

Milestone 6.3: Design, features and functional requirements of the ACTRIS Science and User Forum

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1. Introduction

The ACTRIS Science and User Forum (hereinafter also referred to as *Forum*) is the *physical and digital* platform that will be organized and managed by the Service and Access Management Unit (SAMU) of the Head Office to host exchanges with the users regarding the use of ACTRIS services.

The objective of the document is to provide an overview and initial structure of the digital version of the Forum that will be integrated into the ACTRIS website.

The document begins with establishing the mission of the Forum, defining both its strategic and informative tasks.

The following chapters go on the key aspects that will guide refining the Forum's concept and progress with its implementation. In particular, chapters 3 and 4 identify the target users and the Forum's distinctive content to fulfil their main requirements.

The basic design and features of the dedicated solution that will be integrated into the ACTRIS website are explored in chapter 5, as the base structure that will be considered for the initial implementation.

The content of this document will be further developed during the implementation of the Forum, which will be integrated in the ACTRIS website by the first semester of 2021.

2. Mission of the Forum

The Forum's mission is to provide ACTRIS users with a dedicated platform where they can easily get information or communicate expectations, experiences, ideas and specific needs or challenges concerning the ACTRIS services.

It shall streamline the relation between users and SAMU, providing **the ideal stage to gain valuable insights on the users' requirements**, expectations and feedback regarding the services that will drive the development of the ACTRIS services and activities.

It shall also **provide SAMU with the means to deliver input and recommendations to the relevant ACTRIS bodies** for discussion and analysis of present and future scientific and technical challenges by mediating bottom up initiatives/requests regarding usage of CF/NF services.

The Forum contributes to keep the users at the forefront of the RI activities, maximizing the level of user engagement, the use of ACTRIS services and the users' satisfaction. Moreover, bringing the users together in one common place also allows to measure and improve the engagement and increase the quality and effectiveness of content delivered.

Given these conditions, the Forum is a **crucial tool for SAMU to execute and monitor the effectiveness the user strategy**, a wider and more complex approach to the different aspects of the relation between ACTRIS and its users: user acquisition, user engagement, user experience, service development.

3. Target audience of the Forum

ACTRIS aims to provide its services to a wide range of users: Public research organisations, universities and higher education organisations, international organisation; Public services; Private companies and businesses.

Therefore, **it is important to target the different users, clearly identify their specific needs and approaches to the ACTRIS services, understand their background, expectations and research needs, and plan the specific set of activities** (objective, channel, frequency, etc.) to effectively engage and exchange with the them. These crucial steps are taken into account with the development and systematic execution of the ACTRIS user strategy.

The main users' requirements concerning the access to ACTRIS services (what they want and why) have been considered to drive the design and implementation of the Forum, under the assumption that they will be further discovered, discussed and taken into account in the continuous development of the user strategy during the RI's lifespan. Main users' requirements are:

- Get information on how to access and use the infrastructure (service catalogue, access programs, call for access, etc.)
- Gain access to guidelines, training materials, data and models
- Gain insights on current and future developments
- Gain awareness on the use made of ACTRIS services and resources
- Provide feedback on the ACTRIS experience, success stories, etc.
- Communicate ideas, specific technical needs or challenges, opportunities for collaboration and development of technologies and methodologies

4. Content of the Forum

Distinctive content and resources will be provided and organized in the Forum to serve its mission and fulfill the main users' requirements.

Even if the main topic of the Forum is very specific (i.e. the user access to ACTRIS services), it shall be considered that the user audience is very broad, some looking for very specific information and others looking for an overview. A thorough work on creation and organization of content must be considered and carried out by SAMU to present the different information in a simple format.

This is the backbone of the Forum and will be managed by SAMU within a continuous update process to maximize the level of user engagement and increase the quality of content delivered to user communities, the effectiveness of knowledge sharing and the users' satisfaction.

Although, to some extent, SAMU will organize physical events to bring together ACTRIS experts and users for discussion around the topics that will be selected as emerging needs and requirements or to give insights about ACTRIS services, opportunities and future developments, **the content of the Forum will be mainly delivered through the dedicated online solution of the ACTRIS website.**

Specific forms and surveys will be available to users for collecting their needs, requirements, feedback, user stories, etc., and more in general, to reach SAMU on the topics concerning the physical and remote access to ACTRIS services. These forms will be in different shapes based on the needed objectives and approach, both passive (user-initiated) and active (SAMU-initiated). Also, features for access-related message threads, thematic channels, etc. will be implemented.

A **calendar** will provide information about upcoming events (online/face-to-face) organized by SAMU like webinars, training events, topic-specific workshops, consultations, service review meetings, etc. to illustrate ACTRIS services and opportunities, review and plan strategic development, establish relationships, etc.

Information about ACTRIS services, opportunities, current and future development will be highlighted through specific material in the flexible form of **articles, HowTos and FAQs, Tips & Best Practices**, etc.

A dedicated selection of static content that would be beneficial to the users of ACTRIS services will be provided as an **online library: use cases reports, success stories, publications, etc.**

5. Design and functional requirements of the online Forum

The Forum will be integrated in the ACTRIS website as a relevant complement to the systems for access management (PASS) and helpdesk for physical and remote access (SUPRA).

These complimentary systems shall be organized to **provide the users of ACTRIS services with a fully centralized experience on the ACTRIS website**, allowing them to access the services, express their needs and feedback, be connected with the right information about data, tools, resources, dedicated events, opportunities and challenges, research ideas, new discoveries and any other topic of interest.

The graphic elements and visual design of the online Forum will be inherited from the broader ACTRIS website of which the Forum is a part. However, a dedicated design is necessary to arrange the graphics and content of the Forum so that it is focused on providing a successful user experience, is easy to navigate and ensures that users have a way to access the content they need with very little input.

To achieve this, **the online Forum will be provided as a context-oriented knowledge base**, an easily accessible hub that includes information and resources around the topic of user access to services through a very clean, simple and intuitive layout.

As a knowledge base system, the Forum will allow some flexibility in organizing the specific and different content in the form of: Q&A pages, feedback pages, events, explanatory documentation, link to user helpdesk.

Search functionality, Call to Action buttons, relevant topic categories or announcements shall be evident on the main page. The content structure must be clearly identified to set up the list of topic categories and configure an easy to use navigation.

User registration and content visibility features should also be used to provide a more flexible use and possible scalability of the solution.

6. Next steps

After the initial phase of defining the mission and the structure of the Forum, the next steps will focus on the implementation of the platform on the ACTRIS website.

The functional requirements and the design proposed with this document are usually included in the range of capabilities of the most common Content Management Systems used to develop the websites.

Anyway, specific and popular solutions on the market could ease the implementation, organization and maintenance of the Forum, and ensure a certain degree of scalability and flexibility with different possible use.

All the possible options would be checked at the time of starting the implementation, ensuring the potential fully interoperability with other ACTRIS systems to guarantee a proper processing of user requirements and feedback and provide/retrieve any needed information to/from the systems.

The implementation will start lightly with setting up the main contents and channels to follow the growth of the RI and communities of users. In particular, the specific timeline and development of TNA that will be ongoing in the next years will be considered at the beginning, with other content and features explored and added in the future as needed to accomplish the mission of the Forum.

The next action steps will focus on:

- Integration in the ACTRIS website (by February 2021)
- Building the structure and content (April 2021)
- Public Launch (June 2021)

The testing phase will be carried out in parallel to the development.