Home   Participants   Experts   Proposals   Grants   Roles and access rights   H2020 Online Manual   What's New   IT Support

Pages

/ ...

/ Partner Search in the Funding and Tenders Portal

Manage your Partner Search Profile

- Accessing your organisation profile
- Editing your organisation profile
- Publishing your Partner Search
- Unpublishing/Republishing your Partner Search

💡 This page covers how to maintain the partner search profile of your own organisation. To look for partners, click here.
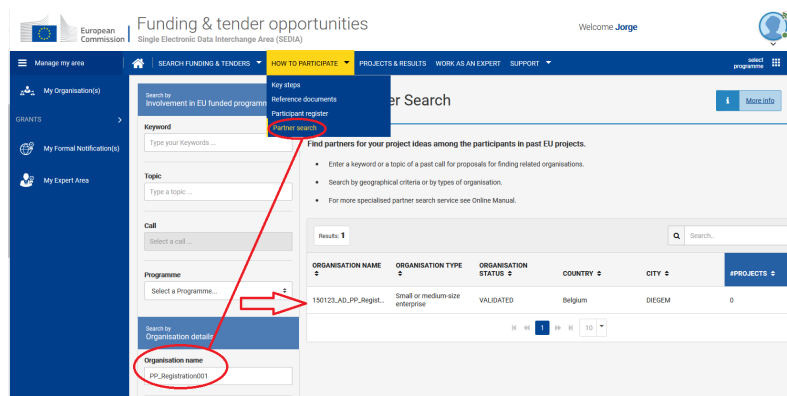
Accessing your organisation profile

To access the Partner Search of your organisation, click on **My Organisations** in the Funding & Tenders Portal.
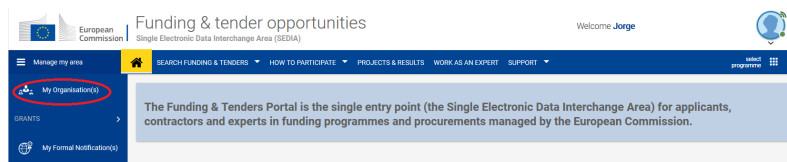

Then click on **Actions**, next to the organisation, and select **View Partner Search Profile** from the list of available actions. You will see this option only for those organisations for which you hold a **Self-Registrant**, a **LEAR** or an **Account Administrator** role.
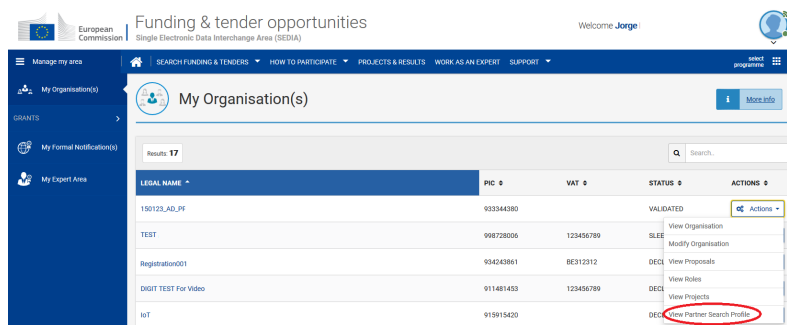
Alternatively, you can look for your own organisation using the Partner Search.

Then click on your own organisation to access the Partner Search profile. If you hold one of the three roles mentioned above, you will see the **Edit Description** and the **Add** buttons which allow you to modify both the organisation description and add additional keywords.
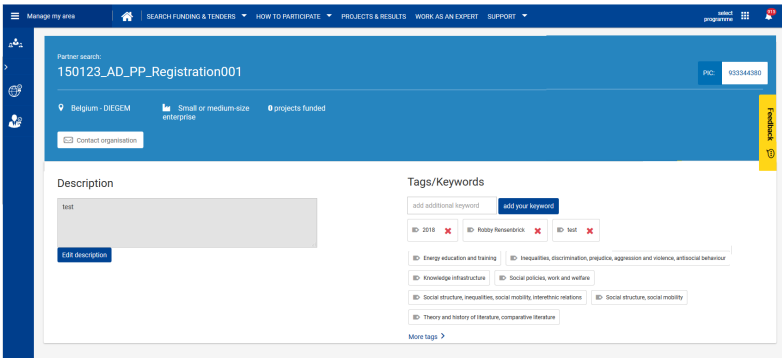
Editing your organisation profile

Adding keywords to your organisation profile in Partner Search will make it easier for potential partners to find your organisation. Also, a good description will provide them with clarity on the areas of expertise of your organisation. To update the profile, log in to the Funding and Tenders Portal first and access the Partner Search profile of your organisation.

You will see the [Edit description] button, click on it to add a description to your organisation. Then click on [Save description], it will be immediately visible for the rest of users.
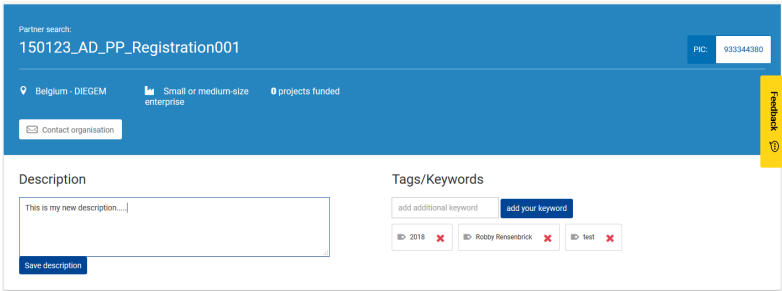
Finally, enter a keyword in the box and click on the **add your keyword** button, they will be displayed under the **Tags/Keywords** area. Click the cross on right side of any of the keywords to remove them from the list (see note below). Enter as many keywords as you wish, always one by one. They are also immediately visible for users.
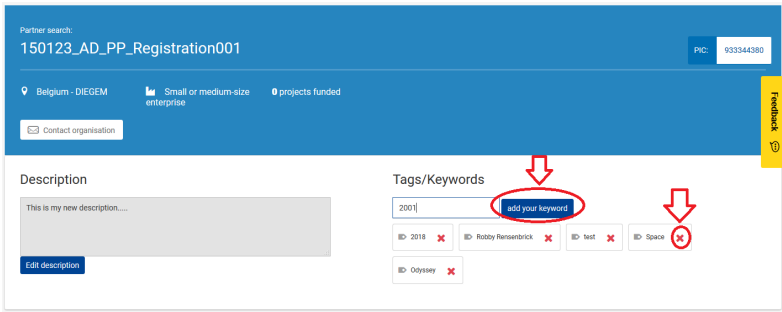

Important note about Keywords: The list of keywords are a combination of keywords freely added to the organisation's profile and keywords used in funded projects where the organisation has participated. Only those ones which are added manually can be deleted. The ones imported from funded projects cannot be removed.

At the bottom of the page you have the list of topics for which your organisation is currently searching for a partner, see the following section to know how to manage your Partner Search requests.

Publishing your Partner Search

Log in to the Funding & Tenders Portal. Under **Search Funding & Tenders**, search for a topic in which your organisation would be interested in. Click on it. Once you are displaying the topic page, click on **Partner Search** on the left or scroll down to the **Partner Search** section in the page (just after the **Topic conditions and documents** section).
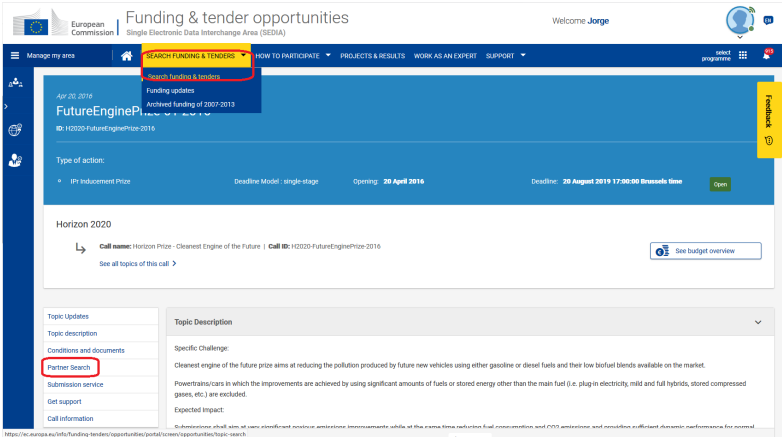
Click on the **View / Edit** button. If you are LEAR, Self-registrant or Account Administrator of an organisation, you will see the list of expertise offers/ requests and a box on the top with a drop-down list. Use the drop-down list to select one of your organisations and click on **ADD**.

Please note that the **Add** button is only visible if you have organisations for which no offer/request for expertise for this specific topic have been published. To edit your already-published offer/request for expertise, look for it in the list and select the **Partner search details** option via the Actions button on the right.

The Partner Search Details window gets displayed now, where you can specify whether you need expertise provided by the partner or you are offering your own expertise to the future partner (see 1 below). After selecting the corresponding option, enter your Partner Search description (maximum 500 characters, see 2 below).

Then click on **Save changes** to publish your Partner Search or on **Back to previous page** to discard and go back to the list of Partner Searches for that Topic. After saving, if you go back to the list of expertise offers/request, you will see yours at the bottom of the list. Click on the **actions** button on the right, you can access your request/offer as published and edited via the **Partner search details** option, or directly Withdraw the request/offer via the **Withdraw the partner search** option.

When you select the first option, your are taken back to the Partner Search Details window, where you can edit the content of your request/offer for expertise. Click on **Save changes** to publish the updated version.

You can also Withdraw now from this same screen, via the new button **Withdraw partner search**. After withdrawing, a new button appears, **Republish partner search**, which allows you to make your request/offer visible for the others again.

Please note, "withdraw" means that your request/offer for expertise will not be visible for the others, but it is not deleted. If you withdraw a request/offer for expertise for a specific topic, and you want to publish a request/offer again for the same topic, the content as it was before withdrawing will be fully accessible for you when selecting the same organisation and clicking on the **ADD** button.

In this situation, making changes to the the old message and clicking either **Save changes** or **Republish partner search** will make your offer/request for expertise visible to the others again.

Unpublishing/Republishing your Partner Search

To withdraw a partner search request/offer for one of your organisations, Select **My Organisations** on the right, Then select the View Partner Search Profile option under **Actions**.

Scroll down to the bottom of the page to the **Published partner searches** section. Then click on the Actions icon, ans select **Partner search details** to see the current offer/request for expertise or **Withdraw the partner search** to unpublish it.

When withdrawing a request/offer for expertise, a warning message displays. Click on the **Confirm** button to unpublish it.

The offers/requests for expertise for your organisation do not get deleted when withdrawing them, they simply are not visible any more for the others, both in the Partner Search profile page of your organisation nor on the Topic page.

Click on **View / Edit** button just above the **Published partner searches** section to get to the list of your offers/requests. You can see the details (last date of publication, topic, the type and the current status, see 1 below), and just below the details, you can read the content of the request/offer as it is/was (see 2 below).

If the status of the request/offer is withdrawn, the available actions are **Partner search details** and **Publish the partner search**, whereas if the status is published, the available actions are **Partner search details** and **Withdraw the partner search**.

The **Partner search details** action takes you to the offer/request page where you can further edit the content, whereas the other two actions publish/unpublish the request/offer without giving you the chance to edit it.

If you are editing a published request/offer, the **Save changes** button becomes active as soon as you made a modification, or placed the cursor on the description box. Clicking on **Save changes** will publish the edited version of the request/offer, clicking on [Withdraw partner search] will make the request/offer not visible for the public, but still any changes done during the editing process will be kept. The correct button to deleted an edited version without saving the changes is the [Back to previous page] button.

If you are editing a withdrawn request/offer, the **Save changes** button becomes active as soon as you made a modification, or placed the cursor on the description box. Both clicking on **Save changes** or on [Republish partner search] will make the edited version of the request/offer visible to the others.

Note: The quickest way to display your withdrawn partner searches is to go to your organisation profile, scroll down to the **Published partner searches** section and click on the [View / Edit] button.

No labels