EOSC-Exchange: Focusing on Services Onboarding

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

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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
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!

catalin.condurache@egi.eu

onboarding@eosc-portal.eu