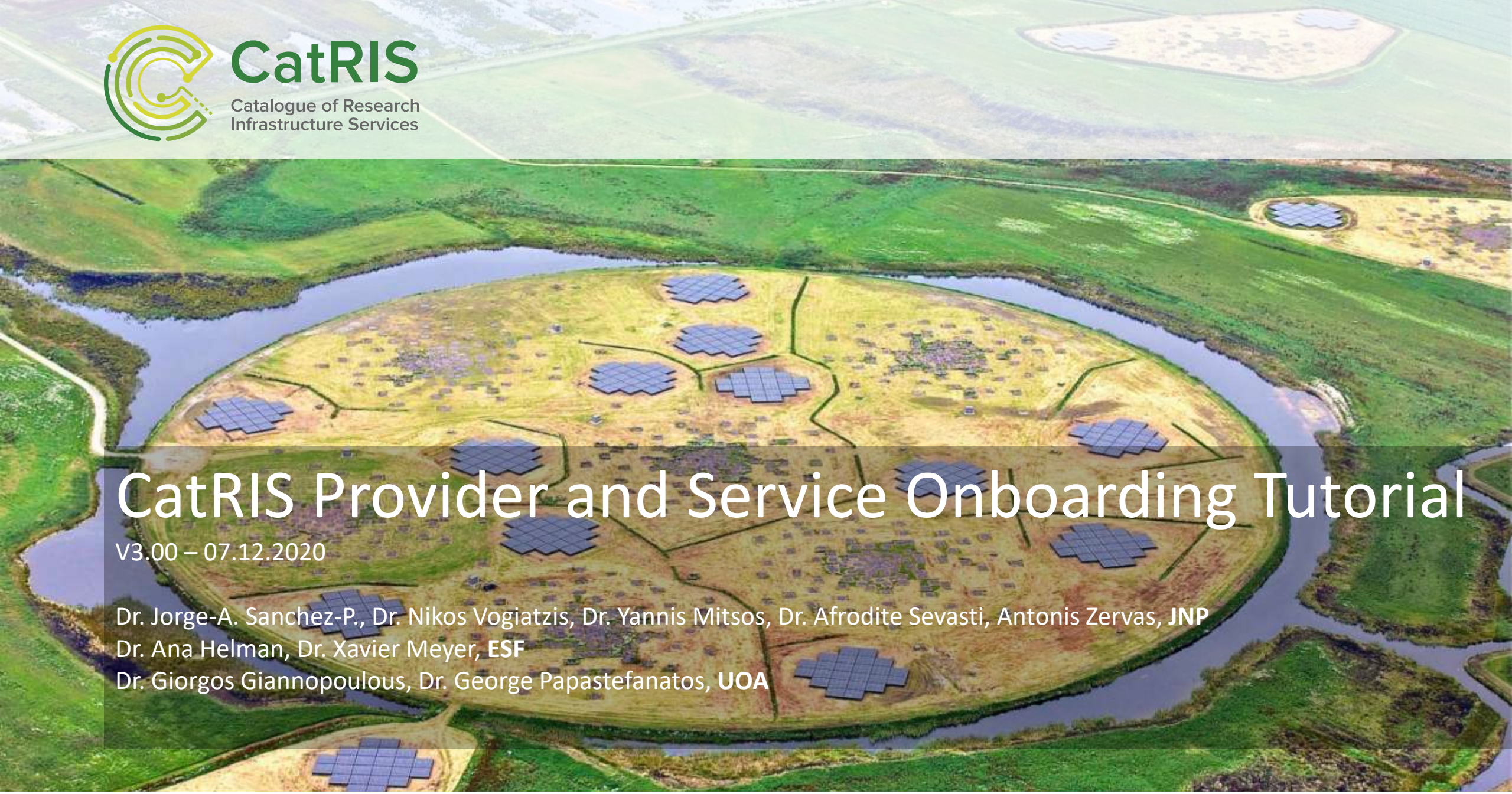
CatRIS
Catalogue of Research Infrastructure Services



CatRIS Provider and Service Onboarding Tutorial

V3.00 – 07.12.2020

Dr. Jorge-A. Sanchez-P., Dr. Nikos Vogiatzis, Dr. Yannis Mitsos, Dr. Afrodite Sevasti, Antonis Zervas, **JNP**
Dr. Ana Helman, Dr. Xavier Meyer, **ESF**
Dr. Giorgos Giannopoulous, Dr. George Papastefanatos, **UOA**

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

CatRIS

Catalogue of Research Infrastructure Services

Overview of CatRIS Portal Onboarding Process

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Phases of the Onboarding Process

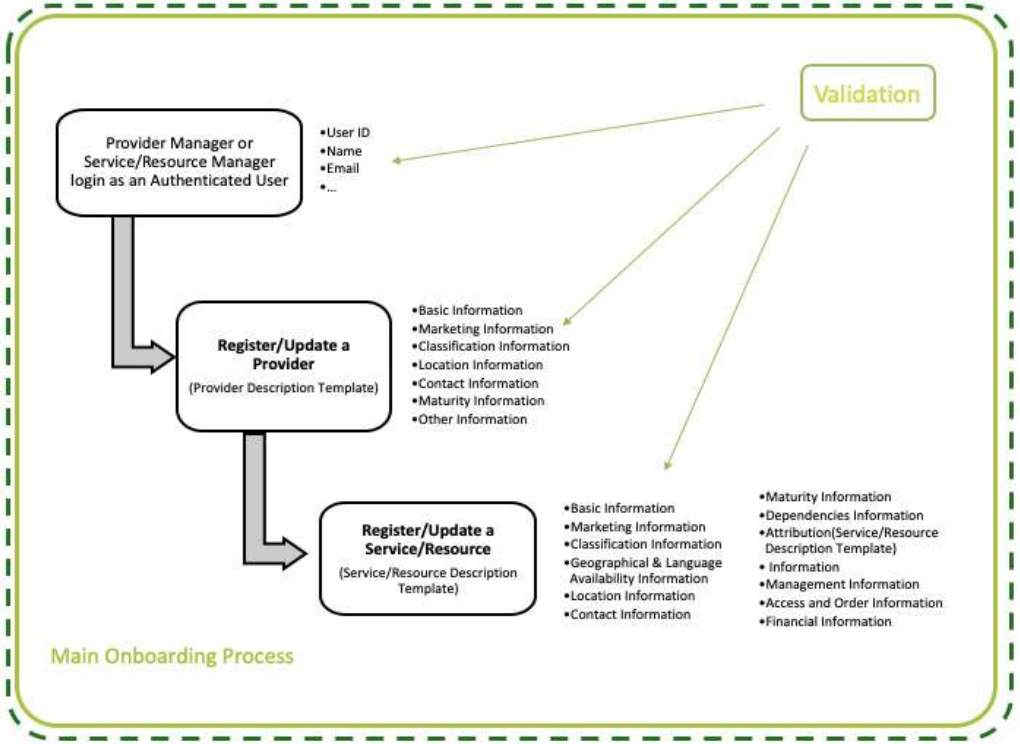
- The CatRIS Portal Onboarding Process (CPOT) currently specifies the Onboarding of Providers and their Services. The current form includes 3 distinct Phases implemented in 10 distinct Stages.
- The 3 Phases of the Onboarding Process are:

  A. An Authorised Representative of a Provider **registers him/herself into the CatRIS Portal**.

  B. The Authorised and Authenticated Representative of a Provider **onboards (and updates) the Provider**.

  C. The Authorised and Authenticated Representative of a Provider **onboards (and updates) the Services offered by the Provider**.

- As soon as each phase is concluded (approved or rejected), the user is notified to proceed accordingly. If the three-phase onboarding process is successful, then the Provider is registered to the CatRIS Portal and their Services become publicly accessible.



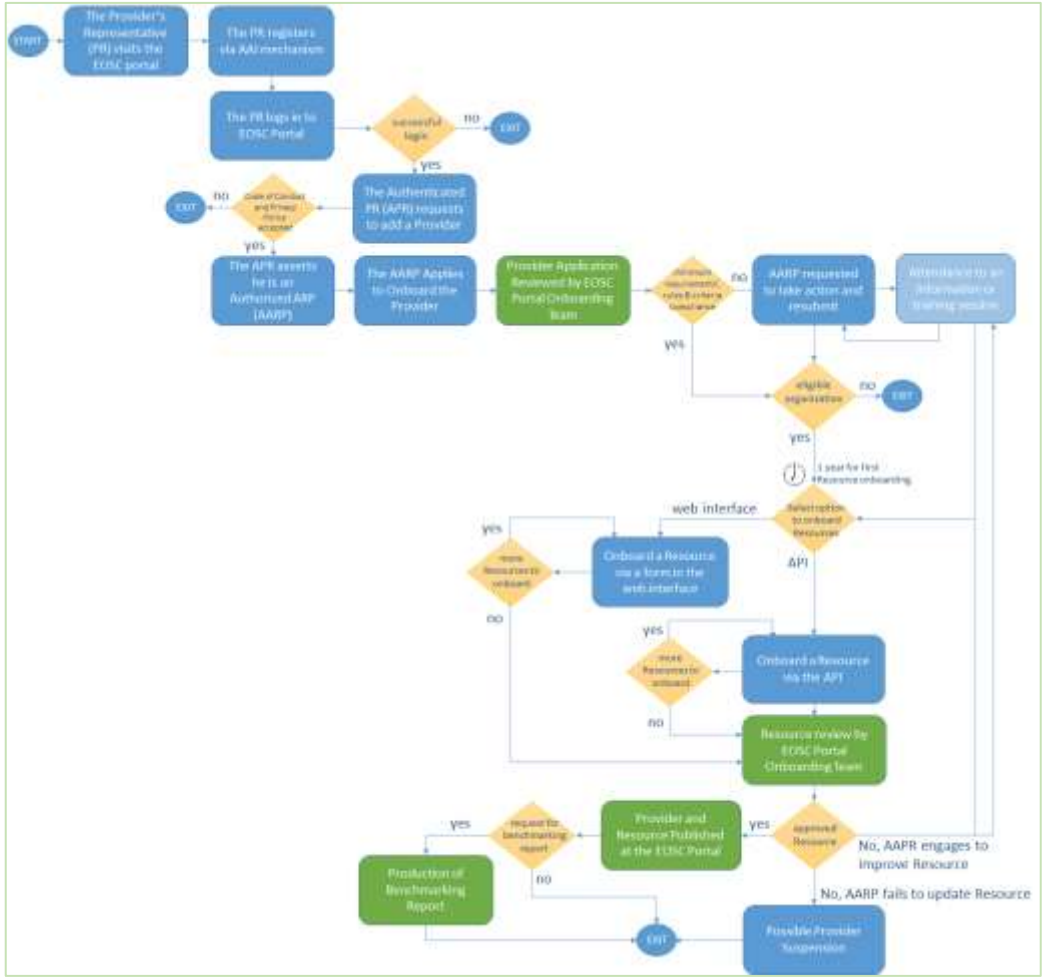
This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stages of the Onboarding Process

CatRIS
Catalogue of Research Infrastructure Services

The 10 Stages of the Onboarding Process are:

1. The ARP [1] registers with the CatRIS Portal
2. The AARP [2] logins to the CatRIS Portal
3. The AARP asserts Authorisation for the Provider
4. The AARP applies to onboard the Provider
5. The CPOT [3] reviews the Provider Profile
6. The AARP selects the method to onboard Services
7. The AARP applies to onboard Services
8. The CPOT reviews the Service Profiles
9. The AARP applies to onboard other Services
10. The CPQT [4] creates a Report



[1] ARP: Authorised Representative of the Provider
[1] AARP: Authorised and Authenticated Representative of the Provider
[1] CPOT: CatRIS Portal Onboarding Team
[1] CPQT: CatRIS Portal Quality Team

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

CatRIS

Catalogue of Research Infrastructure Services

Phase A. Registration of Authorized Representative of Provider

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

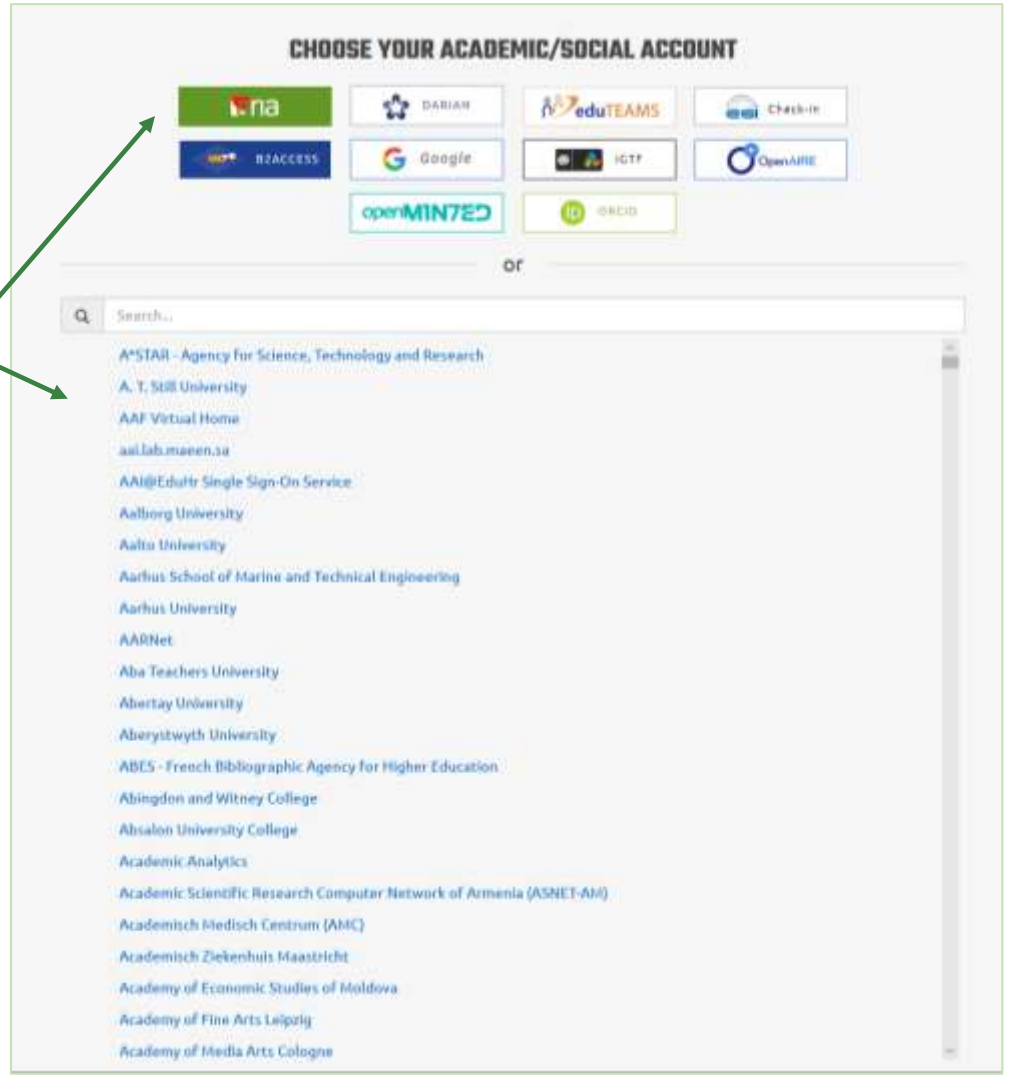
Stage 1 – The AARP logins to the CatRIS Portal

- The Authorised and Authenticated Representative of the Provider (AARP) visits CatRIS Portal: https://www.portal.catris.eu/home
- The AARP clicks on the LOG IN button on the top right of his screen

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 1 – The ARP registers with the CatRIS Portal

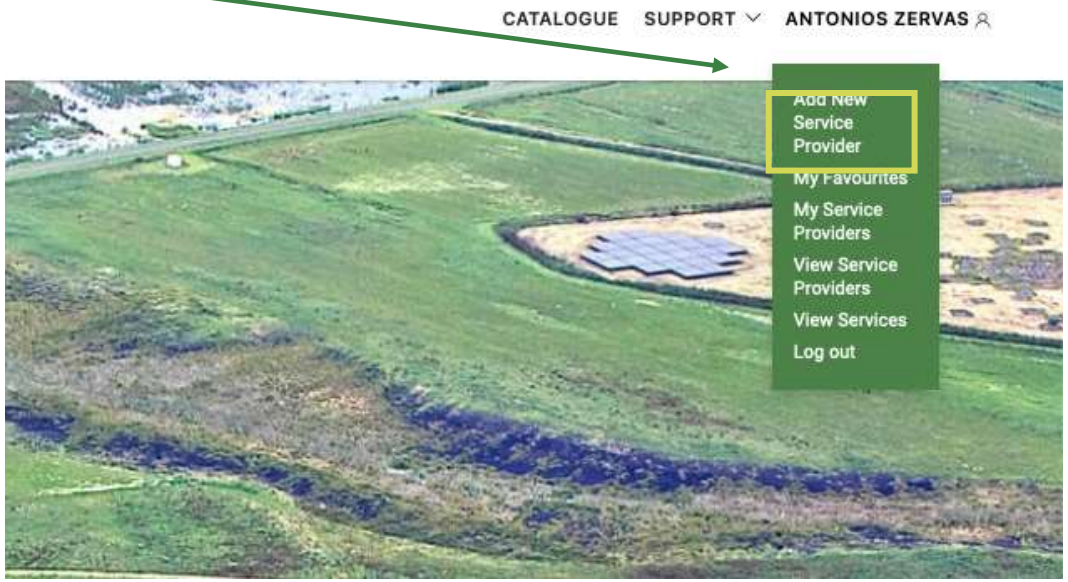
- The Authorised Representative of the Provider (ARP) registers with the CatRIS Portal using an existing identity from a Social or Academic Authentication and Authorization Infrastructure (AAI) mechanism.
- CatRIS supports AAI mechanisms of many Academic and Research Institutions worldwide as well as ORCID, Google, aria, DARIAH, eduTeams, IGTF, EGI Check-in, B2ACCESS, OpenAIRE, openMINTED.
- In case of difficulties during authentication communicate to tech-support@catris.eu depending on the issues a 1-to-1 call to offer guidance may be also organized.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 2 – The AARP logins to the CatRIS Portal

- The Authorised and Authenticated Representative of the Provider (AARP) logins into the CatRIS Portal with the AAI mechanism chosen.
- Once logged in, the menu allows access to the "Add New Service Provider" functionality. This is also available at https://www.portal.catris.eu/provider/add
- The AARP should read at this step the information about personal data treatment and privacy policy available at https://www.portal.catris.eu/support/privacy-policy
- In case of difficulties during authentication communicate to tech-support@catris.eu depending on the issues a 1-to-1 call to offer guidance may be also organised.

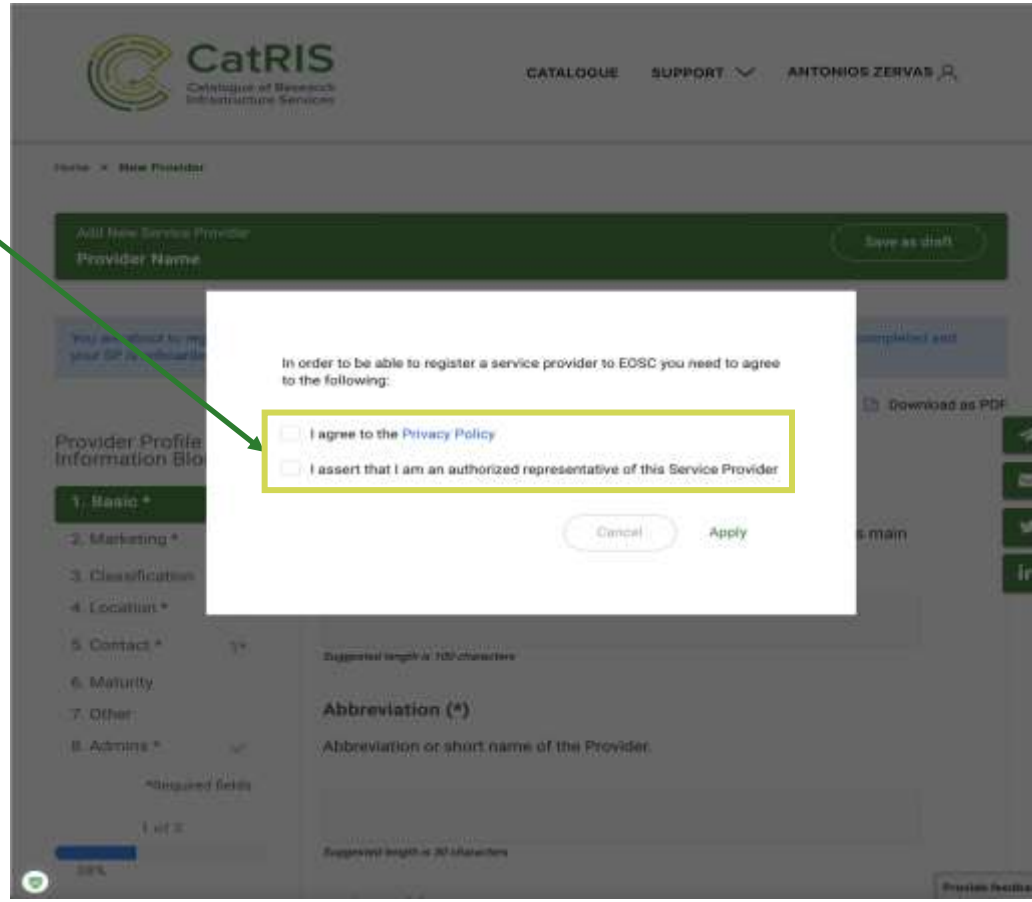


This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Catalogue of Research Infrastructure Services – www.catris.eu

Stage 3 - The AARP asserts Authorization

- By clicking on "Add New Service Provider" the ARP is asked a) to agree to the CatRIS Portal Privacy Policy and b) to assert the Authorisation of Representation of the Provider Organisation.
- Once a is accepted and the b asserted, the Authenticated and Authorized Representative of the Provider (AARP) can apply to onboard the Provider.
- The CatRIS Portal Privacy Policy applies to the collection of the data, public vs. internal, etc.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Catalogue of Research Infrastructure Services – www.catris.eu
CatRIS

CatRIS

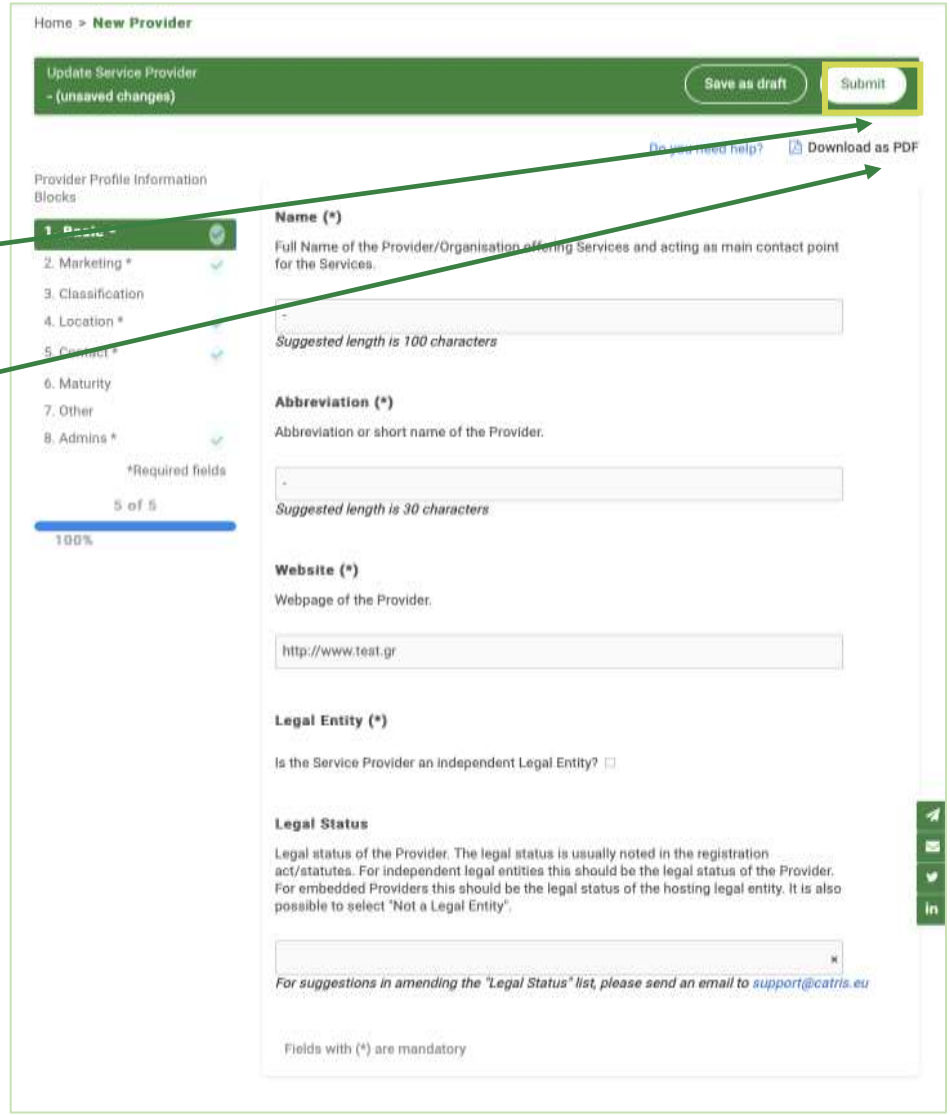
Catalogue of Research Infrastructure Services

Phase B. Onboarding of CatRIS Provider

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 4a - The AARP applies to onboard the Provider

- The AARP may now apply to onboard the Provider by completing the Provider Profile.
- All mandatory fields (denoted with *) have to be filled in.
- Need to press the Submit button to finalize the Provider application.
- The Provider Profile Template is also offered for download and preview in pdf and in excel formats. It includes standardized definitions, examples and recommendations. https://www.portal.catris.eu/assets/files/Provider-Form.pdf
- In case of difficulties during Provider onboarding communicate to tech-support@catris.eu depending on the issues a 1-to-1 call to offer guidance may be also organised.

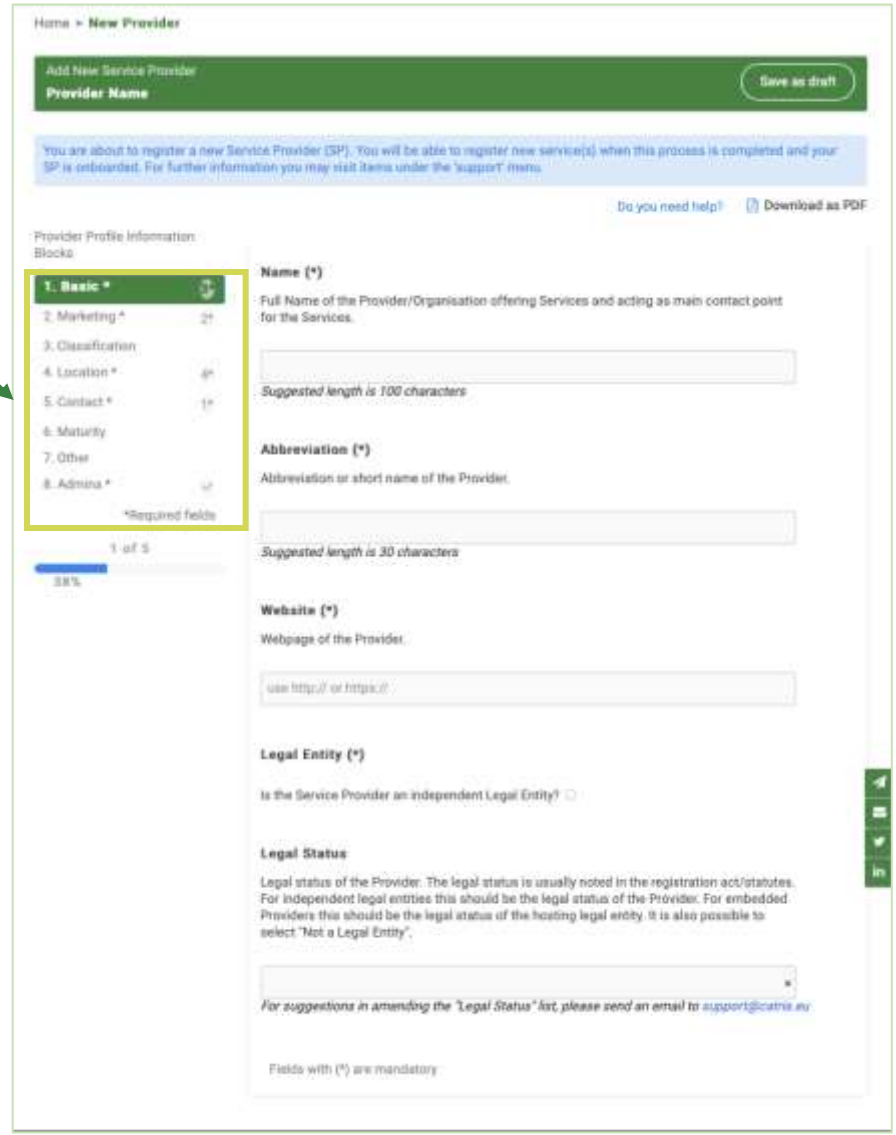


This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 4b - The AARP applies to onboard the Provider

- The SP Profile is organised in eight information blocks:
  - **Basic Information**: such as the name, the description, the logo, the website, etc. of the Provider.
  - **Marketing Information:** such as Profile, logo, multimedia
  - **Classification Information:** scientific domain, category, ESFRI domain, tags, etc.
  - **Location Information**: location of the Provider, coordinating & participating countries, etc.
  - **Contact Information**: contact persons and position
  - **Maturity Information:** Life Cycle status, etc.
  - **Other Information**: relevant to the legal status, networks, and activity of the Provider.
  - **Admins Information**: administrators of the Provider.

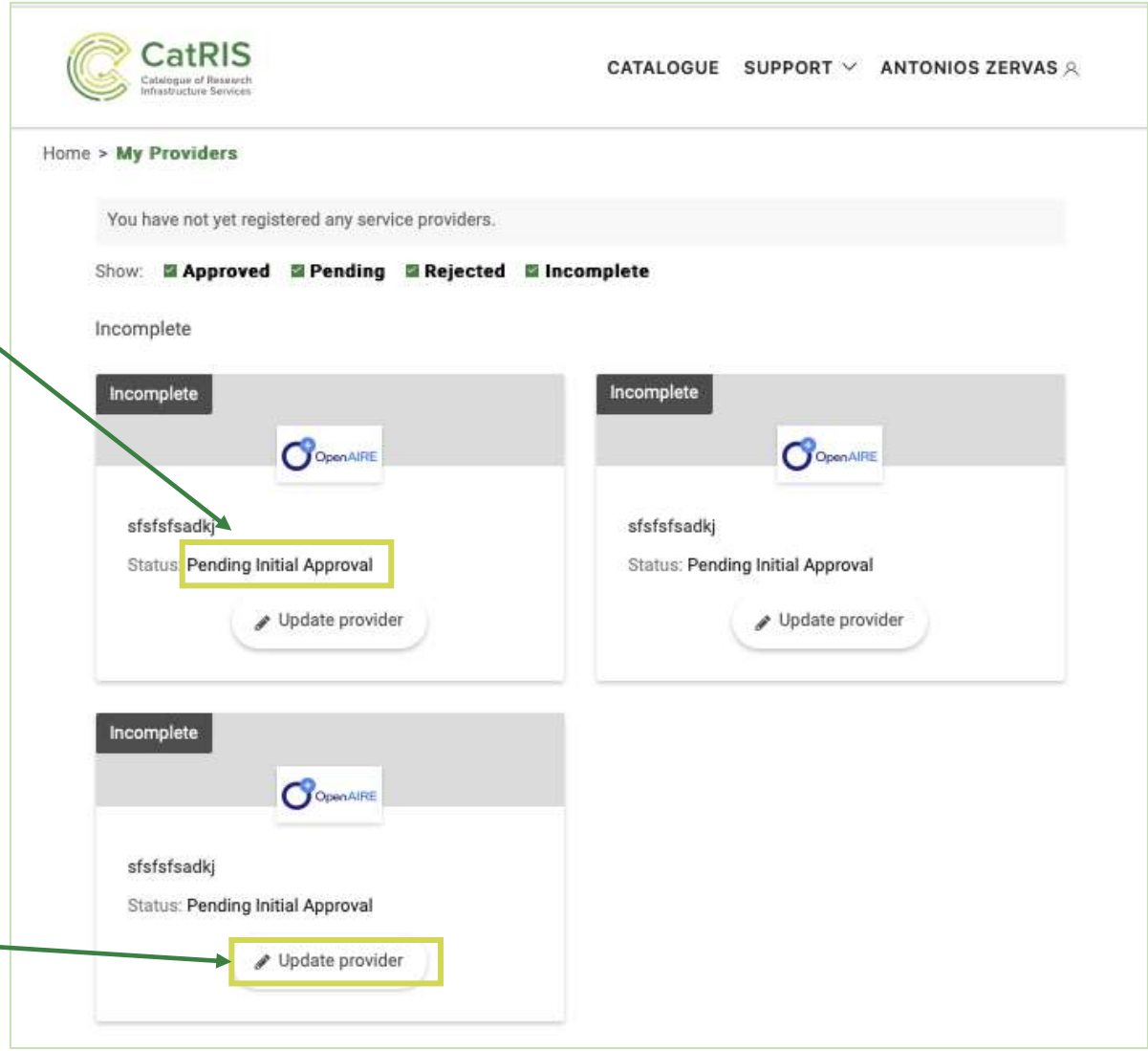
- All information has to be in the proper format (e.g. text, URL, email address, etc) and size.
  - Automated mechanisms are used to the greatest extent possible to ensure that all required information is included and that the information is of the correct type, size, etc.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 4c - The AARP applies to onboard the Provider

- Upon successful submission, the AARP will be navigated to the “My Service Providers” page, where the new Provider is marked as “pending initial approval”.
- The CatRIS Portal will also notify by email the Admins of the Provider and the CatRIS Onboarding Team (CPOT) of the successful submission.
- The CatRIS portal will open a ticket in the CatRIS dedicated Jira project. The CPOT confirms the opening of the Jira ticket for the Provider and updates it with any additional information deemed necessary.
- The AARP can update at any time the information about the Service Provider by clicking the “Update Provider” button.



Catalogue of Research Infrastructure Services – www.catris.eu
CatRIS

This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 5a – The CPOT reviews the Provider Description

CatRIS
Catalogue of Research Infrastructure Services

- At this stage the Provider application needs to get approved by the CatRIS Onboarding Team (COT) using the CatRIS Validation Tool.
- The COT checks the Minimum Requirements and the rules and criteria and the typology of the Provider Description Template (mandatory fields, lengths, types, etc) and provides comments and recommendations for improvements on the Validation Tool.
- If the Provider description does not comply with the minimum requirements, or the rules and criteria or the typology of the Provider Description Template, the AARP is contacted by email to take action on the recommendations stated in the Validation Tool and update the Provider Description.
- Typos and obvious errata are corrected by the COT. The AARP is informed accordingly.
- At this stage the AARP is offered the option to join an information or training session with the COT to get personalized consultation on the best way to onboard the Provider and its Services. In this, often 1-to-1 Webinar, the Provider will have the chance to ask questions and get personalized consultation on the best way to register its services.
- In case of delays, both the Provider and the COT receive reminders of the pending process via email messages.

Minimum Requirements

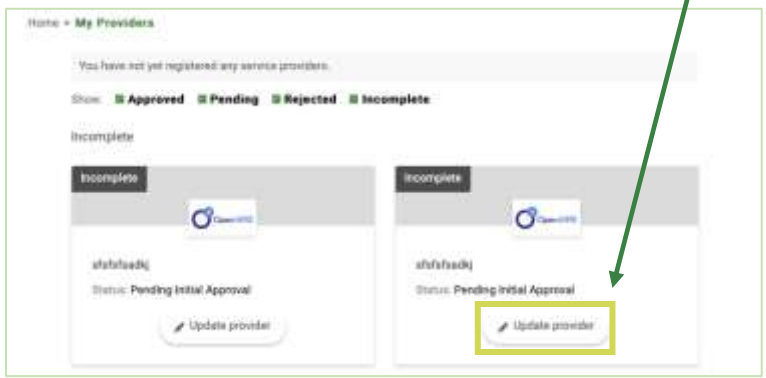
1. Should be Research Infrastructures, Core Facilities or Shared Scientific Services that offer one or more services to users (academic or industrial researchers, public or private sector organisations, etc.).
2. Should be operating at European, national, regional or institutional level.
3. Should be the entity registering the service and operating it.
4. Should be independent legal entities (ERICs, universities, research organisations), entities embedded in a hosting organisations (laboratories, platforms) or projects offering specific services (such as H2020 or Horizon Europe projects offering (trans-national) access, access to a network of distributed facilities, etc.).

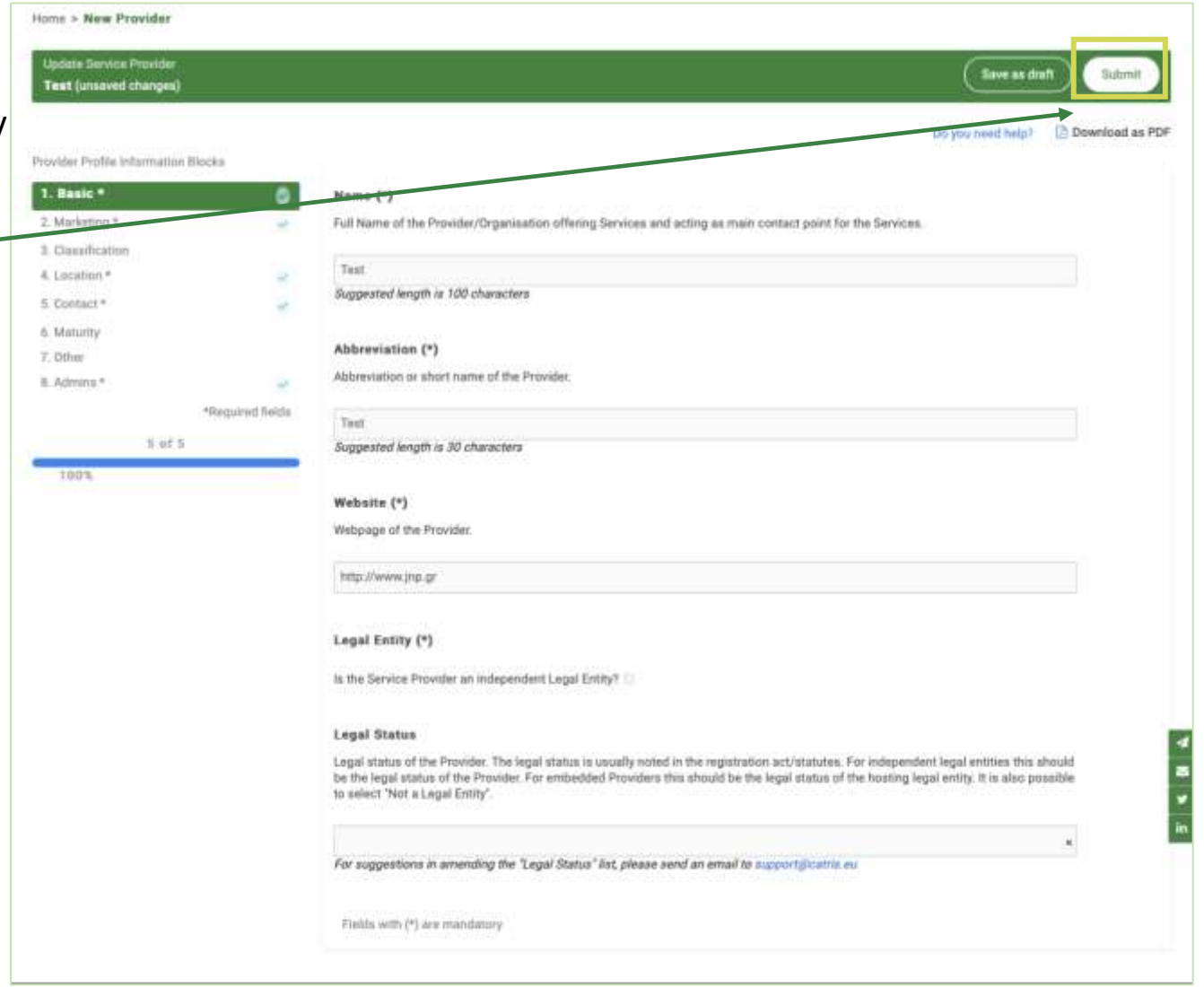
Code	Attribute Name	Value (Example)	Required	Definition	Type	Multiplicity	Public	Length Check
Basic Information								
EPP.BAI.0	ID	openaire	Mandatory	A persistent identifier, a unique reference to the Provider in the context of the EOSC Portal.	String (max 30)	1	Yes	8
EPP.BAI.1	Name	Open Access Infrastructure for Research in Europe	Mandatory	Full Name of the Provider offering the resource and acting as main contact point.	String (max 100)	1	Yes	49
EPP.BAI.2	Abbreviation	OpenAIRE	Mandatory	Abbreviation or short name of the Provider.	String (max 30)	1	Yes	8
EPP.BAI.3	Website	https://www.openaire.eu	Mandatory	Webpage with information about the Provider.	URL	1	Yes	23
EPP.BAI.4	Legal Entity	Y	Mandatory	A Y/N question to define whether the Provider is a Legal Entity or not.	Boolean	1	Yes	1
EPP.BAI.5	Legal Status	Non-Profit Partnership (NPP)	Optional	Legal status of the Provider. The legal status is usually noted in the registration act/statutes. For independent legal entities (1) - legal status of the Provider. For embedded providers (2) - legal status of the hosting legal entity. It is also possible to select Not a legal entity.	List of controlled values	1	Yes	28

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 4d – The AARP updates the Provider Description

- If the AARP wants to resubmit the Provider description, the AARP is directed again to the My Providers page to click on the Update Provider button.
- Upon completion the submit button has to be clicked to save the updated information on the Service Provider.

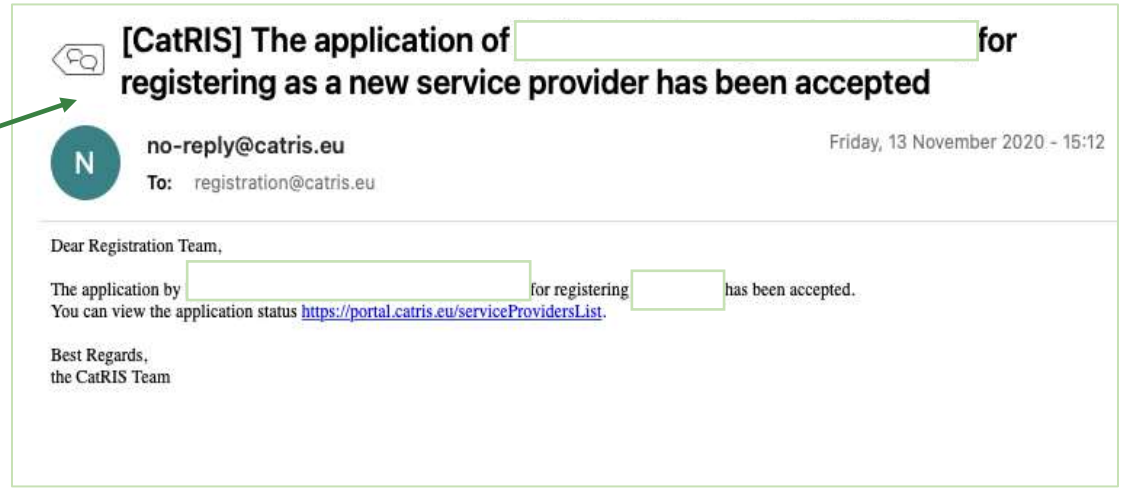




This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 5b – The CPOT approves the Provider Description

- The Provider description is reassessed following the same process.
- When the Provider description complies with the minimum requirements, the AARP is notified by email from the CatRIS Portal.
- The CPOT updates the status in the Jira ticket.
- The Provider is now registered to the CatRIS portal as a new Service Provider.



[CatRIS] The application of [redacted] for registering as a new service provider has been accepted

N **no-reply@catris.eu** Friday, 13 November 2020 - 15:12

To: registration@catris.eu

Dear Registration Team,

The application by [redacted] for registering [redacted] has been accepted.
You can view the application status https://portal.catris.eu/serviceProvidersList.

Best Regards,
the CatRIS Team

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

CatRIS

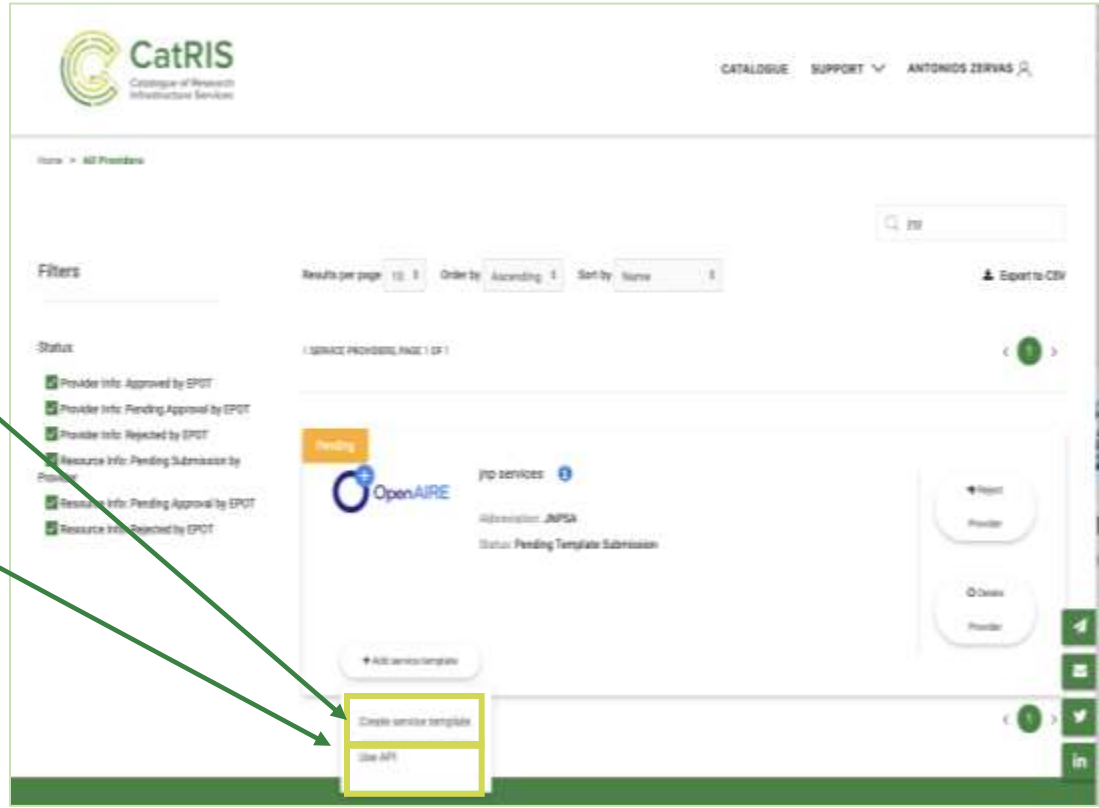
Catalogue of Research Infrastructure Services

Phase C. Registration of Service

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 6 - The AARP selects method to onboard Services

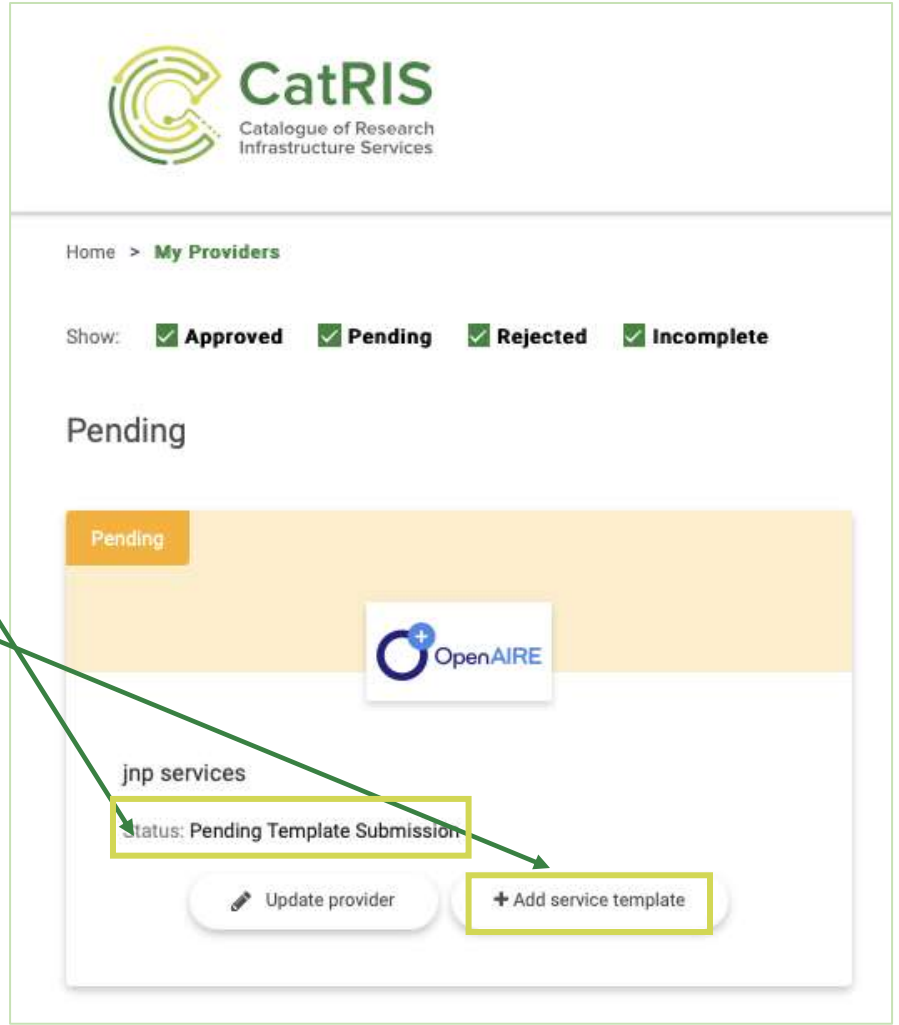
- The AARP logins (if not already logged in) to the Portal and may proceed with the onboarding of Services.
- The AARP is offered two options to onboard Services:
  - a) via a web interface for each Service individually
  - b) via the CatRIS Portal Application Programming Interface (API).
- If the web interface is selected then Stage 7a follows otherwise Stage 7b.
- For Onboarding with the CatRIS Portal API follow the “CatRIS Portal API Tutorial”.



This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 7a - The AARP applies to onboard the 1st Service

- After the Provider profile is approved, the "My Providers" page, changes status to "Pending Template Submission".
- The AARP may now apply for the onboarding of the 1st Service with the "+Add Service template" button.
- In case of difficulties during Service onboarding communicate to support@catris.eu Depending on the issues a 1-to-1 call to offer guidance may be also organised.
- Attention: The button Update Provider Profile updates the Provider Profile and not the Services Profile.

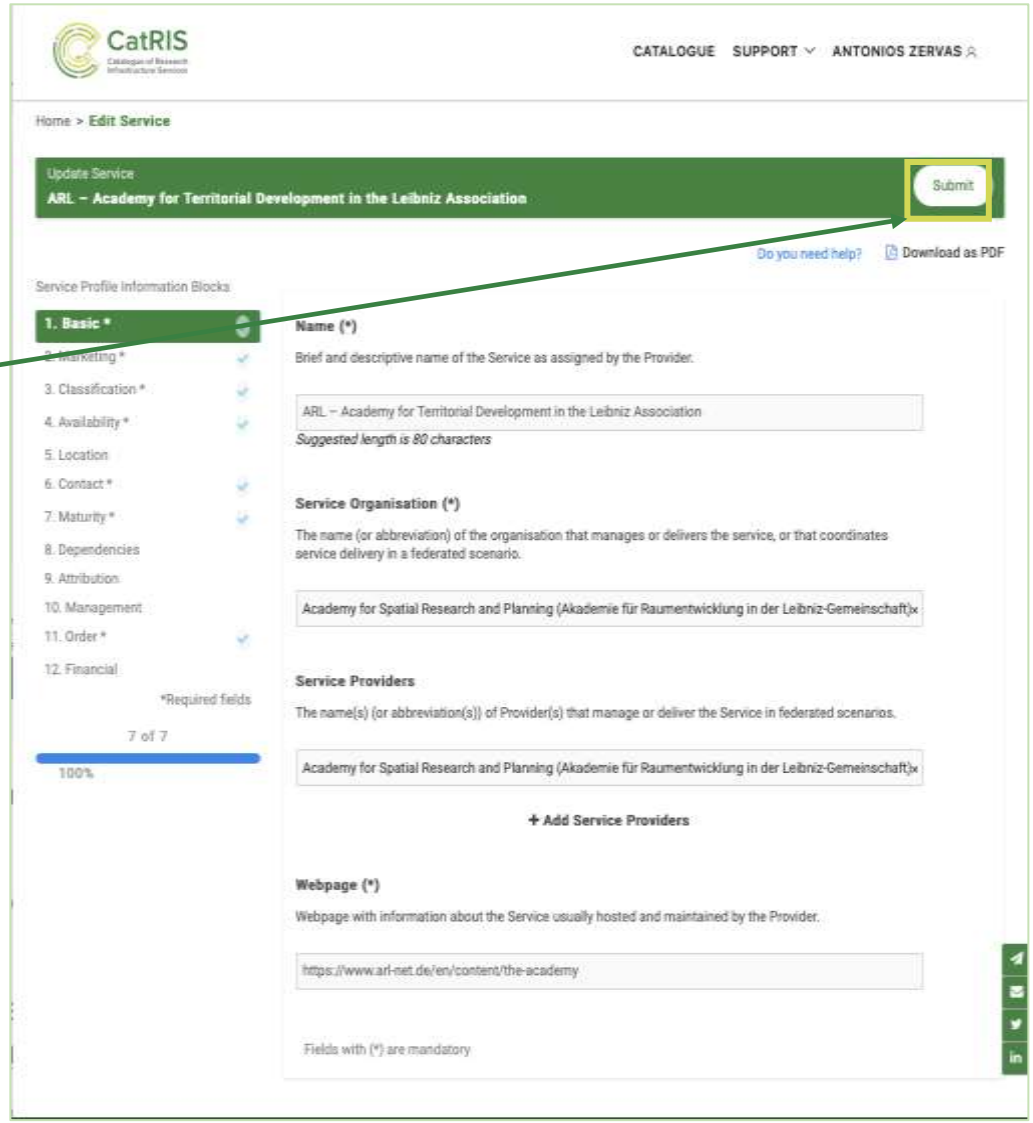


This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Catalogue of Research Infrastructure Services – www.catris.eu
CatRIS

Stage 7a - The AARP applies to onboard the 1st Service

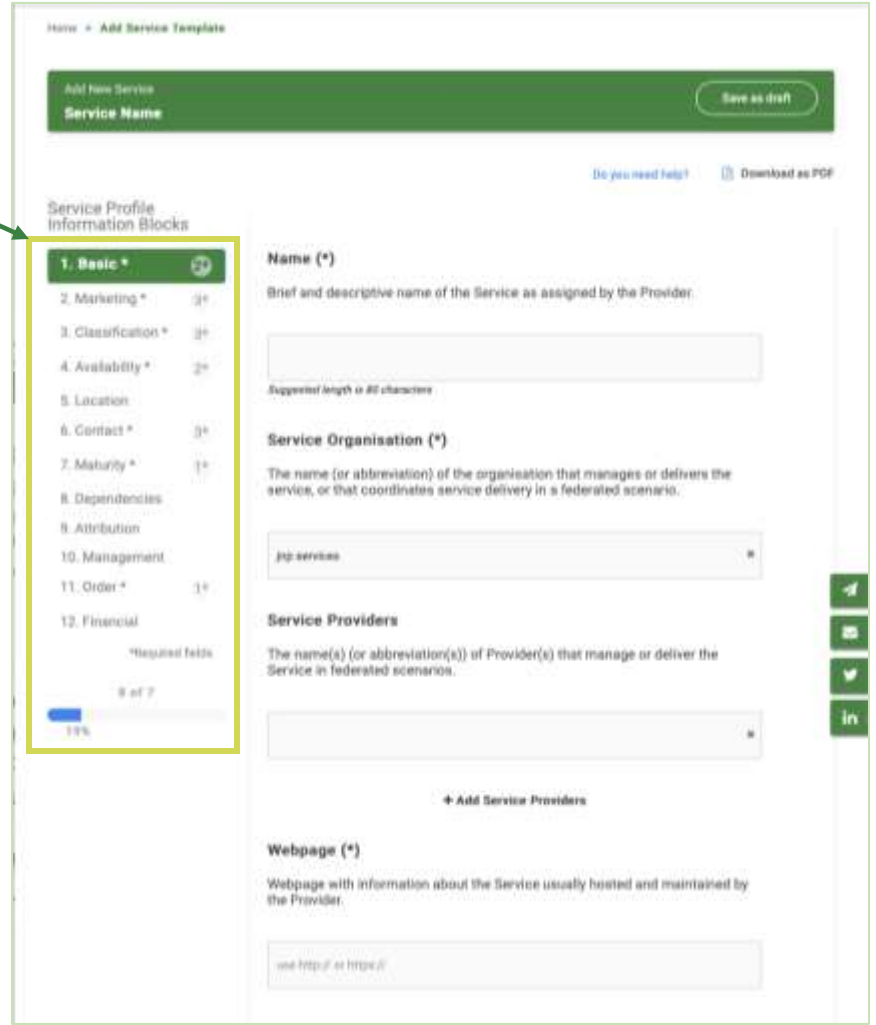
- The AARP may now apply to onboard the 1st Service by completing the Service Profile.
- All mandatory fields (denoted with *) have to be filled in.
- Need to press the Submit button to finalize the Service Profile submission.
- The Service Profile is also offered for download and preview in pdf: https://www.portal.catris.eu/assets/files/Resource-Form.pdf and in excel formats. It includes standardized definitions, examples and recommendations.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 7a - The AARP applies to onboard the 1st Service

- The Service Profile is organised in **twelve** information blocks:
  - **Basic Information:** the name, organisation/Providers that manage or deliver the service, the webpage.
  - **Marketing information:** Description, Tagline, Logo, Multimedia, Use Cases
  - **Classification Information**: Scientific Categorisation, Categirisation, target users, access type/mode, tags, etc.
  - **Availability Information**: The Geographical and Language availability of the service
  - **Location Information**: The geographic location of stored data, samples etc
  - **Contact Information**: Main and Public Contact, helpdesk and security contact email
  - **Maturity information**: TRL, Life cycle status, certifications, standards, version, etc
  - **Dependencies Information**: Required Services, Related Services & Platforms
  - **Attribution Information**: Funding body/Program, Grant Project
  - **Management Information**: Helpdesk page, User Manual, Terms of Use, Privacy /Access Policy, service level, training, status, maintenance etc.
  - **Order Information**: Order Type, Order webpage
  - **Financial Information**: Payment Model, Pricing



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 7a - The AARP applies to onboard the 1st Service

- When all required fields are properly filled in, the AARP is navigated to the submitted Service presentation page.
- The CatRIS Portal notifies by email the Admins of the Provider and the CPOT of the successful submission.

[CatRIS] Your service has been accepted

N **no-reply@catris.eu** Wednesday, 27 May 2020 - 09:42

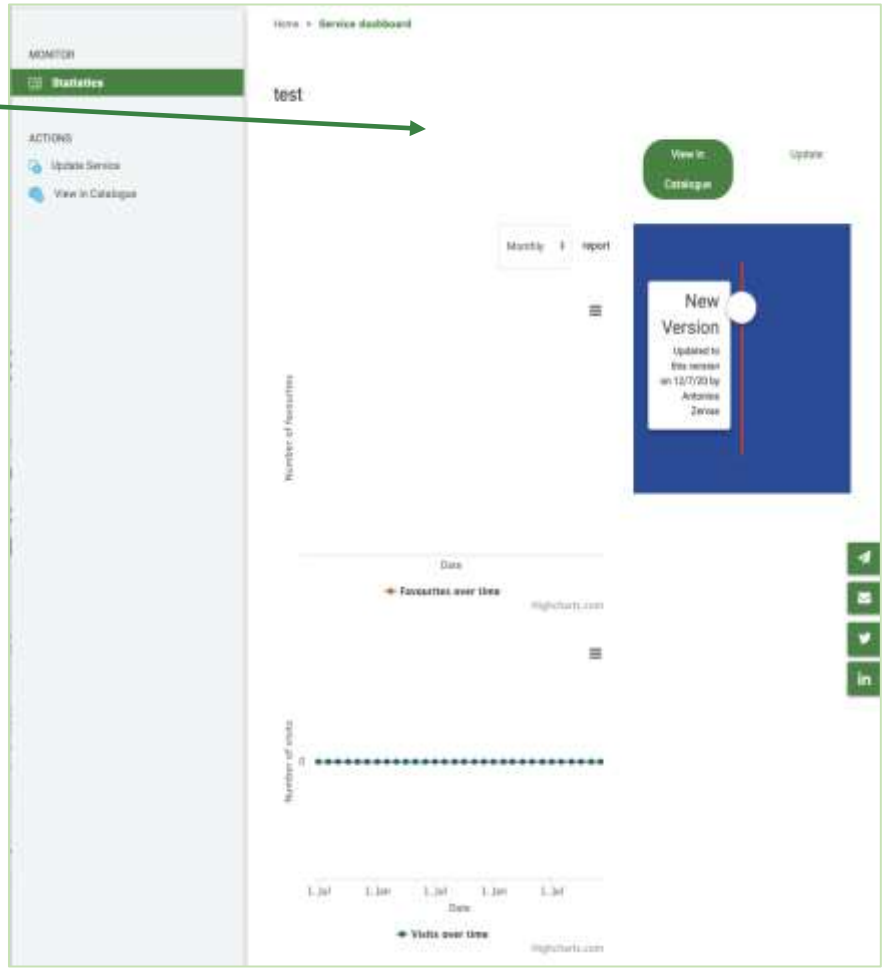
To:

Dear Jörn,

The information for the service
has been reviewed and has been successfully added to the CatRIS Catalogue.
You can view the new service
https://portal.catris.eu/service/ You may now login and
proceed with providing more services for

Thank you for your interest in becoming a member of CatRIS.

Best Regards,
the CatRIS Team



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 8 - The CPOT reviews the Service Profile

- Once the Service application is submitted it is assessed by the CPOT using the CatRIS Validation Tool.
- The CPOT checks the minimum requirements and the rules and criteria and the typology of the Service Profile (mandatory fields, lengths, types, etc.) and provides comments and recommendations for improvements on the Validation Tool.
- If the Service Profile does not comply with the minimum requirements, or the rules and criteria or the typology of the Service Profile Template, the AARP is contacted by email to take action on the recommendations stated in the Validation Tool and update the Service Profile.
- Typos and obvious errata are corrected by the CPOT. The AARP is informed accordingly.
- At this stage the AARP is offered the option to join an information or training session with the CPOT to get personalized consultation on the best way to onboard the Provider and its Services. In this, often 1-to-1 Webinar, the Provider will have the chance to ask questions and get personalized consultation on the best way to register its Services.

Minimum Requirements

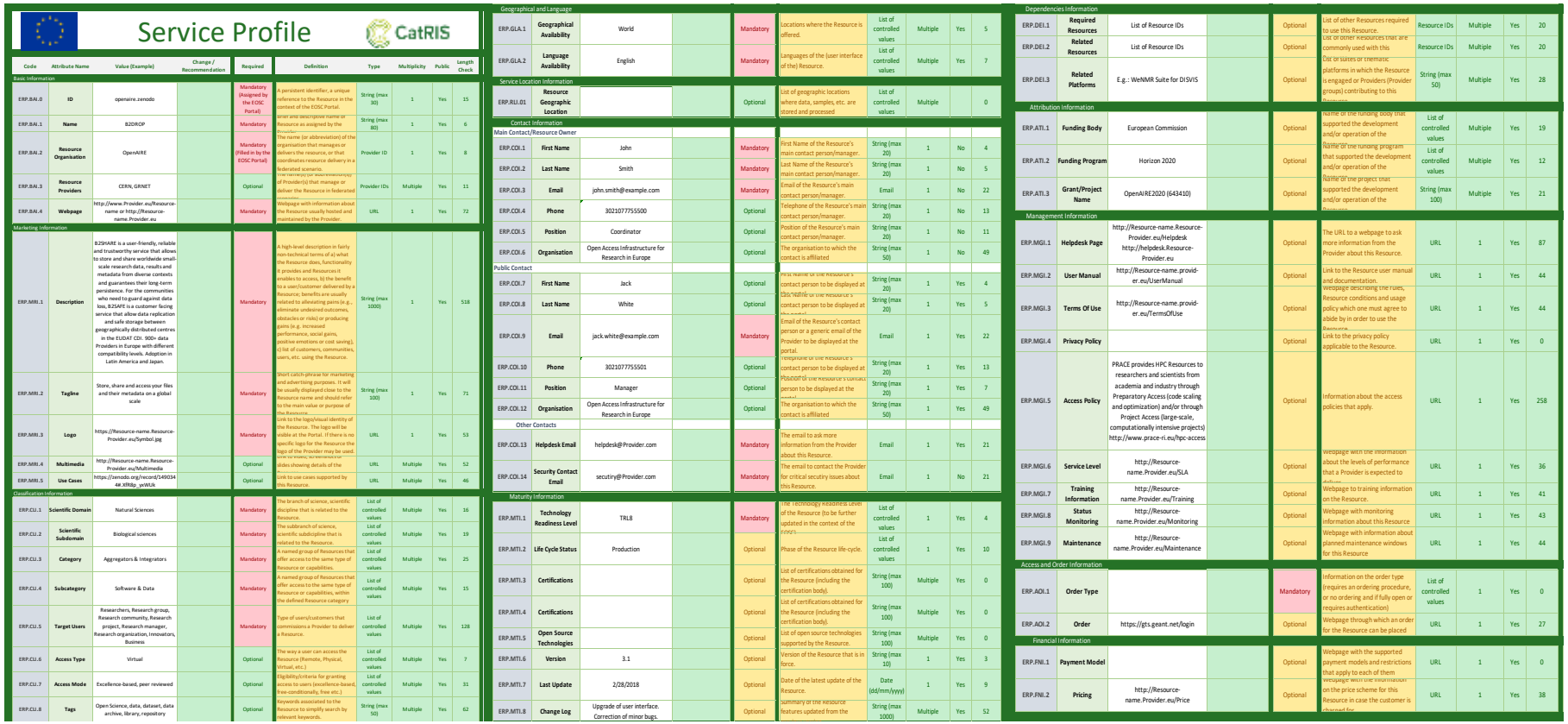
1. Services must be actual Services according to an official Service Management definition. It should be an ongoing activity offered 'live' to customers. This may be a (research) infrastructure Service, or a human Service (e.g. training, consultancy).
2. The Service must be coherent. It must be available and offer stand-alone value. It may not be only a feature/component of a larger Service.
3. The Service must meet at least **one** of the following:
    - The Service must be targeted to the research community
    - The Service must be provided by the research community
    - The Service comes from a H2020 funded project
    - The Service is part of a procurement framework targeting researchers.
4. The Service must be available in Europe and in a European language. Key information must be in English:
    - The Profile must be in English
    - The Basic Information in the User Interface must be available in English
    - Privacy statements, terms of use and SLA/SLS must be available in English. Other documentation may be in native language only.
    - The Helpdesk must be able to answer queries in English at a minimum.
5. The mandatory fields in the Service Profile Template must be provided, including required linked information.
6. URLs must be Fully Qualified Domain Names (FQDN).

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 8 - The CPOT reviews the Service Profile

CatRIS
Catalogue of Research Infrastructure Services

- The CPOT examines the quality of the information and links submitted.
- At this step, it is ensured that the information given is clear, and it follows the general recommendations given at the Service Profile Template.
- Spelling, accuracy and the composition of the writings will also be reviewed.
- Moreover the functionality of all links is examined.



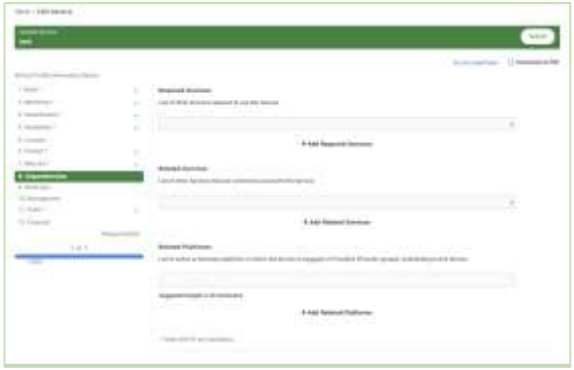
Service Profile — CatRIS

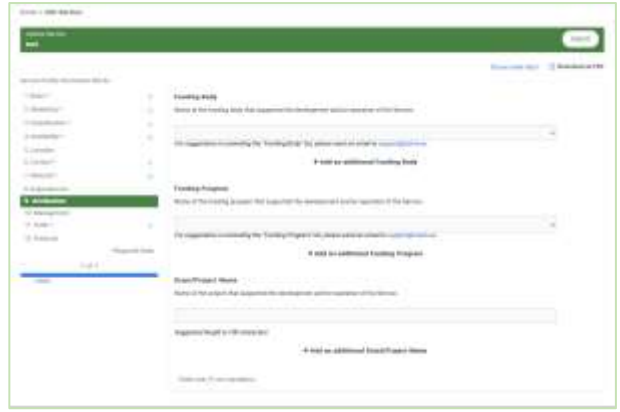
Code	Attribute Name	Value (Example)	Change / Recommendation	Required	Definition	Type	Multiplicity	Public	Length Check
Basic Information									
ERP.BAI.0	ID	openaire.zenodo		Mandatory (Assigned by the EOSC Portal)	A persistent identifier, a unique reference to the Resource in the context of the EOSC Portal.	String (max 30)	1	Yes	15
ERP.BAI.1	Name	B2DROP		Mandatory	User and descriptive name of Resource as assigned by the Provider.	String (max 80)	1	Yes	6
ERP.BAI.2	Resource Organisation	OpenAIRE		Mandatory (Filled in by the EOSC Portal)	The name (or abbreviation) of the organisation that manages or delivers the resource, or that coordinates resource delivery in a federated scenario.	Provider ID	1	Yes	8
ERP.BAI.3	Resource Providers	CERN, GRNET		Optional	The name(s) (or abbreviation(s)) of Provider(s) that manage or deliver the Resource in federated scenarios.	Provider IDs	Multiple	Yes	11
ERP.BAI.4	Webpage	http://www.Provider.eu/Resource-name or http://Resource-name.Provider.eu		Mandatory	Webpage with information about the Resource usually hosted and maintained by the Provider.	URL	1	Yes	72
Marketing Information									
ERP.MRI.1	Description	B2SHARE is a user-friendly, reliable and trustworthy service that allows to store and share worldwide small-scale research data, results and metadata from diverse contexts and guarantees their long-term persistence. For the communities who need to guard against data loss, B2SAFE is a customer facing service that allow data replication and safe storage between geographically distributed centres in the EUDAT CDI. 900+ data Providers in Europe with different compatibility levels. Adoption in Latin America and Japan.		Mandatory	A high-level description in fairly non-technical terms of a) what the Resource does, functionality it provides and Resources it enables to access, b) the benefit to a user/customer delivered by a Resource; benefits are usually related to alleviating pains (e.g., eliminate undesired outcomes, obstacles or risks) or producing gains (e.g. increased performance, social gains, positive emotions or cost saving), c) list of customers, communities, users, etc. using the Resource.	String (max 1000)	1	Yes	518
ERP.MRI.2	Tagline	Store, share and access your files and their metadata on a global scale		Mandatory	Short catch-phrase for marketing and advertising purposes. It will be usually displayed close to the Resource name and should refer to the main value or purpose of the Resource.	String (max 100)	1	Yes	71
ERP.MRI.3	Logo	https://Resource-name.Resource-Provider.eu/Symbol.jpg		Mandatory	Link to the logo/visual identity of the Resource. The logo will be visible at the Portal. If there is no specific logo for the Resource the logo of the Provider may be used.	URL	1	Yes	53
ERP.MRI.4	Multimedia	http://Resource-name.Resource-Provider.eu/Multimedia		Optional	Link to a video, screencast or slides showing details of the Resource.	URL	Multiple	Yes	52
ERP.MRI.5	Use Cases	https://zenodo.org/record/149034 4#.XR6b_pNUk		Optional	Link to use cases supported by this Resource.	URL	Multiple	Yes	46
Classification Information									
ERP.CLI.1	Scientific Domain	Natural Sciences		Mandatory	The branch of science, scientific discipline that is related to the Resource.	List of controlled values	Multiple	Yes	16
ERP.CLI.2	Scientific Subdomain	Biological sciences		Mandatory	The subbranch of science, scientific subdiscipline that is related to the Resource.	List of controlled values	Multiple	Yes	19
ERP.CLI.3	Category	Aggregators & Integrators		Mandatory	A named group of Resources that offer access to the same type of Resource or capabilities.	List of controlled values	Multiple	Yes	25
ERP.CLI.4	Subcategory	Software & Data		Mandatory	A named group of Resources that offer access to the same type of Resource or capabilities, within the defined Resource category	List of controlled values	Multiple	Yes	15
ERP.CLI.5	Target Users	Researchers, Research group, Research community, Research project, Research manager, Research organization, Innovators, Business		Mandatory	Type of users/customers that commonly access a Provider to deliver a Resource.	List of controlled values	Multiple	Yes	128
ERP.CLI.6	Access Type	Virtual		Optional	The way a user can access the Resource (Remote, Physical, Virtual, etc.)	List of controlled values	Multiple	Yes	7
ERP.CLI.7	Access Mode	Excellence-based, peer reviewed		Optional	Eligibility/criteria for granting access to users (excellence-based, free-conditionally, free etc.)	List of controlled values	Multiple	Yes	31
ERP.CLI.8	Tags	Open Science, data, dataset, data archive, library, repository		Optional	Keywords associated to the Resource to simplify search by relevant keywords.	String (max 50)	Multiple	Yes	62
Geographical and Language									
ERP.GLA.1	Geographical Availability	World		Mandatory	Locations where the Resource is offered.	List of controlled values	Multiple	Yes	5
ERP.GLA.2	Language Availability	English		Mandatory	Languages of the (user interface of the) Resource.	List of controlled values	Multiple	Yes	7
Service Location Information									
ERP.RLI.01	Resource Geographic Location			Optional	List of geographic locations where data, samples, etc. are stored and processed	List of controlled values	Multiple		0
Contact Information									
Main Contact/Resource Owner									
ERP.COI.1	First Name	John		Mandatory	First Name of the Resource's main contact person/manager.	String (max 20)	1	No	4
ERP.COI.2	Last Name	Smith		Mandatory	Last Name of the Resource's main contact person/manager.	String (max 20)	1	No	5
ERP.COI.3	Email	john.smith@example.com		Mandatory	Email of the Resource's main contact person/manager.	Email	1	No	22
ERP.COI.4	Phone	3021077755500		Optional	Telephone of the Resource's main contact person/manager.	String (max 20)	1	No	13
ERP.COI.5	Position	Coordinator		Optional	Position of the Resource's main contact person/manager.	String (max 20)	1	No	11
ERP.COI.6	Organisation	Open Access Infrastructure for Research in Europe		Optional	The organisation to which the contact is affiliated	String (max 50)	1	No	49
Public Contact									
ERP.COI.7	First Name	Jack		Optional	First Name of the Resource's contact person to be displayed at the portal.	String (max 20)	1	Yes	4
ERP.COI.8	Last Name	White		Optional	Last Name of the Resource's contact person to be displayed at the portal.	String (max 20)	1	Yes	5
ERP.COI.9	Email	jack.white@example.com		Mandatory	Email of the Resource's contact person or a generic email of the Provider to be displayed at the portal.	Email	1	Yes	22
ERP.COI.10	Phone	3021077755501		Optional	Telephone of the Resource's contact person to be displayed at the portal.	String (max 20)	1	Yes	13
ERP.COI.11	Position	Manager		Optional	Position of the Resource's contact person to be displayed at the portal.	String (max 20)	1	Yes	7
ERP.COI.12	Organisation	Open Access Infrastructure for Research in Europe		Optional	The organisation to which the contact is affiliated	String (max 50)	1	Yes	49
Other Contacts									
ERP.COI.13	Helpdesk Email	helpdesk@Provider.com		Mandatory	The email to ask more information from the Provider about this Resource.	Email	1	Yes	21
ERP.COI.14	Security Contact Email	secutiry@Provider.com		Mandatory	The email to contact the Provider for critical security issues about this Resource.	Email	1	No	21
Maturity Information									
ERP.MTI.1	Technology Readiness Level	TRL8		Mandatory	The Technology Readiness Level of the Resource (to be further updated in the context of the EOSC).	List of controlled values	1	Yes	4
ERP.MTI.2	Life Cycle Status	Production		Optional	Phase of the Resource life-cycle.	List of controlled values	1	Yes	10
ERP.MTI.3	Certifications			Optional	List of certifications obtained for the Resource (including the certification body).	String (max 100)	Multiple	Yes	0
ERP.MTI.4	Certifications			Optional	List of certifications obtained for the Resource (including the certification body).	String (max 100)	Multiple	Yes	0
ERP.MTI.5	Open Source Technologies			Optional	List of open source technologies supported by the Resource.	String (max 100)	Multiple	Yes	0
ERP.MTI.6	Version	3.1		Optional	Version of the Resource that is in force.	String (max 10)	1	Yes	3
ERP.MTI.7	Last Update	2/28/2018		Optional	Date of the latest update of the Resource.	Date (dd/mm/yyyy)	1	Yes	9
ERP.MTI.8	Change Log	Upgrade of user interface. Correction of minor bugs.		Optional	Summary or the Resource features updated from the	String (max 1000)	Multiple	Yes	52
Dependencies Information									
ERP.DEI.1	Required Resources	List of Resource IDs		Optional	List of other Resources required to use this Resource	Resource IDs	Multiple	Yes	20
ERP.DEI.2	Related Resources	List of Resource IDs		Optional	List or other Resources that are commonly used with this	Resource IDs	Multiple	Yes	20
ERP.DEI.3	Related Platforms	E.g.: WeNMR Suite for DISVIS		Optional	List or scientific or thematic platforms in which the Resource is engaged or Providers (Provider groups) contributing to this	String (max 50)	Multiple	Yes	28
Attribution Information									
ERP.ATI.1	Funding Body	European Commission		Optional	Name of the funding body that supported the development and/or operation of the	List of controlled values	Multiple	Yes	19
ERP.ATI.2	Funding Program	Horizon 2020		Optional	Name of the funding program that supported the development and/or operation of the	List of controlled values	Multiple	Yes	12
ERP.ATI.3	Grant/Project Name	OpenAIRE2020 (643410)		Optional	Name of the project that supported the development and/or operation of the	String (max 100)	Multiple	Yes	21
Management Information									
ERP.MGI.1	Helpdesk Page	http://Resource-name.Resource-Provider.eu/Helpdesk http://helpdesk.Resource-Provider.eu		Optional	The URL to a webpage to ask more information from the Provider about this Resource.	URL	1	Yes	87
ERP.MGI.2	User Manual	http://Resource-name.provid-er.eu/UserManual		Optional	Link to the Resource user manual and documentation.	URL	1	Yes	44
ERP.MGI.3	Terms Of Use	http://Resource-name.provid-er.eu/TermsOfUse		Optional	Webpage describing the rules, Resource conditions and usage policy which one must agree to abide by in order to use the	URL	1	Yes	44
ERP.MGI.4	Privacy Policy			Optional	Link to the privacy policy applicable to the Resource.	URL	1	Yes	0
ERP.MGI.5	Access Policy	PRACE provides HPC Resources to researchers and scientists from academia and industry through Preparatory Access (code scaling and optimization) and/or through Project Access (large-scale, computationally intensive projects) http://www.prace-ri.eu/hpc-access		Optional	Information about the access policies that apply.	URL	1	Yes	258
ERP.MGI.6	Service Level	http://Resource-name.Provider.eu/SLA		Optional	Webpage with the information about the levels of performance that a Provider is expected to deliver	URL	1	Yes	36
ERP.MGI.7	Training Information	http://Resource-name.Provider.eu/Training		Optional	Webpage to training information on the Resource.	URL	1	Yes	41
ERP.MGI.8	Status Monitoring	http://Resource-name.Provider.eu/Monitoring		Optional	Webpage with monitoring information about this Resource	URL	1	Yes	43
ERP.MGI.9	Maintenance	http://Resource-name.Provider.eu/Maintenance		Optional	Webpage with information about planned maintenance windows for this Resource	URL	1	Yes	44
Access and Order Information									
ERP.AOI.1	Order Type			Mandatory	Information on the order type (requires an ordering procedure, or no ordering and if fully open or requires authentication)	List of controlled values	1	Yes	0
ERP.AOI.2	Order	https://gts.geant.net/login		Optional	Webpage through which an order for the Resource can be placed	URL	1	Yes	27
Financial Information									
ERP.FNI.1	Payment Model			Optional	Webpage with the supported payment models and restrictions that apply to each of them	URL	1	Yes	0
ERP.FNI.2	Pricing	http://Resource-name.Provider.eu/Price		Optional	Webpage with the information on the price scheme for this Resource in case the customer is charged for	URL	1	Yes	38

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 7a-2 - The AARP updates the Service Profile

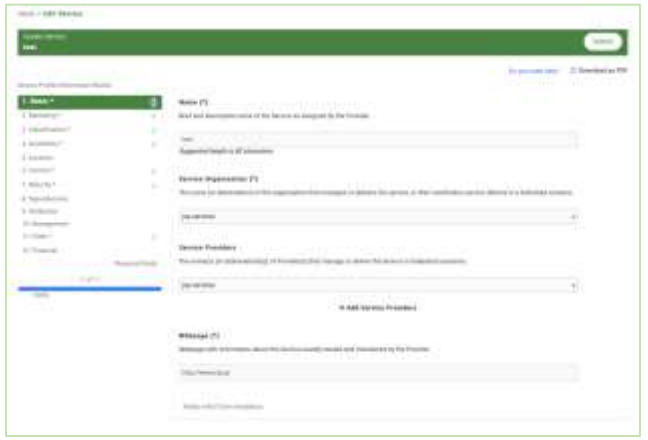
- If the AARP wants to resubmit the Service Profile, the AARP is directed again to the Update Service page.
- Upon completion the submit button has to be clicked to save the updated information on the Service.

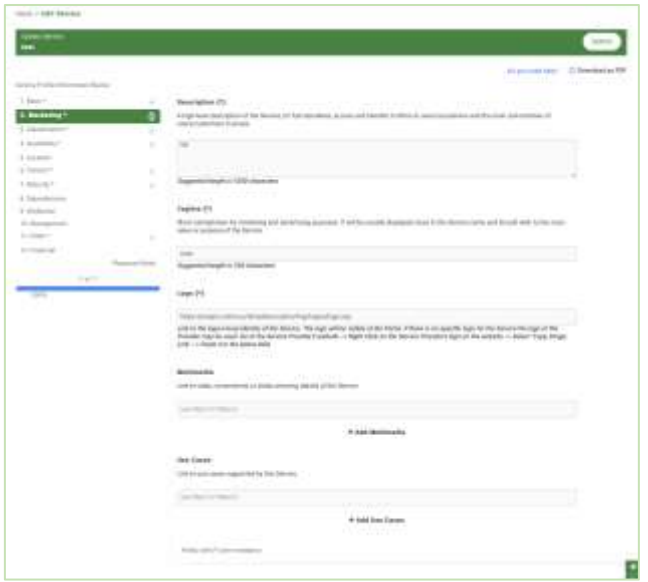




This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 7a-2 - The AARP updates the Service Profile



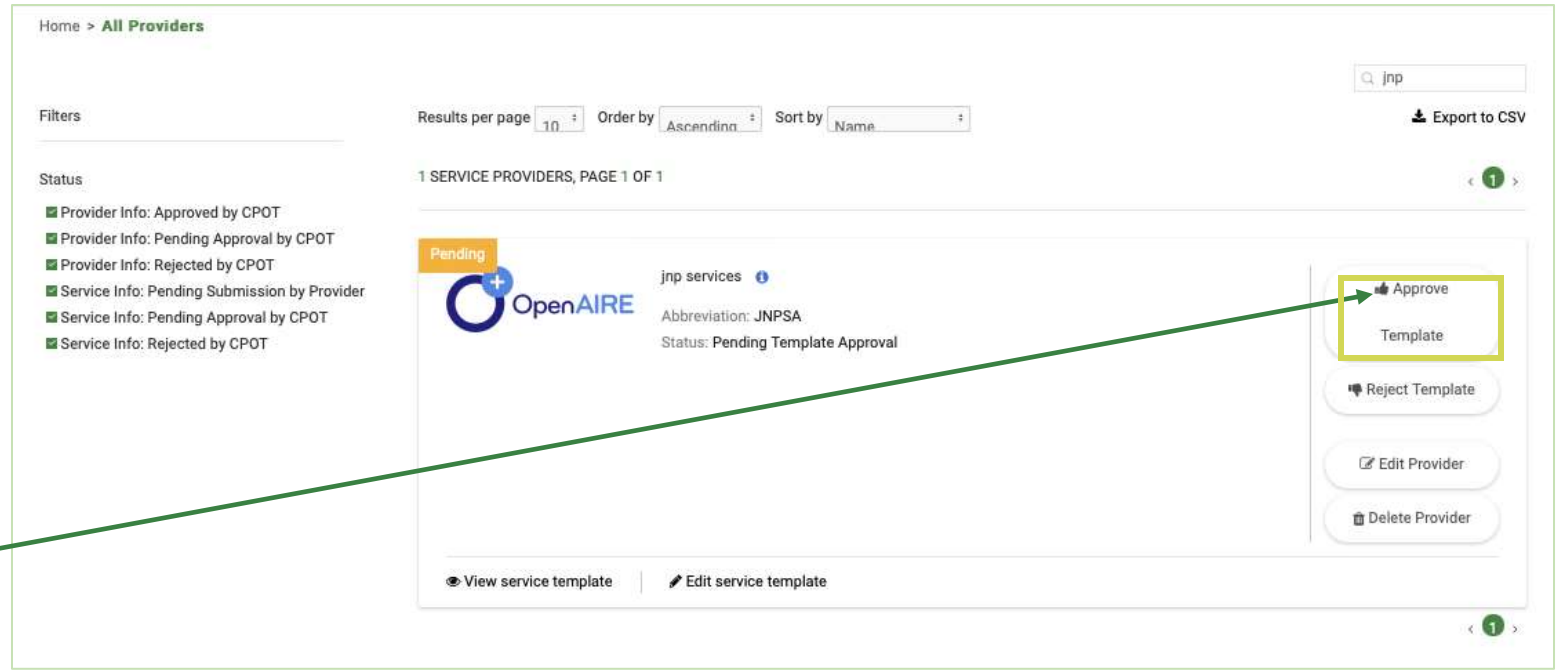


This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Catalogue of Research Infrastructure Services – www.catris.eu

Stage 8-b - The CPOT approves the Service Profile

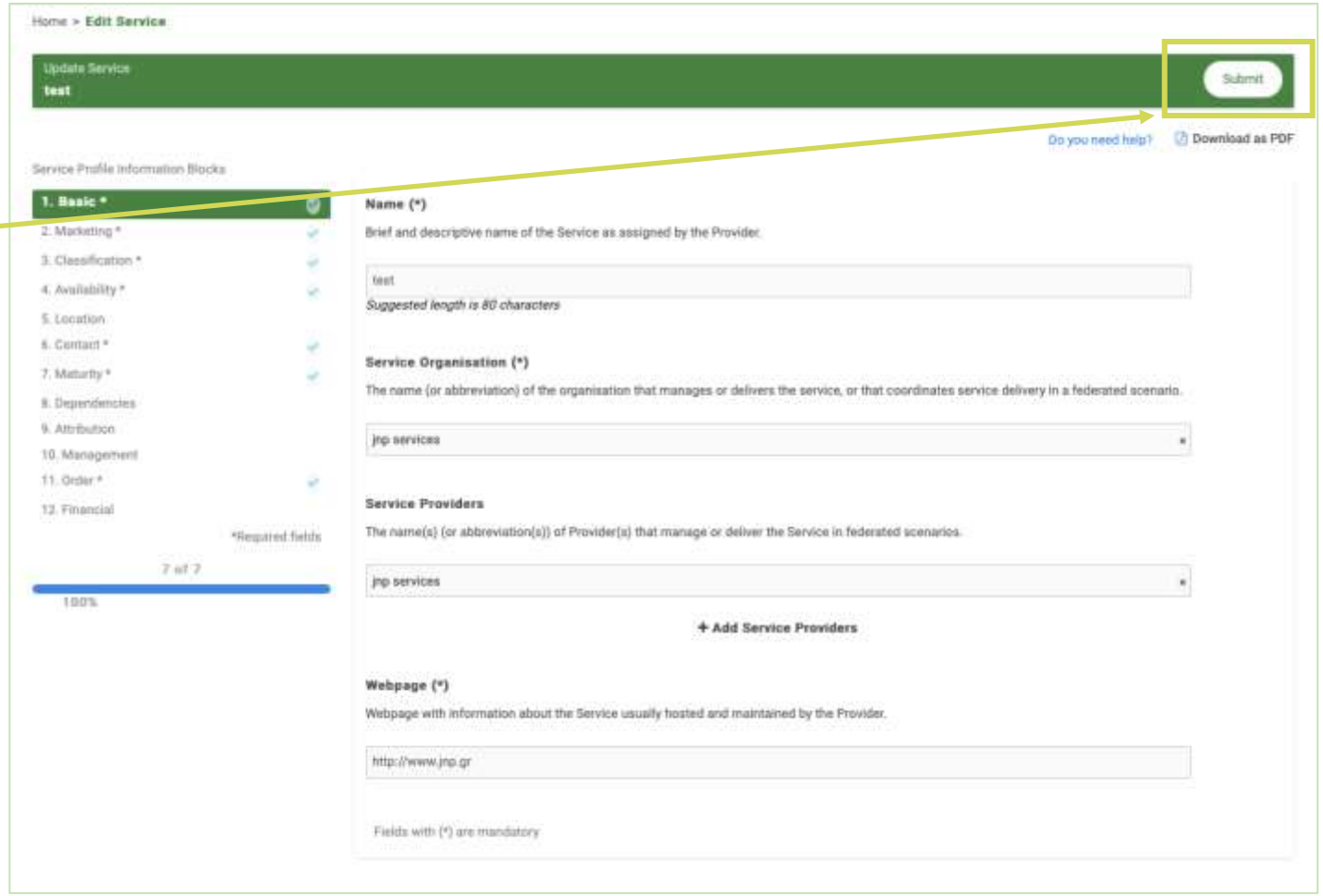
- The CPOT through CatRIS Dashboard have the rights to approve, edit or reject the template.
- CPOT upon reviewing the updated from SP information, is proceeding with the approval



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 9 - The AARP applies to onboard other Services

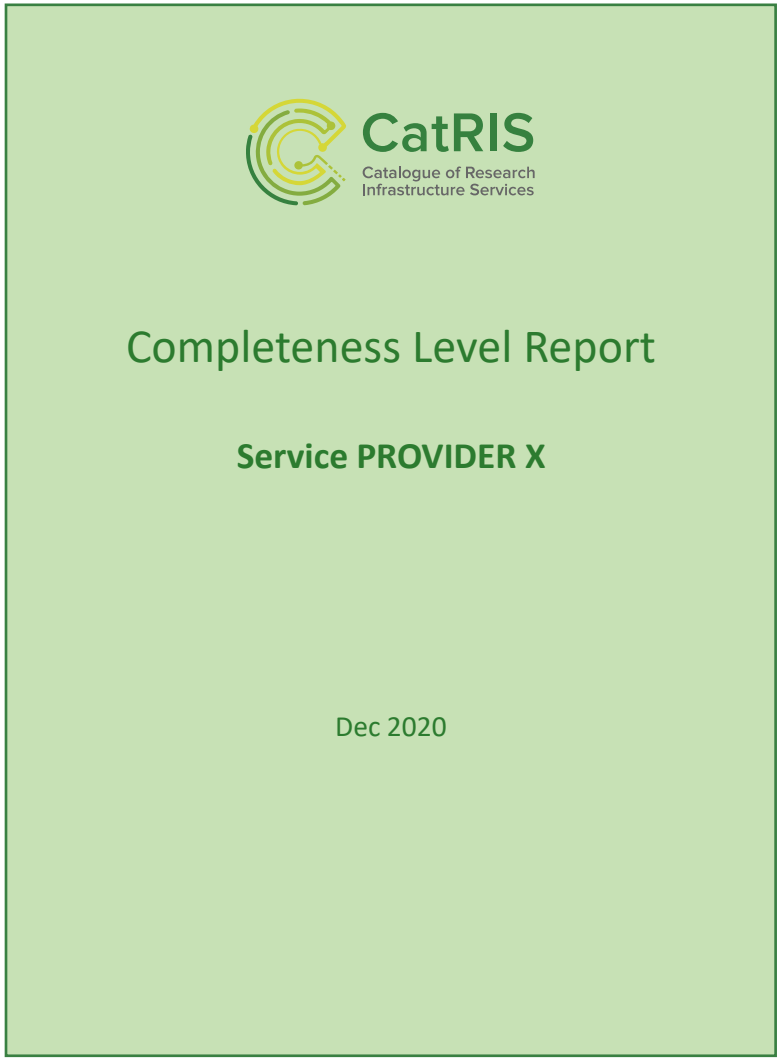
- If the AARP wants to add a new Services, from the “My Providers” menu he/she is directed to the “+Add Service template” button.
- Upon completion the submit button has to be clicked to save the updated information on the Service.



This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement n°824173.

Stage 10 - The CPQT sends a Report

- When all Services of a Provider are listed, the Provider may receive a Report by the CatRIS Portal Quality Team (CPQT) that can be used to show compliance to the CatRIS Portal specifications and proceed with further improvements on the Provider and Service Profiles.
- The sole purpose of this report is to improve the “Service metadata completeness” of the Providers. The reports are private and only shared with the Provider Representative.
- The methodology and tools used to assess this Compliance with the CatRIS Service Catalogue, are made available to the Provider a priori.



Catalogue of Research Infrastructure Services – www.catris.eu

This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement n°824173.

Disclaimer

The information contained in this document is provided by the copyright holders "as is" and any express or implied warranties, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose are disclaimed. In no event shall the authors or the European Commission be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement of substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of the information contained in this document, even if advised of the possibility of such damage. The sole responsibility for the content of this publication lies with the authors. It does not necessarily reflect the opinion of the European Commission. The European Commission is not responsible for any use that may be made of the information contained therein.

Copyright

This work by JNP is licensed under a Creative Commons Attribution 4.0 International Licence (**http://creativecommons.org/licenses/by/4.0/**)

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

CatRIS

Catalogue of Research Infrastructure Services

www.project.catris.eu

catris@esf.org

https://www.linkedin.com/company/catris

@project_catris

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.

Thanks from

CatRIS

Catalogue of Research Infrastructure Services

www.project.catris.eu

@project_catris

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement n°824173.