

ACTRIS IMP D7.1: Recommendations for optimizing the access process and user interaction

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Deliverable 7.1 Recommendations for optimizing the access process and user interaction

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1. Abstract	3
2. Introduction	3
3. Optimizing the access process and user interaction	4
3.1 Access management	6
3.2 Communication	7
3.3 Selection Process	9
3.4 Service provision	10
3.5 Access reporting	12
4. Conclusions and next steps	
5. Reference documents	14

1. Abstract

ACTRIS is a large, highly distributed pan-European Research Infrastructure that has entered its implementation phase in 2020. The aim of the ACTRIS Implementation project (ACTRIS IMP) is to coordinate and accomplish the actions required for implementing a globally recognised long-term sustainable research infrastructure with operational services by 2025. A key objective of ACTRIS IMP is to implement, test and improve the ACTRIS service provision. Therefore, several pilots of access provision are offered through the transnational access (TNA) tool in WP7. The present document builds on the TNA pilot experiences undertaken during the first half of the ACTRIS IMP project to provide recommendations for improving user interaction, access workflows, process, concept and reporting.

2. Introduction

ACTRIS builds on an extensive experience in access management within previous European Commission INFRAIA¹ and INFRADEV² ACTRIS-related projects: EUSAAR (EU Framework Programme (FP) 6, 2006-2011), ACTRIS (FP7, 2011-2015), ACTRIS-2 (Horizon 2020 (H2020), 2015-2019), EUROCHAMP-2020 (H2020 2016-2021), ENVRIplus (H2020, 2015-2019). Moreover, ACTRIS is currently offering access to its services and facilities in the framework of ATMO-ACCESS project (H2020, 2021-2025). Access provision in ACTRIS IMP has two main objectives. The first one is to implement the ACTRIS service provision system by providing a limited amount of TNA to selected ACTRIS services through high-quality of access and user support, centrally managed in a coordinated and harmonized manner by the Service and Access Management Unit (SAMU), and to establish a reliable system for effective ACTRIS service provision to an expanding user base respecting current and future needs. The second objective is to test, evaluate and improve the service provision in ACTRIS together with access key players (users, access providers, review panel and SAMU). The pilot TNA therefore serves in establishing the future and efficient access provision in the ACTRIS operational phase.

In ACTRIS IMP TNA pilot, 11 facilities have been selected for testing the access to specific services to assess and improve the reliability of the overall ACTRIS service provision, to increase the user trust and expand the user base. The platforms were chosen to have a representative view of the diversity of facilities involved in ACTRIS and comprise some of the Topical Centres (TCs), the Data Centre (DC), National Facilities (NFs), or combined ACTRIS Facilities (NF-TC), located in 10 different countries. The specific services being accessible through ACTRIS IMP TNA pilot are described on the <u>ACTRIS website</u>. The available services particularly support excellent science, innovation, training, and new services. Enlarging the userbase to new users or users from other domains and private sector is also a target. The choice of participating facilities and services allows testing and evaluating the service and access provision and help to optimize user interaction, data submission, workflows and management. Ultimately, the experience gained will help to prepare and implement the large-scale access provision system for users in the ACTRIS

¹ European Commission research infrastructures Call - Integrating and opening research infrastructures of European interest

² European Commission research infrastructures Call - Call - Development and long-term sustainability of new pan-European research infrastructures

operational phase. The organisation of access management and provision is made in concertation with the principles and tools developed in WP6 (Implementation of the user access to ACTRIS services), described in Deliverable D6.2 (Report on the ACTRIS User support system³).

The technical concept of the TNA pilot is detailed in Milestone MS39 (Definition of the pilot access process to ACTRIS facilities⁴), including a description of the access management and the modalities of access during ACTRIS IMP and the specific documents and templates needed to provide TNAs according to H2020 regulations and in alignment with the ACTRIS access and service policy.

A detailed assessment of the TNA pilot activities undertaken during the first half of the project is detailed in <u>Milestone MS42</u> (Intermediate assessment of the pilot access concept and process⁵). It serves as a basis for recommendations for optimizing the access process and user interaction and is suggested to be considered in parallel. The present report details the processes, summarizes the TNA undertaken at stations during the two first calls for access, analyses the lessons learnt from the main TNA actors to streamline the procedures - SAMU, access providers, reviewers, and users - and defines the indicators allowing to evaluate the service provision.

The recommendations included in this deliverable D7.1 are primarily building on the processes and experiences reported in Milestone MS42.

3. Optimizing the access process and user interaction

The recommendations listed in this document follow the different steps of the access process which is illustrated in Figure 3.1 below. **Access management** is the focal point, and indispensable for efficient access provision. The access management is centralized by ACTRIS SAMU who acts as the unique interface between the actors involved in service provision and users. SAMU is responsible for organizing all the main steps of the access provision processand which is divided in the following steps:

- **Communication** is the key driver for promoting successful access to ACTRIS services for the user. It includes effective user outreach and efficient user interaction, the publicity for the calls for access and strong advertisement for the TNA opportunities. Communication applies wide communication measures and appropriate communication tools and channels.
- The selection process consists of the user application process and the user selection, made through a three-step review by SAMU, access provider and the independent review panel. Once the application is accepted the user access can be organized.

³ ACTRIS IMP D6.2: Report on the ACTRIS User support system

⁴ ACTRIS IMP MS7.1 Definition of the pilot access process to ACTRIS facilities

⁵ ACTRIS IMP MS7.4 Intermediate assessment of the pilot access concept and process

- **Service provision** consist of the phase where the user(s) get access and support to the ACTRIS services by the operator of the facility which provides the access.
- Access reporting regroups the access monitoring and tracking of access provision by SAMU, the
 collection of post access documentation, acquiring of the user feedback and improvement of the
 services based on comments received, and the process of publication, dissemination and data
 provision resulting from the access by the users.

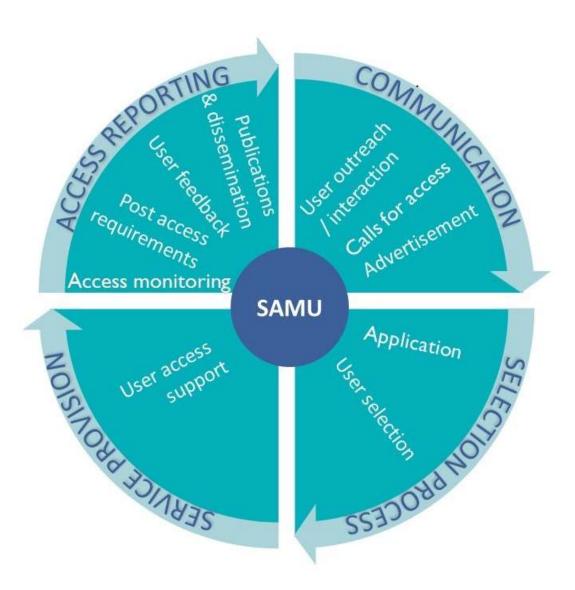


Figure 3.1. ACTRIS IMP access life cycle

In the following sub-sections, each stage in the ACTRIS access life cycle will be elucidated in more detail and for each stage, pertinent recommendations resulting from the assessment of the TNA pilot activities carried out to date are formulated.

3.1 Access management

Within operational ACTRIS, access management is under the responsibility of the Service and Access Management Unit (SAMU) of the Head Office (represented by beneficiary CNR). SAMU acts as the single-entry point for users willing to access ACTRIS services and liaising with the access providers and reviewers. This centralized access management ensures resource and process optimization, reduction of the time, cost and complexity associated with access management while providing compliance and consistency across all the RI's components. The role and competences of SAMU is detailed in ACTRIS Access and management plan⁶.

SAMU ensures the compliance to rules and regulations of TNA under ACTRIS IMP within H2020. Access provision is, therefore, also provided in accordance with the following principles:

- wide advertisement and account of gender and experience dimension,
- free of charge access provision,
- transnationality principle
- access offer to non-EU participants up to 20% of total access provided,
- selection by an independent access panel, with priority given to new users and users from countries where no equivalent facility exists,
- inclusion of logistical, technological and scientific support and the specific training in access provision.

Under ACTRIS IMP, access provision is governed by the ACTRIS Access Management Plan, the ACTRIS Data Management Plan⁷, the ACTRIS Access and Service Policy (ACTRIS PPP deliverable D2.6), and the ACTRIS Data policy (ACTRIS PPP deliverable D2.3). Access is furthermore aligned with the EU Charter for Access to Research Infrastructure⁸.

In ACTRIS IMP, the coordination and management of the TNA pilot is under the joint responsibility of CNRS⁹ and CNR¹⁰. During the project lifetime, the access management evolves with the implementation of the tailored access management platform ACTRIS «PASS» (Platform for managing user access to ACTRIS ServiceS) developed by SAMU to control and automatise each step of the access process¹¹. This platform will help reducing time between each interaction in a user-friendly way.

⁶ ACTRIS IMP MS34 2nd draft of the ACTRIS Management Plan

⁷ ACTRIS Data management plan: https://github.com/actris/data-management-plan/blob/master/DMP/ACTRIS-DMP.md#36-actris-data-discovery-virtual-access-and-services-dvas

⁸ European charter of access for research infrastructures - Publications Office of the EU (europa.eu)

⁹ Centre national de la recherche scientifique (cnrs.fr)

¹⁰ Consiglio Nazionale delle Ricerche (cnr.it)

¹¹ As detailed in ACTRIS IMP MS7.1 Definition of the pilot access process to ACTRIS facilities section 3

Recommendations 1:

SAMU should foster a trusting relationship with the users and should be available to respond to the needs and requests of the users in a swift way and accompany them in the overall access process. SAMU staff should try to have a personal exchange with the users to maintain human interaction and not to give users an impression of a machinal automatic process.

SAMU should ensure rapid access to facilities when demand arises (depending on service type/ user type/ weather conditions required).

SAMU should establish an efficient contact and exchange with the actors in the process, the users but also with the reviewers involved in the selection process and facility operators providing the services to the users.

SAMU should keep and maintain historical documentation of access and easily provide statistics on access.

SAMU should always seek to ensure the most effective access provision process and develop an optimum format to give sufficient time for users to apply and for SAMU and evaluators to treat the requests while ensuring effectiveness of access process to reduce time between application and access to the facility.

3.2 Communication

Communication is the first step in the access process to expose ACTRIS services and facilities and reach out to users. User outreach and interaction, the definition of access modalities and appropriate advertisement measures to ensure wide advertisement of the TNA opportunities are described below.

User outreach and interaction

Efficient communication towards users is key for successfully promoting access opportunities to ACTRIS services. Therefore, since the beginning of the project a comprehensive user and networks database has been built with the support of ACTRIS Head office Communication team to widely advertise access to ACTRIS services. The data base includes the ACTRIS community mailing list, TNA users from past projects, associated partners from ACTRIS IMP and past projects, private sector companies reached via the innovation mailing list collected in respect of the EU GDPR Regulation 2016/679. Access providers also relayed the information to their user database. Expanding the user base is challenging for ACTRIS particularly beyond the atmospheric domain and with respect to the private sector but continuous efforts are made to promote ACTRIS to non-traditional communities together with other WPs focussing on innovation (WP3, WP9).

Interaction with users is essential to ensure that the RI meets its users' needs and expectations. The ACTRIS User support system is detailed in ACTRIS IMP D6.2¹². To help users obtaining a clear understanding on the services offered, a preliminary version of the <u>Catalogue of ACTRIS Services</u> has been established during the project and offers a comprehensive listing and organization of all available ACTRIS services. In a next step, this catalogue of ACTRIS services will be integrated in the access provision system and closely

¹² ACTRIS IMP D6.2: Report on the ACTRIS User support system

linked to the PASS access management platform. To provide efficient assistance SUPRA – SAMU User helpdesk function for Physical and Remote Access will be implemented to provide a central information and contact point on all access-related aspects to the users. Detailed information on user requirements is essential for ACTRIS to be able to adjust its services to the user demands and ensure optimal service provision. To better connect and communicate with the users, SAMU also manages the ACTRIS Science and User Access Forum¹³ – a physical and digital platform to provide a framework for discussions and exchanges among the users around ACTRIS services.

Calls for access

Access to research infrastructure services is organised in calls. Different types of call format are possible, and calls can be open or targeted (specific topics, fields of expertise, target users...). They can also be continuous where applications can be submitted all year long ("rolling call") or limited in time with specific deadlines. The nature, focus, scope and time of the call is defined by SAMU in agreement with access providers.

During ACTRIS IMP, access to ACTRIS services are based on a fixed call format where proposals can be submitted during three dedicated calls for access. Fixed calls limited in time are meant to ensure competition and selection among proposals according to H2020 TNA rules. In operational ACTRIS, continuous call could be envisaged to allow more flexibility and ease the access process.

Advertisement

The opportunities of TNA within ACTRIS IMP are advertised in collaboration with the ACTRIS communication and outreach strategy developed in WP10 (ACTRIS communication and public relations). The following communication tools and channels are used: ACTRIS website, facilities' websites, social media (Twitter, LinkedIN), various other projects' and networks' mailing lists, newsletters (e.g., ACTRIS, ENVRI¹⁴, ENRIICT¹⁵), brochures (ie: <u>ACTRIS services brochure</u>), user fora, workshops, meetings, and conferences, etc. Other ways of communications at exhibitions or as an advertisement in a journal could be envisaged. The ACTRIS website is the key point for users to get all relevant information about the access process and relevant documentation and forms under the Access to Services section.

Recommendations 2:

ACTRIS Head office communication manager and SAMU must work closely together to evaluate the most efficient communication pathways for both recurrent and new users. Access providers should act as relays of the information and are key in disseminating access opportunities.

Particular efforts should continuously be made to reach out as wide as possible and extend the user base, to reach out as wide as possible to new user communities, e.g., to attract new users from non-atmospheric domains (environmental, health, energy domain etc.), from non-traditional end user (public services,

¹³ https://www.actris.eu/science-and-user-access-forum

¹⁴ The <u>ENVRI</u> community is a community of Environmental Research Infrastructures, projects, networks and other diverse stakeholders interested in environmental Research Infrastructure matters.

¹⁵ ENRITC is the European Network of Research Infrastructures and Industry for Collaboration. The project main aim is to establish a pan-European network of Industrial Liaison and Contact Officers (ILOs/ICOs) to improve the RI-industry cooperation and boost the innovation ecosystem in Europe.

companies) or new regions and countries. This effort should be done in agreement with and close cooperation with ACTRIS innovation strategy.

New communications pathways should always be exploited and potential users should frequently and regularly be contacted to promote the opportunities of access.

SAMU and access providers should regularly update the service catalogue to have the most precise description of ACTRIS services available to users.

3.3 Selection Process

The selection process is a fundamental step and is composed of two main phases: application by the user then review and selection of the proposals.

User application

Access requests to an ACTRIS facility must be made by filling up an application. The application form provides all relevant information on the user project to allow adequate review and selection of the users. It is divided in several sections: project information, principal investigator and user group information, recent references, project description, onsite requirements, data management and dissemination plan, and foreseen budget (if relevant). The information collected are needed for access providers to assess the feasibility of the project, for evaluators to review the quality of the proposal, and for SAMU to collect data used for reporting purposes.

In a next step and in operational ACTRIS, applications will be submitted through a specific form integrated in the online access management platform PASS. The form will follow conditional logic, so users only see questions relevant to the service(s) requested.

Review and selection

SAMU coordinates the three-stage review process for reviewing and selecting the users following the process as detailed in ACTRIS IMP MS7.1. These 3 steps are implemented to ensure the conformity and quality of the proposals and involve TNA managers, access providers and independent reviewers.

First, SAMU verifies the application for formal compliance with the EC H2020 regulations on TNA and ACTRIS eligibility criteria according to the ACTRIS access and service policy and ACTRIS Access Management Plan. This check includes transnationality of the applicant, timing, completeness of the application, missing information if any, financial support. The decision on the amount of budget allocated to each proposal is made by SAMU in agreement with access providers.

In a second stage, the access providers fill in a feasibility check form to confirm the availability of the services requested, the existing capacity, the scientific, technical and logistical feasibility of the project, financial feasibility and the timing of the access request. Only after positive evaluation by the access provider, the third review step is launched.

SAMU then transmits the application to an independent peer-review panel for merit assessment or for scientific and technical evaluation. Several different criteria are applied depending on the service requested. The review panel evaluates and selects the applications according to the defined criteria and

access modes, including scientific excellence criteria or technical need-driven criteria depending on services requested as detailed in MS42 or ACTRIS AMP. The market-driven access mode relates to business and innovation, technological development, and innovative solutions has not yet been tested and will be further developed in the last part of the project.

The panel is composed of experts covering the range of scientific topics in the field of atmospheric observations and processes in the field of aerosols, clouds, and trace gases; in-situ and remote sensing, and also depending on the different types of platforms (observational, exploratory, topical centres, data centre) to have an accurate review depending on the type of service requested. The evaluation by the review panel is based on principles of transparency, fairness, and impartiality.

For efficient evaluation, a primary and two secondary reviewers are assigned to each proposal who review the proposals based on selected criteria that were previously established, and using specific evaluation templates. The primary reviewer acts as rapporteur to summarize the conclusion of the evaluation group and reports to SAMU which will communicate the results of the process to the user. The decision on financial support to the project is based on interactions between SAMU and access providers. For the evaluation of the proposals, an evaluation form has been developed which considers specific selection criteria and access modes (see ACTRIS IMP MS42 Section 2.2).

The communication between SAMU, the users, access providers and reviewers will be integrated into PASS in a future step.

Recommendations 3:

SAMU should facilitate the application process for the users as much as possible. Application forms should be developed with conditional logic depending on the services selected – after concertation with access providers on key information needed from their side – to avoid overloading users with questions.

Easily findable guidelines, FAQ, short tutorials and/or webinars should be organised to support users during the application writing phase. A short explanatory webinar could be organised when a call starts to present the procedures, the recording of this meeting could be made available.

Users should be encouraged to contact the access provider prior to the application submission to ease the review process.

SAMU should make the application as light as possible for the users while ensuring that all information needed by SAMU, access providers, reviewers is collected. An effective sharing of information to the reviewers / access providers must be implemented. The process should be efficient: timings of each step should not exceed more than 5 days for eligibility check, 10 days for feasibility check and 2 (maximum 3) weeks for independent review. The total application and selection process should not exceed 6-8 weeks and be minimized as much as possible.

SAMU should organise meetings and /or inform the pool of reviewers and access providers on a regular basis to expose the process and collect feedback to better streamline the process.

3.4 Service provision

User access and support as well as communication between users, providers and reviewers are done by SAMU to provide a central information and contact point on all access-related aspects and accompany the

user at all stages. Following the selection process, the user is informed on the outcome of the review via a reply letter sent by the SAMU. In case of positive evaluation and selection, the user receives an acceptance letter stating the amount of financial support granted and information about post-access documentation and other requirements. In case of negative evaluation, the user receives a letter stating why the proposal has been rejected and including SAMU, access providers or evaluators detailed comments. Some projects could also be granted a second opportunity to be revised and enriched within a specific timeframe.

The potential financial support for travel and subsistence (T&S) is handled at the access provider level to distribute related administrative efforts. However, it is essential that SAMU exchanges with the access provider about the T&S budget to be allocated to optimize its use as a co-financing of users' mobility, and monitors it's use.

The users are requested to accept the TNA conditions including agreement to provide the required TNA documentation, reviewers comments if any — meant to increase the scientific or technical quality of the service provision - , the obligation to disseminate the TNA results and provide the data resulting from the TNA (except for SMEs), the avoidance of double financing by signing a user acknowledgement statement. These communications are currently managed by email but will progressively be done via PASS in the future.

Users are then prompted to contact the access provider to organise their access including access dates, support needed and logistics. Both access providers and users have their commitment towards the access process once an access request has been accepted. Access includes the logistical, technological, and scientific support and the specific training that is needed for users to access the facility. Access providers must inform users on the specific procedures and measures of the access provider host institution internal rules with regards to use of equipment, insurance, and travel reimbursement prior to the access. Users must furthermore comply with national and local law and safety regulations¹⁶.

Users are required to submit the data resulting from access, which may be archived and made available through the ACTRIS Data Centre (DC) in accordance with the ACTRIS data policy¹⁷ immediately or after an agreed period of time. Users from the private sector may be exempted of this obligation. FAIR principles shall be applied to data resulting from access services. The access rights to that data will be stated in the user application and agreed on separately in writing. Users are also encouraged to publish the results of the access in peer-reviewed journals or present at conferences as detailed in section 5 below.

Recommendations 4:

SAMU should ensure that time between evaluation results and reply letters is reduced to secure the effectiveness of access.

Access providers should develop a document stating their host institution principles, requirements, and modalities of access to their installations for the purposes of access.

A centralised travel and subsistence budget would be best to be able to be flexible to have attractive means for other users but the administrative effort is high. A distributed way - as it is now organised -implies the

¹⁶ ACTRIS PPP Deliverable D2.6: <u>ACTRIS access and service policy</u>

¹⁷ ACTRIS PPP Deliverable D2.3: ACTRIS Data policy

need for SAMU to follow up and recommend to the access provider the T&S to be allocated in order to optimize its use as it is only co-financing the mobility.

SAMU should regularly, after the access and for a period of at least 2 years, collect information from previous users on dissemination of the results linked to the service provision.

3.5 Access reporting

Access reporting is the final step and includes access monitoring by SAMU, post access requirements, user feedback and publications/ dissemination activities. Data collected is important to report on TNA activities to the funders and to evaluate the success of the access provision. Peer reviewed publications are key to disseminate the scientific results from access.

Access monitoring

SAMU uses a tracking file to monitor the access activities including the collection of the access metrics, with the measurement of key performance indicators (KPIs) on the users and access (as defined in MS7.4 section 6), information on the quantity and quality of access provided, type of services requested, selection procedures, status of the project, travel and subsistence budget spent and scientific results. These statistics and KPIs are relevant to assess the success of the TNA pilot activity and establish trends on the use of ACTRIS services. Some information collected is also used to report TNA information to the European Commission.

Post access requirements

After completion of the access, users must send back to SAMU the post access documentation – available via the ACTRIS website – including a 'Confirmation of Access' document, issued by the access provider, justifying the quantity of access provided and signed by the access provider; any supporting documents for reimbursement of the travel expenses (to be provided to the access provider); an access scientific activity report to be provided by the user for research services / a certificate provided by the access provider for technical services, an online TNA User feedback questionnaire. Travel and subsistence expenses are only reimbursed after reception of all TNA post access documentation. Currently, reminders for submitting post access documentation are done manually via email. In the future, automatic reminders will be sent by the PASS platform.

User feedback

Feedback collection is crucial to engage users in the improvement of ACTRIS services and access management. As mentioned above, the answer to the ACTRIS IMP user feedback questionnaire is part of the mandatory TNA documentation. It aims at monitoring the level of satisfaction for the services accessed, the current access needs, easiness of the overall access system and the difficulties encountered. Organisation of user meeting either virtually or during a physical ACTRIS meeting is also a way to have direct feedback on their access experience. The ACTRIS feedback loop and processing are described in ACTRIS IMP Deliverable 6.2 (section 8).

Publications and dissemination

Results from work carried out under the ACTRIS IMP TNA activity (e.g., publications, conference contributions) are collected. Information about publications and other dissemination actions linked to the access are extremely important as they are evidence and tangible results of the services provided to the users and of the contributions and support made by ACTRIS. Publications are an indicator of the high-quality of the scientific activities that have been enabled in connection with the access. It is required that the TNA results produced must acknowledge the project, support of facility staff and support of the European Commission and should be reported to SAMU. Publications in open access peer-reviewed journals ensure a large dissemination of the scientific results from the access. Most often, the analysis of the results from TNA takes time and the results are only published with some time lag. Users are requested to communicate the references to the publications resulting from TNA activities to SAMU.

Furthermore, the users (except those coming from the private sector) are required to make the data resulting from this TNA project available to the <u>ACTRIS Data Centre</u>. It is planned to include this requirement in the ACTRIS data management and curation system. This is not yet implemented but in the future the TNA data will be collected, archived, data identification allowed, and access to it will be provided.

Recommendations 5:

- SAMU should gather post access documentation in a timely manner and regularly check the feedback collected for sharing with the actors concerned. Those insights will be used to adapt the service offer to the user needs.
- In relation to KPIs, the tracking of new users should be done in terms of new institutions not only new individuals using the TNA instrument to have a better overview of the user pool.
- Access providers must develop meaningful activity reports for technological and data services
 provided by the Central Facilities as well as for innovation services. They also should act as relays
 to inform SAMU of accepted publications related to TNA projects.
- In the user feedback form, SAMU should collect user consent for being included on an "access" or "user" mailing list to be established by ACTRIS HO for further requests or communications.
- SAMU should make use of the application form to track publications and remind users of data provision obligations and TNA support acknowledgement and send reminders on a regular basis.

4. Conclusions and next steps

This deliverable provides recommendations on the access process and user interaction including specifics aspects for access management, communication, application and selection, service provision and access reporting. It builds on a previous assessment made of the pilot access concept summarizing the testing of the TNA and the results from the exchanges with the actors on the lessons learnt. One of the key messages received by all players involved is the establishment of an efficient and timely access process, making sure the procedures are as light as possible for the user while ensuring all necessary information are collected at each step of the process.

The recommendations presented in this report are based on the experience acquired in ACTRIS IMP WP7 up to month 25 (January 2022) of the project. Some could already be implemented in the second call and are likely to be implemented during the last call for access to be launched mid-2022. The final call will particularly be an occasion to test the transition to and operation of the access management platform PASS. Specific efforts in attracting users from new regions and private sector is and will continuously being done.

Another set of recommendations for implementing access in operational ACTRIS will be delivered at the end of the ACTRIS IMP project in the deliverable D7.2 Recommendations for implementing access to ACTRIS services.

5. Reference documents

- 1. ACTRIS PPP Deliverable D2.3: ACTRIS Data policy
- 2. ACTRIS PPP Deliverable D2.6: ACTRIS access and service policy
- 3. ACTRIS IMP Grant Agreement (N° 871115)
- 4. ACTRIS IMP D6.2: Report on the ACTRIS User support system
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