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D1.1 Access Portal



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General information

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| Deliverable | D1.1 |
| Work package | WP 1 |
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| Project coordinator | Michel Boër michel.boer@anaee.eu |
| Dissemination level | Public |
| Prepared by | Florent MASSOL & Michel Boër (29/09/2023) |
| Sent to the Executive committee | 29/09/2023 |
| Approved by | Michel Boër (29/09/2023) |
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Version history

| Version n° | Date | Description |
|-------------------|-------------|-----------------------------|
| V1.0 | 28/08/2023 | Initial document |
| V2.0 | 26/09/2023 | Many revisions |
| V3.0 | 12/01/2024 | Consistency of terms, typos |



Contents

| | |
|--|-----------|
| Access portal | 3 |
| 1. Objectives | 3 |
| 2. Description | 4 |
| 2.1. Outline..... | 4 |
| 2.2. Access portal..... | 5 |
| 2.2.1 The Expression of Interest..... | 5 |
| 2.2.2 The Application Management Tool..... | 7 |
| 3. Next steps | 12 |

1. Objectives

The aim of the access portal is to provide a single point of entry with the following requirements:

- Allow the user to prepare her/his proposal and to request the needed set of integrated services proposed by AgroServ,
- Allow the management of the TA/VA (WP1) to evaluate the feasibility of the proposal, exchange with the user, and send the proposal for review to an independent panel of experts,
- Allow the independent panel of expert to perform a review on the scientific and technical quality of the proposal, and report their recommendations to the management of the TA/VA
- Provide provision to get all the needed information at the proposal stage (user details, proposal details, DMP, ethics, etc.), and to follow the project from the submission to the execution stage, to the reporting of results.

The access portal should include, or point to, all the relevant information, such as the guidelines for access (see D1.2), ethical guidelines (D4.2), and the integrated catalogue of services.

2. Description

2.1. Outline

The application guidelines are described in detail in D1.2. We summarise the procedure and refer the reader to D1.2 for the details.

Given the potential complexity of the applications that span a wide range of disciplines, a 2-step procedure has been designed as sketched in Figure 1.

The first step is an expression of interest (Eoi) where the user describes the main objective of its project, the methodology, and the services requested. At this stage the access managers evaluate the feasibility of the proposal. This results in recommendations to the user as to optimise his proposal, or possibly in a rejection based on eligibility criteria. For the second step, the user is invited to submit a full proposal which will be evaluated and ranked by the proposal review committee.

If the proposal is accepted, it is implemented using the relevant RI services, and the access portal is used to track the project along its life, as well as its proper achievement and outcomes.

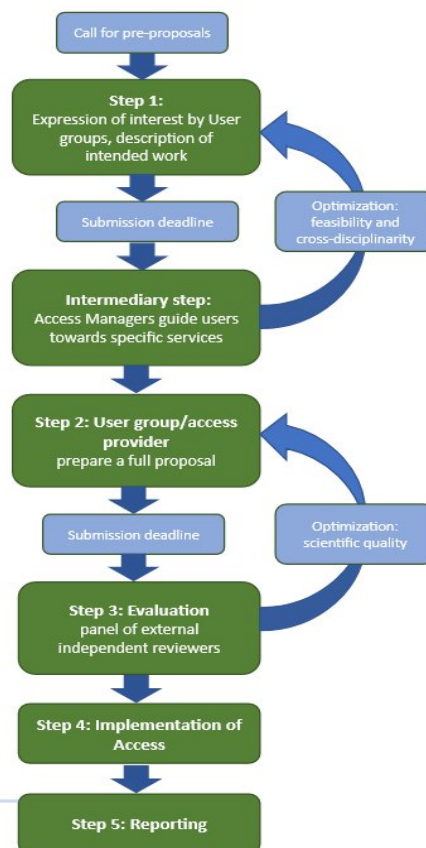


Figure 1: Outline of the life of a project.

2.2. Access portal

The access portal is interfaced through the agroserv.eu site. The ISIA application handles both the catalogue of services and the application management tool (AMT).



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The AMT has the following functions:

- User interface for the first stage of the proposal (expression of interest)
- User interface for the second stage of the proposal (full application)
- Interface for the AgroServ consortium and service providers to evaluate the eligibility of the proposal and its feasibility.
- Interface for the Proposal Review Committee (PRC) to evaluate the proposals and provide its ranking
- Interface for the dialogue between the user and the AgroServ consortium to manage the proposal, provide recommendations, ranking from the PRC, and manage the proposal and project along its whole lifetime in AgroServ (i.e. to the completion of the project).

We detail below the various stages of the access procedure through the portal.

2.2.1 The Expression of Interest

The first stage does not need any authentication, as it is only an expression of interest (EoI). The AgroServ web site redirects the potential user to an online form (Figure 2) where they can submit their EoI. The user can save the form for a later completion. A message that confirms the effective submission is sent to the user and to the AgroServ team.

Informations

Welcome to the AgroServ Submission platform

Please read the Application Guidelines before submitting the pre-proposal: [Here](#)

Application deadline for pre-proposals: **23rd of October 2023**

How to proceed ?

The pre-proposal submission is without any registration or login account.

Only the main author is able to fill in the data.

Please fill in all the mandatory fields (*) in each tab and **don't forget to click on the "Update"** button to save your entry on each form before submission.

You have the option to save your entries before the final submission. When you click "Save", you will receive an automatically generated email with a confirmation and a link to access and edit your saved proposal.

If you have filled in all mandatory fields, you can submit your pre-proposal.

Help desk for technical questions: isia@bio.ens.gsl.eu

Pre-proposal: Expression of Interest

Please select the Research Infrastructures (** indicates mandatory fields) and if you know already the services (optional).

Note: Multiple services have been included in an access to ensure cross-disciplinary projects i.e. at least two services from at least two Research Infrastructures. Priority will be given to multi actor consortia who will address cross-disciplinary topics related to agroecology. Users has to use at least two or more services of two or more Research Infrastructures.

Mandatory fields

Title of project *

First name * Last name * Email *

Infrastructures & Services Contacts information Pre-proposal description Short Questionnaire

Identified Infrastructures & Services for your project (Basic form)

Choose 2 or more Infrastructures * Note: Multiple services have to be included in an access to ensure cross-disciplinary projects i.e. at least two services from at least two Research Infrastructures

If you know already services AgroServ Catalog of services

Confirmation

To continue, type the characters you see in the picture *


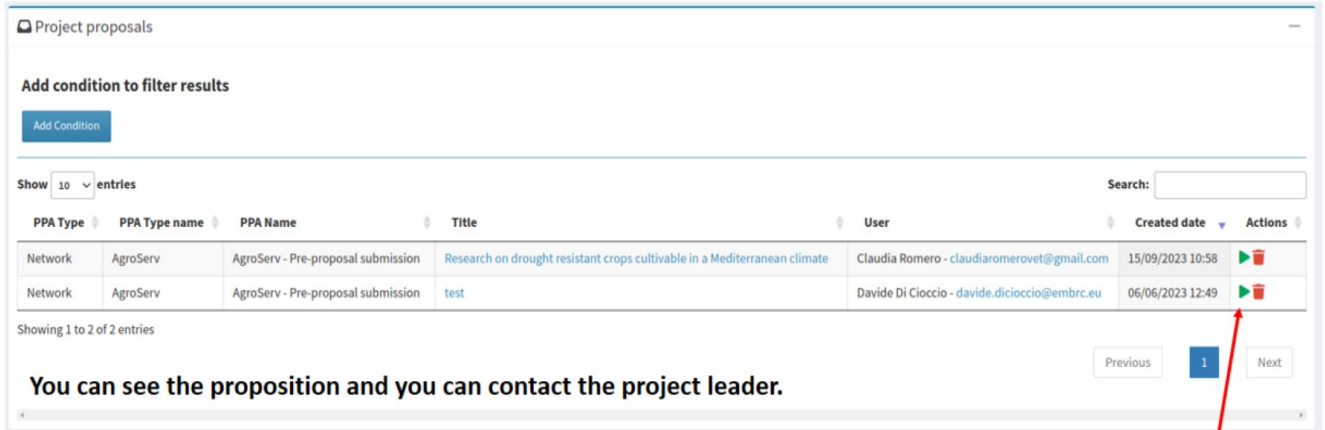


Figure 2: Submission form for the Expression of Interest.





2.2.2 The Application Management Tool

The ISIA application centralises the project EoIs submitted (Figure 3). This allows for a first security and eligibility test, then a dedicated area is created, where both the user and various contributors (review panel, access managers, etc.) will be invited.

The list of new projects appears on the "List of all projects" page of AgroServ's Central Hub.



The screenshot shows a web interface titled "Project proposals". It includes a search bar and a table of project entries. The table has columns for PPA Type, PPA Type name, PPA Name, Title, User, Created date, and Actions. Two entries are visible: one for "Research on drought resistant crops cultivable in a Mediterranean climate" and another for "test". A red arrow points to a green play button in the Actions column of the first row.

| PPA Type | PPA Type name | PPA Name | Title | User | Created date | Actions |
|----------|---------------|------------------------------------|---|--|------------------|---|
| Network | AgroServ | AgroServ - Pre-proposal submission | Research on drought resistant crops cultivable in a Mediterranean climate | Claudia Romero - claudiaromerovet@gmail.com | 15/09/2023 10:58 |   |
| Network | AgroServ | AgroServ - Pre-proposal submission | test | Davide Di Cioccio - davide.dicioccio@embr.eu | 06/06/2023 12:49 |   |

Showing 1 to 2 of 2 entries

Previous 1 Next

You can see the proposition and you can contact the project leader.

The Central Hub Access Manager create the project space by clicking on the green button.

Figure 3: Example of the project management interface.

The interface is used by the by the access manager and the AgroServ team, to see the updates on status, and access to the project space (Figure 4). This interface is strictly private.

The list of all project space allows to see last updates, status and access to the project space

| Status | Acronym | Name | Service Type | Creator | Validator | Created date | Starting date | Ending date | Last update | Actions |
|---------------|----------------|----------------|--------------------------------------|----------------|----------------|------------------|---------------|-------------|------------------|---------|
| Under prepare | Project test 2 | Project test 2 | AgroServ projects evaluation process | Heba Ibrahim | Florent MASSOL | 19/07/2023 14:26 | 05/09/2023 | | 05/09/2023 14:49 | |
| Under prepare | Project test | Project test | Test | Heba Ibrahim | Florent MASSOL | 05/09/2023 14:13 | | | 05/09/2023 14:48 | |
| Under prepare | Test | Test | AgroServ projects evaluation process | Florent MASSOL | Florent MASSOL | 04/03/2023 22:59 | | | 08/05/2023 22:43 | |

Access Manager can update information and status of the projects and access to the project space.

Figure 4: The project management space.

Each project has a dedicated space (Figure 5). The different partners in charge of the elaboration, of the evaluation, and of the monitoring of the project are invited to this space with the relevant rights (Figure 6). At each stage of the process, the various actors can communicate, exchange documents, including those relevant for the feasibility, eligibility, evaluation and reporting of the results. The proposal and review processes are linked (Figure 5).

You can manage users, scheduling tasks. Everything is tracked in an event log.

You can see the evaluation process in the Tree of Steps in a process form.

```

graph LR
    Root[Root] --> IR[Initial request]
    IR --> TNE[TNA eligibility]
    TNE --> EA[Ethical aspects]
  
```

Figure 5: The project area.

The Central Hub Access Manager invites the Access managers involved in the project
(those whose infrastructure has been selected for the project)

Similarly, Access Managers can invite other contributors (project owner's team, service managers, reviewers, etc.) and assign them specific rights.

| Invitation status | Name | Role in project | Actions |
|-------------------|---------------------|-----------------|---------|
| Validate | Florent MASSOL | Manager, Leader | |
| Validate | Ana-Maria Ciubotaru | Viewer | |
| Validate | Roland Pieruschka | Viewer | |
| Validate | Sarah Dramé | Viewer | |
| Validate | Simone Gatzke | Viewer | |

Figure 6: The dashboard for project management.

The access manager panel are invited to perform the feasibility assessment of the proposal. At this stage, an experimental protocol may be suggested to the user. This consists of parallel tasks, as illustrated in Figure 7. Once feasibility and eligibility are assessed, the user is invited to write a full proposal that will be reviewed by the Proposal Review Committee.

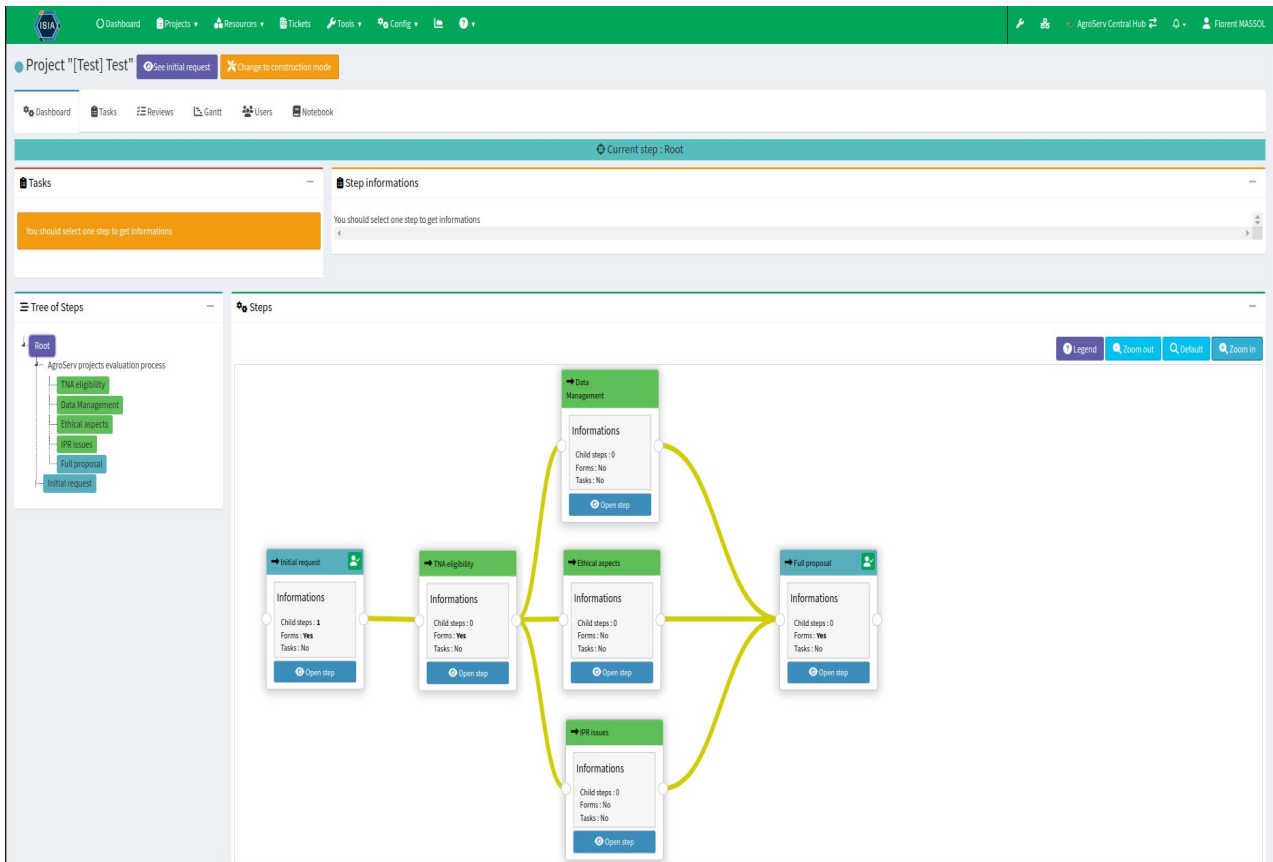


Figure 7: The evaluation, with the feasibility in parallel processes, followed by the full scientific review.

At stage 2, the user is invited to prepare a detailed proposal, using the forms illustrated Figure 8, with more details Figure 9.

Project "[Test] Test" [See initial request](#) [Change to construction mode](#)

Dashboard Tasks Reviews Gantt Users Notebook

Current step: Full proposal

Tasks

+ Create new Task

Nothing to display.

Step informations

Contacts information **Full proposal description**

General information (Basic form) +

Description of the project implementation (Basic form) +

Selection of facilities and services (List form) +

Expected output incl. impact (Basic form) +

Figures and Tables (List form) +

References (Basic form) +

Tree of Steps

- Root
- AgroServ projects evaluation process
 - TKA eligibility
 - Data Management
 - Ethical aspects
 - IPR issues
 - Full proposal
 - Initial request

Steps

< Parent step: Root << Come back to root

Legend Zoom out Default Zoom in

Figure 8: The form for the second stage of the proposal.

Figure 9: Detail of the second stage proposal form.

3. Next steps

The access portal is now active and receiving its first project from the users. We are currently finalising the forms which will be used by the access managers and reviewers to report on the feasibility and scientific evaluation of the projects. Given the interdisciplinary nature of the project and large diversity of the RI and services involved, user feedback (here we include in “users” the user of the services, but also access managers and reviewers) will be welcomed to evaluate the friendliness of the interface, its practicability for the various tasks that will be performed along the lifecycle of a project in AgroServ, from initial EoI to the review, to its full completion (if selected).

The strength of ISIA is that it embeds in a single tool the catalogue of services, CATRIS/EOSC compliance, user access and project management. This is thanks to the development of the procedure made in liaison between WP1 (access) and WP2/WP3 (catalogue and VA), and a capacity to adapt to the various need of the users who can request simple, quick projects, as well as large programs that involve an



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extensive set of services for a long time. After the first call we plan to revise the access procedure thanks to the user feedback, which will be reflected by a revision of this document.