EOSC Future

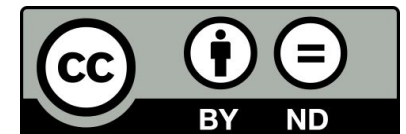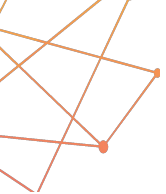# EOSC-Exchange: Focusing on Services Onboarding

Catalin Condurache (EGI Foundation)
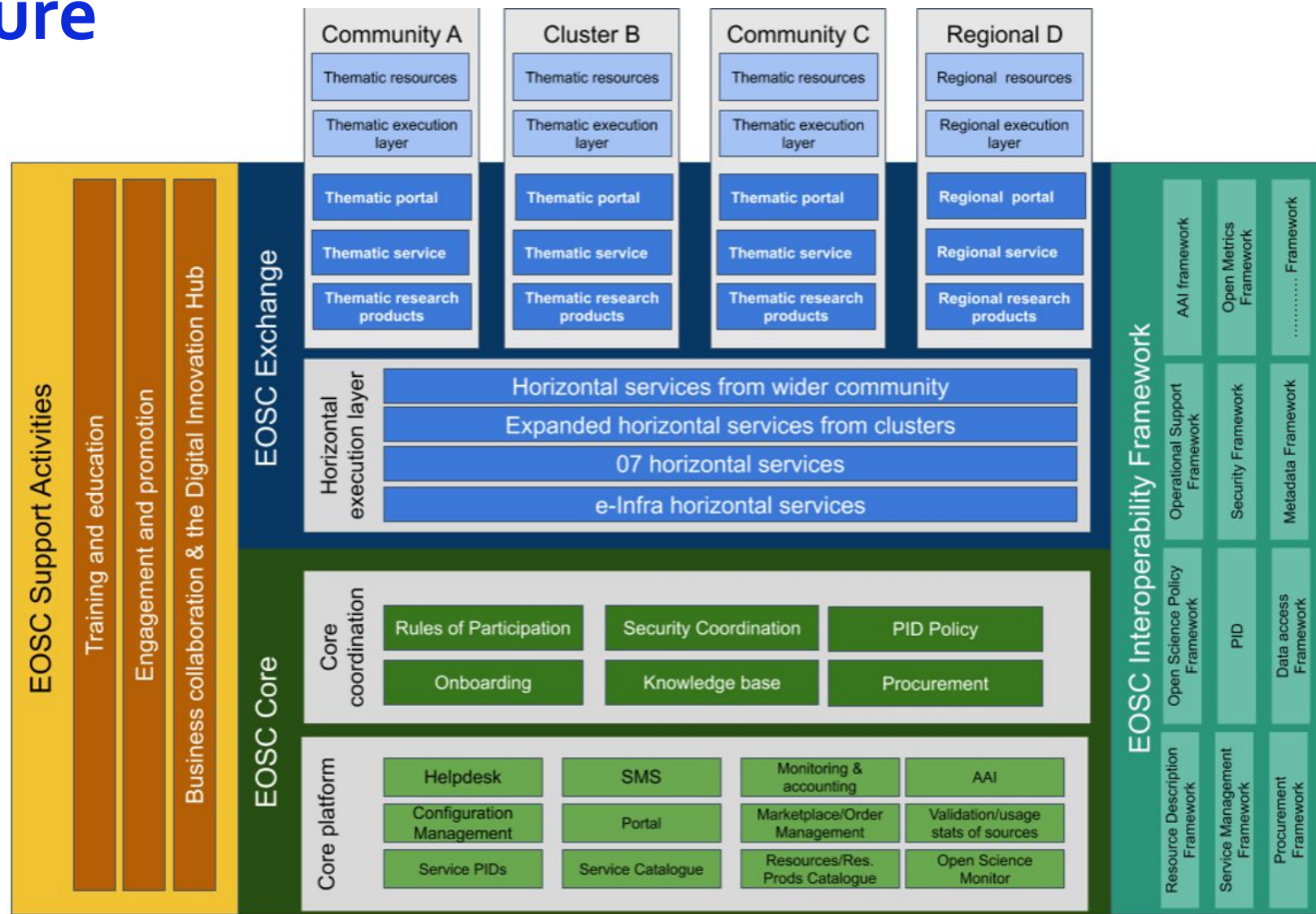on behalf of EOSC Portal Onboarding Team

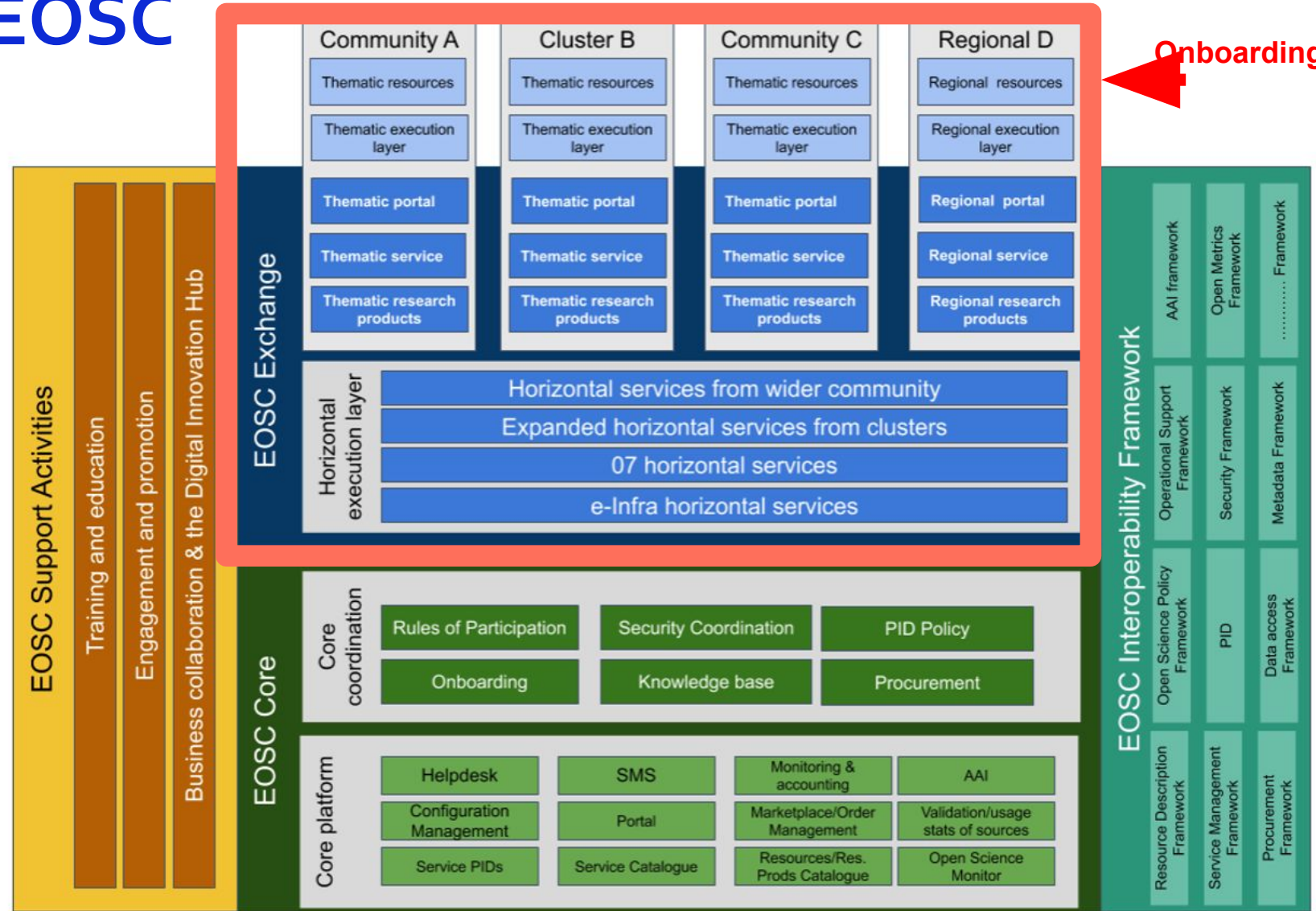EOSC Symposium 2023

# EOSC Architecture

Three components

- EOSC Core
- EOSC Exchange
- EOSC Interoperability Framework

# Onboarding to EOSC

- It is about populating the EOSC-Exchange with…
- **resources** registered to the EOSC by RIs and clusters to serve the needs of users

# Resources, resources, resources

At the start of EOSC Future

- only Resource Provider and Resource ('live' IT services, but no software or data sources or research products) types were onboarded

It then evolved to services, data sources / research products, community (external) catalogues (collections of RPs and Services), training materials, interoperability guidelines

- each type characterized by specific profile / metadata

- based on https://wiki.eoscfuture.eu/display/EOSCSMS/SPM+Guideline-02%3A+EOSC-Exchange+Definition+of+resource+types

# The Onboarding process

- Process developed by EOSC Enhance and EOSC-hub projects and fully reshuffled during EOSC Future

- Continued activity without interruption since 2018

- Two separate activities

  - Validation of new requests against EOSC Rules of Participation requirements

  - Audit existing records to ensure they remain valid

- Follows the EOSC Exchange inclusion criteria

# The onboarding process - improvements under EOSC Future

- Integrated workflow using Jira

- Improved initial checking of fields during input

- Proper auditing of records incl. selection of records to be audited

  - Ongoing automated checking

- Developing support for importing multiple records from other catalogues

  - Pilot with NI4OS Europe, EOSC Nordic

- Consistent application of RoP requirements including GDPR

  - Terms of Use and Privacy Policy

- Set up of EOSC Onboarding Strategy group

- Further scalability improvements

# The onboarding process - now

- Dedicated space in Confluence
  - https://wiki.eoscfuture.eu/display/EOSCOB/Welcome+to+the+EOSC+Onboarding+space
  - Fully documented

# About EPOT

- EPOT (EOSC Portal Onboarding Team) supports the process

  - Merge of EOSC Enhance Onboarding team , EOSC Hub Onboarding team and the Dev teams of the EOSC Portal parts (Providers, Marketplace-Catalogue)

  - Implements the onboarding process

- Part of Task 6.1 activities under EOSC Future

  - 30+ people involved in total (based on mailing list membership)

  - About half directly involved in regular EPOT activities – EPOT meetings, rota, validation, audit

- Dedicated onboarding sub-teams from other tasks

  - Interoperability guidelines, OpenAIRE, training resources

# About EPOT

- EPOT regularly represented in E-OSG and Release coordination meetings, also when requested in other WP and Tasks meetings (Metadata schemas, Training and dissemination)

- Communications with users via onboarding@ mailing list, also EOSC Helpdesk
  - EOSC Onboarding group support

- Fully documented procedures to validate and audit all type of resources

- Active involvement in improving the Providers Portal interface (bug reporting)

# About EPOT

Impact

- Webinars

  - Training workshop on Privacy Policy and ToU (2 parts)
  - Onboarding using API

- Contribution to various events

  - EOSC Days France 2022
  - EOSC Providers Days 2022

- Contributions to Profile releases

  - PP and ToU for services
  - Legal status of RPs
  - Community catalogues

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# Challenges - past

- Addition of different types of resources aligned EPOT scope with EOSC exchange

- Providers Portal interface for EPOT not always friendly and helpful

    - infamous case of the search engine

    - 404 error now and then

- Overall good collaboration with developers but hindered by other tasks and priorities

# Challenges - ahead

- Re-categorize the existing services based on new service types: data sources, training materials

- Continue the audit process – current cut off date 1 Oct 2022

  - No providers or services onboarded before 1 Oct 2022 without audit stamp

# Summary

- Onboarding expertise lies with EPOT

- It has taken a lot of effort within the project to get where we are now
    - 315 Resource Providers active
    - 408 Services active
    - 24 Training resources active
    - 17 Guidelines active
    - 65 Data sources active
    - 2 Community Catalogues active

- It shall not be lost

# Thank you!

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