EERTIS USER GUIDE

What is EERTIS

EERTIS is an online platform that reunites the majority of public and private European research and technology infrastructures that provide research and technology services. Any interested user has the possibility to check the aforementioned services and, if they fit their needs, they can send enquiries to ask for more information with the aim of, eventually, booking the services they are interested in, according to the organization access policy. EERTIS has stemmed from the former platform *eeris,* due to the necessity to update the old platform according to the user needs.

Data migration from *eeris*

If an organization has already had an account on the old *eeris,* when registering on EERTIS, the organizational account administrator can choose to migrate the data from *eeris*. Since the new structure is different from the old one, we strongly suggest that, before starting the migration process, the organization account administrator should define the structure of his organization, according to the new updates *(More information about the new structure is provided in the next chapters).*

Once the administrator has logged in on the platform, he/she can go to the Admin Center and kickstart the data migration. A user-friendly wizard will open up where the administrator can choose the following: the entity the research infrastructure will be shifted to, the entity that owns it, its account administrator and can also handpick the equipment items that will be associated with it *(More information about the new entities on EERTIS and their features is provided in the next chapters).*

This process can be resumed for each research infrastructure associated with that specific organization account.

Notes:

- The "Organization" entity has been automatically shifted to EERTIS. The account administrator must transfer the entities below it, namely the Research Infrastructures and its associated services and equipment.
- When migrating a research infrastructure, all its associated services are being automatically migrated and associated with it. Any further changes can be operated from the newly created accounts on EERTIS, by their designated administrators.

How is EERTIS structured

The platform has a pyramid/hierarchical structure, containing several layers, which is meant to reflect the real dimension of the organization.

- Organization (Org)
- Suborganization (SO)
- Research Facility (RF)
- Laboratory (Lab)
- Service
- Equipment
  *Major Equipment

At the top of the pyramid there is the Organization. According to your organization chart, it can be divided into administrative units, such as faculties, departments, centres, etc. These are the Suborganizations. The following layers are the Research Facility and the Laboratory. All these entities can provide their own services and own equipment. However no layer, except for Services and Equipment (and Organization), is mandatory.

For a better understanding of this structure, please look at the diagram below, which reflects the multilayer structure and all the possible associations between the entities.
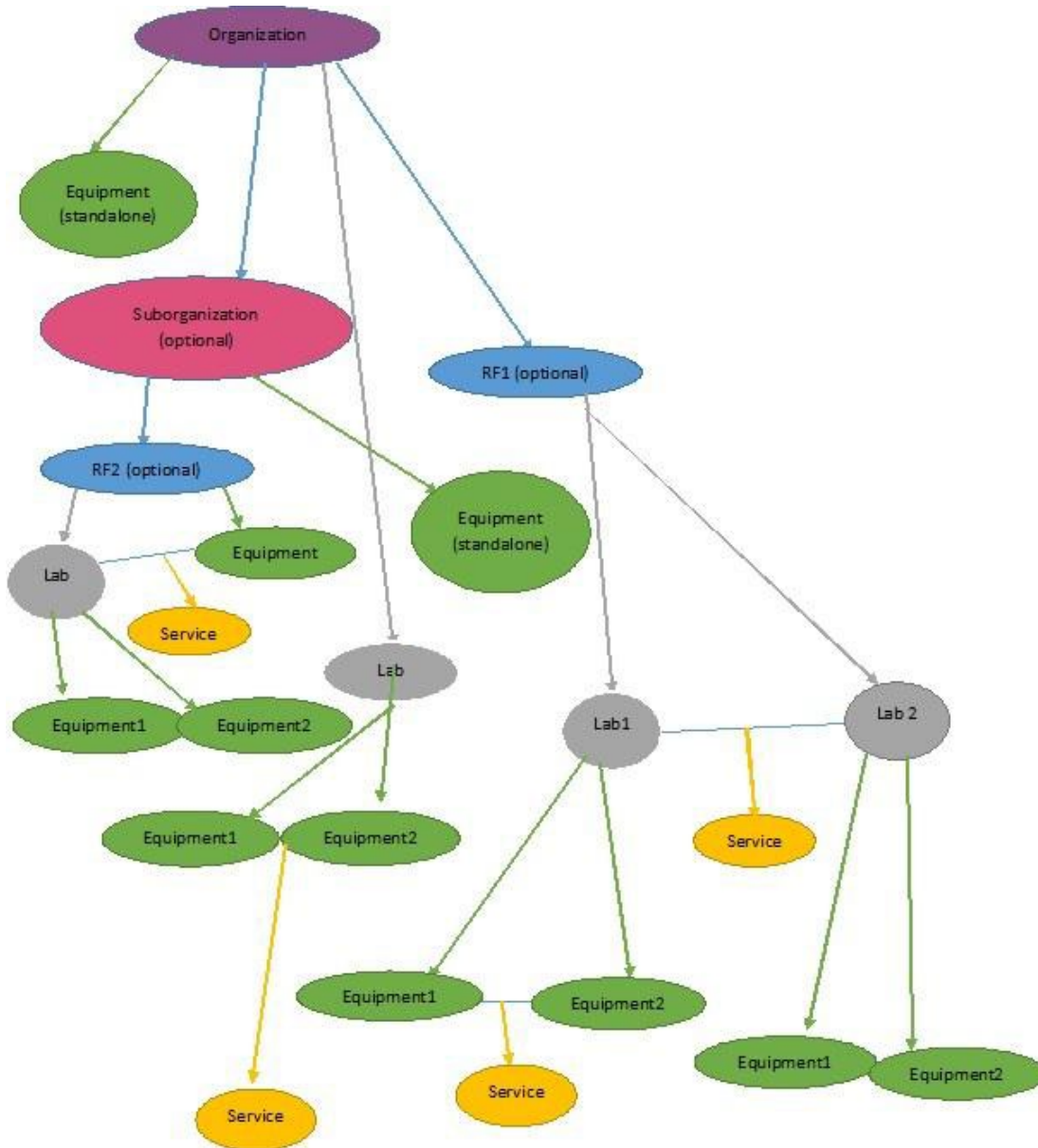
Definition of the main entities/accounts existing on the platform

Organization (Org) = it is a mandatory account, at the top of the pyramid structure. It may have suborganizations, according to the organization chart, research facilities, laboratories, equipment and may provide services. All the aforementioned entities may be either directly linked to the organization or exist in a hierarchical structure. The organization administrator is the one who creates the entire hierarchy and appoints administrators for the entities below the organization.

Suborganization (SO) = it is an optional layer, meant to reflect the real size/dimension of an organization. It may have research facilities, laboratories, equipment and provide services. An organization administrator may add up to two layers of suborganization.

Research Facility (RF) = it is an optional layer, according to the organization chart, created by the Organization Administrator. A Research Facility must meet the following criteria: it must have either a minimum of two laboratories or one laboratory and one piece of equipment. All RFs provide services. The RF administrator is appointed by the entity above it, namely the Org or the SO administrator. In turn, the RF administrator appoints the administrators for the entities directly below (e.g laboratories or equipment) and for the services it provides.

Laboratory (Lab) = it is an optional layer, according to the organization chart. A Lab must meet the following criteria: it must have at least one piece of equipment and provide services. The Lab administrator is appointed by the entity above it, namely either the RF administrator or the Org/SO administrator, if the Lab is directly below these entities. The Lab administrator appoints the administrators for the equipment and for the services it provides.

Equipment = It is a mandatory object, but it can be placed at any level of the hierarchy. The equipment administrator is appointed by the entity above it, namely either the Lab, RF or the Org/SO administrator.

Major Equipment = represents an optional label associated with the Equipment entity, depending on each organization. A major equipment distinguishes itself from the other pieces of equipment because of its extreme complexity. It holds important significance and has great worth within the organisation. This concept has been introduced to emphasize a highly valuable equipment which provides services for the entire organization. A major equipment must obligatory have one of the following tags: IOSIN, ERIC or ESFRI.

Service = It is a mandatory object, but it can be placed at any level of the organizational hierarchy. The service administrator is appointed by the entity above it, which can be any of the above mentioned ones. However a service can be provided by more than one entity. For example, one service can be provided by several equipment items, or by one equipment plus one entire Laboratory.

Types of users and their rights/responsibilities

You do not need to register in order to browse the platform and look at the public information regarding organization, research facilities, laboratories, equipment items and the services they provide.

User account = a user who has signed up on the platform, in order to browse the platform and to send enquiries to request further information about the entities he/she is interested in.

Organization account administrator = a user who has been officially appointed by the organization management, to manage the organization account.

Responsibilities

- adds and edits information about the organization;
- adds SOs, RF, Labs, Stand-alone equipment and lists services provided directly by the organization => defines the organization structure and appoints administrators for them.

  Once he/she appoints administrators, he/she no longer has the rights to edit, update and modify the information related to that specific entity. The only right he/she still holds, is the right to change the account administrator, since this is the exclusive right of the one that created the entity account. If he/she does not appoint anyone to manage the entities directly below the Org, he/she will automatically be the administrator of the entities listed below the Org;

- can delete/unpublish existing accounts (go to the *Publishing/Unpublishing rights* section for more details on this matter)

Suborganisation account administrator = a user appointed as a SO administrator by the organization administrator.

Responsibilities

- adds and edits information about the suborganization;
- adds RF, Labs, Stand-alone equipment and lists services provided directly by the suborganization and appoints administrators for them.

  Once he/she appoints administrators, he/she no longer has the rights to edit, update and modify the information related to that specific entity. The only right he/she still holds, is the right to change the account administrator, since this is the exclusive right of the one that created the entity account. If he/she does not appoint anyone to manage the entities directly below the SO, he/she will automatically be the administrator of the entities listed below the SO - this rule applies only for the entities that he/she directly listed, NOT for the ones listed by the ORG administrator;

- can delete/unpublish existing accounts (go to the *Publishing/Unpublishing rights* section for more details on this matter).

Research Facility account administrator = a user appointed as a RF/SO administrator by the organization administrator.

Responsabilites:

- adds and edits information about the RF;
- may add other Labs, Equipment or list services, besides those added by the Org/SO administrator, if he/she sees fit and appoints administrators for them.

  Once he/she appoints administrators for the layers listed under his entity, he/she no longer has the rights to edit, update and modify the information related to that specific

entity. The only right he/she still holds, is the right to change the account administrator, since this is the exclusive right of the one that created the entity account. If he/she does not appoint anyone to manage the entities directly below the RF, he/she will automatically be the administrator of the entities listed below the RF - this rule applies only for the entities that he/she directly listed, NOT for the ones listed by the ORG/SO administrators.

- can delete/unpublish existing accounts (go to the *Publishing/Unpublishing rights* section for more details on this matter)

Laboratory account administrator = a user appointed as Lab administrator by either the Org/SO administrator or by the RF administrator.

Responsabilites:

- adds and edits information about the Lab;
- may add other pieces of Equipment and list services, besides those added by the Org/SO and RF administrators, if he/she sees fit and appoints administrators for them.

    *Once he/she appoints administrators, he/she no longer has the rights to edit, update and modify the information related to that specific entity. The only right he/she still holds, is the right to change the account administrator, since this is the exclusive right of the one that created the entity account. If he/she does not appoint anyone to manage the entities directly below the Lab, he/she will either automatically be the administrator of the entities listed below the Lab - this rule applies only for the entities that he/she directly listed, NOT for the ones listed by the ORG/SO/RF administrators.

- can delete/unpublish existing accounts (go to the *Publishing/Unpublishing rights* section for more details on this matter)

Equipment account administrator = a user appointed as an equipment administrator by either the Org/SO administrator, the RF administrator, or the Lab administrator;

Responsabilites:

- adds and edits information about the Equipment;
- may list services associated with that piece of Equipment;
- can delete/unpublish existing accounts (go to the *Publishing/Unpublishing rights* section for more details on this matter)

Service administrator = a user appointed as a service administrator by either the Org/SO administrator, the RF administrator, or the Lab administrator.

Responsibilities:

- adds and edits information about the Service;
- adds association to existing pieces of equipment or any other type of entities;

    *e.g. A Service can be provided by one equipment and a Laboratory;
        A Service can be provided by several equipment items.

- can delete/unpublish existing accounts (go to the *Publishing/Unpublishing rights* section for more details on this matter)

*You may manage as many accounts as you wish. Until you appoint administrators for the accounts directly below the account you manage, you remain the administrator for those specific accounts.

Notes:

● What is a **Research Infrastructure** on EERTIS?

The entities listed above represent the EXISTING accounts on the platform. However, in some sections of the platform (e.g Search area) you may notice the term **Research Infrastructure***.* The research infrastructure is a generic term which comprises research facilities and laboratories. It does not exist de facto on the EERTIS platform, as a specific account.

● What are the differences between **Organization** and **Suborganization** on one side and **Research Faculty** and **Laboratory** on the other side?

You have noticed that the platform provides accounts shaped to the specific organization chart. However, there is a difference between the Org/SO accounts and the RF/Lab accounts. RFs and Labs represent the Research Infrastructure belonging to a particular organization, whereas the Org/SO aim to represent the administrative branches. Compared to Org/SO, RF and Labs have richer and finer grained metadata (including predefined domains as well as user defined tags). If filled in, this rich metadata makes your entities easier to be discovered on EERTIS, when it comes to targeted searches.

When considering how to define your organization structure on EERTIS, please consider the following:

1. Is your entity best described as a single laboratory (with many pieces of equipment)? If yes, then define it as a Lab.
2. Does your entity have its own equipment and services, but is not a laboratory and it doesn't include any other laboratories? If yes, then define it as a Suborganization.
3. Does your entity include multiple laboratories (or one laboratory and some other equipment items)? Then, you could define it as a Research Facility, or as a Suborganization. Please carefully consider your choice.

   3.1. If your entity is divided into other administrative entities (eg, departments), which are different from your research labs, then define it as a Suborganization.

   3.2. If your entity only includes research labs (with no other administrative entities situated above or parallel to the laboratories), then think if it can be truly described as a Research Facility

Publishing and Unpublishing rights

General rules:

➔ No entity will be visible on the platform unless all the entities above it and directly associated with it are published

➔ There are general criteria for publishing an entity:
- ◆ An Equipment is published if the Laboratory/RF/SO/ORG entity that owns it, is published on the platform (Laboratory/RF/SO/ORG);
- ◆ A Laboratory is published if it has at least one equipment attached to it, which in turn, must be published on the platform; Another condition is that the entity that owns it (eg. RF, SO, Org) is also published on the platform;
- ◆ A Research Facility is published if it has at least two Laboratories /or at least one Laboratory and one equipment attached to it, which in turn must be published on the platform. Another condition is that the entity that owns it (eg. SO, Org) is also published on the platform

➔ The creation of a structure starts at/with the top levels of the organization and goes further down (eg. Org -> SO-> RF ->Lab -> Equip, etc), whereas the publishing flow is a bottom up process/approach, but always considering meeting the requirements (e.g Equip ->Lab -> RF -> etc)

Entity status
➔ Draft= The entity is not published and not visible on the platform. The reason for not being published is that either mandatory information or associations are missing or that the account administrator has started filing the information about that particular entity, but he/she has not finished the process and has postponed it for various reasons.

➔ Published = The entity is published and visible on the platform. All mandatory information and all necessary associations have been completed. All the above mentioned general rules have been followed.

➔ Published (pending)= The entity is not published and not visible on the platform. However, the entity meets all the requirements (mandatory information and associations are in place), but it still requires the directly above associated entities to be Published.

For a better understanding of this requirement, we invite you to read about the following use-cases, provided as an example:

Scenario : How to create and publish a Research Facility with one directly associated Equipment and one associated Laboratory which also has one equipment.
1. You have previously created an organization account;
2. You can create a **Research Facility,** directly associated with your organization (or your Suborganization). This Research Facility will be auto-saved as a **Draft;**
3. You create a Laboratory directly associated with the Research Facility. This Laboratory will be auto-saved as a **Draft;**
4. You create **Equipment 1** directly associated with the Laboratory. This Equipment 1 will be auto-saved as **Draft** and it represents the final brick in the above mentioned thread.
5. You create **Equipment 2**, directly associated with the Research Facility (as part of the RF requirements). This Equipment 2 will be auto-saved as **Draft**

You have now created the structure from the top to the bottom. Now you can start the publishing flow from the bottom to the top

6. Go to E**quipment 1** and **Publish** it. This Equipment 1 will shift to the **Publishing Pending** status, which indicates your intention to publish the item. However, the item is not yet Published since the entities above are not yet published.
   you can also do this after step 4
7. Go to the **Laboratory** and **Publish** it. This Laboratory will shift to the **Publishing Pending** status, which indicates your intention to publish the item. However, the item is not yet Published since the entities above are not yet published.
8. Go to E**quipment 2** and **Publish** it. This Equipment 2 will shift to the **Publishing Pending** status, which indicates your intention to publish the item. However, the item is not yet Published since the entities above are not yet published.
   you can also do this after step 5
9. Go to the **Research Facility** and **Publish** it. Since all the conditions are met, the Research Facility will now be **Published** and all entities below and directly associated with it will be automatically **Published** and visible on the platform
   We assume that all the entities above and directly associated with the Research Facility have been previously Published.

Additional steps to the Scenario above
- If the Research Facility account administrator wishes to **Unpublish** the entity, he/she can do so. At this moment, the Research Facility will become **Draft** and all the entities below and directly associated with it (Laboratory 1, 2) will automatically become Published (pending) and not visible on the platform.
- If the Research Facility account administrator wishes to resume the published state, he/she can do so. At this moment, the Research Facility will become **Published** and all the entities below and directly associated with it (Laboratory 1, 2) will automatically become Published and visible on the platform

IMPORTANT:
● *In this scenario, there is the same account administrator for each entity;*
● *We also assume that all mandatory information associated with any entity is filled in, therefore the Published (pending) status is not caused by missing information, but because of the actions carried out by the administrators;*
● *In case there are different account administrators in this thread, they will all be notified on any changes operated by the administrator above them.*

Account administrators assignment flow

General terms:
Owner - a user that has created an entity
Administrator - a user that has the rights to edit an entity, but he/she has not necessarily created that entity
the owner may or may not be the same person as the account administrator

General rule:

An owner has the right to nominate account administrators for the entities he/she has created. Once another person has been assigned as an account administrator, the owner can no longer edit that entity. However he/she still retains the right to reassign another person (including himself/herself) as an account administrator.

If an owner has nominated/changed the administrator of an entity he/she owns, the assigned person will become the new administrator of that particular entity and owner of all its associated entities. In addition, the assignment of the new admin propagates to all lower entities who were previously administered by the old admin - and also affects the ownership of their associated entities. (In other words, the replacement of an entity admin entails his/her replacement throughout the lower sub-tree.)

For a better understanding of the nomination flow and everything it entails, we invite you to read about the following use-cases, provided as an example:
1. X is the owner of a RF. X nominates Y as an account administrator for that RF;
2. Y, the new RF administrator, also becomes owner for all the below associated entities (e.g Lab, Equip, etc);
3. If X was also account administrator for the associated entities, Y will also become an account administrator for those entities;
4. If Z (a third party) was an account administrator for the associated entities, Z will remain the account administrator for those entities;

Therefore, we now have the following changes in the account administrator flow:
- X remains the owner of the RF;
- Y has become the account administrator for the RF and owner of the below associated entities;
- Y has become the account administrator of the below associated entities, if Y is directly replacing X;
- Z remains account administrator for the below associated entities, if Z was the account administrator from the beginning

the last two changes can exist simultaneously

Search engine

Any visitor can browse the platform and look at the public information regarding organizations, research facilities, laboratories, pieces of equipment and the services they provide. There is the possibility to filter your browsing actions according to the aforementioned entities, or other advanced options, depending on the specific entity. You can also search for specific items from various categories.