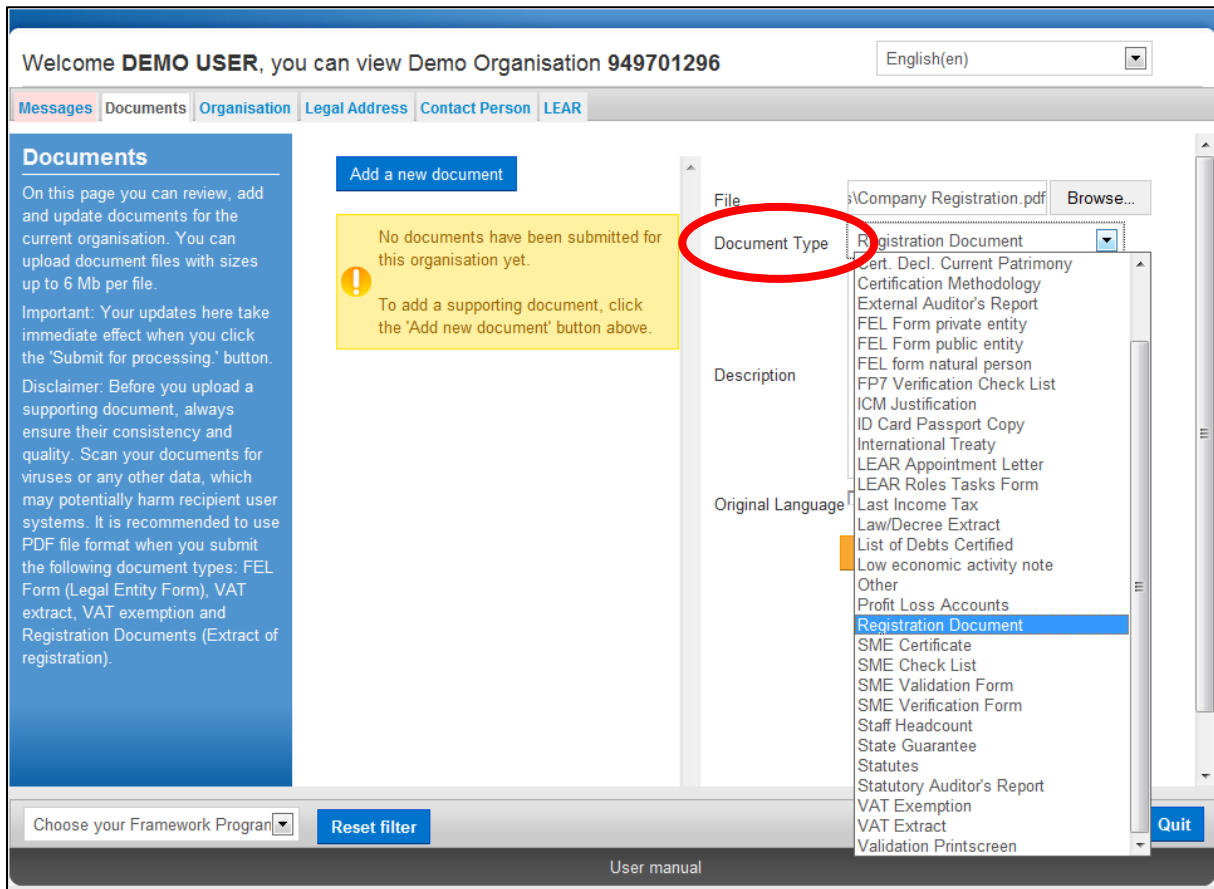

Figure 27: Registration - Upload Document – Document Type

Note: If your document does not fall under any of the types in the list, select type 'Other'. See section **DOCUMENT MANAGEMENT** for more information about document types.
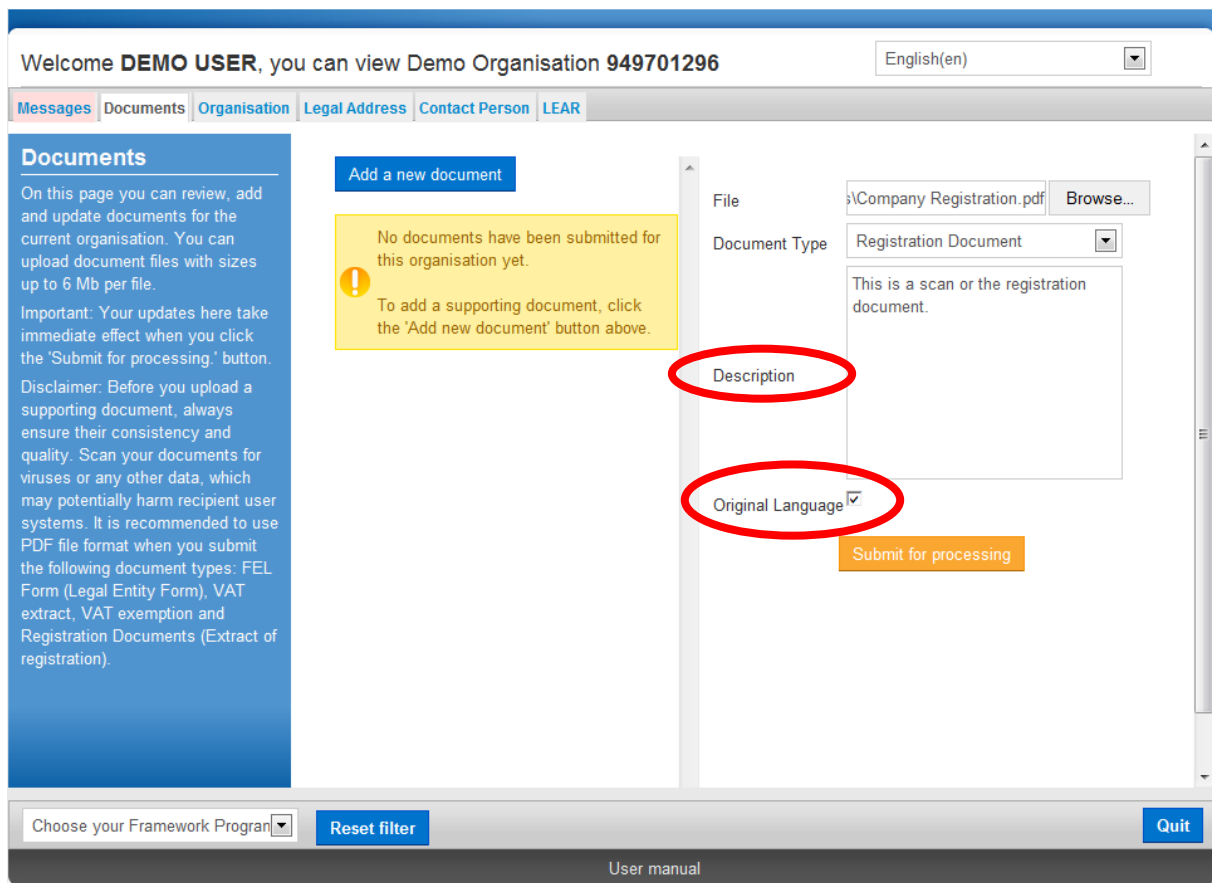
Figure 28: Registration - Upload Document –Description & Official Language

5. In the Description field (**Figure 28: Registration - Upload Document –Description & Official Language**), enter a description of the file – author, subject, content, and so on.

6. Check the 'Original language' box if the document is in the original language of the organisation (for example, the place of establishment of the organisation).

7. Finally, click Submit for processing to save your data and to upload your file.
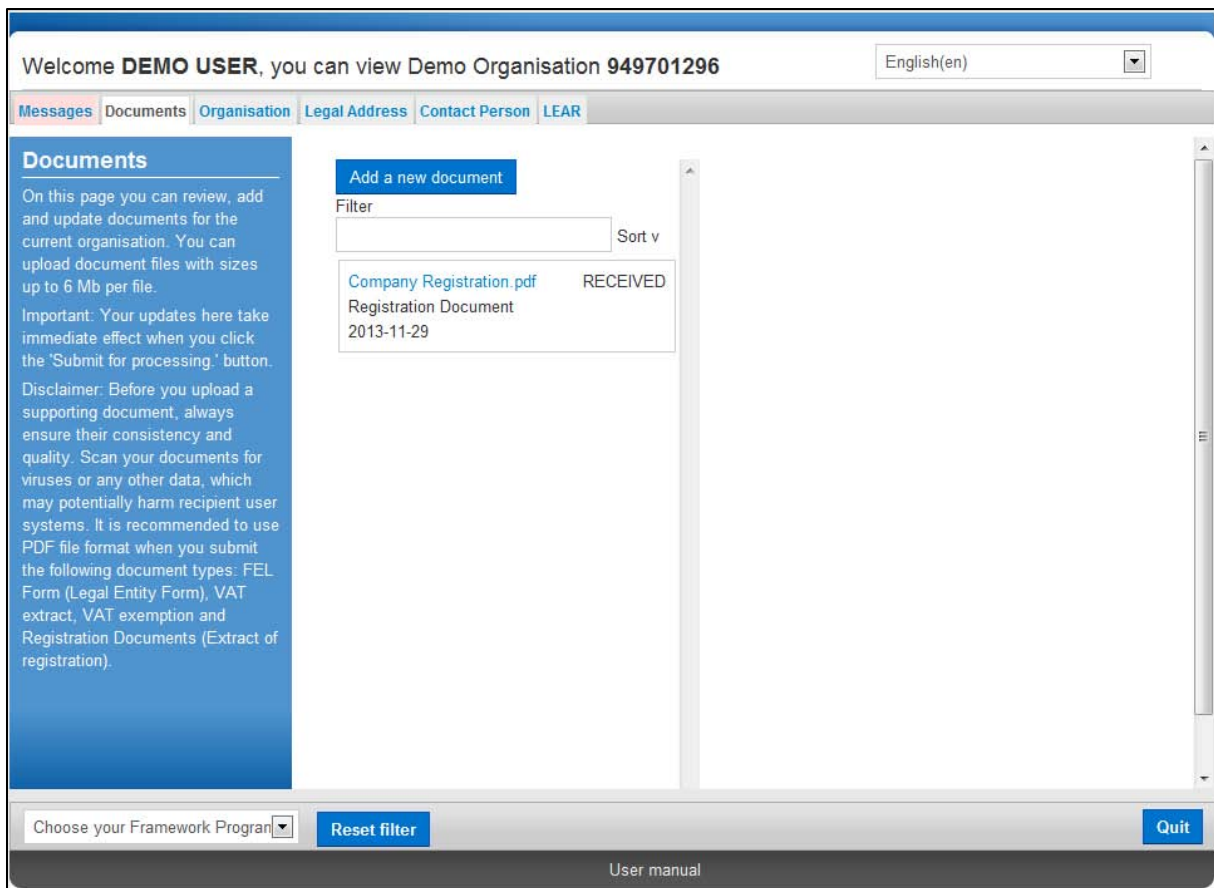
Figure 29: Registration - Uploaded Document List

Your document has been uploaded - in the document list area on the left-hand side of the page (**Figure 29: Registration - Uploaded Document List**), you can now see all your uploaded files.

Note: See section**DOCUMENT MANAGEMENT** for more information about document statuses.

8. Now you can:

    *   click **Add new document** to upload another document , or

    *   click **Quit** to exit the Documents Management FacilityURF Update Panel.

Note: All changes made in the 'Documents' tab are recorded immediately. However, if you have made other updates in the remaining tabs, you must click **Update your data** to save all the changes before quitting.

DATA MODIFICATIONS AND UPDATES

Modifying Organisation Data

You can modify your registration data. The update option is indicated by the accessible **Update your data** button on the URF Update Panel.

The URF Update Panel

The URF Update Panel (**Figure 30: The URF Update Panel**)enables users to update organisation data.

Figure 30: The URF Update Panel

The URF Update Panel contains the following tab pages:

- **Messages**

- **Documents**

- **Organisation**

- **Legal Address**

- **Contact Person**

- **Legal Status**

- **LEAR**

- **EAC**

Note: To show all these tabs, select a framework programme from the drop-down list located at the bottom left corner of the panel.

Common Options in the Update Panel

All Update Panel tabs contain the **Update your data** option–when you click this button, URFwill save **ALL** the modified data from **ALL** tabs and will then close the Panel. The only exception is the Documents facility – all the uploads and changes made there are implemented immediately when the data is submitted.
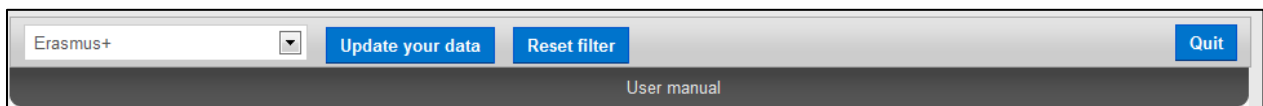
Erasmus+ ▾	**Update your data**	**Reset filter**	**Quit**
	User manual		

Figure 31: The URF Update Panel – common options

You can also reset the list of specific programmes in the list in the left corner of the Update Panel using the **Reset filter** button.

The **Quit** button allows you to discard your changes and close the Update Panel without saving any updates.

Core, Common, and Specific Data Updates

The Update Panel allows updating Core, Common, and Specific organisation data, generally following the order of data feed during the initial registration.

- **Core data**:
    - o Organisation Data (name, registration number, VAT number, etc.)
    - o Legal Address

- **Common data**:
    - o Contact Person
    - o Document Management

- **Specific data**:
    - o EAC organisation type

Updating Core Organisation Data

Core data updates cover the modification of core organisation information and legal address data in the Organisations and Legal Address tabs.

Organisation data

In the Organisation tab, you can modify all the core data of the organisation that was originally provided during the initial registration process. See section **Registration Wizard: ORGANISATION Data** for details about each field.

Whenyou modify the Legal Name, the Business Registration Number and/or the Establishment/Registration Countryof the organisation, you are required to specify the Effective Date when this modification is toenter into force. This information is required for grant amendment reasons.

Note: The Effective Date entry field is read-only by default and will only become editableafter one or more of the updates mentioned above is made.

Figure 32: Modifications of the validated data (Organisation Data)

Legal Address

In the Legal Address tab, you can modify any information related to the legal address of the organisation.

When you modify the Street Name, Street Number, Postal Code, City and/or Country, the hidden Effective Date field will be shown and will be automatically set to the current day's date. You can then set a different date when the updates made are to enter into force.

This information is required for grant amendment reasons.

Figure 33: Modifications of the validated data (Legal Address)

Updating Common Organisation Data

Common data updates cover the modification of organisation information in the Contact Person, and Documents.

Contact Person

In the Contact Person tab, you can modify the details of the Contact Person.

Figure 34: Modifications of the validated data (Contact Person)

Documents: Document Management

The **Document Management Facility** (the 'Documents' tab in the URF Update Panel) enables authorised users to upload new supporting documents and to modify the metadata (descriptions) of the documents uploaded by them.

Figure 35: Modifications of the validated data (Documents tab)

You can **upload** document files with sizes up to **6 Mb per file**. There is no limitation about the overall size of all the uploaded documents for an organisation. You must provide the 'Description', 'Type', and 'Author' for each document you upload – these fields are mandatory.

You can also **read** and **download** all the uploaded documents for the respective organisation.However, **you may not delete** a document once uploaded in the system, even if it was you who uploaded it.

IMPORTANT: See section DOCUMENT MANAGEMENT for full details about document management in URF, as well as for detailed step-by-step procedures describing each document management action.

Validating Your Updates

All the tabs in the URF Update Panel contain the [Update your data] and [Quit] buttons(**Figure 36 : Update/Quit buttons located in all the tabs**).
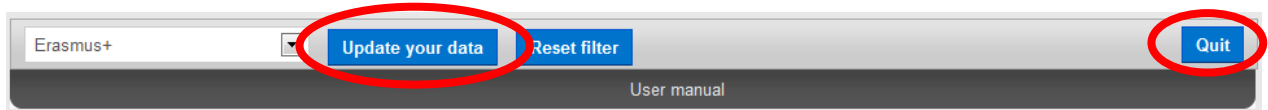
Figure 36 : Update/Quit buttons located in all the tabs

To discard your updates:

Click [Quit] to close the URF Update Panel **without** saving your latest updates.

To validate your updates:

Click [Update your data] to save all the updates made in **ALL** of the tabs. A confirmation prompt will appear asking you if you are sure you want to submit your changes (**Figure 37: Confirmation of modifications**)
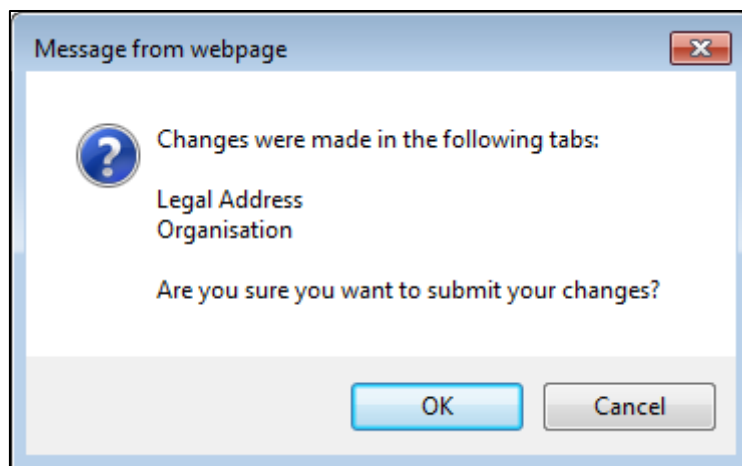
Figure 37: Confirmation of modifications

- If you cancel the validation, URF will keep your latest updates and you will return to the last tab you had open. You can go on with your updates as well as introduce new changes.

- When you confirm the validation,URF will save your updates and will close the Update Panel. Next you can either return to the EACParticipant Portal pageor log out.

DOCUMENT MANAGEMENT

The **Document Management Facility** (the 'Documents' tab in the URF Update Panel) enables authorised users to upload new supporting documents and to modify the metadata (descriptions) of the documents uploaded by them.
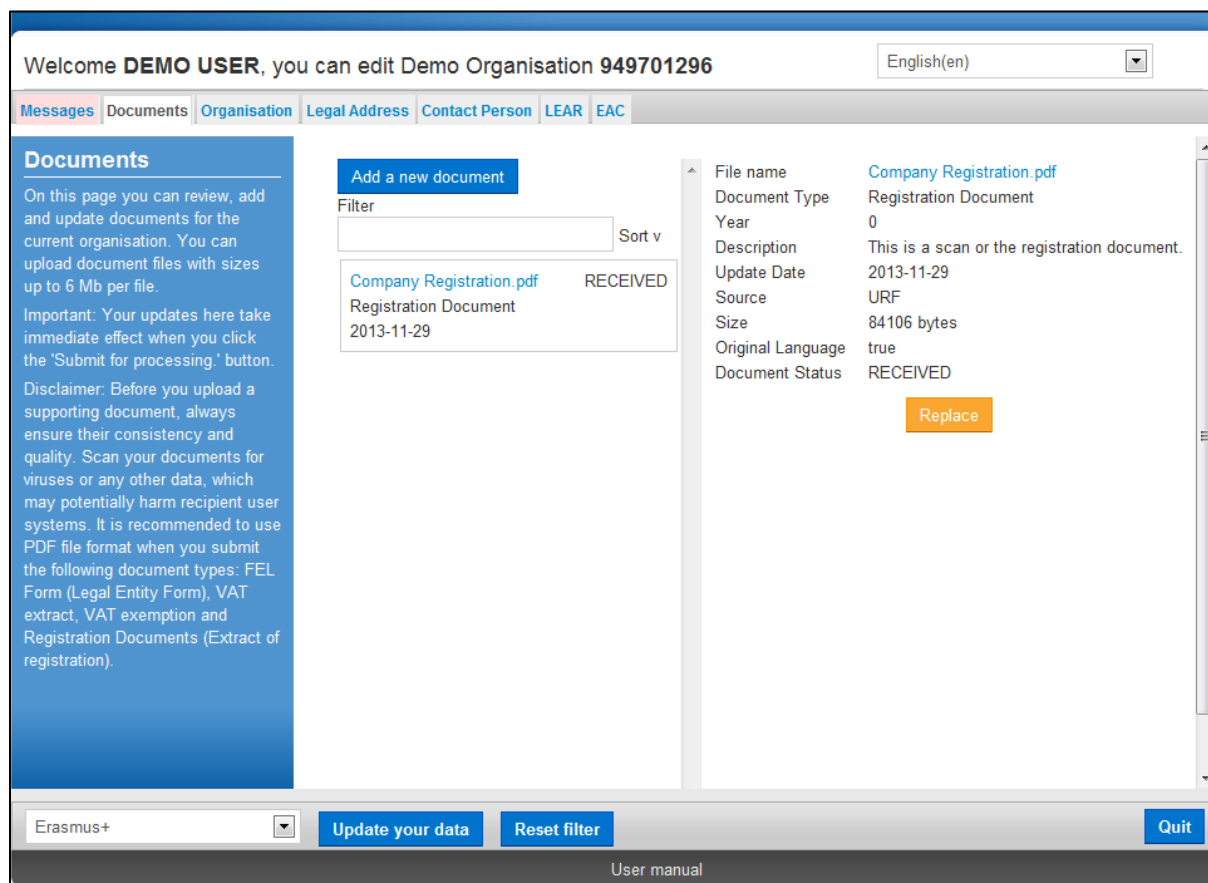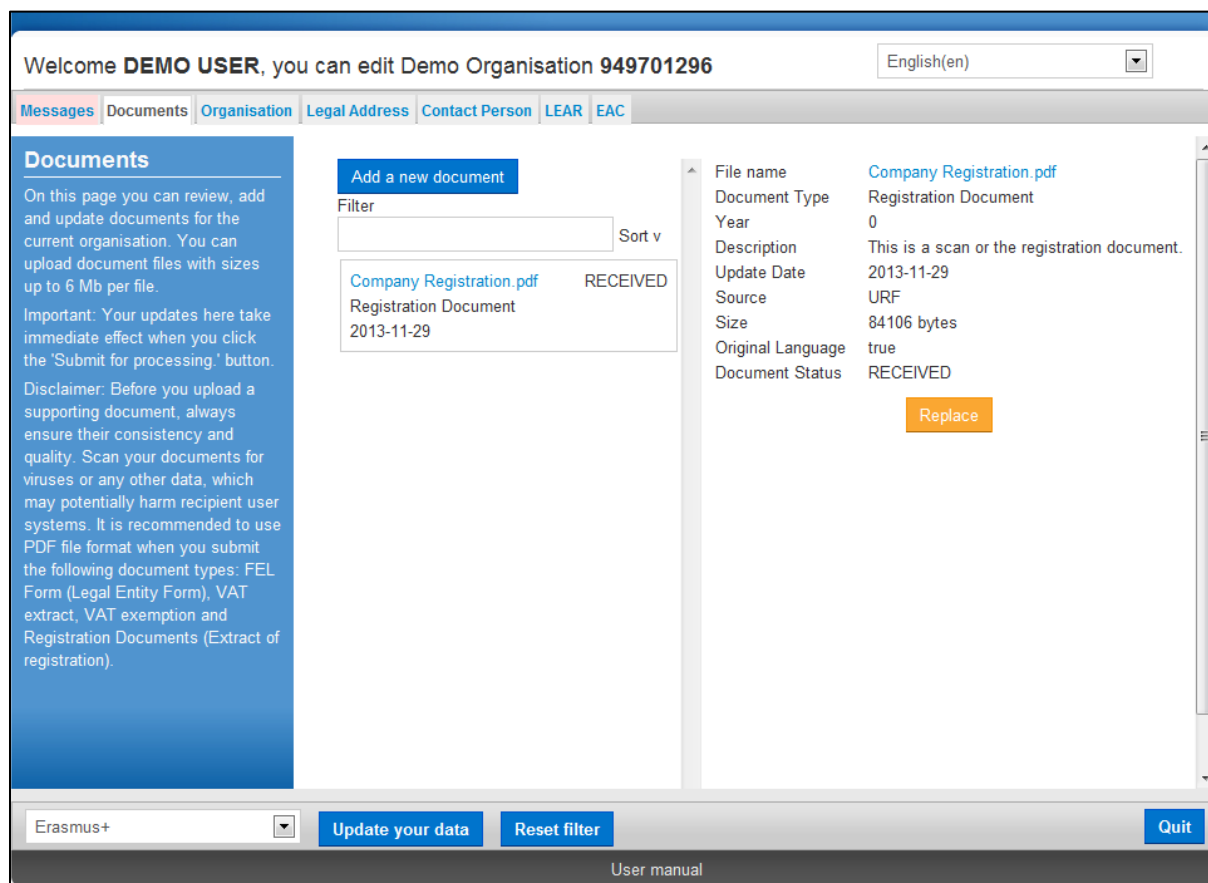

Figure 38: Modifications of the validated data (Documents tab)

You can **upload** document files with sizes up to **6 Mb per file**. There is no limitation about the overall size of all the uploaded documents for an organisation. You must provide the 'Description', 'Type', and 'Author' for each document you upload – these fields are mandatory.

You can also **read** and **download** all the uploaded documents for the respective organisation.However, **you may not delete** a document once uploaded in the system, even if it was you who uploaded it.

View, Sort and Search

- View: To view the properties of a document, just click somewhere in the box surrounding it in the list. The document details will appear in the right-hand side where you can edit the metadata.

- Sort: The documents in the list are sorted by upload date. Use the small arrow button next to the 'Sort' label to switch the sort order (ascending / descending).

- Search: You can search for the supporting documents related to an organisation using the 'Filter' box just above the document list (not visible when there are no documents in the list). The document search is performed using the following metadata: file Name, Type, Author, Status.

Document Types

The URF Document Management Facility provides a list of pre-defined document types for selection during document upload.

The Document Type selection list is available in the right-hand side pane when you add a new document or edit the data of an existing one – see below:
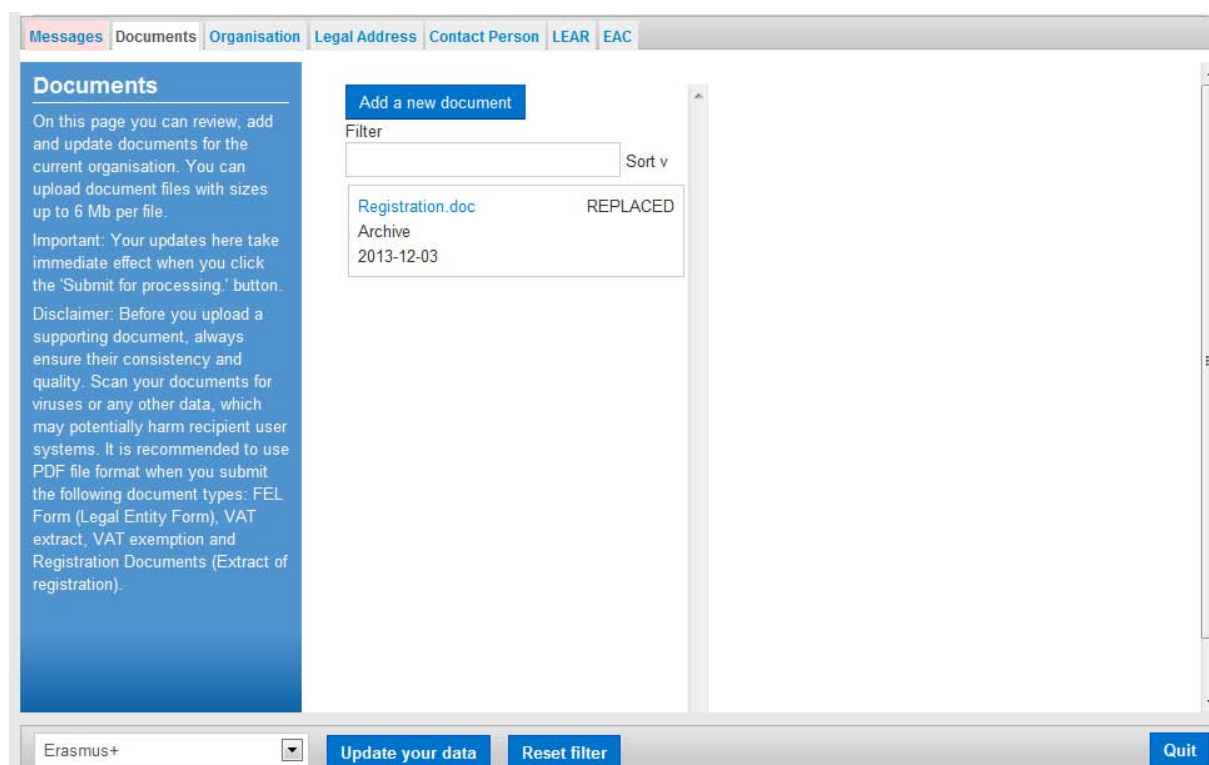
Figure 39: Modifications of the validated data (Document Types selection list)

The type names are descriptive of their purpose and content. When you upload a supporting document, please select the type that best matches the document you are about to upload. If

none of the pre-defined types is suitable, select type 'Other' and add consistent information about the document in its Description.

Limitations

You may not upload executable files and script files - these are not accepted by the system. For example, files with extensions .exe, .bat, .com, .vbs, .vbx, .ocx, .tlb, .js, .bas, .dll, .war, .cmd, .pl, .php, .sh are such files.

You may not upload files with sizes larger than 6 Mb per file.

Uploading a new document

To upload ("add") a new document, perform the steps below:

1. Click **Add new document** and the document properties pane will appear on the right-hand side of the page:
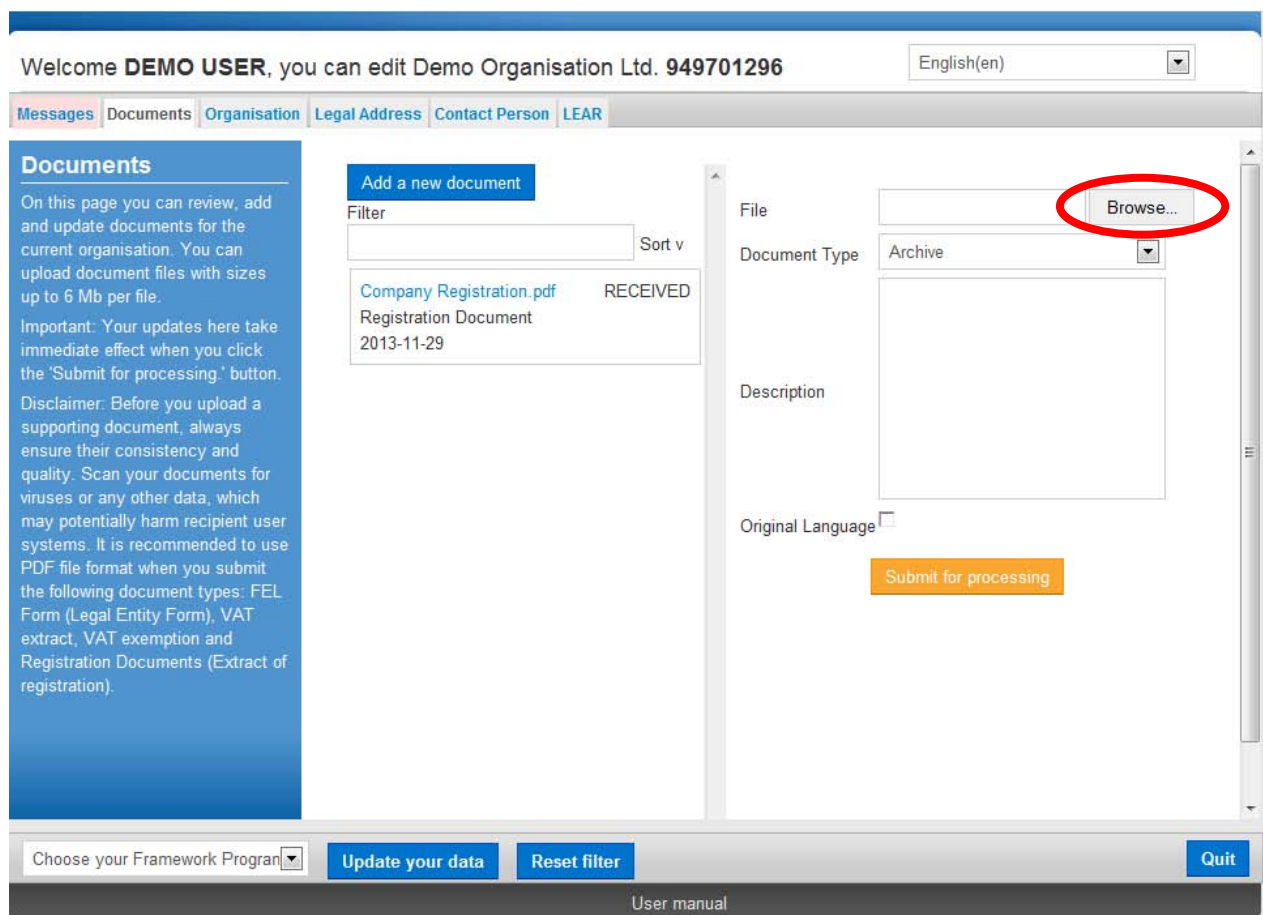
Figure 40 : Updates- Adding a New Document (browse)

2. Click ![Browse_] to browse for the file you want to upload.

3. Select the 'Document Type' from the drop-down list. If your document does not fall under any of the types in the list, select type 'Other'.

4. In the Description field, enter a description of the file – author, subject, content, and so on.
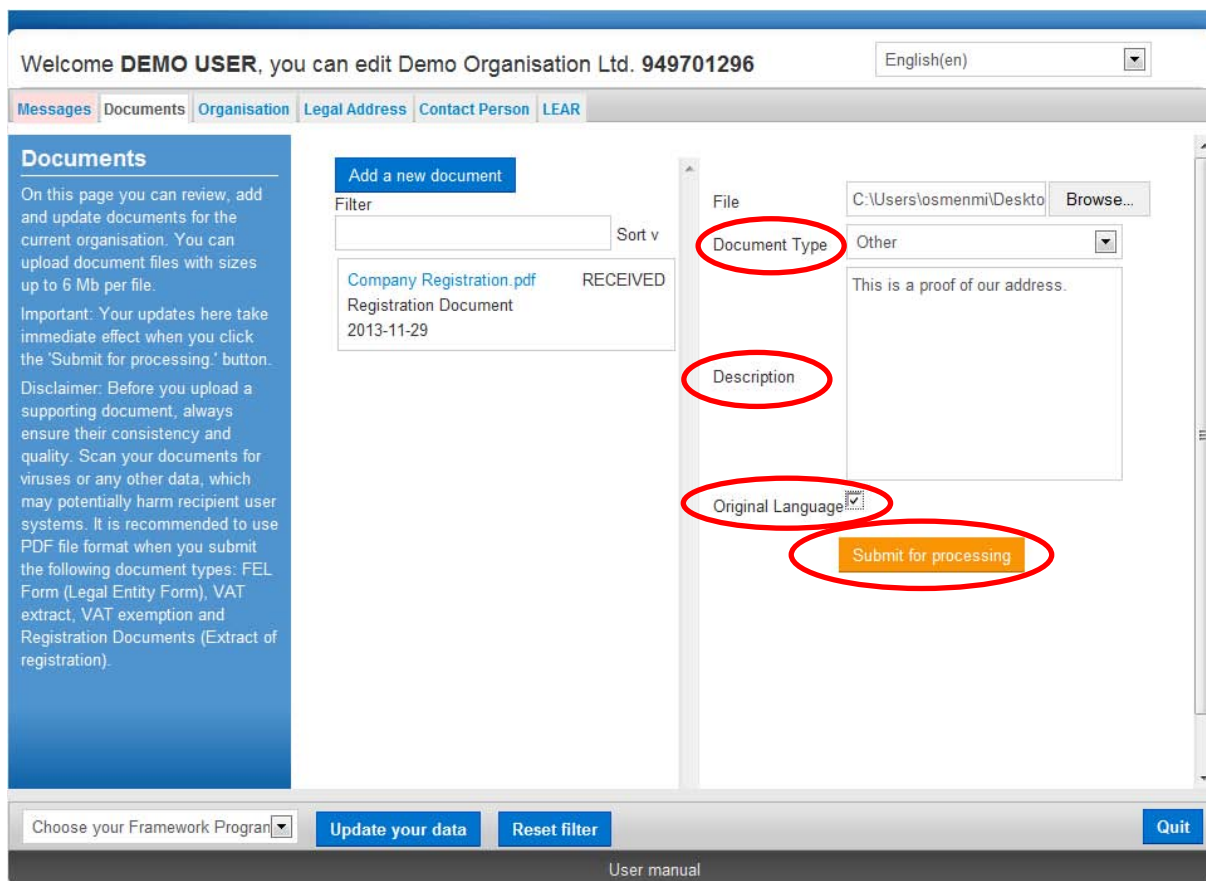
Figure 41 : Updates- Adding a New Document (properties)

5. Check the 'Original language' box if the document is in the original language of the organisation (for example, the place of establishment of the organisation).

6. Finally, click ![Submit for processing] to save your data and to upload your file.

Editing the properties of a document

To edit the properties of an uploaded document:

1. Click on the surrounding box of that document to display its properties in the document properties pane:

Figure 42 : Updates- Adding a New Document (edit document properties 1)

2. Click [Replace] to open the document properties in editing mode:

Figure 43 : Updates- Adding a New Document (edit document properties 2)

3. Modify the document properties as needed.

4. Click [Save] to save your changes, or click [Cancel] to cancel the update.

Replacing a document

To replace an uploaded document:

1. Click on the surrounding box of that document to display its properties in the document properties pane:
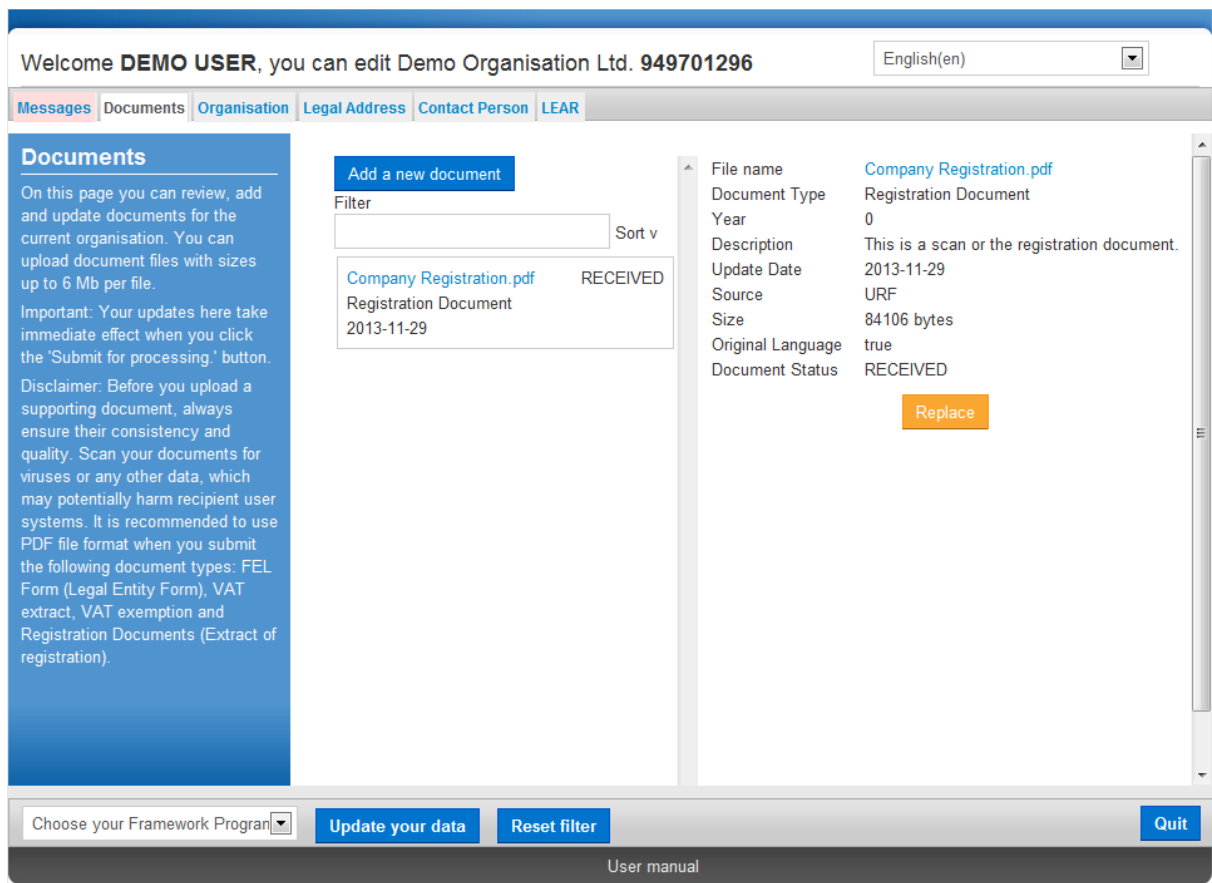

Figure 44 : Updates- Adding a New Document (replace document 1)

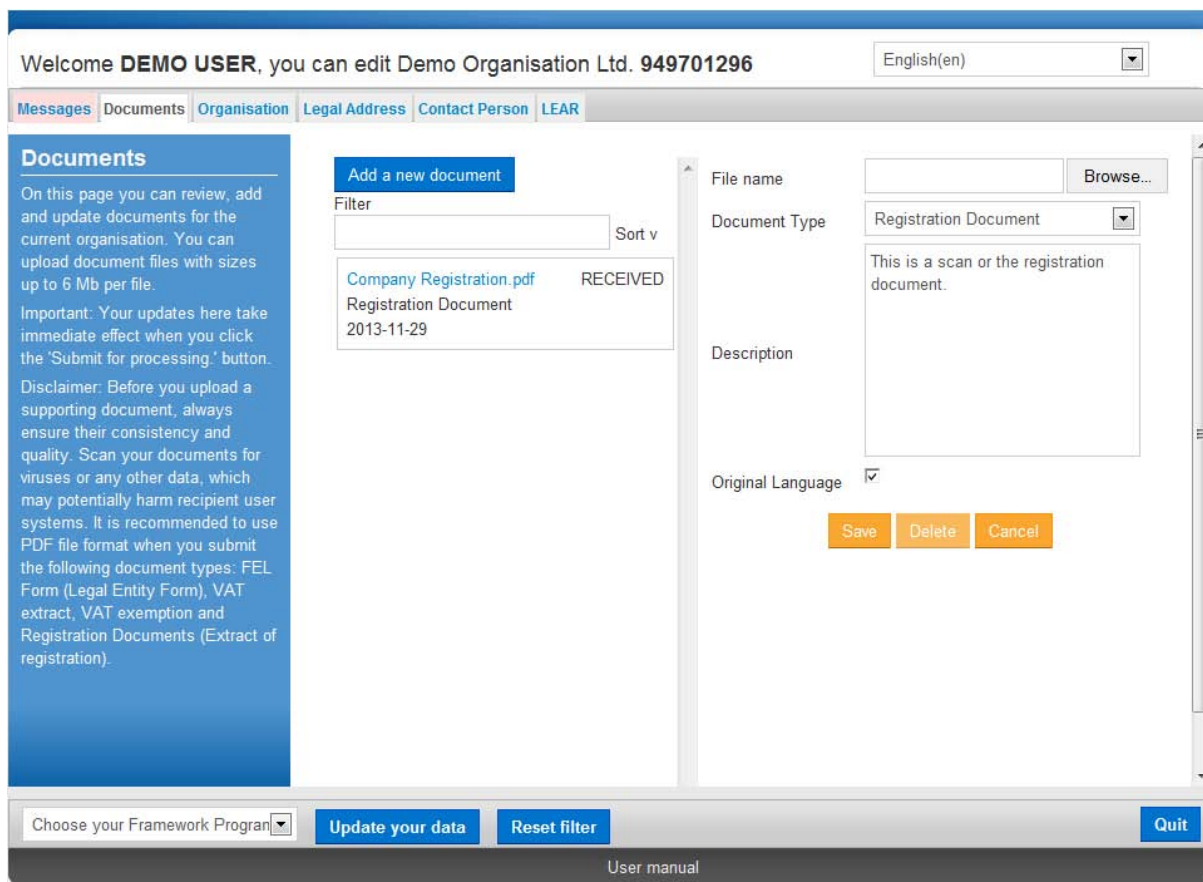2. Click **Replace** to open the document properties in editing mode:

Figure 45 : Updates- Adding a New Document (replace document 2)

3. Click [Choose File] to browse for the replacement file:

4. Click [Save] to save your changes, or click [Cancel] to cancel the update.

Downloading a document

To download a document, click on its name in the document list. Usually a file download prompt will pop up, depending on your browser.

If you cannot download a document file, check the security settings of your browser.

Deleting a document

You may not delete a document that has been uploaded in the URF Document Management Facility.

NOTIFICATION MESSAGESMANAGEMENT

Communication amongorganisation contact persons

The back-end system of URF supports a communication system using Notification Messages. These messages can be of the following types:

- **System**-generated - for system events like "Document received" or similar,

- **Internal** - for internal communication among system users, and

- **External** - for inbound and outbound communication to/from persons with participant.

The **Message Management Facility** in the URF Update Panel enables you to create and send out notification messages of the **'External'** type. These messages will be received by all the persons that are related to the organisation.

Note: In URF, notification messages can only contain text and may not be deleted by the user.

To create a new notification message, invoke the URF Update Panel and perform the following steps:

1. To add a new message, click .
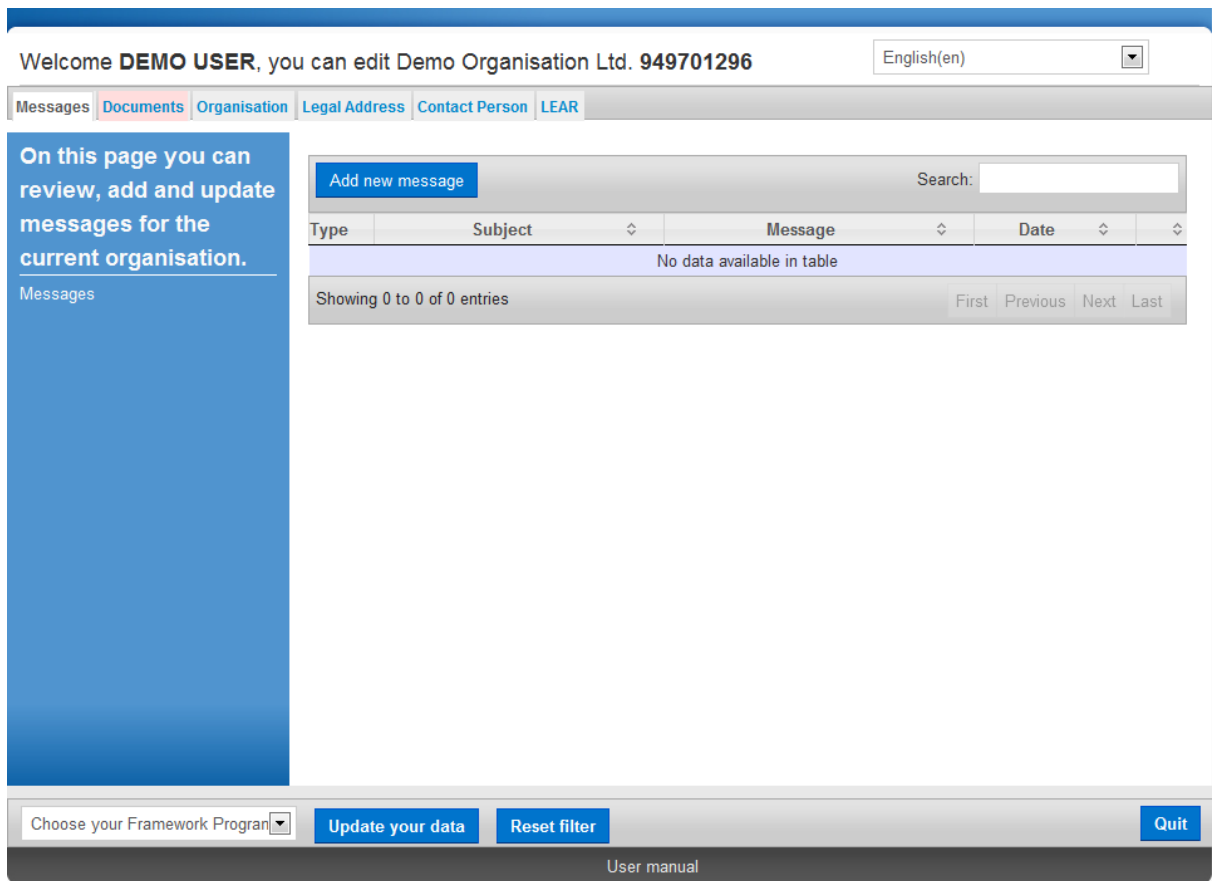
Figure 46: Messages Management (empty)

2. A new dialog box will open where you can provide the Subject and the content of your message (**Figure 47: Messages Management – create a new message**). You can use standard editing and formatting tools from the available formatting toolbar.
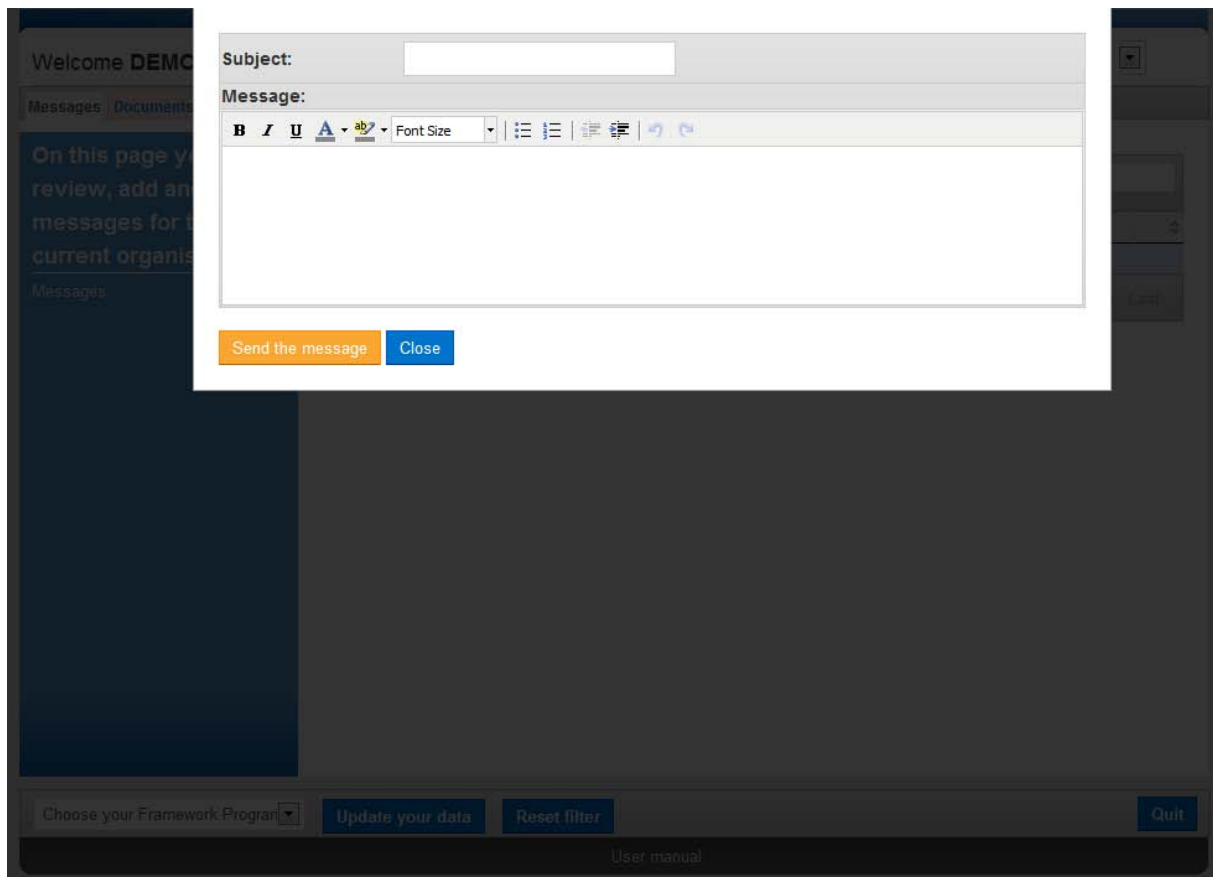
Figure 47: Messages Management – create a new message

3. When you enter the message content, click [Send the message]. To discard the message, click [Close].

4. Your message is now added to the message list (**Figure 48: Messages Management – message list**).
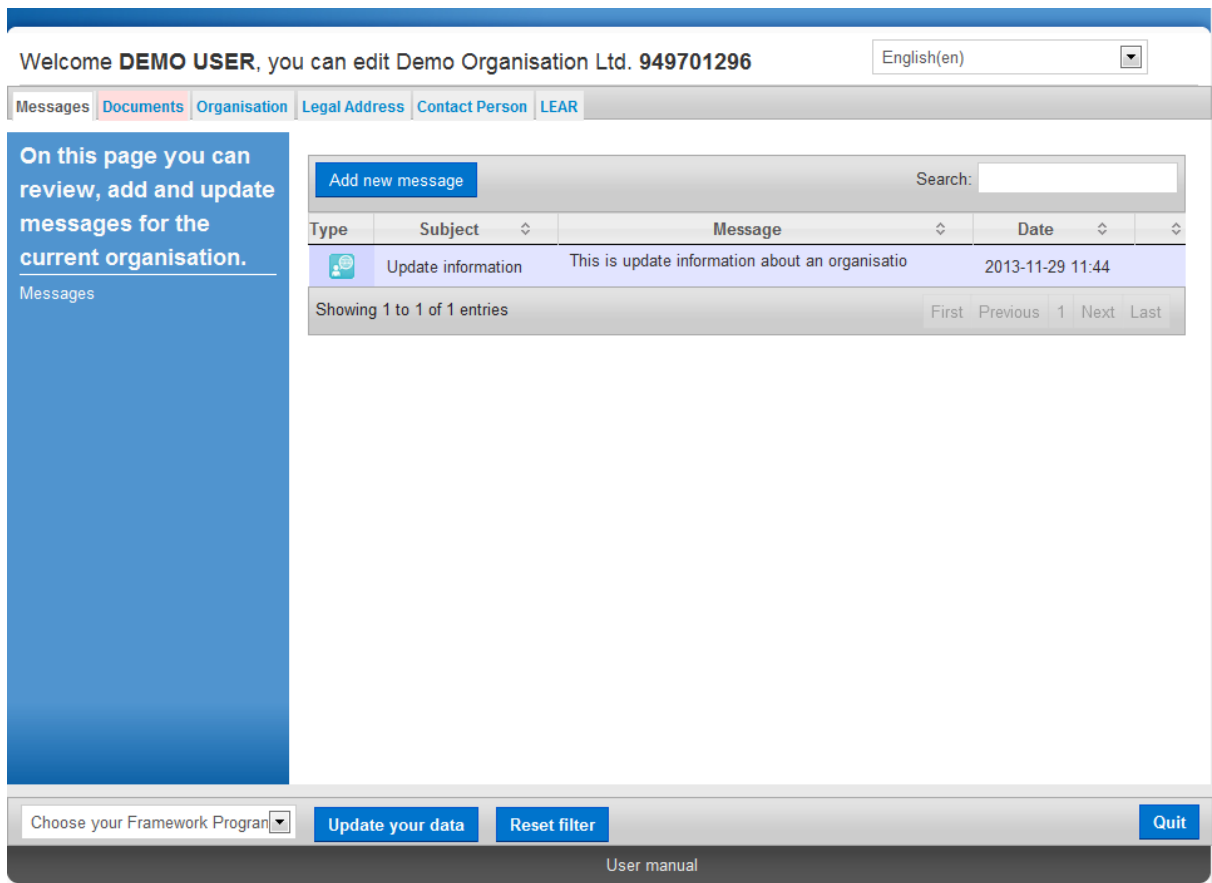
Figure 48: Messages Management –message list

5. You can search for a message using keywords in the **Search** field at the top right corner of the page.

Error Messages: Error Management in URF

URF will display an error message in the left-hand side pane of the URF Update Panel whenever the data entered is incorrect, incomplete or missing.

Error messages will list the entries that must be amended and the problematic entry fields will be highlighted on the screen, as shown in the example below:

Figure 49:Error Messages

GLOSSARY

Term	Definition
Autonomous (organisation)	An autonomous organisation is an organisation that is independent of other legal entities it might be related to, is self-governing, and will typically make its own decisions about how to spend its money and what its business focus is. An independent organisation usually has its own management.
Beneficiary	A Legal Entity which can participate in a FP7 grant.
Bona-fide organisation	Not a Legal entity, but may act as an enterprise grouping other legal entities.
Coordinator	The participant designated as the coordinator in a consortium and in the grant agreement
Document Management Facility	The Document Management Facility is available from the Documents tab page in the URF Update Panel, which enables self-registrants to upload supporting documents.
EAC	European Commission General Directorate for Education and Culture
EAC-EA	The European Commission's Education, Audiovisual and Culture Executive Agency (Executive Agency) is responsible for the implementation of the centralised Actions of the Erasmus+ Programme.
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.
Enterprise	Any Legal Entity engaged in an economic activity, irrespective of its legal form. This includes commercial companies but also, in particular, self-employed persons and family businesses engaged in craft or other activities, and partnerships or associations regularly engaged in an economic activity.
FP7	7th Framework Programme of Research and Technological Development of the European Commission.
IAM	Identity and Access Management
International organisation	An intergovernmental organisation, other than the European Community, which has legal personality under international public law, as well as any specialised agency set up by such an international organisation.
Legal Commitment	Legal base of the obligations and rights between the Commission and another legal entity.

Term	Definition
Legal Entity	An abstraction representing rights and obligations with regard to law and possessions. A legal entity is said to have legal personality. Any organisation registered as a legal entity ("personne morale") under the law applicable to it, or any natural person acting in a legal relation ("personne physique"), which enters in relation with the Commission: contractor (legal entity), supplier, customer, beneficiary, person…
Legal Person or Natural Person	A legal abstraction representing rights and obligations with regards to national law of its place of establishment, community law or international law, and possessions. It is opposed to natural persons. A legal person can group other legal entities (natural or legal), or contain only possessions (e.g. foundation).
Natural Person	The legal entity corresponding to a human being. A natural person can be an enterprise and can be registered in a trade register.
National Agencies	Organisations has appointed by each Erasmus+ Programme Country to implement the Programme at national level and to act as the link between the European Commission and participating organisations at national, regional and local level.
Organisation	A legal entity or bona-fide organisation.

Term	Definition
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 *"executing participant"* proposing and executing an action (e.g. a department within a university or an independent expert) The *"participating legal entity"* 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 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 legal 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).
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 VS, and will then become permanent.
PIC	Participant Identification Code.
Private body or private corporation	A legal person mainly governed by public law (in particular concerning establishment, composition and audit).
Public Body	A Public Body is a Legal Entity established as such by national laws and international organisations.

Term	Definition
REA	**R**esearch **E**xecutive **A**gency
Registration Wizard	The Registration Wizard is a facility offering easy and user-friendly organisation registration procedure to the registrants, using step-by-step screen forms with all the required fields and lists for entry of organisation registration data. The Registration Wizard is invoked from the EAC Participant Portal page when the user starts a new organisation registration or resumes a draft registration.
SME	**S**mall and **M**edium-sized **E**nterprise.
SOA	Service-Oriented Architecture
SSO	Single Sign On.
Supporting documents	Official documents (in any of the EU official language) to be provided by participants as justification of their declared administrative, financial or legal data.
URF	The Unique Registration Facility. This is 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.