

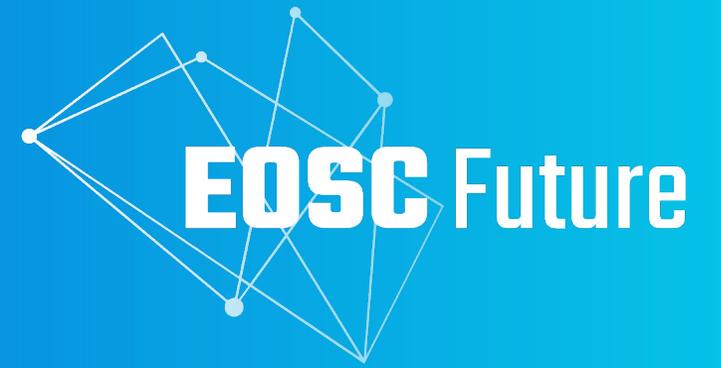
Procedures to onboard data sources and research products

Sabeel Shah, Andreas Czerniak
Bielefeld University Library

12 June 2023

The EOOSC Future project is co-funded by the
European Union Horizon Programme call
INFRAEOOSC-03-2020, Grant Agreement 101017536





Procedures to onboard data sources

Sabeel Shah
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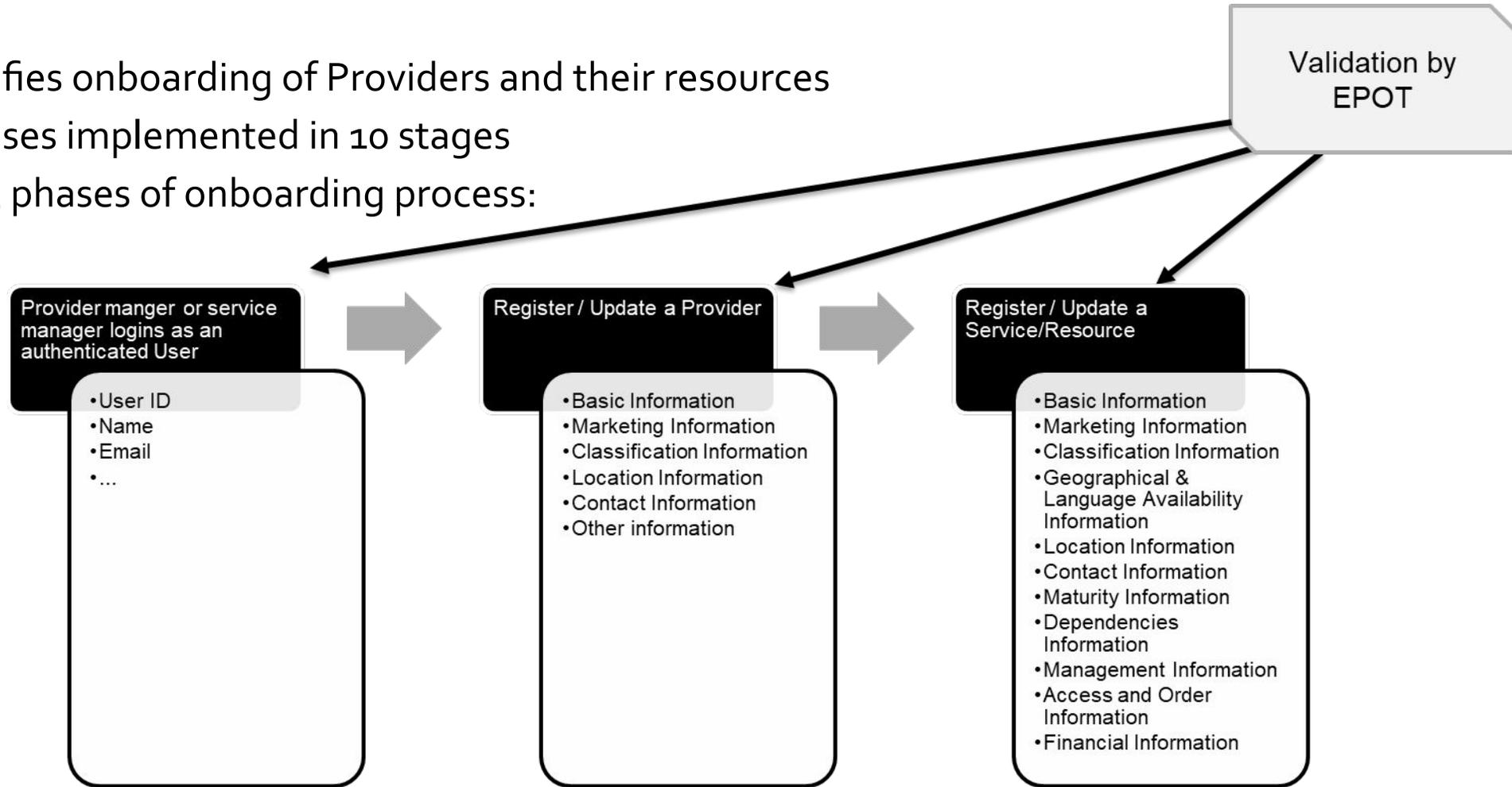
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Onboarding Process – The Three Phases

- Specifies onboarding of Providers and their resources
- 3 Phases implemented in 10 stages
- The 3 phases of onboarding process:





Onboarding Process - The 10 Stages

1. The ARP registers with the EOSC Portal
2. The AARP logs in to the EOSC Portal
3. The AARP asserts Authorization for the Provider
4. The AARP applies to onboard the Provider
5. The EPOT reviews the Provider Profile
6. The AARP selects the method to onboard Resources
7. The AARP applies to onboard Resources
8. The EPOT reviews the Resource Profiles
9. The AARP applies to onboard other Resources
10. The EPQT creates a Report

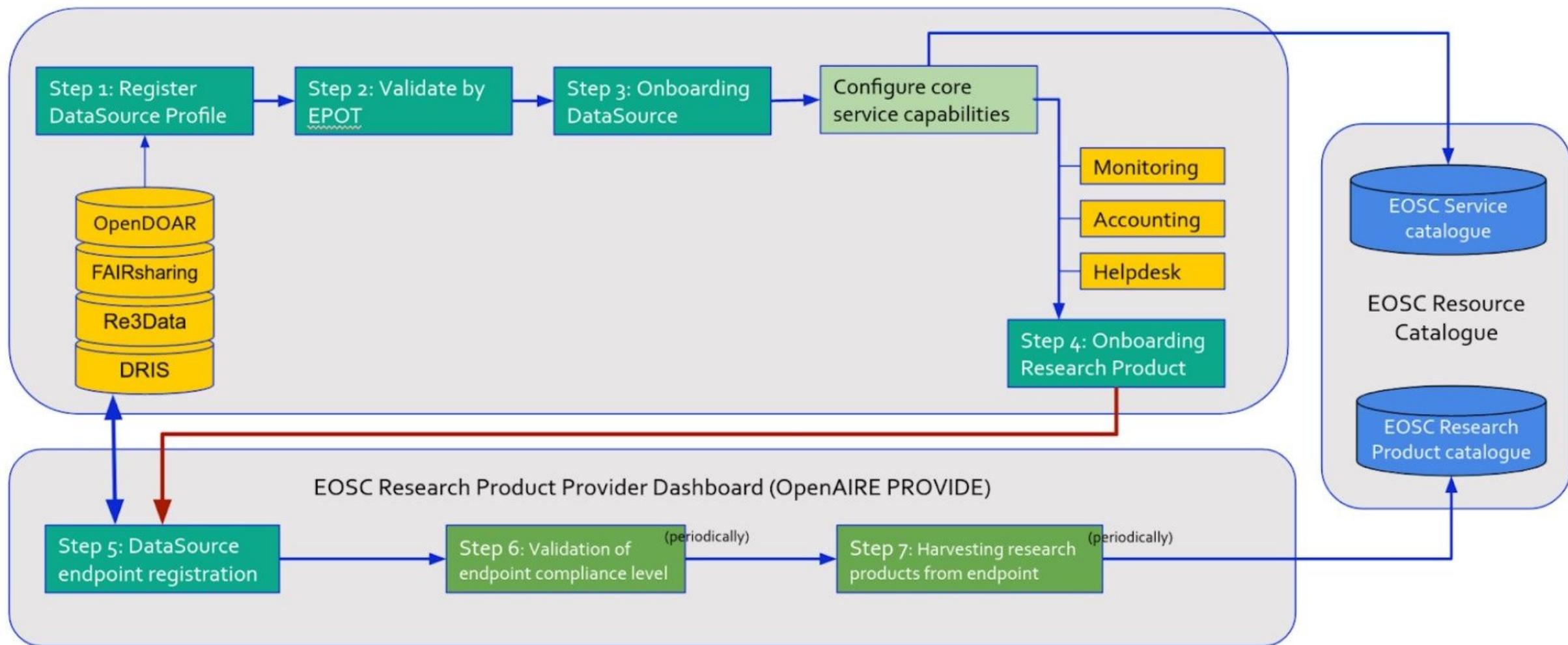
ARP: Authorised Representative of the Provider

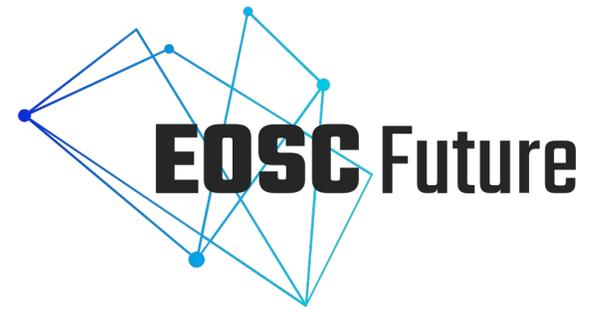
AARP: Authorized and Authenticated Representative of the Provider

EPOT: EOSC Portal Onboarding Team

EPQT: EOSC Portal Quality Team

Detailed view of data-source onboarding



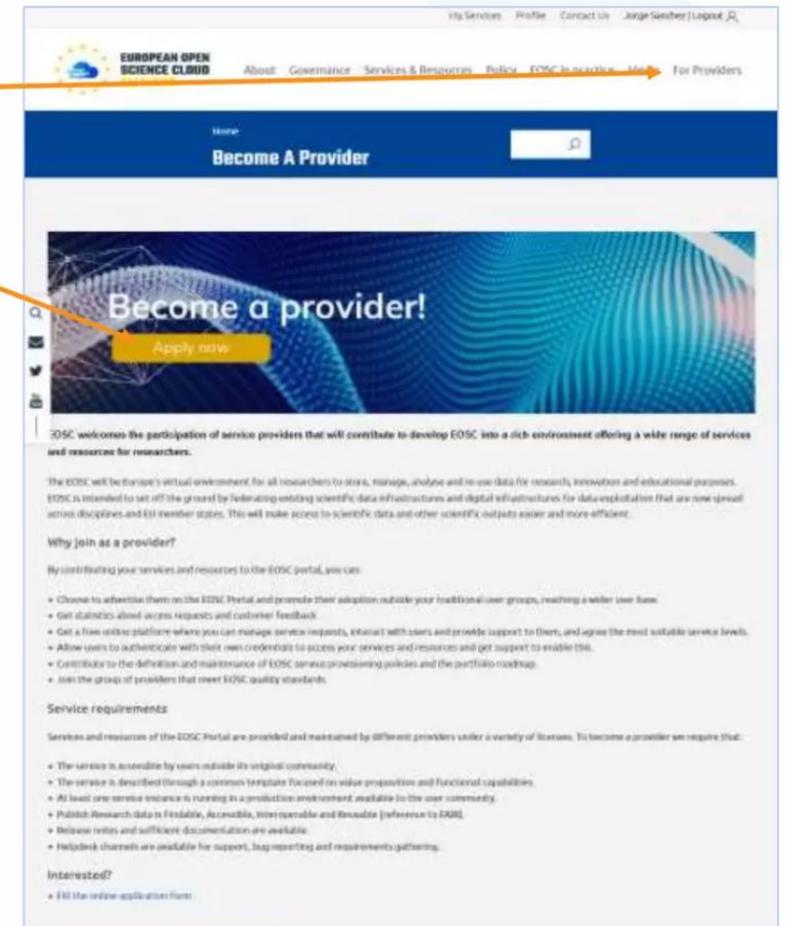


Phase A:

Registration of Authorized Representative of Provider

Onboarding Process – Walk-through

- A Representative of the Provider ^[1] visits the “For Providers” Section of the Portal ^[2] and clicks on "Become a provider! Apply now" ^[3] to start the process of applying to become a Provider.



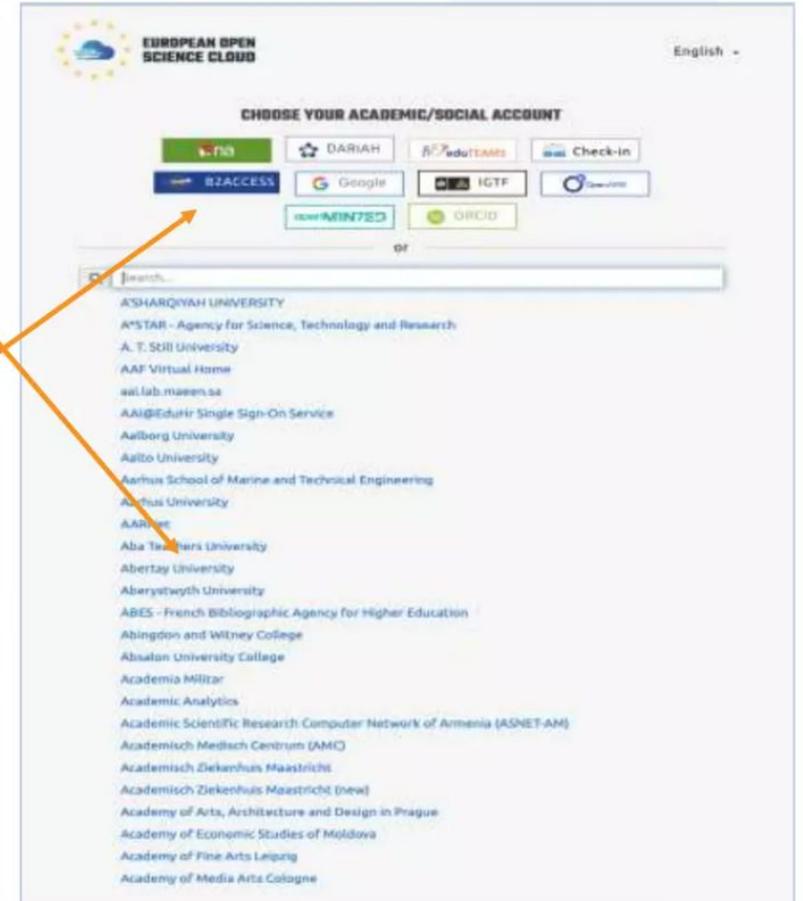
[1] Assumed to be authorised to act on behalf of the Provider at this stage.

[2] <https://providers.eosc-portal.eu/becomeAProvider>

[3] <https://providers.eosc-portal.eu/newServiceProvider>

Stage 1: The ARP registers with the EOSC portal

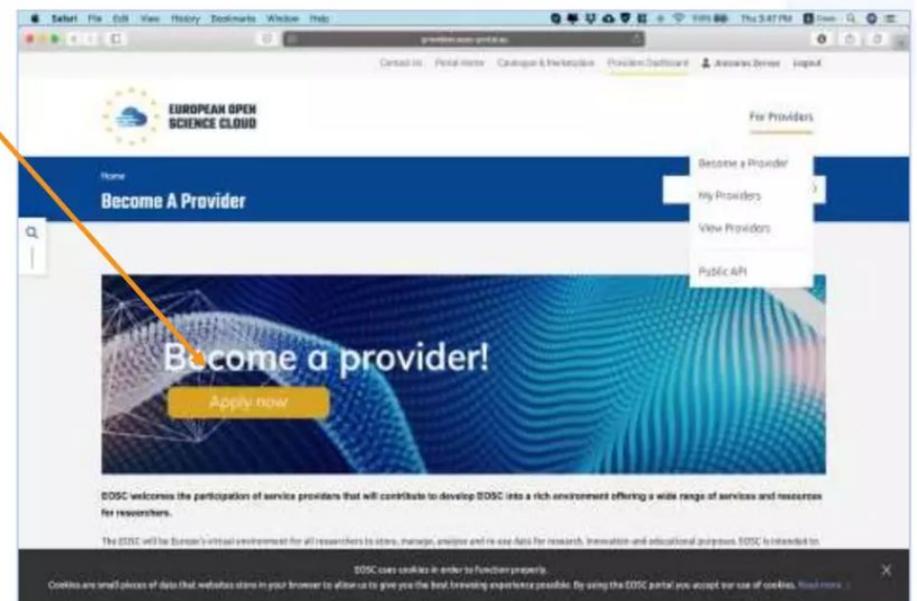
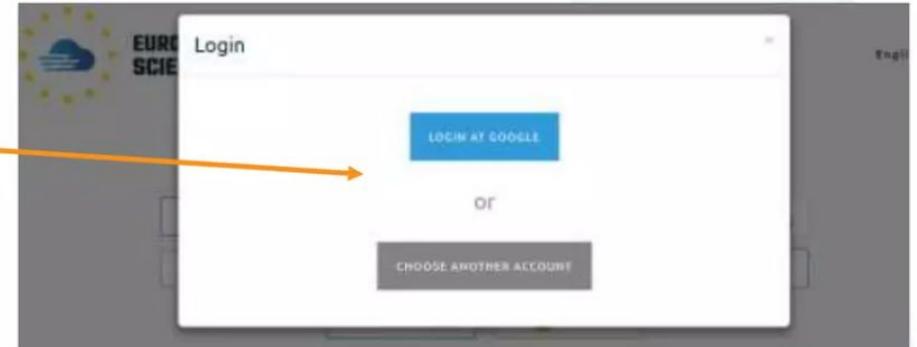
- The ARP^[1] registers with the EOSC Portal using an existing identity from a Social or Academic Authentication and Authorization Infrastructure (AAI) mechanism.
- EOSC supports AAI mechanisms of many Academic and Research Institutions worldwide as well as ORCID, Google, aria, DARIAH, eduTeams, IGTF, EGI Check-in, B2ACCESS, OpenAIRE, openMINTED.
- In case of difficulties during authentication communicate to login@eosc-portal.eu. Depending on the issues a 1-to-1 call to offer guidance may be also organized.



[1] ARP: Authorised Representative of the Provider

Stage 2: The AARP logs in to the EOSC portal

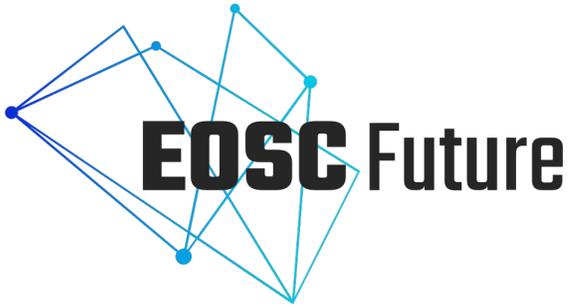
- The Authorised and Authenticated Representative of the Provider (AARP) logs into the EOSC Portal with the AAI mechanism chosen.
- Once logged in, the menu allows access to the **“Become a Provider”** functionality.
- This is also available at <https://providers.eosc-portal.eu/newresourceProvider>



Stage 3: The AARP asserts Authorization

- By clicking on "Add New Provider" the ARP is asked a) to agree to the "EOSC Code of Conduct" , b) to agree to the EOSC Portal Privacy Policy and c) to assert the Authorisation of Representation of the Provider Organisation.
- Once a and b are accepted and the latter asserted, the Authenticated and Authorized Representative of the Provider (AARP) can apply to onboard the Provider.
- The EOSC Portal Code of Conduct sets out what is offered by the Portal and what is expected in return (e.g., periodic updates of data, security recommendations, etc.).
- The EOSC Portal Privacy Policy applies to the collection of the data, public vs. internal, etc.

The screenshot shows the 'Add New Service Provider' form in the EOSC Portal. A modal dialog box is displayed, asking the user to agree to the EOSC Code of Conduct, the Privacy Policy, and to assert that they are an authorized representative of the Service Provider. The dialog has 'Cancel' and 'Apply' buttons. An orange arrow points from the text in the first bullet point to the 'Apply' button in the dialog.



Phase B

Onboarding of EOSC Provider

Stage 4: The AARP applies to onboard the Provider (1/3)

- The AARP may now apply to onboard the Provider by completing the Provider Profile.
- All mandatory fields (denoted with *) have to be filled in.
- Need to press the **Submit** button to finalize the Provider application.
- The Provider Profile Template is also offered for download and preview in pdf and in excel formats. It includes standardized definitions, examples and recommendations. <https://www.eosc-portal.eu/assets/files/providerForm.pdf>
- In case of difficulties during Provider onboarding communicate to onboarding@eosc-portal.eu depending on the issues a 1-to-1 call to offer guidance may be also organised.

Update Service Provider

UPDATE SERVICE PROVIDER

NAME OF YOUR SERVICE PROVIDER (*)

TEST

ADDRESS OF YOUR SERVICE PROVIDER (THIS CANNOT BE CHANGED LATER ON)

AL

42 MEMBERS OF YOUR SERVICE PROVIDER

CONTACT URL

WWW INCLUDE WWW2/WWW3/WWW4

COUNTRY OF REGISTRATION (OPTIONAL NUMBER)

+000000000000

THE WEBSITE OF YOUR ORGANIZATION IS

http://www.jpfga

WWW INCLUDE WWW2/WWW3/WWW4

DO YOU HAVE A PUBLIC DIRECTORY OF SERVICES (SERVICES, DATA, APPS, SOFTWARE, ETC.) YOU ARE PROVIDING/ORGANIZING IN THE MARKET? (IF NOT PUBLISHED AVAILABLE, CAN YOU SEND US A LINK TO THE DIRECTORY OR A PDF FILE?)

DO YOU HAVE ANOTHER PUBLIC & DETAILED DESCRIPTION OF PROVIDED SERVICES, DATA, APPS, SOFTWARE, ETC. YOU ARE PROVIDING/ORGANIZING IN THE MARKET? (IF NOT PUBLISHED AVAILABLE, CAN YOU SEND US A LINK TO A DESCRIPTION OF A SERVICE OR MESSAGE IN PDF FORM?)

SHOULD YOU LIKE TO PROVIDE US WITH ANY ADDITIONAL INFORMATION ABOUT YOUR ORGANIZATION OR THE SERVICES/OFFERED YOUR ORGANIZATION IS?

http://www.jpfga

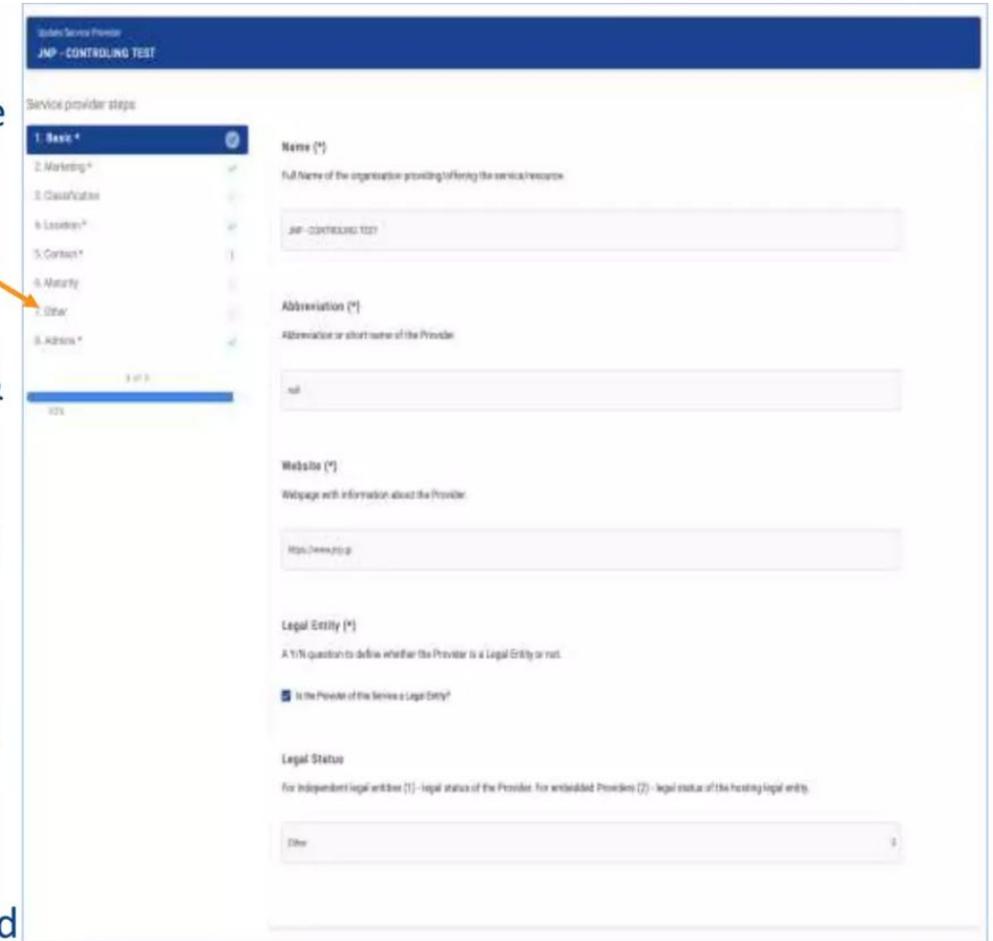
PROVIDER ADMIN

Antonio Zervas zervas.jp@gmail.com

Submit

Stage 4: The AARP applies to onboard the Provider (2/3)

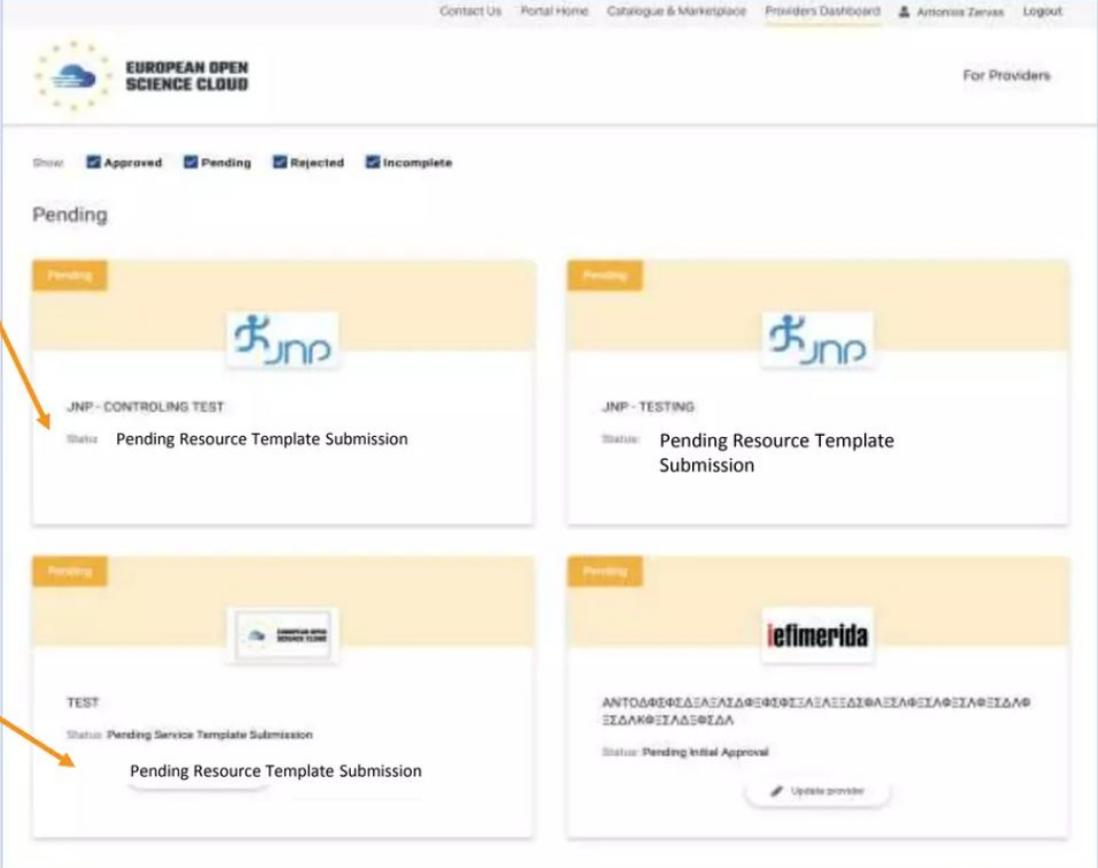
- The Provider Profile is organised in seven information blocks:
 - **Basic Information:** such as the name, the Profile, the logo, the website, etc. of the Provider.
 - **Marketing Information:** such as Profile, logo, multimedia
 - **Classification Information:** scientific domain, category, ESFRI domain, tags, etc.
 - **Location Information:** location of the Provider, coordinating & participating countries, etc.
 - **Contact Information:** contact persons and position
 - **Other Information:** relevant to the legal status, networks, and activity of the Provider.
 - **Admins Information:** administrators of the Provider.
- All information has to be in the proper format (e.g. text, URL, email address, etc.) and size.
 - Automated mechanisms are used to the greatest extent possible to ensure that all required information is included and that the information is of the correct type, size, etc.



The screenshot displays a web form for creating a provider profile. The form is titled 'Update Service Provider' and 'JNP - CONTROLLING TEST'. It features a sidebar with 'Service provider steps' including: 1. Basic (selected), 2. Marketing, 3. Classification, 4. Location, 5. Contact, 6. Admins, 7. Other, and 8. Admins. The main content area shows the 'Basic' information block with the following fields: 'Name (*)' (Full Name of the organisation providing/offering the service/resource) with the value 'JNP - CONTROLLING TEST'; 'Abbreviation (*)' (Abbreviation or short name of the Provider) with the value 'jnp'; 'Website (*)' (Webpage with information about the Provider) with the value 'https://www.jnp.org'; 'Legal Entity (*)' (A Y/N question to define whether the Provider is a Legal Entity or not) with a checked checkbox and the label 'Is the Provider of the Service a Legal Entity?'; and 'Legal Status' (For independent legal entities (1) - legal status of the Provider, for embedded Providers (2) - legal status of the hosting legal entity) with a dropdown menu showing 'Other'.

Stage 4: The AARP applies to onboard the Provider (3/3)

- Upon successful submission, the AARP will be navigated to the “My Providers” page, where the new Provider is marked as “pending”.
- The EOSC Portal will also notify by email the Admins of the Provider and the EOSC Portal Onboarding Team (EPOT) of the successful submission.
- The EOSC Portal will open a ticket in the EOSC dedicated Jira project. The EPOT confirms the opening of the Jira ticket for the Provider and updates it with any additional information deemed necessary.
- The AARP can update at any time the information about the Provider by clicking the “Update Provider” button.



The screenshot displays the "Providers Dashboard" for the European Open Science Cloud. The page is titled "For Providers" and includes navigation links for "Contact Us", "Portal Home", "Catalogue & Marketplace", "Providers Dashboard", and "Logout". The user "Antonia Zarvas" is logged in. The dashboard shows a list of providers in a "Pending" state, with filters for "Approved", "Pending", "Rejected", and "Incomplete". Four provider cards are visible:

- JNP - CONTROLLING TEST**: Status: Pending Resource Template Submission
- JNP - TESTING**: Status: Pending Resource Template Submission
- TEST**: Status: Pending Service Template Submission
- efimerida**: Status: Pending Initial Approval. Includes an "Update provider" button.

Orange arrows from the text on the left point to the "Pending Resource Template Submission" status text in the first two cards and the "Update provider" button in the fourth card.

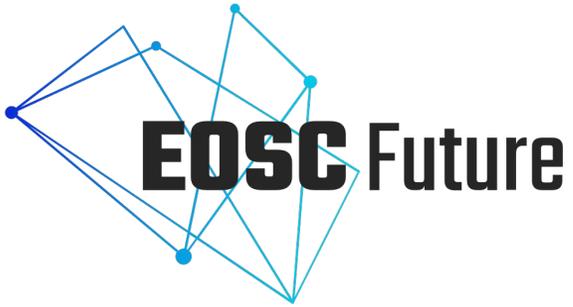
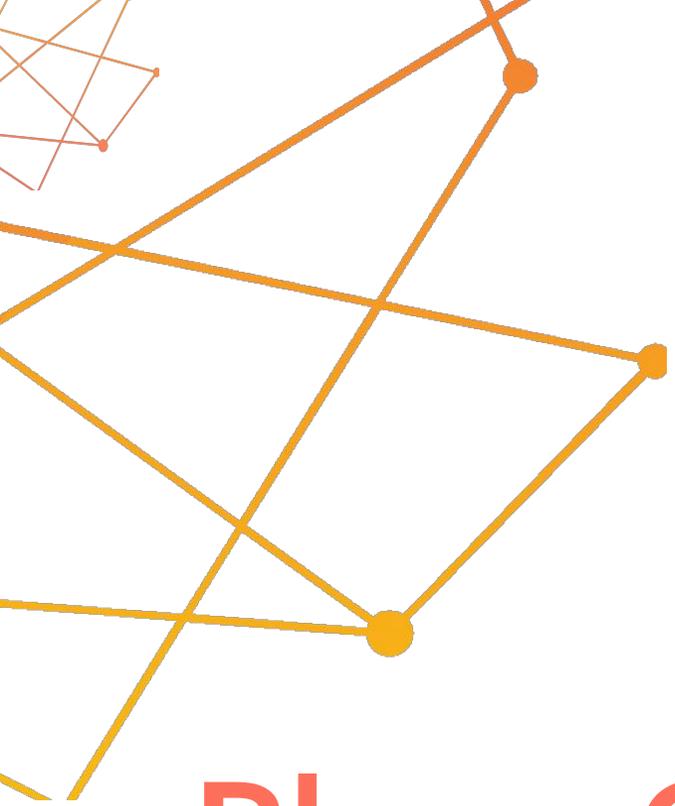
Stage 5: The EPOT reviews the Provider Profile

- At this stage the Provider application needs to get approved by the EOSC Portal Onboarding Team (EPOT) using the EOSC Validation Tool.
- The EPOT checks the Minimum Requirements and the rules and criteria and the typology of the Provider Profile Template (mandatory fields, lengths, types, etc.) and provides comments and recommendations for improvements on the Validation Tool.
- If the Provider Profile does not comply with the minimum requirements, or the rules and criteria or the typology of the Provider Profile Template, the AARP is contacted by email to take action on the recommendations stated in the Validation Tool and update the Provider Profile.
- Typos and obvious errata are corrected by the EPOT. The AARP is informed accordingly.
- At this stage the AARP is offered the option to join an information or training session with the EPOT to get personalized consultation on the best way to onboard the Provider and its Resources. In this, often 1-to-1 Webinar, the Provider will have the chance to ask questions and get personalized consultation on the best way to register its Resources.
- In case of delays, both the Provider and the EPOT receive reminders of the pending process via email messages.

Minimum Requirements

- Should be Research Infrastructures, Core Facilities or Shared Scientific Resources that offer one or more Resources to users (academic or industrial researchers, public or private sector organisations, etc.).
- Should be operating at European, national, regional or institutional level.
- Should be the entity registering the resource and operating it.
- Should be independent legal entities (ERICs, universities, research organisations), entities embedded in a hosting organisations (laboratories, platforms) or projects offering specific resources (such as H2020 or Horizon Europe projects offering (trans-national) access, access to a network of distributed facilities, etc.).

Code	Attribute Name	Example Value	Definition	Type	Multiplicity	Required	Public
Basic Information							
EPP.BAI.0	ID	openaire	A persistent identifier, a unique reference to the Provider in the context of the EOSC Portal.	String (max 30)	1	Mandatory	Yes
EPP.BAI.1	Name	Open Access Infrastructure for Research in Europe	Full Name of the Provider offering the resource and acting as main contact point.	String (max 100)	1	Mandatory	Yes
EPP.BAI.2	Abbreviation	OpenAIRE	Abbreviation or short name of the Provider.	String (max 30)	1	Mandatory	Yes
EPP.BAI.3	Website	https://www.openaire.eu	Webpage with information about the Provider.	URL	1	Mandatory	Yes
EPP.BAI.4	Legal Entity	Y	A Y/N question to define whether the Provider is a Legal Entity or not.	Boolean	1	Mandatory	Yes
EPP.BAI.5	Legal Status	Non-Profit Partnership (NPP)	Legal status of the Provider. The legal status is usually noted in the registration act/statutes. For independent legal entities (1) - legal status of the Provider. For embedded providers (2) - legal status of the hosting legal entity. It is also possible to select Not a legal entity.	List of controlled values	1	Optional	Yes

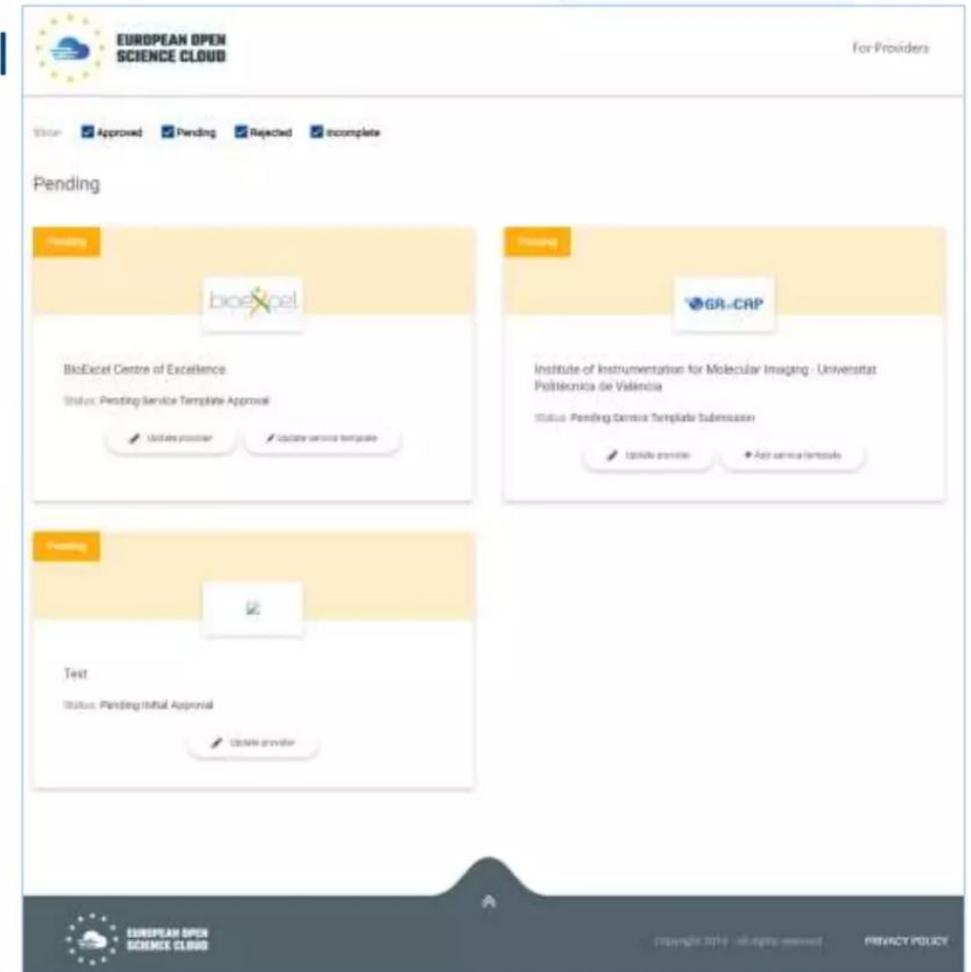


Phase C

Registration of resource

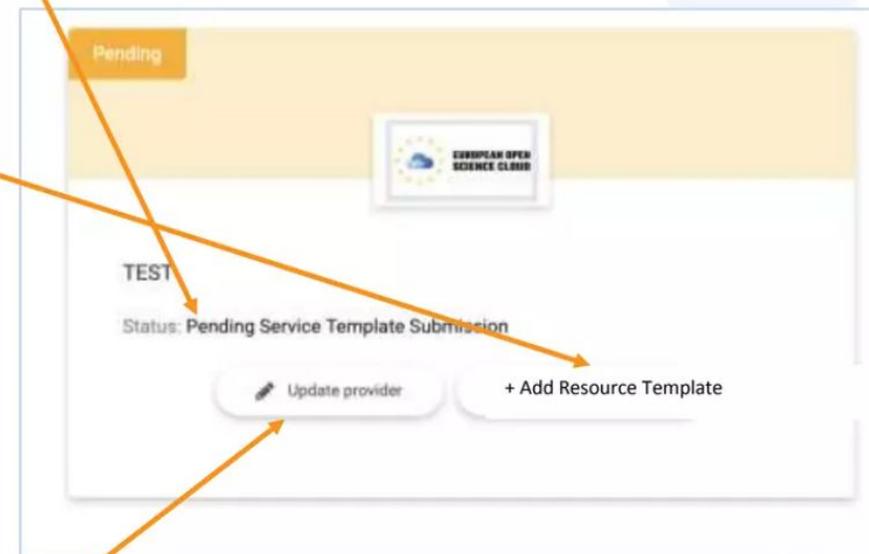
Stage 6: The AARP selects method to onboard Resources

- The AARP logs in (if not already logged in) to the Portal and may proceed with the onboarding of Resources.
- The AARP is offered two options to onboard Resources:
 - a) via a web interface for each Resource individually
 - b) via the EOSC Portal Application Programming Interface (API).
- If the web interface is selected then Stage 7a follows otherwise Stage 7b.
- For Onboarding with the EOSC Portal API follow the “EOSC Portal API Tutorial”.



Stage 7a: The AARP applies to onboard the 1st Resource (1/2)

- After the Provider profile is approved, the “My Providers” page, changes status to “**Pending Resource Submission**”.
- The AARP may now apply for the onboarding of the 1st resource with the “**+Add Resource**” button.
- In case of difficulties during resource onboarding communicate to onboarding@eosc-portal.eu. Depending on the issues a 1-to-1 call to offer guidance may be also organised.
- Attention: The button Update Provider Profile updates the Provider Profile and not the Resources Profile.



Stage 7a: The AARP applies to onboard the 1st Resource (2/2)

- The AARP may now apply to onboard the 1st Resource by completing the Resource Profile.
- All mandatory fields (denoted with *) have to be filled in.
- Need to press the **ADD** button to finalize the Resource Profile submission.
- The Resource Profile is also offered for download and preview in pdf <https://www.portal-eosc.eu/assets/files/ResourceForm.pdf> and in excel formats. It includes standardized definitions, examples and recommendations.

The image displays two side-by-side screenshots of a web application titled "First Service Form". Both screenshots show a form with multiple sections, including "ADD INFORMATION", "SUPPORT INFORMATION", "CONTRACTUAL INFORMATION", and "INTEGRITY". The left screenshot has a red box around the "ADD" button at the bottom, with an orange arrow pointing from the text "Need to press the ADD button" in the list above. The right screenshot is a similar view of the same form, also with a red box around the "ADD" button.

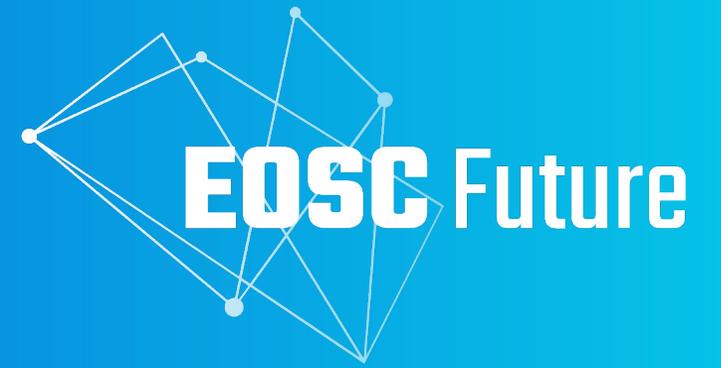


Stage 8: The EPOT reviews the Resource Profile

- Once the Resource application is submitted it is assessed by the EPOT using the EOSC Validation Tool.
- The EPOT checks the minimum requirements and the rules and criteria and the typology of the Resource Profile (mandatory fields, lengths, types, etc.) and provides comments and recommendations for improvements on the Validation Tool.
- If the Resource Profile does not comply with the minimum requirements, or the rules and criteria or the typology of the Resource Profile Template, the AARP is contacted by email to take action on the recommendations stated in the Validation Tool and update the Resource Profile.
- Typos and obvious errata are corrected by the EPOT. The AARP is informed accordingly.
- At this stage the AARP is offered the option to join an information or training session with the EPOT to get personalized consultation on the best way to onboard the Provider and its Resources. In this, often 1-to-1 Webinar, the Provider will have the chance to ask questions and get personalized consultation on the best way to register its Resources.

Minimum Requirements

1. Resources must be actual Resources according to an official Resource Management definition. It should be an ongoing activity offered 'live' to customers. This may be a (research) infrastructure Resource, or a human Resource (e.g. training, consultancy).
2. The Resource must be coherent. It must be available and offer stand-alone value. It may not be only a feature/component of a larger Resource.
3. The Resource must meet at least **one** of the following:
 - The Resource must be targeted to the research community
 - The Resource must be provided by the research community
 - The Resource comes from a H2020 funded project
 - The Resource is part of a procurement framework targeting researchers.
4. The Resource must be available in Europe and in a European language. Key information must be in English:
 - The Profile must be in English
 - The Basic Information in the User Interface must be available in English
 - Privacy statements, terms of use and SLA/SLS must be available in English. Other documentation may be in native language only.
 - The Helpdesk must be able to answer queries in English at a minimum.
5. The mandatory fields in the Resource Profile Template must be provided, including required linked information.
6. URLs must be Fully Qualified Domain Names (FQDN).



Procedures to onboard research products

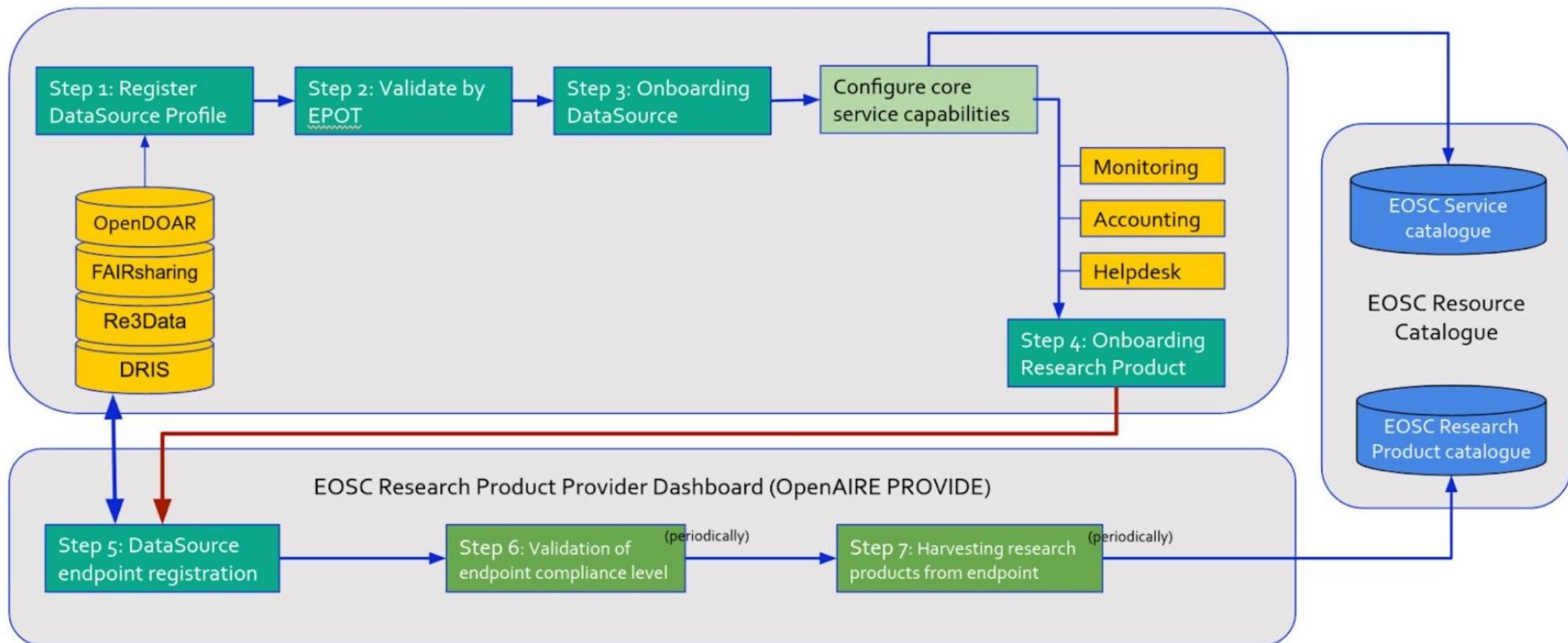
Andreas Czerniak
Bielefeld University Library

12 June 2023

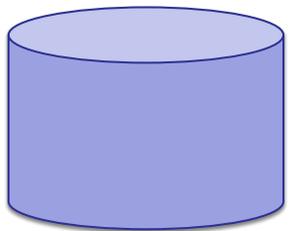
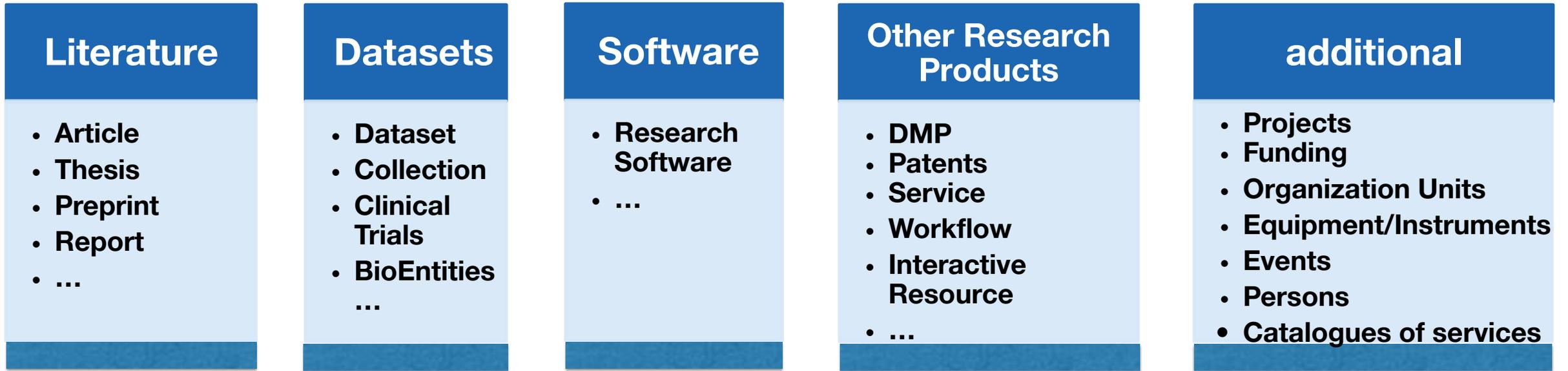
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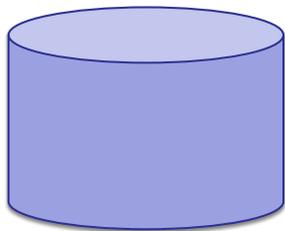
Detailed view of research products onboarding



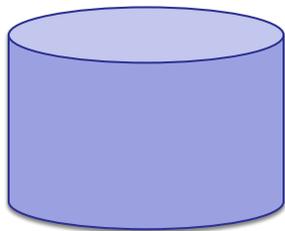
Landscape of Research Products



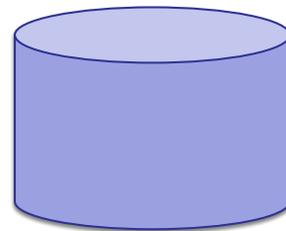
Institutional/
thematic/literature
repositories



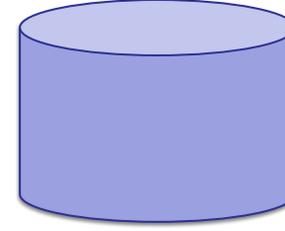
Journals/
publishers



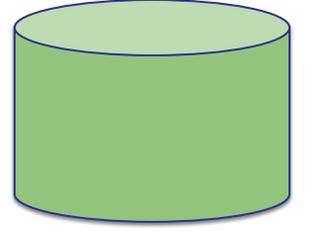
Data
repositories



Software
repositories



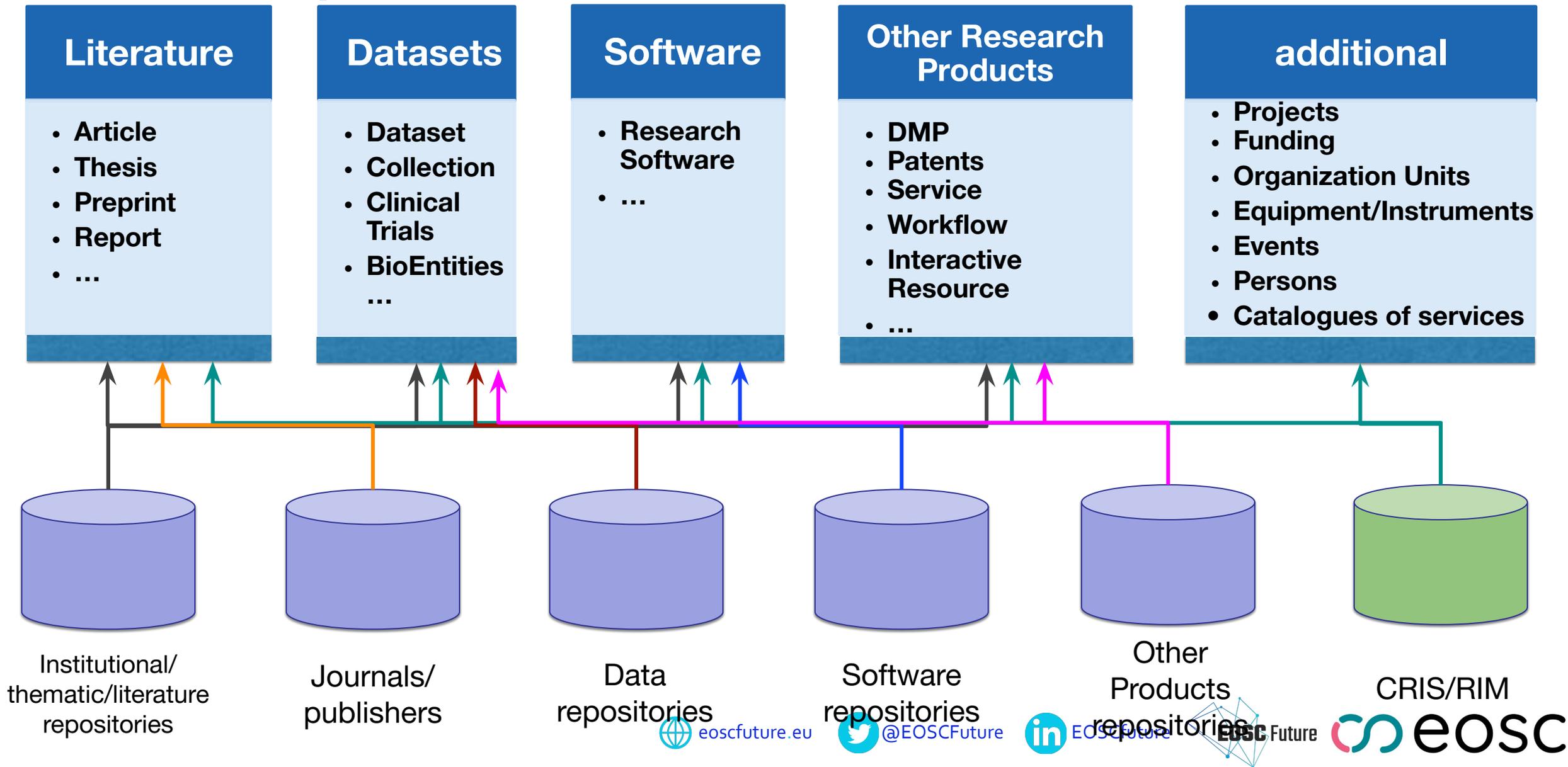
Other
Products
repositories



CRIS/RIM



Landscape of Research Products





Research Product integration via EOSC data source

1. “EOSC Interoperability Framework Guidelines for Research Products” and [EOSC Research Product Catalogue: Architecture and Interoperability Guidelines](#).

EOSC Research Product Profiles include today the following profiles as defined by the OpenAIRE guidelines, which provide a community-endorsed classification of research products, based on **standard metadata formats** (DataCite, Dublin Core, JATS, OpenAIRE) and **vocabularies** (CASRAI, COAR) in scholarly communication. The EOSC profiles includes the following guidelines:

- a. [OpenAIRE Guidelines for Institutional and Thematic Repositories v4.0](#)
- b. [OpenAIRE Guidelines for Literature Repositories v3.0](#)
- c. [OpenAIRE Guidelines for Data Archives v2.0](#)
- d. [OpenAIRE Guidelines for CRIS Managers v1.1](#)



Scenarios

Two scenarios for the first time of Research Products integration from the EOSC Data Source endpoint:

Scenario 1: the research products are **already being harvested** by OpenAIRE.

The research products in the EOSC data source are already discoverable in OpenAIRE. The research products will become automatically discoverable in EOSC through the EOSC Marketplace in about 1 weeks.

Scenario 2: the research products are **not being harvested by OpenAIRE**.

Due to the onboarding procedure, data source provider should be registered with OpenAIRE PROVIDE so that their research products compliant with the EOSC Interoperability Guidelines for Research Products can be harvested by OpenAIRE Aggregation system and become discoverable in EOSC Research Product Catalogue through the EOSC Marketplace for the first time in about 1 month.



Steps: Onboarding research product

Login into PROVIDE

Claim your data-source

Approval by EPOT

Onboard more
research
products

Validate your
data-source

Register your data-source and provide information on endpoint (baseURL), metadata format, and additional informations.

The approved endpoint will be harvested and research product will be is publicly visible.

Onboard additional Research Products, you should only expose the metadata via endpoint.

Only the endpoint needs approval.

The onboarded research will be automatically visible.



join OpenAIRE

EXPLORE PROVIDE CONNECT MONITOR DEVELOP

OpenAIRE | PROVIDE

HOME ABOUT SIGN IN

Your data is valuable. Get connected. Participate

The Provide Dashboard is a one-stop-service where content providers interact with OpenAIRE and become a building block of a global Open Research community. A gateway to the European Open Science Cloud.

SIGN IN

- Login
- Validate the records against one of the eligible metadata formats included in the [EOSC Research Product profiles](#)
- select the data-source from the list of sources and claim it under your control
- Finalize

<https://provide.openaire.eu>

- R Register
- V Validator
- N Notifications

Register your datasource



Repository



Journal



Aggregator



CRIS systems

Info / Help

OpenAIRE's PROVIDE Dashboard allows you to register and update your data source with ease. Please Join!

1) Make your data source OpenAIRE compatible by implementing the [OpenAIRE Guidelines](#). Afterwards, run a compatibility test using the [Validator tool](#).

2) Register your **Repository** in one of the following global registries - [OpenDOAR](#) (for Literature Repositories), [Re3data](#) (for Data Repositories) or [FAIRsharing](#) (for Data and Literature Repositories) and your **CRIS** with [DRIS](#) if not already done (this does not apply for aggregators and journals).

3) Use the [Registration tool](#) to have your data source indexed by OpenAIRE.

If you have any questions, please create a helpdesk ticket writing to helpdesk@openaire.eu.

OpenAIRE Policies

Register your datasource

- 1 Select Datasource
- 2 Register data source
- 3 Register Interface
- 4 Terms of Use
- 5 Finish

Please make sure your Research Information System is registered in [euroCRIS](#).
[euroCRIS DRIS](#)
 Last Updated: 2023-05-28

Select country

-- none selected --

- none selected --
- Albania
- Algeria
- Angola
- Antarctica
- Armenia
- Australia
- Austria
- Bahamas
- Bangladesh
- Belarus
- Belgium
- Benin
- Bolivia
- Bosnia and Herzegovina
- Brazil
- Bulgaria
- Cameroon
- Canada



R

V

N

Register your datasource

1 Select Datasource

Please make sure your Research Data is registered in [euroCRIS DRIS](#)
Last Updated: 2023-05-28

Select country

-- none selected --

-- none selected --

- Albania
- Algeria
- Angola
- Antarctica
- Armenia
- Australia
- Austria
- Bahamas
- Bangladesh
- Belarus
- Belgium
- Benin
- Bolivia
- Bosnia and Herzegovina
- Brazil
- Bulgaria
- Cameroon
- Canada

Register your datasource

1 Select Datasource

2 Register data source

3 Register data source

4 Terms of Use

5 Finish

Basic information

Software Platform (*)

[Other] (enter name below)

METIS

Official Name (*)

METIS EUR

Description (*)

Country (*)

Netherlands

Longitude

0

< PREVIOUS

Us





Register your datasource

1 Select Datasource

Please make sure your Researcher ID is linked to your account
[euroCRIS DRIS](#)
Last Updated: 2023-05-28

Select country

-- none selected --

-- none selected --

- Albania
- Algeria
- Angola
- Antarctica
- Armenia
- Australia
- Austria
- Bahamas
- Bangladesh
- Belarus
- Belgium
- Benin
- Bolivia
- Bosnia and Herzegovina
- Brazil
- Bulgaria
- Cameroon
- Canada

Register your data

1 Select Datasource

Basic information

Software Platform (*)
[Other] (enter name)

METIS

Official Name (*)

METIS EUR

Description (*)

Country (*)

Netherlands

Longitude

0

< PREVIOUS

Register your datasource

1 Select Datasource

2 Register data source

3 Register Interface

The harvesting settings are valid!

Base OAI-PMH URL (*)

https://oai.foo.bar/

Validation Set

Choose existing

-- none selected --

or a custom one

Desired Compatibility Level (*)

-- none selected --

Current Compatibility Level

UNKNOWN

Comments (What else do we need to know?)

< PREVIOUS

5 Finish





Register your datasource

1 Select Datasource

Please make sure your Researcher ID is linked to your profile
[euroCRIS DRIS](#)
Last Updated: 2023-05-28

Select country

-- none selected --

-- none selected --

- Albania
- Algeria
- Angola
- Antarctica
- Armenia
- Australia
- Austria
- Bahamas
- Bangladesh
- Belarus
- Belgium
- Benin
- Bolivia
- Bosnia and Herzegovina
- Brazil
- Bulgaria
- Cameroon
- Canada

Register your data

1 Select Datasource

Basic information

Software Platform (*)

[Other] (enter name)

METIS

Official Name (*)

METIS EUR

Description (*)

Country (*)

Netherlands

Longitude

0

< PREVIOUS

Register your datasource

1 Select Datasource

2 Register data source

3 Register Interface

Register your datasource

1 Select Datasource

2 Register data source

3 Register Interface

4 Terms of Use

5 Finish

By registering your data source, you are giving your consent to OpenAIRE to download, transform and enrich the metadata records, publishing them in the OpenAIRE Research Graph.

- Accept the [Terms of Use](#)
- Agree to the [re-use of full texts](#)

Last date of acceptance of the Terms of Use: -

Note: OpenAIRE will not provide the full text files for public distribution, the users will access from the original datasource.

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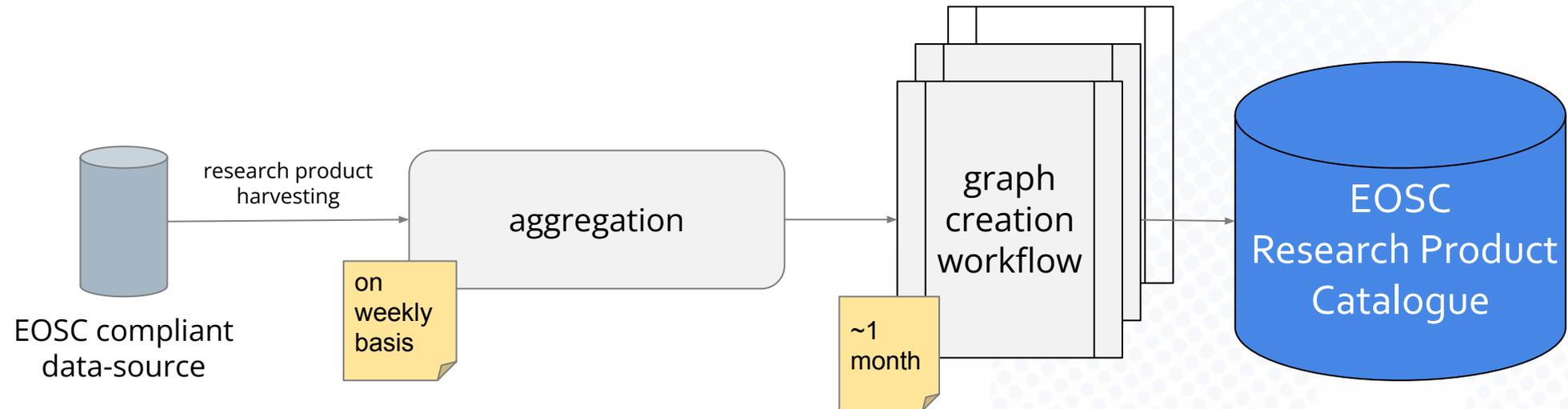
FINISH

Comments (What else do we need to know?)

< PREVIOUS



Harvesting of Research Product entity



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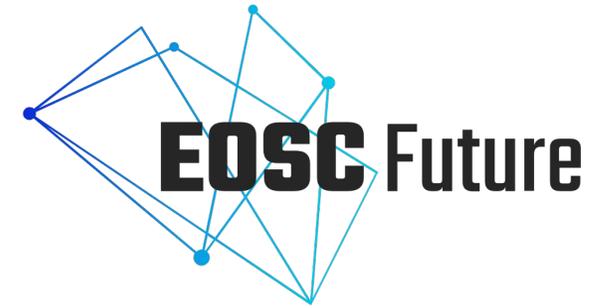
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Thank you for your participation