

## Deliverable 2.6

# ITINERIS Access Platform Specification document



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## INDEX

1. Introduction .....	4
2. Platform users roles and needs .....	5
2.1 User story for the Administrator role .....	5
2.2 User story for the Applicant role .....	6
2.3 User story for the Reviewer role .....	7
2.4 User story for the Provider role .....	8
3. Platform Customization and Technical Development .....	9
4. Key features.....	10
5. Integrated advanced tools .....	20
5.1 Access Control and Authorization .....	20
5.2 Advanced search mechanism .....	20
5.3 Data Export .....	20
5.4 Platform Security and Compliance .....	20
6. Conclusion and Further Development.....	21

## 1. INTRODUCTION

ITINERIS WP2 focuses on developing the ITINERIS HUB, a centralized access point that connects the national environmental Research Infrastructures (RIs) to a wider user community. One main goal is establishing a National Access Framework for harmonized access to FAIR data, services, and facilities the RIs offers. A key objective of the ITINERIS is the development and deployment of a customized access management platform to facilitate access to national environmental RIs and to implement the ITINERIS National Access Program (as detailed in Deliverable 2.3 -Recommendations for the Future National Access Program). An access platform will streamline access processes, from handling user requests to managing reviews and feedback. The ITINERIS Access Platform builds upon and extends the existing PASS platform (Platform for Managing User Access to ACTRIS Services), which has been enhanced and tailored by ACTRIS SAMU to meet the specific needs of the ITINERIS project. The present deliverable “Access Platform - Specification document” outlines the requirements and specifications necessary to guide the development and configuration of the ITINERIS Access Platform, integrated within the ITINERIS HUB. This platform aims to provide a centralized, user-friendly web portal to enhance the visibility, accessibility, and usability of ITINERIS resources for a wide range of communities.

The deliverable specifies the design and development of the Access Platform to manage all stages of the access process as defined in the Access Management Plan (Task 2.1). This platform will serve as the technological backbone for centralizing management of both physical and remote access to the services allowing for the efficient organization and monitoring of the different stages of the process:

1. **Request:** The interested user submits their access request through the platform.
2. **Initial Evaluation:** The request undergoes an initial eligibility evaluation by the call administrator and a feasibility assessment by the service provider.
3. **Reviewer Selection:** The request is assigned to expert reviewers who assess it based on specific criteria and provide scores and detailed feedback.
4. **Final Decision:** Based on the ranking, the call administrator makes the final decision on whether to approve the request.
5. **Monitoring and Reporting:** Approved requests are documented and monitored throughout the access process, allowing both the requesting users and service providers to upload any required periodic reports in their dedicated area, making them available for tracking. Additionally, standard document templates will be provided to guide applicants in completing their proposals, ensuring consistency and uniformity in the evaluation process while enabling full traceability of all digital workflows.

ITINERIS will provide extensive visibility to access opportunities to ensure maximum engagement and utilization of services and resources. By promoting transparent and accessible information through its centralized platform, ITINERIS aims to attract diverse users, fostering greater demand for its offerings. This strategy supports the optimal use of available resources and encourages collaboration, innovation, and knowledge exchange within the research community.

## 2. PLATFORM USERS' ROLES AND NEEDS

The platform will include a comprehensive set of features designed to facilitate every phase of the access management process lifecycle, from proposal submission to the selection of beneficiaries and fund management. With an intuitive interface and advanced tools, the platform aims to provide transparent, efficient, and compliant management of access requests, allowing users to focus on their core missions and objectives. The platform users participate in the process through the following roles and each user can assume different roles in different calls:

1. **Administrator:** Manages the entire process, from creating the program/call to setting user permissions, and overseeing and monitoring activities throughout the various phases.
2. **Applicant:** This role is automatically assigned to all users who register on the site. It grants users access to the platform and allows them to participate in open calls.
3. **Reviewer:** Assigned to an expert user, this role involves evaluating submissions based on specific criteria.
4. **Service Provider:** This role is assigned to the user responsible for a service, allowing them to evaluate the feasibility of applications and monitor approved requests.

The access platform will include dedicated portals tailored to the specific roles within the system with detailed functionalities accessible through their respective menus. This means that the platform is designed to accommodate the needs and responsibilities of each user role—such as Applicants, Administrators, Reviewers, and Providers—by offering distinct interfaces and tools. Integrated tools will be also provided to allow users (based on their role, such as user, admin, etc.) to explore data, create custom reports, and design personalized visualizations, generate graphs, thereby facilitating data analysis and configuring dashboards to meet the specific user's needs. Each portal will provide role-specific features that streamline workflows, enhance efficiency, and ensure users can perform their tasks effectively.

### 2.1 User story for the Administrator role

The Administrator needs the ability to create programs and define participation requirements to efficiently manage open calls for access to research infrastructures. The Administrator needs to create customizable forms for collecting relevant information from participants, ensuring that the data aligns with the specific needs of the program. Flexible workflows are also crucial, enabling streamlined processes for submission, review, awarding, and reporting, adaptable to various scenarios. Administrators must be able to delegate specific responsibilities, such as form completion or proposal review, to different users or roles, therefore task assignment is a key requirement.

Automated workflows are equally important to reduce manual effort, minimize errors, and enhance overall efficiency. Budget management is another critical feature, allowing the Administrator to allocate funds to specific programs or calls, ensuring effective tracking of available and utilized resources. Additionally, the Administrator needs straightforward tools for managing access requests and other operations, whether manually or automatically, to maintain control over system usage.

For the review process, the Administrator requires the ability to assign reviewers to each request proposal, either manually or automatically, ensuring that every proposal is appropriately evaluated. The Administrator must be able to track reviewer activities to monitor progress and promptly address any issues or delays. Evaluation criteria have to be set in the form and in the case of more than one reviewer, an automatic process needs to be possible up to a final evaluation. The administrator has the possibility to assign a grant or reject a proposal, after the completion of the evaluation process. Post-access duties need to be managed: collection of Confirmation of Access from providers, User access report and dissemination activities, User Carbon Footprint evaluation, collection of user feedback, etc. A monitoring dashboard is essential to provide a complete, real-time overview of programs and their progress. Therefore, the platform features designed to address the needs of the administrator role are listed below:

- **Call Creation:** Pages for creating open calls and defining participation requirements in a few steps, without the need for technical skills.
- **Monitoring Dashboard:** A dashboard for managing and monitoring programs and calls.
- **Flexible Workflow Configuration:** Multi-step workflows for managing the submission-review-award-reporting process for each program/call.
- **Step Assignment:** Flexibility in assigning different steps such as form completion, review activities, or management evaluations.
- **Form Creation Tools:** Flexible form and module creation tools for collecting various data types, including validation rules, conditional logic, and file upload functionality.
- **Workflow Automation:** Ability to create workflow automation based on rules applied to proposals and review contents, such as moving proposals between steps, sending notifications, or updating fields.
- **Budget Assignment:** Ability to assign a budget to a program/call and monitor its usage.
- **Access Request Monitoring:** Full lifecycle management of access requests with status and label assignments.
- **Reviewer Assignment:** Manual or automatic assignment of access requests to reviewers, either by assigning a specific number of requests to each reviewer or a certain number of reviewers to each request.
- **Reviewer Activity Monitoring:** Tracking and managing reviewer activities.

## 2.2 User story for the Applicant role

Applicants need a streamlined and intuitive platform to guide them through the processes of discovering opportunities, submitting applications through an intuitive online web form, and staying informed at every step of the way. This eliminates the complexities of paper-based processes, making the application process more efficient. Additionally, potential participants should benefit of a comprehensive FAQ section that provides clear answers to common questions, ensuring they have the necessary information to complete their applications. Applicants need the ability to register on the platform, browse available calls or opportunities, and select the ones that align with their interests or qualifications. The platform must allow them to easily submit applications, upload required documents and track the status of their submissions as they progress through various stages. Applicants must

receive timely notifications whenever there is an action they need to take, such as completing missing information or responding to feedback, or when their application status changes, such as moving to the evaluation phase. They also need to view the results of their submissions and receive an award or rejection letter. In case of proposal approval, the user needs to be able to complete any additional reporting tasks, as required by the specific call after the access project completion. In summary, a dedicated Applicant portal should include the following features to manage the applicant access requests, from initial submission to any required reporting activities based on the specific call:

- **Call Visibility and Browsing:** The platform must provide a clear and user-friendly interface that allows Applicants to view all available calls, filter opportunities based on criteria and access the relevant details of each program or application process.
- **Document Upload and Management:** A dedicated section enables Applicants to upload supporting documents for their applications, such as CVs or project proposals and post-access documents, directly linked to their submissions, ensuring that all required materials are securely submitted and accessible to reviewers.
- **Customizable Application Forms:** The platform allows Applicants to complete forms tailored to the specific requirements of each call, with support for multiple question types and logical validations to ensure accurate submissions.
- **Application Status Tracking:** Applicants can monitor the progress of their submissions through a status tracker. The platform ensures visibility of all key stages, from initial submission to evaluation and results. Once an application is reviewed, Applicants can access the results, including approval decisions, feedback, or next steps required.
- **Notifications and Alerts:** The platform sends automated notifications to Applicants to inform them of actions required (e.g., application deadline, completing missing information, or responding to reviewers) and updates on the status of their application as it moves through different stages.
- **Visibility Controls for Applications:** Applicants can view all submitted applications, including their history, to reference previously submitted materials or track outcomes.

### 2.3 User story for the Reviewer role

Reviewers require a centralized system for managing submitted proposals, allowing them to conduct analyses and evaluations accurately and efficiently. They need the ability to access applications assigned to them at various stages of the workflow, ensuring clarity and efficiency in their review tasks. Reviewers should have visibility into their assigned applications and the history of previously evaluated ones, enabling them to maintain context and consistency in their evaluations. In cases where authorized by the program manager, certain reviewers, such as rapporteurs, may need access to evaluations made by others for the same application, fostering collaboration or consensus-building. To carry out their tasks effectively, Reviewers need customizable evaluation forms that accommodate various question types, such as multiple-choice or open-ended responses, tailored to the specific requirements of the evaluation process. They also require the ability to leave notes and comments on applications to document their feedback clearly and transparently. In summary, the Reviewer requires a platform that offers seamless access to assigned applications, advanced tools to evaluate applications based on specific criteria and workflows established

by the program, and collaborative features to support accurate and efficient decision-making. Therefore, a designed access portal for evaluators to access assigned applications at various stages of the workflow must have the specific features listed below:

- **Visibility Controls for Applications:** Reviewers can access a dedicated view of applications assigned to them for evaluation. They can also review the history of previously evaluated applications to maintain context and consistency.
- **Visibility Controls for Reviewers:** Certain reviewers, such as rapporteurs, can view the evaluations and comments made by other reviewers for the same request when authorized by the program manager. This fosters collaboration and consensus within the review process.
- **Customizable Evaluation Forms:** The platform should have tools to create and use tailored evaluation forms. These forms can include various question types, such as multiple-choice, numeric scoring, or open-ended responses, ensuring flexibility for diverse evaluation needs.
- **Comments and Notes:** Reviewers can add detailed notes and comments directly to the access request. This feature enables them to provide feedback, document observations, or highlight concerns for program managers or other reviewers.

## 2.4 User story for the Provider role

The Provider needs a specialized user access portal to facilitate the feasibility review of access requests submitted for the facilities and to maintain accurate financial and Access Unit tracking under their management. This portal must enable them to assess the feasibility of new requests efficiently, ensuring that their facility's resources are allocated appropriately and sustainably. Providers require access to specific Feasibility Assessment Forms designed for evaluating each access request. These forms should be comprehensive and tailored to include necessary details that help Providers make informed assessments. The platform should offer an Overview of Submitted Requests, allowing Providers to view all received access requests along with a clear indication of each application's status. This overview should not include access to reviewers' comments or evaluations, maintaining confidentiality and focusing on feasibility. Providers must be able to add their insights by using the Option to Add Notes and Comments directly on the access requests they are evaluating. This feature supports transparency and allows for additional context or feedback that can be useful during the decision-making process.

Providers need Access to Call-Specific Reports, which help them monitor the declared access capacity and track the usage of funds allocated to their facility for each call. This feature ensures that the management of resources remains transparent and aligns with the goals of the call. In addition, the Provider requires robust tools to maintain accurate financial and Access Unit tracking allocated to facilities under their management. This aspect includes a real-time update of the remaining Access Units relative to the annual provision to assess how resources are being utilized and identify any potential over- or under-utilization promptly.

In summary, the Provider requires a platform that supports efficient and comprehensive feasibility assessments, offers visibility into submitted requests, allows for feedback through

comments, and provides reports for effective resource management. The specific features that the platform must have to collectively support the Provider role by offering tools and visibility that streamline the feasibility assessment process and promote transparent and effective management of access requests are listed below:

1. **Access to Feasibility Assessment Forms:** Providers can access detailed forms tailored for evaluating the feasibility of new access requests, ensuring that each request is assessed thoroughly and consistently.
2. **Overview of Submitted Requests:** Providers have a clear overview of all access requests submitted to their facility, with an indication of the status of each application. This overview is designed without access to reviewers' comments or evaluations to maintain confidentiality.
3. **Option to Add Notes and Comment:** The platform allows Providers to add notes and feedback on the access requests they evaluate, supporting better communication and documentation within the review process.
4. **Access to Call-Specific Reports:** Providers can monitor call-specific metrics, including declared access capacity and fund usage. This feature aids in tracking resource allocation and ensures transparency in the management of facility resources.
5. **Financial Tracking System and Dashboard for Access Unit Monitoring:**

The platform must include a dedicated system to track Access Units for each facility. This system should automatically calculate the balance of remaining Access Units in real-time, relative to the annual allocation, ensuring that Providers can easily monitor resource usage. A dedicated dashboard should provide a clear overview of the financial resources allocated to each call and their utilization. This should include historical data on Access Unit allocation and financial transactions, allowing Providers to review past performance, identify trends, and inform future resource planning.

### 3. PLATFORM CUSTOMIZATION AND TECHNICAL DEVELOPMENT

The Access Platform will offer extensive customization and future development capabilities, ensuring both front-end and back-end flexibility to adapt to evolving needs. It will support an unlimited number of programs, calls, and users, with advanced access control features allowing for granular assignment of roles and permissions. Administrators can assume the roles of other users to assist with troubleshooting and verification. The platform will include a robust messaging system with dynamic templates for streamlined communication and integrated reporting tools for real-time data visualization, report generation, and customized dashboards. Its advanced search functionality, featuring faceted search, full-text, wildcard, and Boolean operators, will ensure efficient data exploration, while data can be exported in multiple formats (Excel, CSV, JSON). Branding elements like layout, colors, and logos can be customized to suit organizational needs. The platform will ensure high-level security, compliance with accessibility standards, and multi-device optimization, while an activity log will allow administrators to monitor all actions taken within the system. Authentication will be facilitated through Single Sign-On (SSO) protocols such as OpenID Connect, and the platform can be integrated with external systems via APIs. For front-end development,

Angular could be selected for its performance and user-friendly interfaces, while back-end frameworks such as Python's Flask or Django, or PHP's Laravel, might be considered depending on the specific needs of the project. A decision between using MySQL or MongoDB databases would be made based on scalability and data requirements. The platform would potentially be deployable on \*nix servers, hosted within Europe to ensure GDPR compliance, and would include regular updates, security patches, and modifications as required.

## 4. KEY FEATURES

The platform functionalities described for each user portal will be organized within intuitive menus to allow seamless navigation and access to the necessary tools and information.

### HOME PAGE (when not logged in/registered):

- **Login;**
- **Register;**
- **Applicant guidelines** (How do I register as an applicant);
- **Search** bar (possibility to search for programs on the home page);
- Program cards **view**;
- **Select** program card (opens the selected program section).

## ADMIN

### MENU

- **User profile;**
- **Settings;**
- **Reporting;**
- **Reviews;**
- **Application;**
- **Awarded.**

### HOME PAGE (OVERVIEW)

- **Search** bar (possibility to search for programs on the home page);
- Program cards **view**;
- **Select** program card (opens the selected program section);
- **Filter** card view;
- Create new **Program**.

### PROGRAM PAGE

- **Dashboard** program page;
- Program statistics **view**;

- **Select** single call (call card);
- **Create** call;
- **Search** bar (call);
- **Edit/View/Clone** call.

### CALL PAGE (3 different sections):

#### 1. DASHBOARD:

- **Dashboard** call;
- **Statistic views**;
- **Timeline** step by step;
- **Create** new stage;
- **Stages views** (example of call stages, but they may vary):
  1. Application Stage - **task type (fill out form)**;
  2. Eligibility Review round - **review type**;
  3. Feasibility Review round (Service Provider) - **review type**;
  4. Admin Review Feasibility - YES - **administration type**;
  5. Admin Review Feasibility - NO - **administration type**;
  6. Excellence - driven access Review Stage - **review type**;
  7. Technical need - driven access - **review type**;
  8. Market - driven access - **review type**;
  9. Training need - driven access - **review type**;
  10. Administration (make average before rapporteur) - **administration type**;
  11. Rapporteur- **review type**.

#### 2. APPLICATIONS:

- **Dashboard** applications (management of all user applications);
- **Search** bar (application);
- **Filter** applications (complete/draft);
- **Create** applications;
- **Edit** applications;
- **Select** application (check);
- **Tabs**:
  - **Move** applications to trash;
  - **Delete** applications permanently;
  - **Change** application status;
  - **Move** applications to another stage (dropdown);
  - **Award/Decline/Revert** decisions;
  - **Add/Remove** application labels;
  - **Create/Edit/Delete** application labels;
  - **Email** applicants;
  - **Download/export** application data;
  - **Submit/Reopen** applications;
  - **Lock/Unlock** applications;
  - **Edit** application custom filter.

## APPLICATION PAGE (subsection of APPLICATIONS, further divided into 4 sections)

1. **Summary:**
    - Details application **view**;
    - **Edit** custom fields (access start/end date; AccessMode (for evaluators); link to file with average review score; reviewer 1q1 Score etc);
  2. **Application**
  3. **Review:**
    - Currently **status** (eligibility/feasibility);
    - Tutte le Review fatte all'application;
  4. **Note**
    - **Notes** added by the platform manager (with details);
- **TAB** (le stesse della sezione APPLICATIONS);
  - **Back** to applications - to return to the list of all applications

## 3. REVIEWS:

- **Dashboard** assignments in progress;
- **Open** application list (reviewer details);
- **Select** view teams (view the entire review team);
- **Filter** status (active assignments/in progress/complete);
- **Filter** review stage (current stage);
- **Select** application;
- **Manually Assign** (external/rapporteur);
- **Automatic** assign (external);
- **Download/Export** review;
- **Clear** review;
- **Unassigned** review.

## CREATE NEW STAGE

- **Add** a new stage;
  - **New** stage;
  - **Choose** the type of stage (template):
    - Review;
    - Task;
    - Verify/Administration;
- **Edit** stage;
- **Clone** stage;

- **Delete stage;**
  - **Save; Save and exit;**
- **Eligibility:**
  - **Select** conditions to match;
  - **Reset** criteria;
  - **Add/Delete/Clone** criteria;

## **STAGES PAGE** (Divided into 3 sections)

### **1. PROGRAM SETTINGS** (Further divided into 4 sections):

1. **Basics**
2. **Applications** (Application management):
  - Allow applicants to apply more than once;
  - Set a limit for the number of applications;
  - Allow collaborators;
  - Restrict collaborators to specific email domains;
  - Input instructions for inviting collaborators;
3. **Extras**
  - Select program categories;
  - Create program;
  - Set review score;
  - Save;
  - Save and exit;

### **2. WORKFLOW:**

- Dashboard stages list;
- Move stage position;
- Edit/Clone/Delete stage;
- Create new stage;

**EDIT STAGE** (Subsection of **WORKFLOW**, divided into sections depending on the stage type)

#### ➔ **Example: Review Stage**

##### **1. Setting:**

- Input title;
- Input review start/end date;
- Select review option;
- Select status (the status to show to applicants when their application enters this stage);
- Create new status;
- Cancel/Save

##### **2. Evaluation:**

- Assign a weight to each review stage;
- Select score weight (option);
- Cancel/Save

##### **3. Assignments:**

- **Switch** enable automatic review assignment;
- **Select** how to assign applications;
- **Add** new rules for review assignment (automation);
- **Cancel/Save**;

#### 4. Messages:

- **Select** internal messages:
  - Communication between reviewers and administrators;
  - Message history to track communications;
- **Select** Messages to Applicants:
  - Direct communication with applicants to inform them about the status of their applications;
- **Select** Automatic notifications:
  - Automatic notification to users for updates on application status/review process;

#### 5. Visibility:

- **Select (check)** cosa rendere visibile ai reviewers;
  - Personal applicant information;
  - Applicant custom fields;
  - Applicant decision history;
  - Labels;
  - Status;
  - Application title;
  - Application dates;
  - All application task;

#### 6. Stage Automation

- **Dashboard** automation list;
- **Create** automation;
- **Edit/Delete/Clone** automation;
- **Back** to stages - to return to the list of all stages;

### → Example: "Task" Type Stage

#### 1. Setting:

- **Input** title;
- **Input** review start/end date;
- **Select** review option;
- **Select** status (the status to show to applicants when their application enters this stage);
- **Create** new status;
- **Cancel/Save**

#### 2. Tasks:

- **Dashboard** task list;
- **Edit/Clone/Delete** task;
  - Examples:

- **Fill out form;**
  - **Complete an external task;**
  - **Make a payment;**
  - **Get a recommendation;**
  - **Attach file;**
  - **Verify charity status;**
  - **Add new task;**
- 3. Messages :**
- **Select** internal messages:
    - Communication between reviewers and administrators;
    - Message history to track communications;
  - **Select** Messages to Applicants:
    - Direct communication with applicants to inform them about the status of their applications;
  - **Select** Automatic notifications:
    - Automatic notification to users for updates on application status/review process;
- 4. Visibility:**
- **Select (check)** what to make visible to reviewers:
    - Personal applicant information;
    - Applicant custom fields;
    - Applicant decision history;
    - Labels;
    - Status;
    - Application title;
    - Application dates;
    - All application task;
- 5. Stage Automation**
- **Dashboard** automation list;
  - **Create** automation;
  - **Edit/Delete/Clone** automation;
  - **Back** to stages - to return to the list of all stages;

### 3. AUTOMATION

- **Dashboard** automation
- **Back** to stage automation
- **Input** text name ;
- **Select** folder stages;
- **Add/Edit/Clone/Delete** events;
- **Add/Edit/Clone/Delete** conditions;
- **Add/Edit/Clone/Delete** actions;
- **Cancel/Save**
- **Switch** active/not active (automation);

#### 4. REPORTING

- **Dashboard** reporting;
- **Search** bar;
- **Select** the applications field to include as columns within export;
- **Move** fields;
- **Delete** fields;
- **Cancel/Save**;
- **Save & Export**;

#### 5. AWARDED

- **Dashboard** list application awarded;
- **Search** bar;
- **Select** application;
- **Open** application (visualizzazione dei voti - reviews);
- **Export** pdf;

#### 6. REVIEWS PAGE

- **Dashboard** view application list (all applications: complete, in progress, to be assigned, assigned, suspended)
- **Open** applications;
- **Filter (eligibility; feasibility** - all those that have passed the eligibility phase and are in the feasibility phase; complete; in progress; to be assigned; assigned; suspended);
- **Advanced filter (e.g., date, project type, etc.);**
- **Select** review;
- **Delete** review;
- **Assign** review; (redirects to the Reviews subsection of the CALL PAGE)
- **Valuate** Review;
- **Send** default message/notification (if the reviewer has not yet completed the evaluation/to notify reviewers of newly assigned applications);
- **Generate** an automatic report (on the performance of reviewers and the overall status of the review); - this will be redirected to the reporting section.

### APPLICANT

#### MENU

- **User profile**;

- **Settings;**
- **My Applications;**
- **Programs;**
- **Pages - FAQ;**

## HOME PAGE (OVERVIEW)

- **Search** bar (ability to search for programs on the home page);
- Program cards **view**;
- **Select** program card (opens the section for the selected program);

## PROGRAM PAGE

- **Dashboard** program;
- Application description **view**;
- **Apply** to application;

## APPLICATION PAGE

- **Review/Submit** task (active only when the task is completed)
- **Add** collaborators;
- **View** task (both completed and incomplete);
- **Select** task (application form);
  - **Clear/Save/Draft/Submit** button;
- **Preview** your application;
- **Download/Delete** application;
- **Reviews** section (to view who evaluates the application);
- Decision **Details** (if it has been won, the date it was won);

## TASK PAGE (APPLICATION FORM)

- **Dashboard** application form;
- **Fill out** application form;
- **APPLICATION FORM (ex. FIELD):**
  - **Download** guidelines;
  - Description about application;
  - Email;
  - Termini e condizioni;
  - Private sector;
  - Name and Surname;
  - Gender;
  - Nationality;
  - Profile;
  - Field of activity;

- Institution Name;
- Institution status;
- Institution address and country;
- Access start date;
- Access end date;
- Potential flexibility of project dates;
- Info about date flexibility;
- Information on the requested transNational access;
- Form of access (proposed mode)
- Host Facility/ies
- Type of access requested;
- Project title;
- Project acronym;
- The scientific domains of the project;
- Main category of requested service/s;
- **Save & continue edit;**
- **Next** (passa al task successivo e salva il precedente);
- **Review/Submit** task (attivi solo quando il task è completato);
- **Download** application form;
- **Back** to application (Application page);

## MY APPLICATIONS

- **Select** dashboard view (all applications/in progress/submitted/awarded/declined);
- **Open** single application (card);
- **Download/Delete/Preview** application;
- **Continue** application (if it is not complete, it defaults to draft)

## MY PROFILE (user data management)

- **Change** propic;
- **Notifications;**
- **User information view:**
  - Name;
  - Last name;
  - Email;
  - Social Account,
  - Language;
  - Timezone (country)

## REVIEWER

## MENU

- **User profile;**
- **Settings;**
- **Reviews;**
- **Pages - FAQ;**

## HOME PAGE (OVERVIEW)

- **Search** bar (ability to search programs on the homepage);
- Program cards **view**;
- **Select** program card (opens the section of the selected program)

## PROGRAM PAGE

- **Dashboard** program (only programs visible to each specific reviewer));
- **Select** program (card);
- Review application **button**;
  - Custom **form** with specific review questions;
  - **Complete** review button;

## REVIEWS PAGE (External)

- **Dashboard** view application list (only those assigned to the reviewer);
- **Filter priority** (urgent applications with approaching deadlines - sorted by date/priority);
- **Filter** status review (complete, pending, deferred);
- **Search** bar;
- **Select** application;
- **Message/Notification** section;
- **Open** application (to view details);
  - Review application **button**;
    - Custom **form** with specific review questions;
    - **Complete** review button;

## REVIEWS PAGE (Rapporteur)

- **Dashboard** view application list (all applications: both complete and incomplete);
- **Search** bar;
- **Select** application;
- **Confirm** review **button**;
- **Decline** review **button**;
  - **Message (pop up)** to explain the reason for not confirming the review
- **Send** a notice/message to review;
- **Export** old review (archive of previous reviews for reference or feedback).

## 5. INTEGRATED ADVANCED TOOLS

### 5.1 Authentication

Robust access control mechanisms will be implemented to manage user roles, permissions, and data access levels. To handle this aspect a security-focused approach will be developed for managing data access within the platform. Strong mechanisms will be deployed to define and manage user roles, permissions, and data access levels based on the specific context. Integration with standard Single Sign-On (SSO) systems will be employed to manage authentication and authorization, along with standard protocols like OpenID Connect. This ensures secure user identification, granting access to resources only to authorized individuals.

Considering the platform's likely multi-tenancy, users will be restricted to access only the resources and data relevant to their roles and assigned permissions, ensuring confidentiality, integrity, and availability of data.

### 5.2 Advanced search mechanism

An advanced search mechanism (faceted-search and full-text search) will be implemented to facilitate efficient data retrieval and exploration.

The "Search" functionality will include faceted-search and full-text search features, along with wildcard and Boolean operators. This system will be designed to enhance efficient data exploration within the platform. Additionally, the integration of a search system like SOLR (an open-source semantic research system) will be considered.

The goal is to enable users to perform advanced searches, filter results based on specific criteria and quickly access relevant information. This approach will improve the platform's usability and effectiveness, allowing users to intuitively and efficiently locate the data they need.

### 5.3 Data Export

For "Data Export," support will be provided to allow the administrator and providers to export data in various formats, offering flexible download options. The solution will ensure that the administrator and providers can export data in commonly used formats such as CSV, JSON, or other formats as required by the project. An intuitive user interface will be developed to streamline the process of selecting data for export and choosing format options. This will ensure users can efficiently retrieve data and use it in external applications or analysis tools according to their specific needs.

### 5.4 Platform Security and Compliance

Robust security measures, including data encryption and compliance with data protection regulations (e.g., GDPR) will be adopted. The platform will be developed following security best practices and equipped with robust measures, including data encryption on the file

system where necessary, ensuring the confidentiality and integrity of sensitive information. Additionally, during the development phase, full compliance with applicable data protection regulations will be maintained, ensuring that data management adheres to current laws. Data security and regulatory compliance are key priorities, providing users with confidence that their data will be handled securely and following legal requirements.

## 6. CONCLUSION AND FURTHER DEVELOPMENT

In conclusion, the ITINERIS Access Platform represents a significant advancement in the management of applications and access requests. By integrating a robust, user-friendly interface with comprehensive features tailored to various stakeholder administrators, applicants, reviewers, and service providers, the platform is poised to streamline the entire lifecycle of open calls. This document outlines the key functionalities and specifications that will ensure an efficient, transparent, and secure process for managing access to research infrastructure.

The detailed approach to user roles and the intuitive design of the portals will facilitate effective collaboration among users, enhancing the overall user experience. The integration of advanced search capabilities, reporting tools, and customizable dashboards will further empower users to access and analyze data efficiently, thereby fostering a data-driven environment conducive to informed decision-making. The commitment to security, compliance with regulations such as GDPR, and the implementation of robust access control measures will protect sensitive information and maintain user trust.

Moving forward, several areas of development will be prioritized to ensure the continuous improvement and adaptability of the ITINERIS Access Platform:

1. **User Feedback and Iterative Improvement:** Establishing a feedback loop with users will be crucial. Regular surveys and focus groups should be conducted to gather insights into user experience, identify areas for enhancement, and address any emerging needs. This iterative approach will help ensure that the platform evolves in line with user expectations and technological advancements.
2. **Integration with Existing Systems:** The integration of the ITINERIS Access Platform with existing research infrastructure and external systems will be essential (i.e. API).
3. **Scalability and Performance Optimization:** As user demand increases and additional programs are launched, ensuring the platform's scalability will be critical. Regular performance assessments and load testing should be conducted to identify potential bottlenecks and optimize system performance, ensuring a smooth user experience even under high traffic conditions.
4. **Training and Support:** Developing comprehensive training programs and support resources for users will enhance the platform's adoption and usability. Workshops, tutorials, and detailed documentation should be made available to equip users with the necessary skills to navigate the platform effectively.
5. **Enhanced Analytics and Reporting:** Future versions of the platform could incorporate more sophisticated analytics capabilities, enabling users to derive deeper insights from the data collected. Implementing advanced data visualization tools and machine learning algorithms could enhance decision-making processes for

administrators and reviewers.

6. **Continuous Monitoring and Security Audits:** Establishing a routine for security audits and compliance checks will be essential to safeguard user data and ensure adherence to evolving regulations. Ongoing monitoring will help to identify potential vulnerabilities and implement timely updates.

By focusing on these areas of development, the ITINERIS Access Platform can remain a cutting-edge solution for managing research access requests, ultimately supporting the broader goals of the ITINERIS project and enhancing the research community's operational efficiency.