







NFDI4Earth

Deliverable D2.1.2

Review of support requests

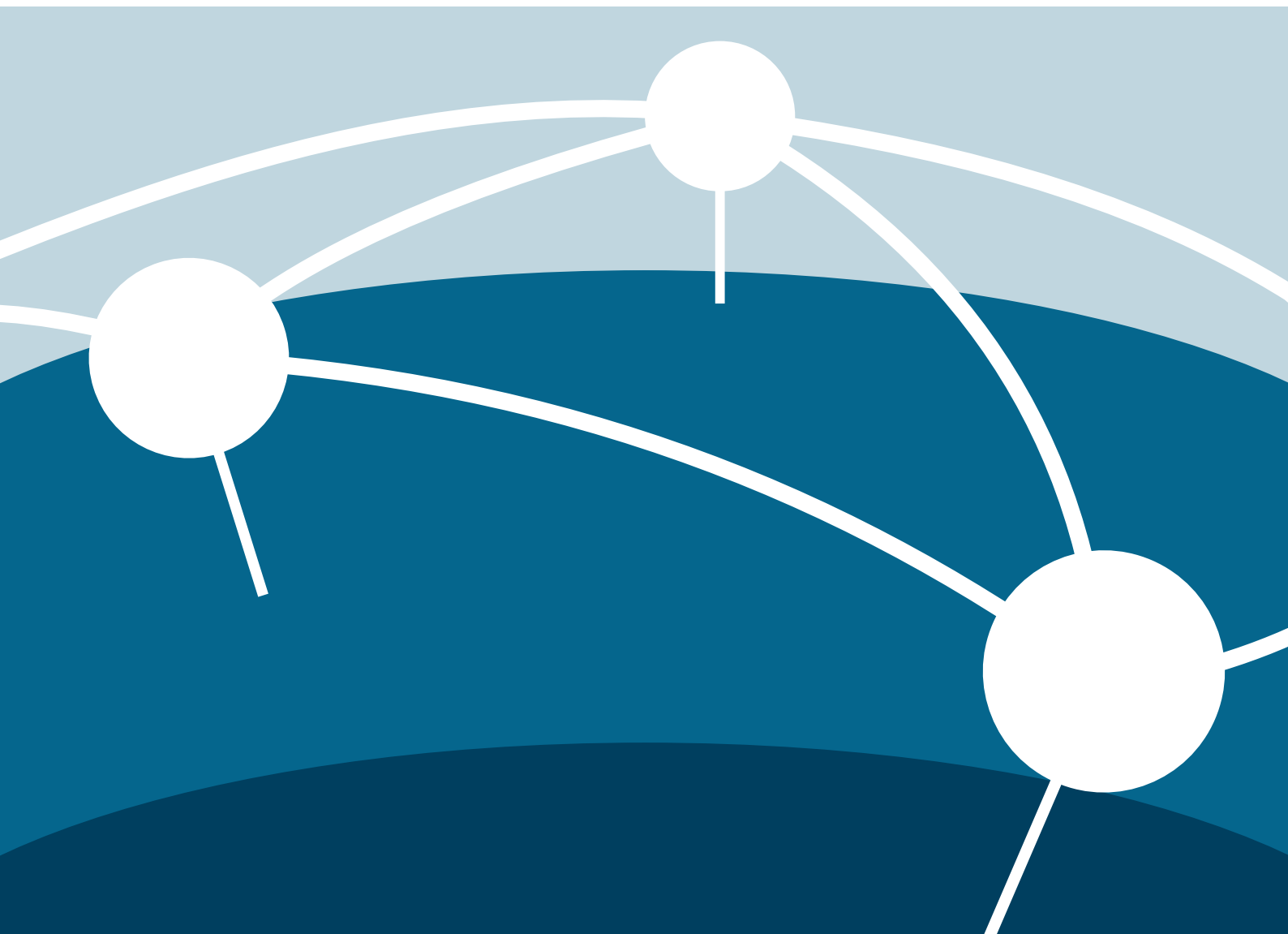
Action 4

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Executive summary

The OneStop4All (OS4A) is the single point of access to all resources of the NFDI4Earth and should be structured in a way to best answer the possible requests the users might have. Therefore, the development process of the portal continuously involved user feedback to improve functionalities, content and design.

In this deliverable we describe the feedback process related to two milestones in the OneStop development so far, namely the internal (soft) release of the portal in December 2023 and the presentation of implemented and planned features at the NFDI4Earth Plenary in May 2024. Both feedback rounds yielded many valuable comments to improve the portal, according to different categories. We describe the process, the categories and the resulting actions in this document.

We conclude that the combination of different approaches to collect feedback regarding the OS4A and its content was successful and that such a process should accompany the further development of the OS4A, including its growing content and future tools.

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1 Introduction

The OneStop4All (OS4A) is the main access point to all NFDI4Earth resources and aims to support all searches and questions that the users from the Earth System Sciences (ESS) might have, e.g., about general principles of FAIR data and data management, about finding and accessing (primarily ESS relevant) datasets, tools and services and information about the NFDI4Earth, the involved organisations and participants.

The OS4A is closely interrelated with the User Support Network (USN, M2.2). If the user's question could not be answered (fully) by the OS4A or if human support is required, the user is invited to contact the USN. In the USN process, the user request is assigned to a support category and a member of USN staff is assigned to answer it (Mehrtens et al., 2023). Hence, reviewing the support requests will ultimately be closely linked to evaluating the tickets sent to the USN. However, as the portal is not public and therefore the link to the USN not operational yet, the evaluation of the forwarded requests to the USN is not covered in this document, but will be in future versions of the deliverable.

Here, we review the feedback from NFDI4Earth participants regarding two versions of the OneStop4All before the official release. The first round of feedback was collected after the internal (soft) release of the portal in December 2023, followed by a second dedicated feedback session during the NFDI4Earth plenary in May 2024. The feedback could not cover all possible support requests and led to many improvements of the portal before it will be released to the public. Note that certain functionalities were not implemented yet in the reviewed versions, so the feedback often reflects more general aspects.

We discuss the two feedback rounds and also list measures taken to improve the identified issues. Future versions of this deliverable will reflect on the OS4A version that is released to the public and the accompanying comprehensive feedback process.

2 Background and structure of the iterative review process

The OneStop4All portal is being developed in an iterative process and under consideration of the needs of the ESS community. Based on collected user stories we employed proto-personas (Anders et al., 2023a) to derive user scenarios covering relevant functionalities (Anders et al., 2023b). As a result of an evaluation of existing research data management (RDM) resources, including auxiliary information and service portals, these functionalities were structured in a way to best cover the needs of users of different prior knowledge and skill levels.

This led to the first version of the portal which was internally released to the NFDI4Earth participants in December 2023 so that the then implemented features could be looked at, commented on and improved. The feedback was collected in a shared document divided

into different categories. It was reviewed by M2.1 and in the OneStop4All working group and transferred into implementation issues by M4.3.

Working towards the release, many of the functionalities were further refined and significant content was produced to populate the specifically designed categories, including topic-based entry points on the start page that are intended to provide task-oriented easy access to curated materials of different topics for the users. Originally, the release was intended to be at the NFDI4Earth plenary in Dresden in May 2024. Due to some delays in implementation, the release had to be postponed. However, the refined structure intended for improved functionality was presented to all plenary participants. In a 1.5-hour breakout session, participants were able to try out and discuss the functionalities already implemented in the OneStop (which still was in a password-protected internal release state), as well as provide feedback on the planned functionalities, which were presented as mockups. This feedback was gathered in special feedback forms, sorted and categorised after the plenary, and actions were derived from it to address the raised issues and improve the release version.

The following sections summarise the two feedback rounds and the improvements that followed from them. The next feedback will be collected alongside and after the release of the OneStop4All in autumn 2024.

3 Review of the feedback from the OneStop4All soft release version (December 2023) and the respective actions

The soft release took place on 15.12.2024 as an online event. The participants were members of the co-applicant organisations of the NFDI4Earth, including members of the working group Synergy and measure leads M2.3 and M2.4 who do not fall into the other two groups. OneStop4All, EduTrain portal, Living Handbook, User Support Network, and the Knowledge Hub were presented in short demonstrations

The participants then had two weeks to try out the OS4A for themselves and provide feedback. After that it was still possible to provide continuous feedback. A shared document was used for feedback on the following aspects:.

1. Feedback related to usability of the portal (e.g. ease of navigation, functionalities, structure, connection between resources, support in your needs/questions, ...)
2. Feedback related to the content (articles, learning materials, information, resources,...)
3. Possible technical issues (speed, links...)
4. Any other feedback

The entries in the form were reviewed on a regular basis. The main topics and the resulting actions on this feedback are listed in the following:

1) Feedback related to usability

- a. Search: Search results display (of list and of metadata), > navigation of search results, detail view of search results, > faceted search expansion with metadata which is > resource-specific, representation of spatial and temporal > extent, specific bugs in the search, functionality of the > search (e.g. is the title of a KnowledgeHub (KH) entry also > searched not only keywords, ...)

Action: Check of the search index construction, inclusion of more facets, adaptation of the display of the results list and the metadata, bugs resolved

b. Topic-based entry points implementation

Action: Further refinement of the categories and content as well as display of the topic-based entry point pages

c. Design aspects of navigation

Action: Adaptations according to the suggestions

d. LivingHandbook (LHB) articles: structure, duplicates, descriptions

Action: Issues discussed with the LHB and process for improvement established (e.g. review of articles, expansion of descriptions)

2) Feedback related to content

- a. Articles harvesting, handling in the KH and display

Action: referred to KH group and resolved

b. Some non-functioning links and relations

Action: bugs resolved

- c. Suggestions for content that would be a useful addition (e.g. > overview of results from N4E such as pilot/incubator tools as part > of success stories)

Action: some of these articles were initiated, other content was highlighted specifically

3) Feedback related to technical issues

- a. Design issues preventing accessibility

Action: checked and partly resolved

b. Formatting of LHB articles, table of content

Action: forwarded to LHB

- c. Technical functionalities such as click results, navigation > hindrance and fallback pages

Action: bug fix

- 4) Any other feedback
 - a. More design issues such as fonts

Action: resolve in a final overall design check

- b. content users expected from the portal, comparison to another portal

Action: Some comments are already addressed, others left to discuss again for version 2 of the portal

4 Review of the feedback from the NFDI4Earth Plenary 2024 and the respective actions

Based on the first round of feedback after the soft release many of the points could already be addressed in the further implementation steps. However, not all envisioned functionalities of the portal could already be finished until the NFDI4Earth Plenary in May 2024, hence the release of the portal was delayed. The status of the development version was extensively presented - with additional information about the forthcoming further developments and extensions. In a breakout session, users (from within and outside NFDI4Earth) got the opportunity to try the already implemented version of the portal and see the intended features for the public version. They were invited to give feedback on the general usefulness of the structure of the portal as well as the collection and presentation of the associated content and functionalities in order to already include this for the public release version.

A printout of the starting page and the opportunity to put stickers on areas and features the users would click on, showed a first overview on how well the current design would satisfy the support requests of the users (Fig. 1).

With the help of dedicated feedback forms, different aspects and functionalities of the portal and the associated support could be queried from the participating plenary attendants:

1. Search
2. Topic-based entry points (not yet implemented -> mockups)
3. Wizard (not yet implemented -> mockups)
4. Content

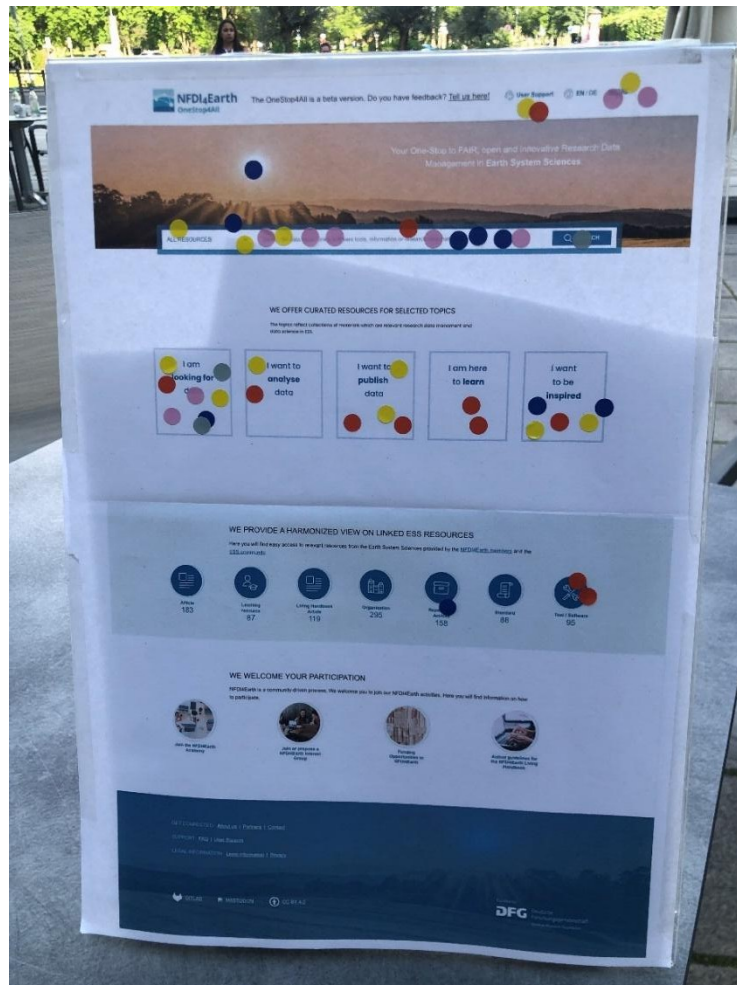


Figure 1: Feedback on current design and structure of starting page

5. Design
6. User Support Network

The main comments and the resulting actions from the feedback are listed in the following:

1) Search

- a. Problems with German and English search terms

Action: in first version we will focus on English only; German language will be addressed in the second version of the portal

- b. Search not working well at the moment

Action: organise a dedicated meeting on improving the search together with M4.3 and KH

2) Topic-based entry points (TBEPs; not yet implemented -> mockups)

- a. Potentially more entry points (e.g. on data managements plans or > to know more about the NFDI4Earth)

Action: discuss if/how/when to include more entry points on user-required topics in a OneStop4All working group meeting after the public release

- b. TBEPs well-structured and described and very helpful, should be the > first thing user sees

Action: keep TBEPs in current way

- c. Improvements on descriptions of buttons and design

Action: design of buttons can be improved, will be re-designed, add short description

- d. Articles on the TBEP pages are helpful

Action: motivate community (via NFDI4Earth coordination, LHB team, newsletter) to contribute more articles to have a larger pool

- e. "I am looking for data" would be most requested

Action: include first beta version of dataset search in OneStop4All version 1

3) Wizard (not yet implemented -> mockups)

- a. Some wizard questions hard to understand

Action: rephrase and revise questions

- b. Specific additions on answers for data publication requested

Action: add the mentioned extras

- c. Users liked the idea, but questions could be improved, sometimes > more explanation needed

Action: have tooltip/text to explain question, rephrase questions iteratively with users

4) Content

- a. Confusion about LHB article/other articles/articles as learning > resources

Action: discuss with LHB and EduTrain

- b. Re-use already existing external sites with good information

Action: discuss with LHB, KH and Co-App

- c. Some metadata missing (e.g. descriptions/abstracts on > repositories/organisations)

Action: enrich this part of metadata

- d. Search specifics for organisations

Action: relate issue to KH

- e. LMS metadata not comprehensive (authors missing)

Action: relate issue to EduTrain

5) Design

- a. Explanations needed on what the NFDI4Earth is and what the > portal offers

Action: add explanation

- b. Improve some button descriptions

Action: add descriptions

- c. LHB table of content is confusing

Action: needs to be improved with LHB and implementation team

- d. Improve descriptions and metadata display

Action: discuss with KH and M4.3

- e. Design not appealing

Action: supply web designer to support the implementation

6) User Support Network

- a. Not easy to understand the concept

Action: inform USN that clarification is needed in interaction with users

Most of these actions were already put in place, the missing ones will be addressed before the public release of the OneStop4All.

5 Conclusions and outlook on adapted functionalities for release version of the OneStop4All and the associated feedback process

Continuous interaction with the community and integration of feedback during the development of the OneStop4All resulted in the first version that was released internally in December 2023. With the feedback after this release and during the breakout session at the NFDI4Earth Plenary 2024 this version was further improved. The amount and quality of feedback showed the community's interest in the portal and the benefits of the co-design. The overall concept of the OneStop4All and its functionality (Anders et al., 2023b) was confirmed by this feedback.

While smaller requests were noted and will be gradually implemented, the larger and more structural points were taken up by the OneStop4All working group and the respective functionalities were adapted according to the feedback before the portal will be released publicly. The topic-based entry points were especially discussed and revised in detail, as well as the search functionality and display of results and metadata. The request for dataset search will be addressed by providing a beta version of a search based on harvesting the Helmholtz DataHub.

Before the public release of the OneStop4All, a thorough testing of different aspects will happen in order to ensure that the functionality and design of the portal satisfies the formal standards of such a website. These tests will comprise functional testing, usability testing, performance and load testing, security tests, compatibility tests and accessibility tests.

The user satisfaction, with regards to their specific support requests, will then be collected by involving a dedicated user feedback group, by recording any user feedback from the site and by screening the requests forwarded to the User Support Network. The report of this feedback will be the topic for the next iteration of this deliverable, D2.1.3.

We would like to stress that content creation is an important overall task of all measures in NFDI4Earth and that the OS4A is "just a tool" to make all the information findable. However, it

is great to see the sustained effort that leads to high quality output from the measures and the opportunities this provides.

We conclude that the combination of different approaches to collect feedback regarding the OS4A and its content was successful and that such a process should accompany the further development of the OS4A, including its growing content and future tools.

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