

EOSC Portal Compiled Requirements: EOSC Regional and Thematic Cluster Projects

This document outlines the requirements extracted from the majority of EOSC thematic cluster and regional projects during the first phase of the EOSC Enhance Requirements Gathering campaign between June and September 2020. It directly follows the EOSC Portal Requirements deliverable report published by EOSC Enhance in August 2020.

To compile the list of requirements, individual interviews were conducted with the project representatives. The gathered requirements were then compiled and presented at the EOSC Portal Requirements Validation and Prioritisation Workshop on 28 September 2020 where the interviewees were gathered and asked to prioritise each.

Following the prioritisation and taking into account the scope of work of EOSC Enhance, the EOSC Enhance Requirements Gathering Task Force then indicated when the requirement is planned for implementation or whether it will be documented and passed on to future EOSC Portal operators. The planned implementation indicated below is only indicative as some complex requirements need to be further discussed in detail with the sources.

Note that this compilation only includes requirements gathered from the EOSC regional and thematic cluster projects and does not reflect other requirements gathered through other channels or means.

The requirements are classified based on the following:

- General Requirements: Proposed functionalities that are targeted towards both users and providers, span multiple EOSC Portal components or are hosted primarily in the Content Component of the EOSC Portal
- Functionalities towards EOSC Service and Resource Providers
- functionalities towards EOSC End-Users

| Requirements & Needs to be addressed | Average Priority | Planned Implementation | Reason/Comments | Portal Component | Functionality |
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| General requirements | | | | | |
| Create an EOSC Portal Training section | 8.8 | For Portal Release 1 (Nov 2020) | This section has been piloted and ready for release 1 | Content Component | Training |
| The EOSC Portal training section should tackle general topics (e.g. GDPR, ICT etc.) Targeted trainings remain on the RIs side. | 5.9 | For documentation and handover to future EOSC Portal operators | Only training specifically on the portal usage is part of the scope of EOSC Enhance. Nonetheless, the infrastructure is ready to host such modules if prepared by others | Content Component | Training |
| Training providers can maintain or update their training resources | 8.8 | For Portal Release 1 (Nov 2020) | As a resource listed in the EOSC Portal Marketplace, as training listings are treated the same as any other service/resource, | Provider Component | Training |



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| made available in the portal | | | providers should have control over the pages as part of the 1st portal release | | |
| Training material should be sortable and searchable | 8.3 | For documentation and handover to future EOOSC Portal operators | At the moment, training materials can be published at the Content Component are the searchable and sortable. As for resources - training materials in the User Component. After additional clarification of the needs, the User Component may implement some search mechanism based on the latter. | User Component, Content Component | Training |
| The data component allowing data set searches, provenance tracking and reproducibility of experiments should be available. | 5.2 | For documentation and handover to future EOOSC Portal operators | Relatively low priority. Needs clarification whether this means low interest in harvesting such data by the portal or other reasons to not give it enough credit. Enhance T4.4 should have their interest in addressing this | User Component | Data Component |
| Multichannel helpdesk system (Email, chat, call, webinars, tutorials) | 6.9 | For documentation and handover to future EOOSC Portal operators | Currently, XGus helpdesk system operated by the EOOSC-hub team is integrated with the Portal in Content Component and User Component. Other communication methods need to be evaluated in the team of the future Portal operators to ensure the maintenance of the helpdesk system | All | Helpdesk |
| Integrated CRM (helpdesk, orders, supplier-customer communications) for a single view of customer history | 6.1 | For documentation and handover to future EOOSC Portal operators | Harmonization of the CRM would definitely be beneficial for the end user. User Component plays this role of the main contact point for the end user, but there are several contact methods, and they are detached to some extent. Integrating different entities like order history and helpdesk on a single customer history will be appropriate once the plans for the maintenance of these channels will be concretized by the future Portal operators | All | Helpdesk/CRM |
| EOOSC Portal functionalities towards EOOSC Service and Resource Providers | | | | | |



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| Prospective providers can access a section with the full guidelines for the onboarding of national catalogues & registries | 9.6 | For documentation and handover to future EOOSC Portal operators | Onboarding of national catalogues & registries on behalf of individual providers, should be first discussed and decided at the procedural level. Main issues concern: Who is authorised and how to represent the regional and national catalogue? Whether an individual provider listed in the national catalogue should be able to update their offerings in the EOOSC catalogue. Where is the actual onboarding performed (remote catalogue or eosc-portal's one)? | Provider Component | Service onboarding |
| National, Regional or Thematic aggregators are able to onboard their resources in automated way | 8.5 | For documentation and handover to future EOOSC Portal operators | See above comment. I propose to discuss them together. If we decide on the process, we can have this functionality earlier than the 2nd release. | Provider Component | Onboarding |
| Providers can update their service/resource pages independently | 9.4 | For Portal Release 1 (Nov 2020) | Yes, they must be logged in as service provider users via the email they are assigned with that role for their organization | Provider Component | Service Management |
| Providers can access a dashboard that displays analytics about their own services & resources | 6.9 | For Portal Release 2 (Sept 2021) | A prototype of the dashboard will be earlier available in 1st release (Provider Dashboard), which will be enriched for the next 2nd release | Provider Component | Analytics |
| Providers can access a dashboard that shows top services ordered across the portal and filterable also by category, country, domain | 5.6 | For documentation and handover to future EOOSC Portal operators | There were some concerns whether service performances should be aggregated and shared across all providers (top performing services, etc). If this is approved by the EOOSC Portal operations, then it will be included in Release 2 | Provider Component | Analytics |
| Providers can access a Providers' Technical Documentation area | 9.4 | For Portal Release 1 (Nov 2020) | We will have a) Manuals, b) API documentation. This info will be updated based on the new features and functionality released. | Provider Component | Onboarding |
| To implement a monitoring/maintenance model for each of the record (services, data, etc.) part of the Portal | 9.9 | For Portal Release 1 (Nov 2020) | Users of a service provider has access to the full log timeline that affected a resource, as part of the Provider Dashboard | Provider Component | Administration |
| Have an API portlet where external portals | 9.5 | For Portal Release 1 (Nov 2020) | There will be a separate endpoint for API, api.eosc-portal.eu | Provider Component, API | API |



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| can also search EOOSC Portal listings. | | | | | |
| Accounting system to manage transactions | 4.2 | For documentation and handover to future EOOSC Portal operators | Not clear or within the context of the project | Provider Component | Administration |
| Services/resources are assigned PID | 9.6 | For documentation and handover to future EOOSC Portal operators | There was a discussion whether PID assignment should be handled within EOOSC Portal or 3rd party systems\nnational and regional catalogues should assign PIDs and EOOSC Portal will accept PID-powered resources | Provider Component | Administration |
| EOOSC Portal functionalities towards EOOSC End-Users | | | | | |
| User can use the search engine to search data, services, software | 9.7 | For Portal Release 1 (Nov 2020) | User Component is equipped with a sophisticated query engine to search services/resources and their offers by their names, descriptions and other connected metadata. This part has been ready for Release 1. Although this functionality for may be enhanced Release 2 (considering other resource types, other metadata, other search rules). EOOSC Future assumes implementation of even more sophisticated AI based search system. | User Component | Discoverability |
| Users can rate resources | 5.0 | For Portal Release 1 (Nov 2020) | User Component implements a mechanism necessary to rate resources. We can consider changing the content in the feedback form / provide more dimensions of rating and a mechanism to compute rating "stars" as a more sophisticated and composed metric. Maybe low interest shows a low trust in the rating mechanism. This could be a basis for a research of resource "value" vs "rating" | User Component | Discoverability |
| Users can compare resources | 7.5 | For Portal Release 1 (Nov 2020) | Implemented. Users were mainly interested in enhancing functionalities to compare technical parameters of the services/service orders. We can consider this at the later project stage | User Component | Discoverability |



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| Automated order fulfilment or at least minimise manual processes | 6.3 | For Portal Release 2 (Sept 2021) | Implementation need to be based on a pragmatic use case. There are couple ways to address this, many arising in the early stages of EO SC Hub Marketplace. Some research will show the most valid approach to a generic implementation | User Component | Ordering |
| Enriched service descriptions with more technical information | 9.2 | For Portal Release 2 (Sept 2021) | Technical information is part of the ordering mechanisms. This mechanism may be also reused to make detailed specifications of the technical parameters. Some research will show how this can be usable in making comparisons between resources | User Component | Discoverability , Ordering |
| User can create profiles and get recommended services and resources | 6.1 | For Portal Release 1 (Nov 2020) | Implemented. Ready for release. Pretty low rating may show a low interest in this feature or controversial attitude in the scientific domain | User Component | Discoverability |
| Users can see the complete requirements, policies and user documentation in Service/Resource pages to access or order them | 10.0 | For Portal Release 1 (Nov 2020) | Will be available with the release of new Resource profile | User Component | Discoverability |
| Service/resource pages should display automatically whether the service is alive | 9.7 | For documentation and handover to future EO SC Portal operators | Feature mentioned many times in the earlier projects. Not exactly aligned with the Portal KVP. Former efforts of GOCDB, DPMT and several related infrastructures show that this is a topic for a scope of an entire project. Hard to achieve in the federated scenario. To be addressed in EO SC Future | User Component | Discoverability |
| Users can see Use cases displayed on service/resource pages | 6.6 | For Portal Release 1 (Nov 2020) | Will be implemented together with the release of new Resource profile | User Component | Ordering |
| Users can see related services/resources | 7.7 | For Portal Release 1 (Nov 2020) | Will be implemented together with the release of new Resource profile | User Component | Discoverability |
| Users can see compatible services/resources | 7.8 | For Portal Release 1 (Nov 2020) | Will be implemented together with the release of new Resource profile | User Component | Discoverability |



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| Users can search based on workflows rather than just services | 7.3 | For documentation and handover to future EO SC Portal operators | The requirement is not exactly in scope of the Portal implementation. To be taken into account when enhancing EO SC Profiles and Definitions. Can be done with a proper categorisation / use of a resource taxonomy | User Component | Discoverability |
| User can see the service/resource all time rating and most recent average rating | 6.4 | For documentation and handover to future EO SC Portal operators | Not really a priority as the low interest shown. Rating feature (other survey entry) itself is questionable. This feature is the enhancement of the rating. | User Component | Discoverability |
| Structure the portal as a Science Gateway with thematic sub-portals, transdisciplinary virtual environments, & marketplace of horizontal services | 7.6 | For documentation and handover to future EO SC Portal operators | Serious UI concept change. This idea may be a good direction to follow overall. Implementation is costly though. Needs consideration in the EO SC Future | User Component | Discoverability |
| Users can access a dashboard for a self-consistent OS working environment | 6.7 | For documentation and handover to future EO SC Portal operators | Need some clarification to determine how the user space can be reorganized to achieve the desired User Experience | User Component | |
| User can use a Test Suite for resources/services | 4.8 | For documentation and handover to future EO SC Portal operators | More of a policy level task. Can be supported on the tool level but not the other way around | User Component | Discoverability |
| Users can see the origin/source country of a service/resource | 8.0 | For Portal Release 1 (Nov 2020) | Will be implemented together with release of new Resource profile | User Component | Discoverability |
| User can see what kind and the level of support they can expect from the provider in the resource/service page | 9.0 | For documentation and handover to future EO SC Portal operators | Partly implemented together with the release of new Resource profile (helpdesk link and email address). Support mechanism is built in the MP and is usable by the end users to contact the operations team who play a role of a broker for user - provider communication. Some other mechanisms can be considered to facilitate more possibilities to engage with the support on the Portal level. | User Component | Discoverability |
| Users can view the live order status | 8.2 | For Portal Release 2 (Sept 2021) | Implemented (Project view of the service/resource) for the services using EO SC Portal as the order handling tool. Integration with other tools and promoting the use of the Portal for this task can | User Component | Ordering |



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| | | | be the solution. More research needed | | |
| User can see the expected order fulfilment time | 7.5 | For documentation and handover to future EOSC Portal operators | Ordering configuration can make it possible to declaratively set this information. Currently there is no way to do that. May be taken into account if we find a value proposition both for users and providers. Promoting resources with these expectations set and trying to enforce fulfilment on the portal level can be a direction. Need further research | User Component | Ordering |
| Post-order feedback survey | 8.2 | For Portal Release 2 (Sept 2021) | Currently only rating is involved as a feedback survey. The feedback form should be enhanced to provide more information about services. | User Component | Ordering |
| User is automatically sent/directed to training/tutorial/quick start guide after order is fulfilled | 4.0 | For documentation and handover to future EOSC Portal operators | Low priority. Easy to do | User Component | Ordering |

Conclusions and Next Steps

As part of the requirements gathering activities conducted with the EOSC regional and thematic cluster projects, a total of 39 requirements have been extracted. Validation and prioritisation was conducted during a workshop on 28 September 2020, after which an analysis was made by the EOSC Enhance Requirements Gathering Task Force Validators and laid out next steps for each.

At present, EOSC Enhance is planning 13 requirements for implementation as part of EOSC Portal Release 1 scheduled for the end of November 2020. 5 Requirements will be targeted for implementation as part of EOSC Portal Release 2. Meanwhile 12 requirements are planned for documentation and handover to future EOSC Portal operators, out of which two of these may be implemented under EOSC Enhance if pre-requisite conditions are met. All these are tentative only as many requirements require additional information from the sources of the requirements.