## **Participant Portal Earlier Releases**



Production deployment of the Participant Portal release 4.3.10 was executed on 30/08/2018.

2-Step verification available. It is a security setting which allow you to set up a extra layer of security to the applications under **My Area** in the Participant Portal. Please check the 2-factor verification page to get familiar with this new security setting.

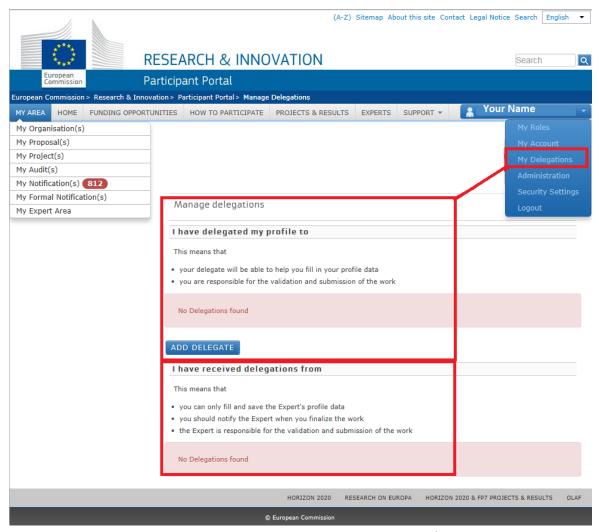
LEAR Access to projects and proposals. LEARs/Account Administrators of organisations participating in projects but who lack a participant role for the project may request read access to be able to see the details of the project. Please check here to know how it works. New roles linked to Audits. Please check more information about the audit roles here. A new section is available now under **My Area**, called **My Audits**. This section is to be used by

external auditors.

Expert profile delegation. Experts will be able to delegate the administration of their expert profile and manage their delegations via the Participant Portal. Click here for further details on

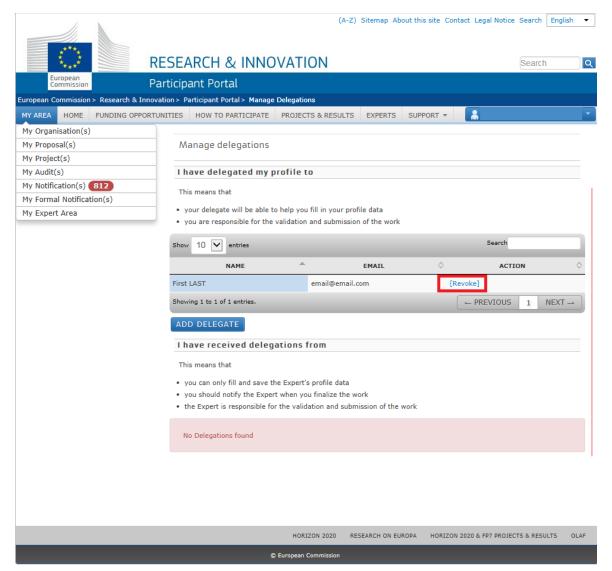
how to delegate within the new Expert Dashboard. When both adding delegates or managing your delegates, you will be redirected to the Participant Portal. You can also launch your delegations there by clicking on your name on the right, and selecting **My Delegations**.

You will display to whom you have delegated the administration of your profile in the upper part of the screen, and from whom you have received delegation rights in the lower part of the screen.

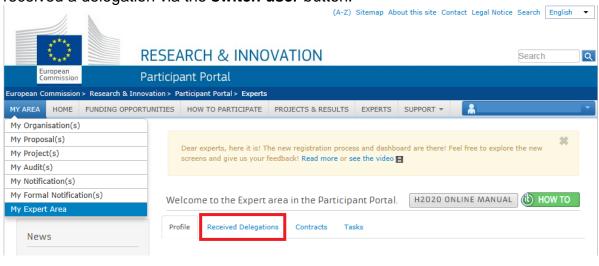


The received delegations can be accessed too via My Area / My expert Area and then go to the Received Delegations tab.

If you want to add a new delegate, click on **Add delegate**, then fill in the first name, the last name and the email address. Notice that you can provide any email here, even if not registered with an EU Login. In that case, the delegate will have to create an EU Login. To revoke any of your delegates, click on "**Revoke**".



You can access your received delegation also from **My Area / My Expert Area**, and the go to the **Received Delegations** tab. From there you can switch to the users from whom you received a delegation via the **switch user** button.



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Production deployment of the Participant Portal release 4.3.9 was executed on 11/01/2018.

This release focused on improvement of the Partner Search functionality.



Production deployment of the Participant Portal release 4.3.8 was executed on 18/12/2017.

This release focuses on enhancing the organisation profile with a new Partner Search functionality. This functionality comprises:

Two types of Partner searches: offers of expertise to other organisations and requests for expertise from other organisations.

The Topic pages include a section where the organisations which are looking for partners to participate are listed.

You can easily publish a new expertise offer/request for any of your organisations from the topic page.

When looking for partners, you can contact the organisation replying to their expertise request /offer via an action button.

When viewing a profile for which you have access to maintain the organisation profile, you will have action buttons which allow you to easily manage your expertise offers/requests.

The organisation profiles include now a section at the button where all the active expertise offers /requests of the organisation can be viewed at once.

Check the especific section under Proposals to know how to manage the functionality.

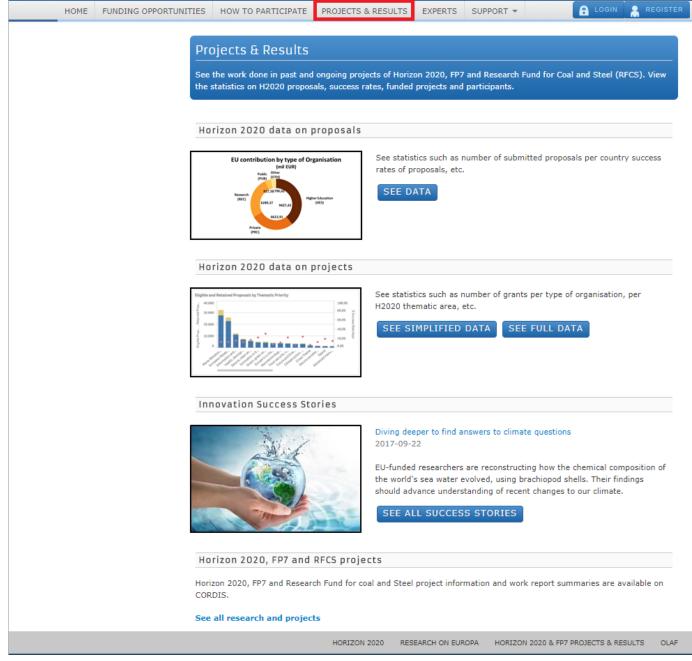


This is an overview of what is new in the portal:

**H2020 Dashboard**. Accessible from the the Funding & Tenders Portal **Home** tab, it shows a set of interactive graphics about H2020 proposals and projects statistics:

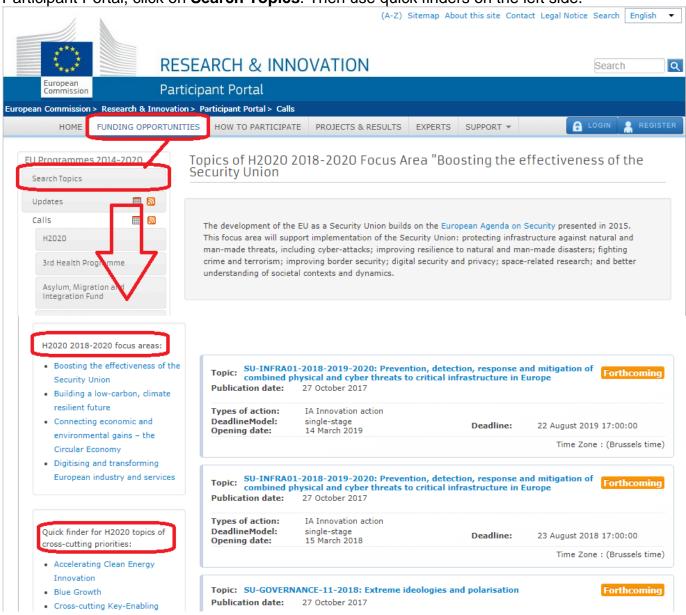


A **Projects and Results**. In addition to the interactive graphics about H2020 proposals and projects data, it also offers a direct link to **CORDIS** and to the Success Stories from the **EC Research Innovation** site.



A new set of predefined Funding Opportunities search queries based on focus areas. To facilitate your search for funding opportunities, you can use one the new shortcuts

filtering topics according to focus areas. Within the Funding Opportunities section from the Participant Portal, click on **Search Topics**. Then use quick finders on the left side.





Production deployment of the Participant Portal release 4.3.6 was executed on 13/07/2017.

This release introduced the following main changes in the Participant Portal:

## Partner Search:

Search for partners is available now in the Portal. Check here for more information on how to use this functionality.

Search results include Customizable Pie Graphics.

It Helpdesk contact form – the 'Hercule III Programme' and the 'Pilot Projects & Preparatory Actions' have been added to the Programme drop-down list in the contact form (Support/ It Helpdesk).

My Expert Area – You can launch the scientific tasks for ongoing evaluation sessions via the **MT** button ( **Participant Portal / My Expert Area**, select the '**Tasks**' tab).



This release introduced the following main changes in the Participant Portal:

My Notification(s) – introduction of 'never' preference for normal priority e-mail notifications. If this preference is selected, notification emails of notmal priority are not sent-out to the user. However, all notifications are still availabe in the Participant Portal.

Partner Search – introduction of organisation profiles pilot.

APIs – introduction of new services: portal keyword tree service, H2020 FP division tree service, partner search organisation profile service, partner search organisation projects service. APIs – update of calls and topics services.

Ergonomic improvements.

Technical improvements.



This release introduced the following main changes in the Participant Portal:

My Organisation(s) – introduction of possibility to add multiple contacts for self-registered organisation.

Support – IT Helpdesk Contact Form - introduction of new help domains.

My Expert Area – H2020 Expert Rotation Rule – increase of the threshold to 200 days.

My Project(s) – introduction of the possibility to sort the table by the active tasks.

Ergonomic improvements.

Technical improvements.



This release introduced the following main changes in the Portal:

My Proposal(s) – Proposal Consortium – introduction of excel export.

My Project(s) – Project Consortium – introduction of excel export.

My Organisation(s) – Roles – introduction of history of recent changes of FSIGN and LSIGN accounts.

How to participate – Beneficiary Register – introduction of 'Erasmus Code' search criterion.

Support – IT Helpdesk – additional programmes added to the Programme selection. Introduction of contact project functionality.

User interface improvements.

Technical improvements.



This release introduced the following main changes in the Portal:

Support - FAQs – Introduction of 'was it helpful' functionality to gather user feedback. My Proposal(s)/Project(s) – Edit Roles - Improvements of role management service by introduction of alphabetic ordering, display of email address and better visibility of comments.

My Proposal(s) – Proposal Consortium opens up in main portal window.

Ergonomic improvements.

Technical improvements.



My Expert Area - All action buttons (e.g. Manage Profile, Edit Identity Data, Add Account) open up the related tool in a new browser tab instead of pop-up.

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How to Participate - Beneficiary register - introduction of improved organisation search.

Support - IT Helpdesk - programme selection introduced in the IT Helpdesk contact form.

Support - FAQ - introduction of possibility to view archived FAQs.

Support - FAQ - introduction of related FAQs.

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My Expert Area - introduction of two new programmes: JUSTICE

RIGHTS, EQUALITY AND CITIZENSHIP

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FAQs - new FAQs page with more content, new layout as well as search and filtering possibilities.

My Proposals - management of roles in submitted proposals after submission deadline.

My Organisation(s) - possibility to download PDF report for organisations' projects.

My Project(s) - new filtering option 'Hide closed projects'.

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Funding Opportunities – calls now presented exactly as they appear in the legally adopted H2020 Work Programmes. Now, all information about a call is brought together, into a coherent whole. A call can contain groups of topics with different opening dates and deadlines.

Topic pages - instead of the tabs layout, all information is now presented on one page. It also assures easier access to the submission system.

My Organisations – introduction of the Excel export of organisation roles.

My Expert Area – introduction of the new programme - Promotion of Agricultural Products (managed by Chafea). If you want to have the possibility to be selected as evaluating expert for this new programme, please indicate so in the PP expert management tool.

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This release introduced the following main changes in the Portal:

My Formal Notifications – new feature which provides access to formal notifications sent to the Consortium by the Commission. Formal notifications are reserved for specific purposes, for correspondence requiring acknowledgement of receipt, e.g. as a means to receive replies to formal notifications sent by the Commission.

My Projects – new column added in the list of projects providing quick information on urgent project tasks

My Projects – Project Consortium (PC) button is moved to column 'Actions' in My Projects table My Organisations – organisations with status 'blocked' can be viewed and edited What's New page– link added to the history of all PP release notes

My Proposals – proposal ID or draft proposal ID is displayed in My Proposals table User interface improvements.

Technical improvements.



This release introduced the following main changes in the portal:

Site Map – Introduction of site map of the Participant Portal.

My Roles – My Roles display all user roles, including roles created as a consequence of deprecation of PIC.

Logout – Introduction of pop-up window advising user to close all browser windows after log-out if shared computer is used.

User interface improvements.

## Known issues:

Following issues are known but were not fixed by the present release and will require a separate fix or will be delivered within the next release:

List of topics in topic search results should be sorted by topic ID.

My Proposals – only proposals with draft ID are displayed.

Add Roles in Project – When adding Project Specific Legal Authorised Signatory and Project Financial Signatory role to the project, role field moves to the left.



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