**Guidelines for Research Infrastructures registered in the MERIL portal to register and update their information in CatRIS.**

*These instructions apply to RIs that have an existing (draft or published) entry in the MERIL portal*

If this is not your case, please use this document instead.

In case of doubt, please contact catris@esf.org

Service Provider (SP) registration in CatRIS portal comprises a two-step process in which the user:

(a) first submits information of the SP Organization (Research Infrastructure) and

(b) then submits information of a service that this SP provides.

Please note that all available information in MERIL that was relevant to CatRIS has been transferred.
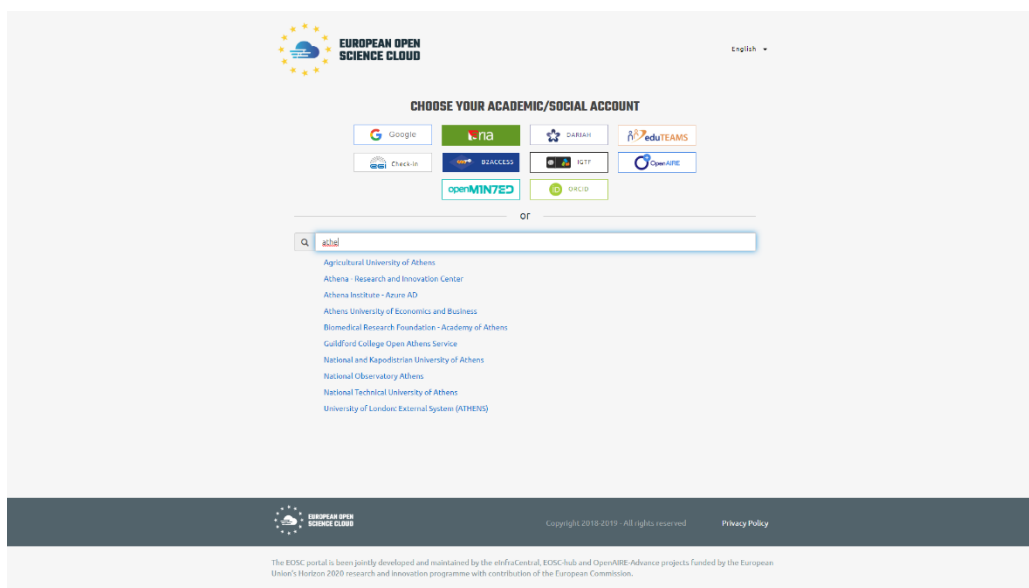
To ensure the quality of the process, both steps need to be approved by the CatRIS portal administrators. As soon as each step is approved (or rejected), the user is notified, and can proceed accordingly. After this two-step SP registration process is completed, the SP user is registered to the portal and can directly register additional services. The following points present this process.

*For issues related to the information that needs to be filled in, please contact us in support@catris.eu*

*For technical issues and questions, please contact us in tech-support@catris.eu*

1. Follow the link provided in the invitation email to access you pre-filled record in CatRIS. If you do not have the link, please contact catris@esf.org . Login to the portal.
    a. You will be navigated to EOSC AAI page.
    b. Check within the available list whether your organization is supported by the EOSC AAI and, if so, use your credentials to log in.
    c. If your organization is not supported, you may use another one of the available options, e.g. Google or ORCID.
    d. After logging in, please make sure to complete the registration process in a rational time frame, i.e. 2 hours. Otherwise, your session might expire and, in this case, you might need to restart the process.

2. When logged in, you will be directed to the page "Update Service Provider".
   a. Fill in the missing information and update potentially outdated information about the Service Providing Organization that is imported from the MERIL database and click "Submit".
   b. Make sure that you have filled in all mandatory fields (marked with *) with information in the proper format (e.g. text, URL, email address).

   c. If you have filled in all the required fields properly, you will be navigated to the "My Service Providers" page, where your new SP is marked as "pending initial approval". After your profile gets approved by the portal administrators, you will be notified by email to continue the registration process, as follows.
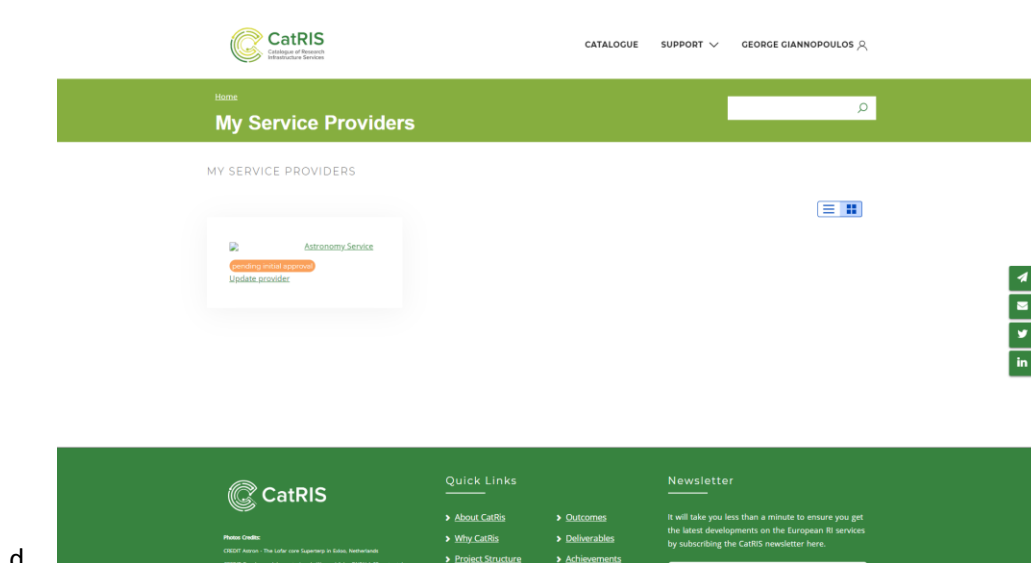
d.

3. In the "My Service Providers" page, select "+Add service template" in order to submit a new service or "→Select from pending service" to update an existing one.
   a. Fill in the form about the service that is being registered or updated and press "Submit".
   b. Make sure that you have filled in all mandatory fields (marked with *) with information in the proper format (e.g. text, URL, email address).
   c. If you have filled in all the required fields properly, you will be navigated to the submitted service presentation page.
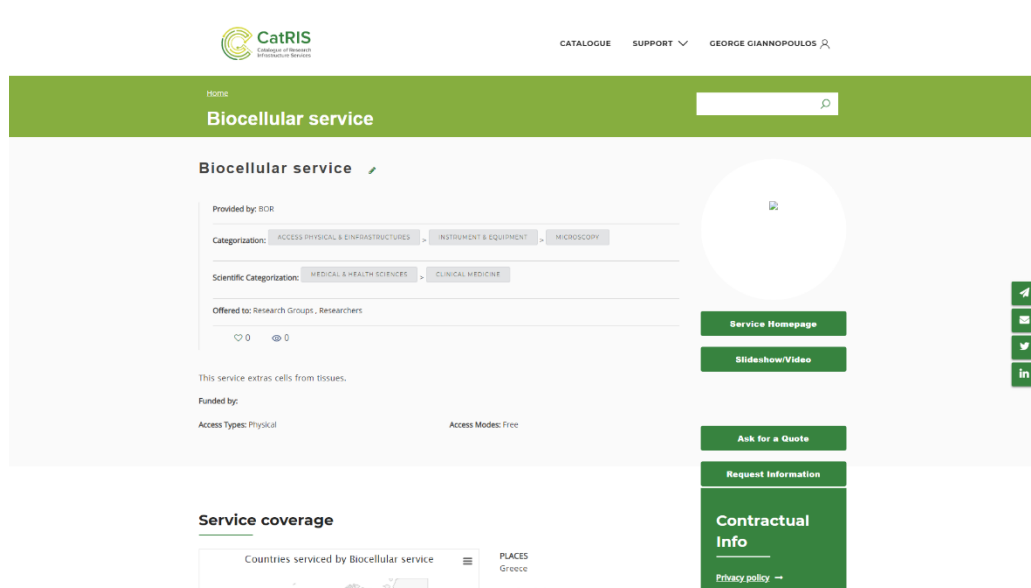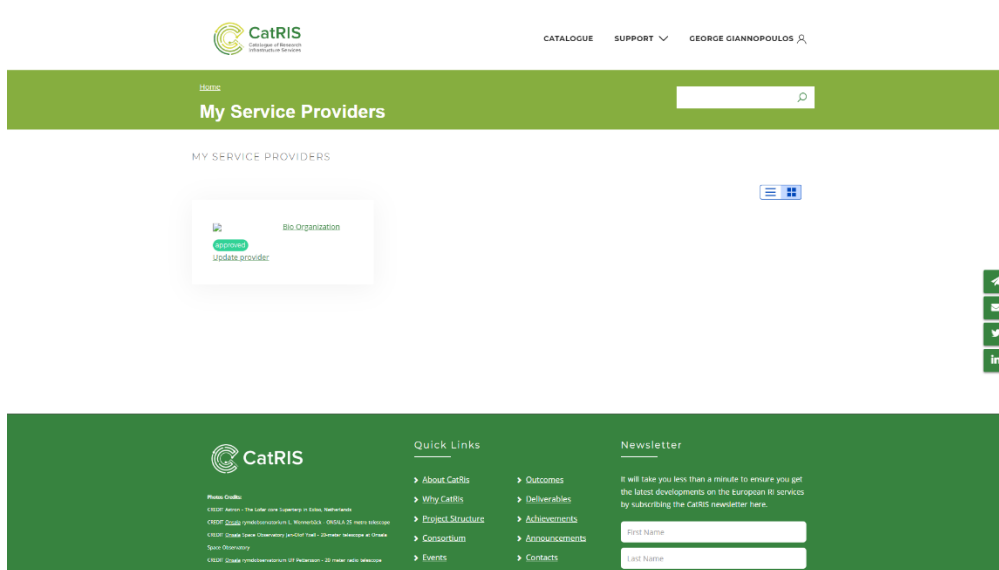


   d. After the submitted service gets approved by the portal administrators, you will be notified by email and you *are then registered* to the CatRIS portal as a new Service
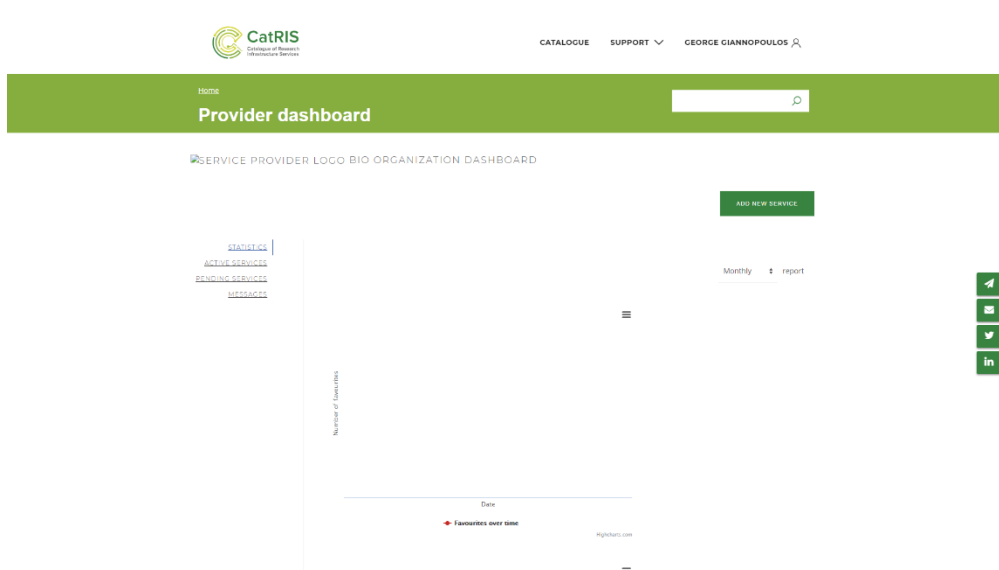
Provider user. Also, you will be able to verify the success of the SP registration process by inspecting that your SP is marked as "approved" in the "My Service Providers" page.



4. Now you can click on your SP and be directed to the SP dashboard page.



a. There you can:
   i. see statistics for your services,
   ii. add new services, and
   iii. reach a set of additional functionalities that is constantly being enriched!