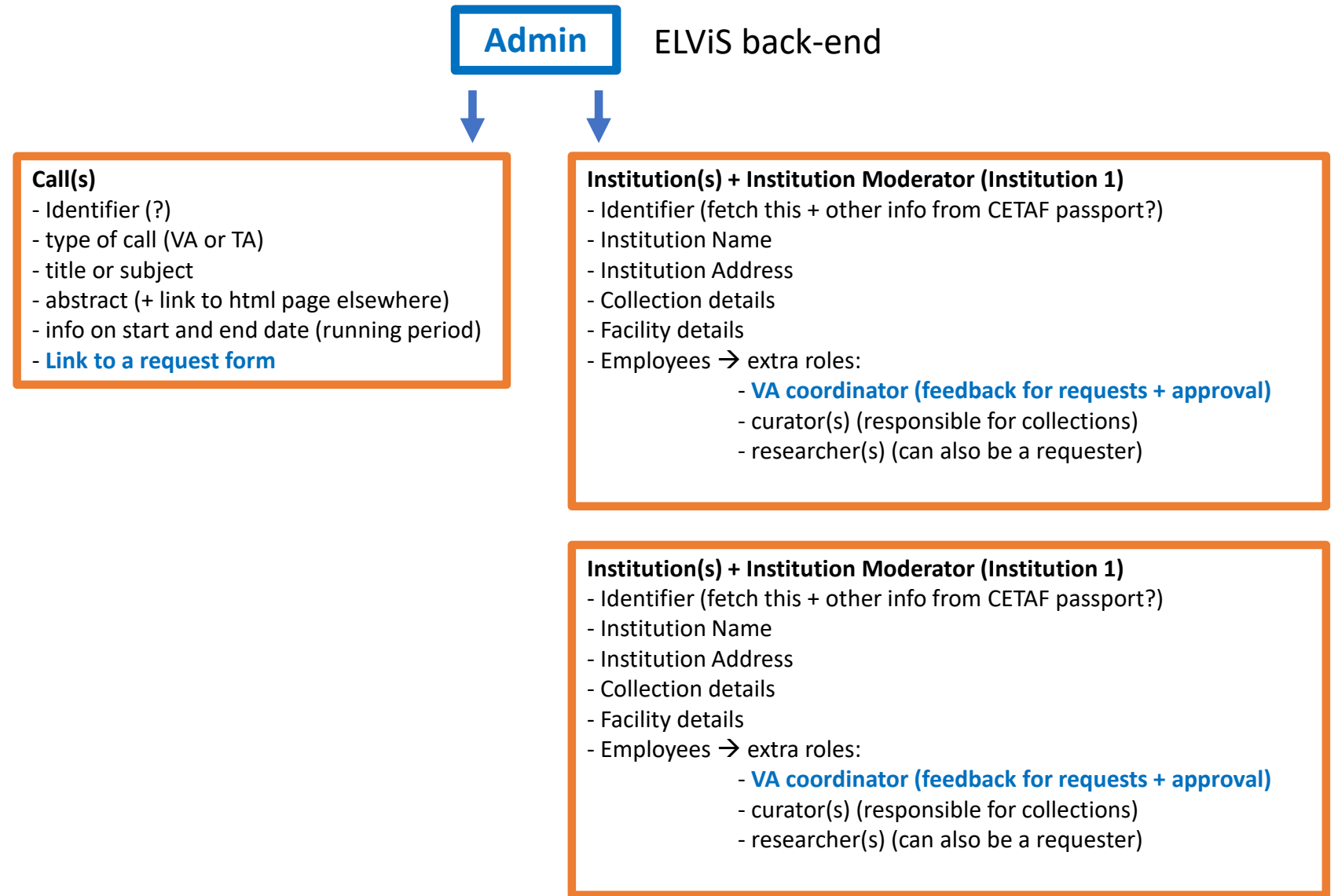


An **Administrator** is able to:

- register a VA call which contains basic information as indicated (for MVP ELViS only one VA call, but eventually we have to register more VA calls)
- register institutions with basic information and assign for each an **Institution Moderator**, who will take care of additional info and employees/roles



An [Institution Moderator](#) is able to:

- add and manage all extra information of the institution needed, such as: collection details, facility details
- register his/her colleagues: the other employees of the institution with their roles, for now most important: [VA coordinator](#)

ELViS homepage



Requester(s)

- Identifier (ORCID?)
- basic information to get read access

Admin

ELViS back-end



Call(s)

- Identifier (?)
- type of call (VA or TA)
- title or subject
- abstract (+ link to html page elsewhere)
- info on start and end date (running period)
- [Link to a request form](#)

Institution(s) + Institution Moderator (Institution 1)

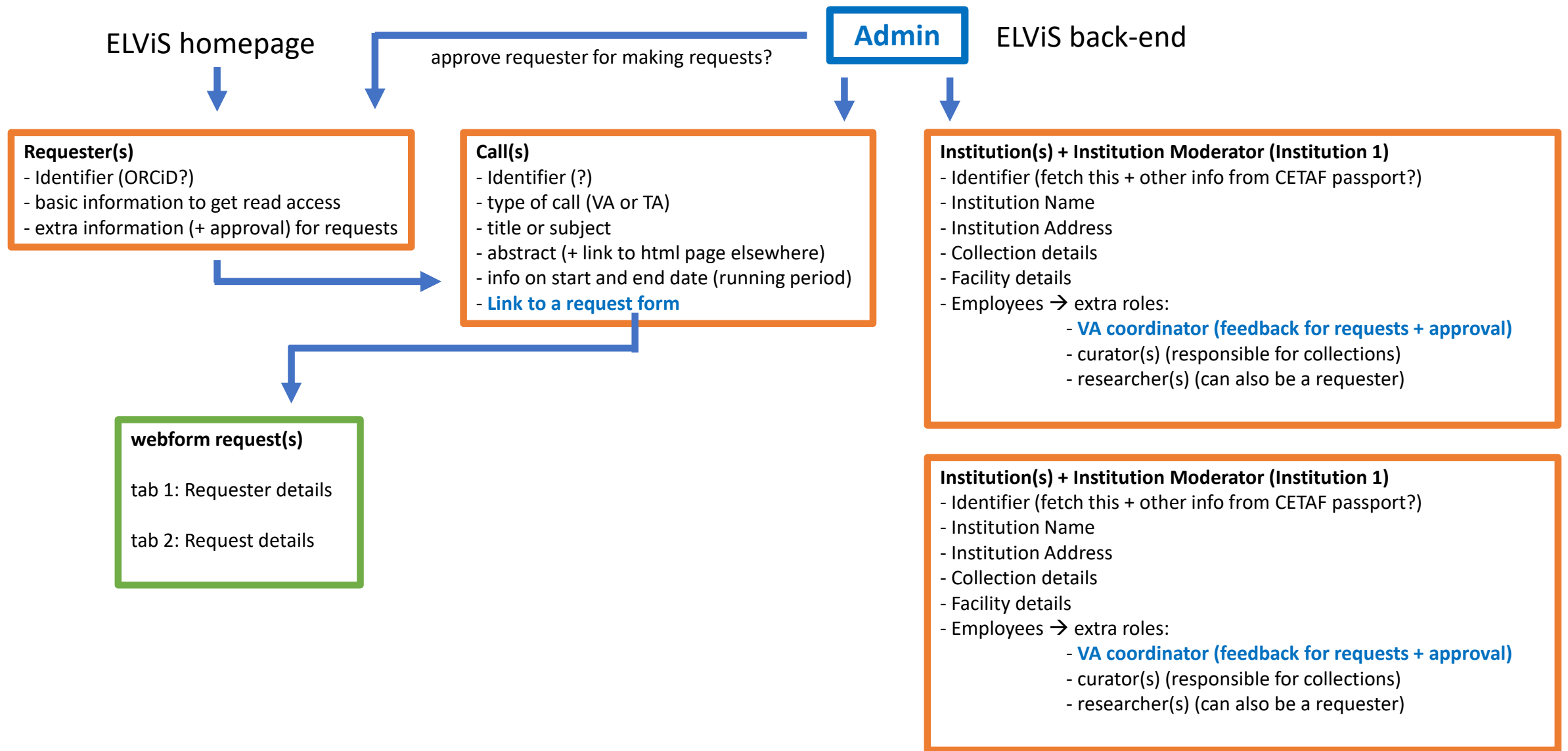
- Identifier (fetch this + other info from CETAF passport?)
- Institution Name
- Institution Address
- Collection details
- Facility details
- Employees → extra roles:
 - [VA coordinator \(feedback for requests + approval\)](#)
 - curator(s) (responsible for collections)
 - researcher(s) (can also be a requester)

Institution(s) + Institution Moderator (Institution 1)

- Identifier (fetch this + other info from CETAF passport?)
- Institution Name
- Institution Address
- Collection details
- Facility details
- Employees → extra roles:
 - [VA coordinator \(feedback for requests + approval\)](#)
 - curator(s) (responsible for collections)
 - researcher(s) (can also be a requester)

Via the ELViS homepage a [Requester](#) (researcher), who wants to make use of the system, can register him-/herself

- first to get read access for all the information available in ELViS, like: available calls, available institutions and their collections and facilities

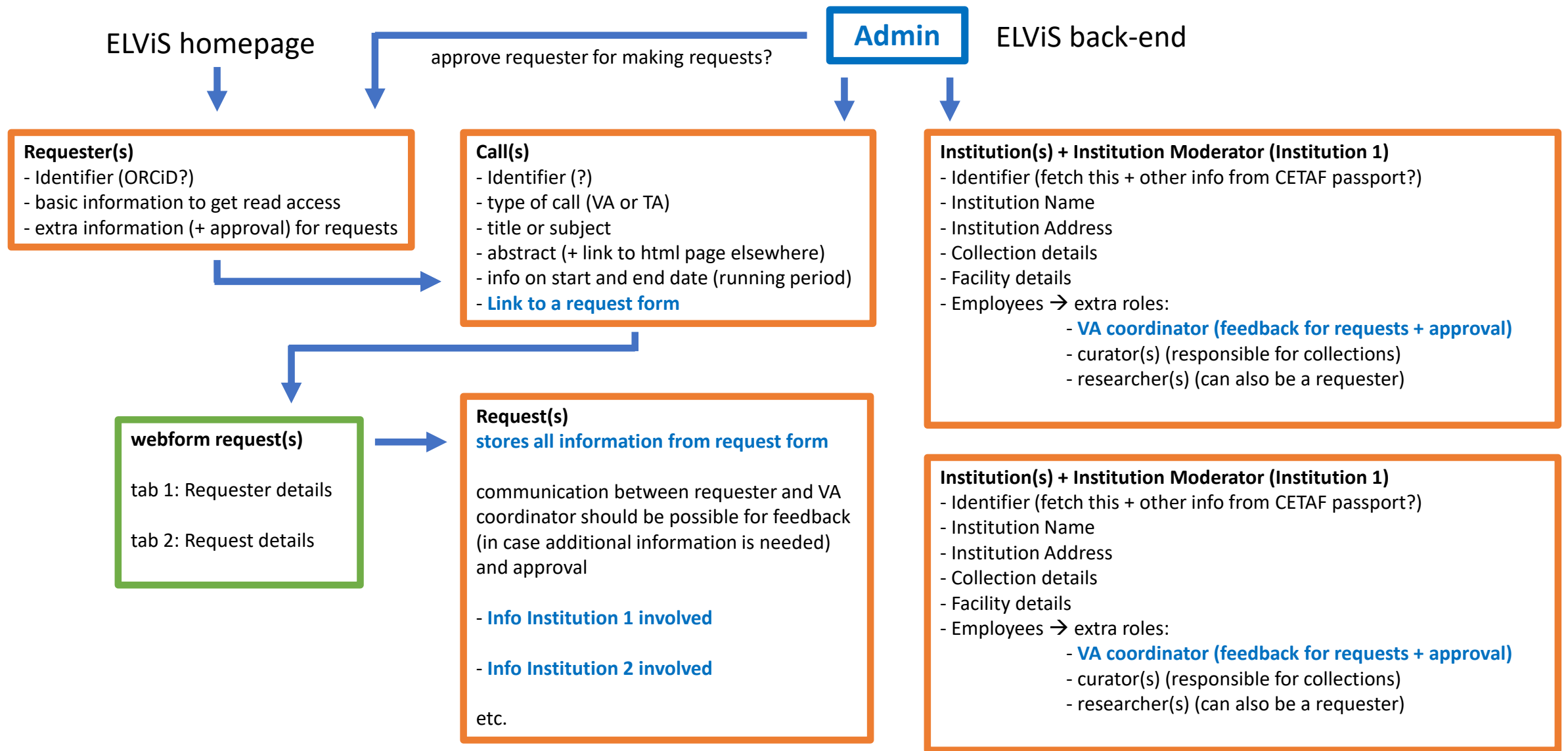


Via the ELViS homepage a **Requester** (researcher), who wants to make use of the system, can register him-/herself

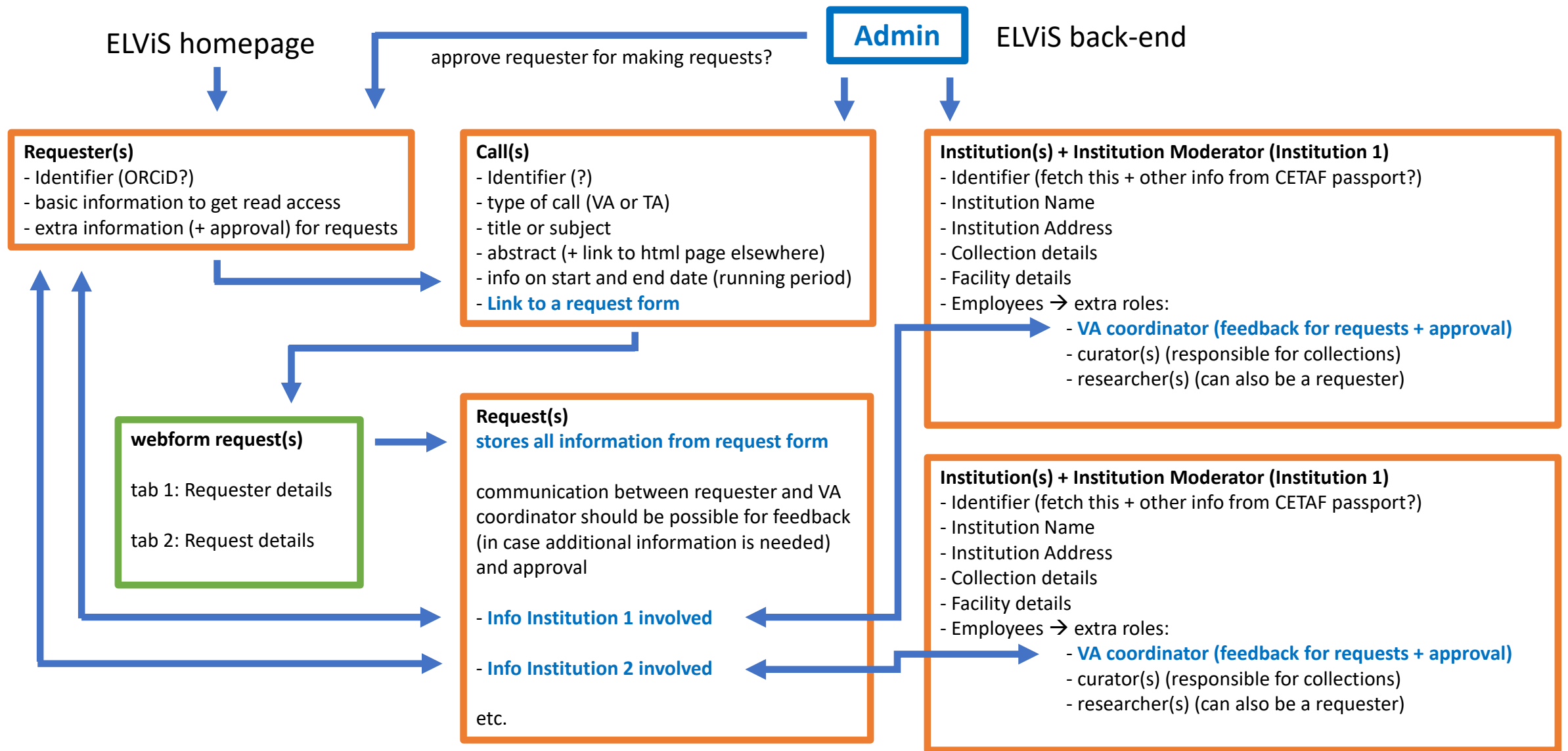
- first to get read access for all the information available in ELViS, like: available calls, available institutions and their collections and facilities

- next to also be able to register a request for a **call** via the [request form](#) that is available for that call

*probably someone should be able to verify, approve and – if necessary – inactivate the Requester registration → the **Admin**?*



The information provided via the webform for requests is stored as an official **Request** in connection to the **Call**; a request can be about an action on collections and/or facilities of **one institution**, but can also involve **multiple institutions** ...



It should be possible to communicate about a [Request](#) between Institutions and a [Requester](#). Within each institution a [VA coordinator](#) is responsible for this: he/she can evaluate the request, ask the requester to provide additional information and eventually can approve or reject the request; this means that the Request functionality should have a sort of “comments”-functionality with email notifications, related to the status of the request, in which the VA coordinator is leading.

Call(s) specifications

Main Redmine ticket: #44974, related tickets: #44976 and #44977

Within the Synthesys+ project a “Call” is a sort of open invitation to Researchers to make a request which is funded. This Call has a certain period within which requests are possible. There are VA (= Virtual Access) Calls and TA (= Transnational Access) Calls possible. The VA Calls are mainly about digitisation requests, so request to digitise collections of participating institutions, and the TA Calls are more about (all kinds of) loans of and visits to specimen of collections of participating institutions. For the MVP ELViS we only have to deal with one Call: a VA Call which starts on the 20th of February 2020 and ends on the 30th of April 2020, at 17:00 UK time

A Call must be registered by an Admin and such a registration should contain:

- An Identifier (I don’t think the Synthesys project will provide one, so this can be an internal system identifier)
- The type of the Call: VA or TA
- The title or subject of the Call: I don’t think the Synthesys project has already provided one, so this can be: “Digitisation on Demand” for now
- An abstract or summary of what the Call is all about: this can be a large text field
- A possibility to add a link to a website for more information on the Call
- A start date and an end date for the period during which the Call is active and requests connected to this Call can be registered
- A link to the Webform for Requests

Webform request(s) specifications 1/3

Main Redmine ticket: #44979

A Webform for registering Requests should be as generic as possible, so should be able to:

- Select the VA Call for which it is applicable, via a dropdown list of all available Calls: VA as well as TA Calls, but only for the Calls which are “open”, so for which the start date has passed but the end date not yet (for the MVP ELViS we only have to deal with one Call: a VA Call which starts on the 20th of February 2020 and ends on the 30th of April 2020, at 17:00 UK time)
- Provide Requester(s) details:
 - Fetch the information of the Requester who is actually activating the Webform (via his/her login information: name, institution he/she is involved in, email address, ORCID)
 - Enable the Requester to add one or more other requesters who will work on the same request (via a search function on the list of available requesters), this functionality should be repeatable, because more than one extra requester (co-worker) can be involved in a request
- Provide Request details 1/2:
 - Select the nature of the request (via a dropdown list; for now – for the VA Call for the MVP ELViS – it will mainly be: “digitisation”, later on, for the TA Calls, there will be more categories like: all kinds of loans and visits)
 - Provide a name for the request (via a free text field)
 - Provide an abstract or summary for the request (via a large text field)
 - Enable the Requester to select an institution which will be involved in the request as well as the VA coordinator of that institution (via fetching the institution plus its VA coordinator already registered in the system), this functionality should be repeatable, because a request can involve more than one institution
Note: because this is a VA Call for digitising collections, the institutions that have to be selected/mentioned here are the institutions which are going to take care of the digitisation, so this is depending on the nature of the request as selected here earlier
 - Provide a list of the institutions, their collections and the amount of specimen that will be involved in the request; this can be done via a repeatable set of three fields: 1) a possibility to select an institution from the list of the participating institutions already registered, 2) a free text field to type the name of the collection and 3) a free text field (numbers only) to type the amount of specimen of the collection involved.

Webform request(s) specifications 2/3

- Provide Request details 2/2:
 - Possibility to add “Further details if required”, which can be done via a large free text field with that text as label.
 - Provide a list of the preservation/preparation type(s) of activities covered by the proposal; this can be done via a repeatable set of two free text fields: one labelled: “Preservation type” and one labelled: “Further details if required”.
- Provide information on the Impact of the request, via a series of large free text fields with these labels:
 - What field(s) of research or problem does your request support/address and how?
 - How does your request address the Horizon 2020 societal challenges?
 - Describe any areas of innovation in your proposal, either in workflows, data, or the research it will enable.
 - Who do you expect to be the users of the data (please include all groups, not just scientific research users)?
 - How might you communicate with potential users of the data?
- Provide information on the “Process, workflow, facilities and outputs”, which can be done via:
 - a large free text field with as label: “Data and/or metadata fields and formats proposed as outputs”
 - a repeatable set of three fields containing: a possibility to select an institution from the list of the participating institutions already registered and involved in the request (see above) plus a large free text field with as label: “Facilities required”, plus a second large text field with as label: “Proposed workflow”.
- Provide information on the “Costs” involved via a repeatable set of fields containing: a possibility to select an institution from the list of the participating institutions already registered and involved in the request (see above) and next to the institution selected a possibility to upload a document containing the costs calculation (this will probably be a template, so a pre-defined format, like Excel).
- Provide information on “Data storage and release”, via:
 - a repeatable set of two fields containing: a possibility to type a name of a platform via which the data will be published (free text field) and a possibility to add further details for that (free text field).
 - a possibility to select a license which will be applicable for the publication of the data; this can be done via checkboxes with a few allowed licenses, like: CC0, CC-BY, CC-BY-NC, plus a possibility to add a license which is not mentioned (free text field)
 - a possibility to add information on a proposed timeline for data release (free text field)
 - a possibility to add further details for that (free text field)

Webform request(s) specifications 3/3

- a repeatable set of fields for providing information on data storage per institution involved in the request, containing:
 - a possibility to select an institution from the list of the participating institutions already registered and involved in the request (see above) and next to the institution selected a possibility to provide information about its Collection Management System (its name) via a free text field.
 - a possibility to make a selection of file formats which will be applicable for the publication of the data; this can be done via checkboxes with a few allowed format, like: CSV, JPEG, PNG, TIFF, TXT, XLXS, ZIP, plus a possibility to add a format which is not mentioned (free text field).
 - a possibility to provide information on storage type(s), like cloud, disc, harddrive (free text field)
 - a possibility to provide additional information (large free text field).
- A submit button to store the request
maybe – given the amount of information that should be provided – it would be nice to make it possible to store the form temporarily to come back to it later on and finish it and then submit it definitely?

Institution(s) specifications 1/3

Main Redmine ticket: #44970, subtasks: #45190, #45191, #45193, 45194, #45196 and related task: #44993

Within the Synthesys+ project 21 European institutions are participating, but there are only 19 involved in the first “Call”, the VA Call for the MVP ELViS, so therefore initially only these 19 will have to be registered in the MVP ELViS.

Note: It is possible to fetch the information of the 19 institutions participating in the VA Call (and other institutions as well later on) via their so called CETAF passports, fetching this info an API, but that can be dealt with after the MVP ELViS.

An Institution must be registered by an Admin and such a registration should contain:

- An Identifier (I don't think the Synthesys project will provide one, so this can be an internal system identifier)
- The acronym for the institution
- The name of the institution
- The address of the institution (street, number, postal code, city)
- The country of the institution
- The general email address of the institution
- The website of the institution

Note: the info of the institutions can be obtained by using their CETAF passports → fetching this info like that via an API can be implemented later.

Note: The next pages contain a list of the institutions which will participate in the VA Call (with their country code in front of their names and their official acronyms after their names; the names link to their websites) and a list of their VA Coordinators; we might already register these institutions and these VA coordinators:

Note: Regarding facilities of these institutions: there is an Excel list available with information on facilities per institution; this might be a start to see whether we can come up with a basic dropdown list of high level types of facilities (there is a separate Redmine ticket for this: #45330); that list is attached to ticket #44970.

Institution(s) specifications 2/3

List of institutions which could already be registered in the MVP ELViS:

[AT: Natural History Museum, Vienna \(NHMW\)](#)

[BE: Royal Botanic Institute Natural Sciences, Brussels \(RBINS\)](#)

[BE: Royal Museum Central Africa, Tervuren \(RMCA\)](#)

[BE: Meise Botanic Garden, Meise \(BGM\)](#)

[CZ: Narodni Museum, Prague](#)

[DE: Museum fur Naturkunde, Berlin \(MfN\)](#)

[DE: Botanischer Garten und Botanisches Museum, Berlin \(BGBM\)](#)

[DE: Senckenberg Gesellschaft fur Naturforschung, Frankfurt, Dresden, Gorlitz \(SGN\)](#)

[DE: Staatliches Museum fur Naturkunde Stuttgart \(SMNS\)](#)

[DK: The Natural History Museum Denmark, Copenhagen](#)

[ES: Museo Nacional de Ciencias Naturales & Real Jardin Botanico Naturales, Madrid \(CSIC\)](#)

[FI: Finnish Museum of Natural History, LUOMOS](#)

[FR: Museum National d'Histoire Naturelle \(MNHN\)](#)

[GB: Natural History Museum, London \(NHM\)](#)

[GB: Royal Botanic Gardens Kew \(RBGK\)](#)

[GB: Royal Botanic Gardens Edinburgh \(RBGE\)](#)

[HU: Hungarian Natural History Museum, Budapest \(HNHM\)](#)

[IL: National Natural History Collections of the Hebrew University of Jerusalem \(HUJI\)](#)

[SE: Naturhistoriska Riksmuseet, Stockholm \(NRM\)](#)

Institution(s) specifications 3/3

List of VA Coordinators which correspond with the institutions mentioned on the previous page, can already be registered in the MVP ELViS:

Natural History Museum Wien: Nora Wurzinger nora.wurzinger@nhm-wien.ac.at

Royal Botanic Institute Natural Sciences: Patrick Semal patrick.sem@naturalsciences.be

Royal Museum Central Africa: synthesys.plus@africamuseum.be

Meise Botanic Garden: synthesys_TA@plantentuinmeise.be

Narodni Museum Prague: Jiri Frank jiri_frank@nm.cz

Museum fur Naturkunde: Frederik Berger. frederik.berger@mfn.berlin

Botanischer Garten und Botanisches Museum: Robert Vogt. r.vogt@bgbm.org

Naturmuseum Senckenberg: Marco Thines. marco.thines@senckenberg.de

Staatliches Museum fur Naturkunde Stuttgart, Joachim Holstein. joachim.holstein@smns-bw.de

University Copenhagen: Martin Vinther Sorensen. mvsorensen@snm.ku.dk

Consejo Superior de Investigaciones Cientificas: Begona Sanchez. bego@mncn.csic.es

LUOMOS, Anne Koivunen. anne.koivunen@helsinki.fi

Muséum National d'Histoire Naturelle, Paris pierre-yves.gagnier@mnhn.fr & magalie.castelin@mnhn.fr

Natural History Museum, London: synthesys-va@nhm.ac.uk

Royal Botanic Gardens Kew, Sarah Phillips. sarah.phillips@kew.org

Royal Botanic Gardens Edinburgh, Elspeth Haston. E.Haston@rbge.ac.uk

Hungarian Natural History Museum, Bernadett Dome dome.bernadett@nhmus.hu

Hebrew University Jerusalem, Rivka Ribanovich, rivkar@mail.huji.ac.il

Naturhistoriska Riksmuseet, Steffen Kiel. steffen.kiel@nrm.se