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**(\*) Dissemination Level**

- PU** Public
- PP** Restricted to other programme participants (including the Commission Services)
- RE** Restricted to a group specified by the consortium (including the Commission Services)
- CO** Confidential, only for members of the consortium (including the Commission Services)

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## Executive Summary

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*Beforehand disclaimer: this deliverable represents the **TERRINet Handbook** and contains useful information for TERRINet users who intend to participate in Trans-national Access (TNA) Integrating Activities and apply to the TERRINet Open Calls. It is intended that this document is released as an initial draft of the TERRINet Handbook.*

*This deliverable describes procedures and guidelines on best practices related to the Project that are subject to continuous improvement during the whole Project.*

*The current version of this deliverable, its updated versions and its Annexes will be stored under the Private Area of the TERRINet website ([www.terrinet.eu](http://www.terrinet.eu)), that is also directly accessible from all the partners by clicking the following link:*

*<https://owncloud.santannapisa.it/index.php/s/89I4MwwwcLIMDMWf/authenticate>*

This deliverable represents the **TERRINet Handbook** and contains useful information for TERRINet users who intend to participate in Trans-national Access (TNA) Integrating Activities and apply to the TERRINet Open Calls. This deliverable is the result of the activities carried out within the task 2.2 “Definition of access provisions (timeline of the access; type of access-short, long; eligibility; cover costs; evaluation; selection), part of the work package 2 of the TERRINet Project: “Setting up the Robotics Research Infrastructure”, led by the Karlsruhe Institute of Technology (hereinafter KIT).

This deliverable aims at providing the users with detailed guidelines to access the TERRINet Robotic Research Infrastructures after the selection stage, that is when their proposal is granted with access to the platform of interest in order to develop their scientific idea.

Although this document specifically describes the procedures and the guidelines to access the Sant’Anna School of Advanced Studies infrastructure (SSSA hereinafter), the TERRINet Consortium agreed that in general it is intended to become a concerted Handbook of procedures to access all the 15 available infrastructures in TERRINet. Indeed, each partner of the Consortium who makes some platforms available for access within the framework of the TERRINet Project has provided its own administrative documents containing useful information on procedures and guidelines to access their own infrastructures. Such documents are considered as Annexes of this deliverable and will be appropriately provided to users granted with access.

## 1 Introduction

This document is the result of the extensive work carried out from SSSA with the contribution of KIT to prepare the official TERRINet Handbook, as part of WP2 activities.

The general goal of WP2 is to define common procedures to enable different users<sup>1</sup> based in European Member States, Associated States and other third Countries, from both Academia and Industry, to obtain access to excellent and high-quality infrastructures for research purposes.

This manual is conceived to provide TERRINet users specifically applying to TNA Integrating Activities with explanatory useful information about the whole procedure related to **Accesses**, that will be managed under the activities of WP7.

## 2 Trans-national Access procedure

TNA to one of the TERRINet Robotics Research Infrastructures is the possibility for selected users to get free of charge access to equipment and laboratories jointly with the required technical and scientific assistance for a limited duration of stay (a typical stay should last 10 days). At the end of the stay, users will be refunded, either entirely or partially, of the expenses occurred during the stay upon presentation of receipts (see the specific conditions in 3.1 Preparatory Work).

Accesses are granted to users that will be selected through a **selection procedure** comprising the following stages (Figure 1):



Figure 1: block diagram of the selection procedure.

More specifically, the overall procedure includes additional stages, i.e. the preparation of a proposal by applicants to be submitted to one of the TERRINet Calls (see Figure 2).

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<sup>1</sup> With the term “user” we define in general the final user of the Robotics Infrastructures, who can be not only an industrial or academic researcher –post-doctoral included- but also students (school students, undergraduate, graduate, PhD, Master) as well as entrepreneurs, regardless the size of the company.

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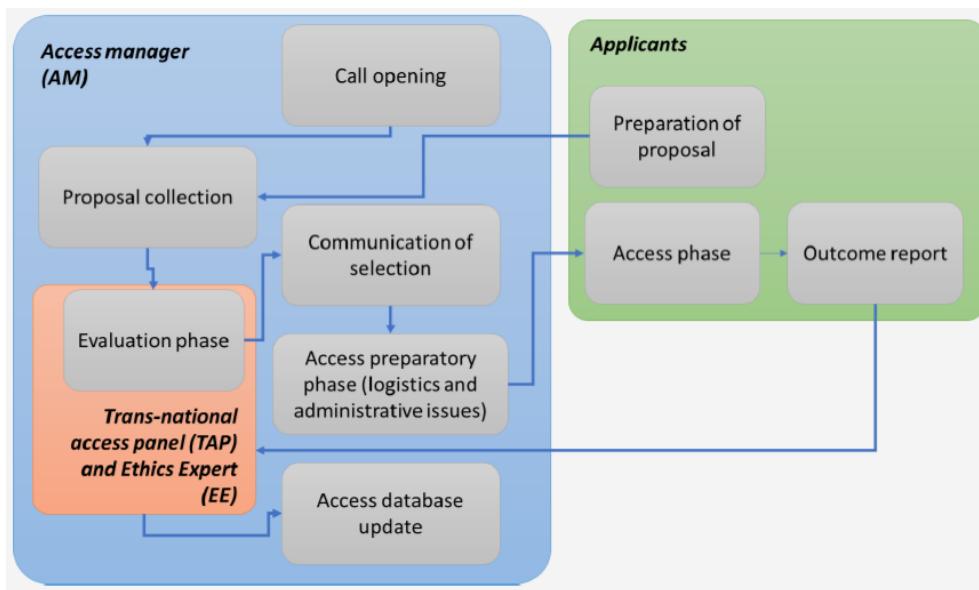


Figure 2: block diagram of the overall Trans-national Access procedure.

The selection procedure begins with the launch of a Call for Application. I.e., the first TERRINet Open Call was launched on December 1<sup>st</sup>, 2018. Each Call will stay open for two months, except that the Project Coordination should decide to grant a deadline extension (see Figure 3).

Call opening	Call deadline	Evaluation of proposals	Notification of results	Access preparatory phase	Access
Dec 1, 2018	Feb 28, 2019 Extension granted until <b>March 31, 2019</b>	Apr 1- May 30, 2019	May 31, 2019	Jun 1-30, 2019	Jul - Oct 2019

Figure 3: time line of the First TERRINet Open Call.

The **proposals** submitted to one Call **will be evaluated** from a panel of evaluators specifically appointed and the **notification of results** will be given to applicants at the end of the period of evaluations.

Right after the notification of results, the selected users will be contacted by the host infrastructure to define the exact period of access and to carry out a possible preparatory phase for access. During this phase the user will also be required to take a brief “pre-access survey” to help the Consortium to improve the access procedures and to make the Consortium able to address a more targeted public in the future TERRINet Calls for Applications. The pre-access survey mainly addresses opinions about users’ requirements, motivations, and expectations related to the forthcoming participation in the project. A similar pre-access survey will be sent to users at the end of the stay and the outputs will be compared.

Potential users should **apply online** using a dedicated platform developed by the partner TUM. The link to submit a proposal to the first Open Call is <http://vmknoll34.informatik.tu-muenchen.de/call/terrinet-first-open-call> (inactive after the closure of the Call).

The first step is an online registration to create a user account. By accessing with own credentials, a user can download the application form and complete the online procedure for submitting the proposal. During the procedure, potential users will be required to download and **read for acceptance the Privacy policy** and to **fill the Ethics Self-Assessment (ESA)** referring their proposal.

As soon as a Call will close, all the proposals received will be assigned to a panel of evaluators composed of at least 2 independent evaluators: one evaluator will be the internal responsible of the platform addressed within the proposal and one evaluator will be an external expert selected by keywords.

Evaluation procedure will assure fairness as they will be based on scientific merit, excellence and the overall quality of applications.

**Eligibility criteria:** scientific quality, motivation of the candidate and the purpose of the visit. Ranking will be expressed in a range from 1 (lower priority for granting the access) to 10 (higher priority for granting the access).

Number	Criterion	Weight
1	Scientific and technical relevance, originality and innovation, methodology.	0,5
2	Relevance for European RTD <sup>2</sup> policies and priorities, such as social impact, impact on EU industry (e.g. standardization and competitiveness), sustainable growth interest, young researchers, and female researchers.	0,25
3	General quality of the proposal in terms of completeness and organization of the proposal, clear definition of the objectives and expected results, relevance of the proposed dissemination actions, justified requested amount of access.	0,25

Only those proposals whose ESA will result in concerning issues should undergo a third evaluation by a designated **Ethical Expert (EE)**, a professional with a high reputation and various past experiences as an EE in European projects.

Proposals submitted by industrial users will also receive an assessment from the TERRINet Technology Transfer Committee (TTTC), that is in charge of supporting innovation and technology transfer from academic research to industry.

At the end of the evaluation phase, the results will be notified to applicants along with an Evaluation Summary Report (ESR) containing the evaluators' comments. **Only selected users will be granted with free of charge access to the TERRINet infrastructures and they will be further contacted by the TERRINet team.**

Before accessing the infrastructures in order to carry on their research projects, users will address a preparatory phase, that will consist in a **preliminary preparation to properly (safely and according to bylaw) access the infrastructures.**

The preparation mainly consists in three steps:

- The preparatory work, including the first contact with the selected applicant from the administrative office (or the person in charge of the management of foreign visitors) of the host infrastructure. The preparatory work could include a preliminary usage of the platform addressed in order to set up in advance pieces or tools that could be

<sup>2</sup> Research and Technical Development: <http://www.europarl.europa.eu/factsheets/en/sheet/66/policy-for-research-and-technological-development>

useful for the user during the access (i.e., the set-up of a specific gripper to use with a robotic arm);

- the on-site work;
- the closing phase of the user's stay at the host infrastructure.

The above mentioned procedure includes a list of forms that are described in this deliverable and that will be collected from each partner who makes platforms available for access.

The specific forms which are in place in the addressed infrastructure, should be duly read for acknowledge before the user's signing of the TNA Agreement (DOCUMENT 6) and the arrival at the host infrastructure.

The documents templates are available to provide evidence to whomever wants to read them. It is possible to request them by either contacting the SSSA Access Manager at info@terrinet.eu or the contact person at the host infrastructure.

### 3 Guidelines for accessing the Robotic Research Infrastructures of Sant'Anna School of Advanced Studies

#### 3.1 The preparatory work

As soon as the selected user is officially informed about the results of his/her application, the Access Manager at SSSA will establish a first contact by email, notifying the contacts of the person at the host infrastructure to refer to for the following communications.

By doing so, the researcher can start having a direct contact with the Robotic Research host Infrastructure management team, thus sharing questions and information.

At the very beginning, the user and the scientific responsible of the guest institution should take two important agreement:

- the duration of the stay;
- the precise day of beginning and of ending.

Indeed, a stay should last at least 5 days, of which the first is dedicated to preparatory activities, the second to training, and the remaining 3 days to implement the project.

The typical stay envisaged to carry out experiments at SSSA is of 10 days, however the duration of the stay will be subject of negotiation between the user and the guest infrastructure depending on the nature of the project to implement and it will be regulated in the signed TNA Agreement.

Before accessing the infrastructures in order to carry on their research projects, users will address a preparatory phase, that will consist in a **preliminary preparation to properly (safely and according to bylaw) access the infrastructures**.

The **preparatory work** may include a preliminary usage of the platform addressed in order to set up in advance pieces or tools that could be useful for the user during the access (i.e., the set-up of a specific gripper to use with a robotic arm);

Additionally, each selected user will be required to fill a completely anonymous pre-access survey intended to improve the TERRINet access procedures and to address a more targeted public in the future TERRINet Calls for Applications. The data collected in the pre-

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access survey will be compared with the results of the post-access survey, that will be completed by users after the end of their access.

The Robotic Research host Infrastructure management team is in charge of sharing information on the Infrastructure venue, such as location and directions, i.e., by providing a document directions to reach the infrastructure.

As a mere example, DOCUMENT 1 attached "How to reach the BioRobotics Institute" provides the directions to reach the three main branches of the SSSA BioRobotics Institute: i) the "BioRobotics Institute" located in Pontedera; ii) the "Research Center on Sea and marine Robotics" in Livorno, and iii) the "Assistive Robotics Lab" in Peccioli.

Furthermore, if applicable, a general document will be shared to illustrate the services offered to the users during the stay, such as the Guest House facility, the Canteen facility and the Library facility. As a mere example, DOCUMENT 2 attached describes the rules to access the Guest House, the Canteen and the Library of the SSSA BioRobotics Institute.

A "Reimbursement Form" will be shared with the user, illustrating the reimbursement policy. As a mere example, DOCUMENT 3 attached describes the reimbursement policy of the SSSA BioRobotics Institute.

The administrative department of the host infrastructure will be in charge of refunding users with money to cover in part or even entirely the costs incurred for travel, accommodation, and meals, and eligible to be covered by the TERRINet Project.

In fact, at the end of the stay, the users will be refunded of the costs sustained up to a maximum of a budget calculated on the basis of the average cost of living in the host country. Users should prove the expenses sustained by invoices/receipts of travel (air plane, train, bus, subway tickets), accommodation and food.

As a mere example, the users choosing SSSA infrastructure as host institution will get a maximum refund of about 65 € per day to cover daily subsistence (25 €/day) and accommodation (40 €/day), plus up to 400 € to refund the costs of travel to reach the infrastructure (airplane, train, etc...) and for the daily trips (train, subway, bus, etc...).

Users can request information regarding the maximum refunding fares at the host infrastructure, that however will be explicitly included in Annex 1 of the TNA Agreement (Financial guidelines).

## 4 On-site work

Upon his/her arrival at the host infrastructure, the user will be welcomed by the contact person in charge of admitting the users.

During the preliminary meeting (day 1), the user will provide the original signed copy of the TNA Agreement.

The user will be also required to fill a "Registration Form" to collect his/her personal data to register and include him/her in the Institution database, for safety and reimbursement purposes. As a mere example, DOCUMENT 4 attached represents the Registration Form of the SSSA BioRobotics Institute.

On day 2, the user will meet the scientific responsible of the robotic platform to be used and will follow a brief training on safety and usage of the robot.

The implementation of the research will follow hereinafter (day 3 – end).

### 4.1 Training

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### 4.1.1 Safety requirements

In order to access the addressed Robotic Research host Infrastructure and to be compliant to all the safety requirements, the user will be required to attend a targeted training on safety, given by the scientific responsible of the robotic platform and/or by the host infrastructure Safety Unit Coordinator, and a technical training on the use of the platform given by the scientific responsible.

The scientific responsible of the platform to be used is in charge of drafting the report of the safety training. As a mere example, the attached DOCUMENT 8 represents the template for the minutes of workers' training used at SSSA. The document "Laboratory Safety Instructions" is the Annex 1 of the DOCUMENT 8 and it will be provided to users during the safety training for acknowledgment.

Furthermore, as a mere example, DOCUMENT 5 represents the "Board of activities" in place at SSSA BioRobotics Institute that the user will be required to fill before his/her arrival at the host infrastructure and to send it to the contact person at the host infrastructure. This document is required to better prepare the training on safety that the user should attend afterwards.

This document contains a description of all the activities that the user shall perform. The evaluation of the possible risks related to such activities will be performed by the host Infrastructure Safety Unit Coordinator in cooperation with the scientific responsible of the robotic platform, and the content of the specific safety training will be defined accordingly.

### 4.1.2 IP requirements

In order to regulate the IP aspect and the disclosure of information that the user may collect during the stay, before starting the research activity he/she will be required to sign a "Trans-national Access Activities Agreement". The information provided in the paragraphs "Intellectual Property" and "Confidentiality" of the DOCUMENT 6 are intended to regulate the treatment of confidential information disclosed by the host infrastructure, as well as the intellectual property of the user's activity during the TERRINet TNA at the host infrastructure.

This agreement also contains the policy to regulate the prospective user's publications on his/her research results achieved during the stay at the host infrastructure under the TERRINet Project, and the exploitation of potential patentable information that may derive from the user's project, in compliance of what stated in the TERRINet Project Grant Agreement (No 730994).

### 4.1.3 Personal Data treatment

In compliance with the EU Reg. 679/2016 and the national legislations of the State Members' of the host institution, a Privacy Policy for visiting users should be signed for acknowledgement by the users before starting his/her activity at the host institution. As a mere example, DOCUMENT 7 attached describes the Privacy Policy in place at SSSA BioRobotics Institute.

Two types of data could be involved by the said regulation:

- i) Personal data of candidates who apply for the exchange;
  - ii) Personal data processed during the research activities.
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The host institution will cooperate with the users to ensure that the organizational and technical measures, needed to fairly and lawfully undertake the research, will be implemented until the end of the project, including the final reviews.

## 4.2 Implementation of the project

From day 3 onwards, the user will carry out his/her research under the surveillance and the technical assistance of the scientific responsible of the robotic platform.

During and throughout the access the user should **complete carefully the accesses register** on every day of access, on the basis of the template provided.

The excel template should be completed in its title with the Access provider short name, the Infrastructure and the Platform. The template should be printed and filled day by day with the following information: date, start time, end time, lunch break, a short description of the activity carried out that day, and the total hours of usage of the platform. The user and the responsible person of the platform or the tutor should also duly sign the register day by day.

**IMPORTANT!** This document is a mandatory requirement and necessary for reporting. Without this documentation it is NOT possible to report accesses and usage of the platform. It is the way to prove your access at the host infrastructure in order to fulfil the administrative duties related to accesses (refunds and accounting). Obviously, it CANNOT be done at a later stage, indeed it must be completed in its parts day by day, on the basis of the actual use of the platform by the TERRINet user.

## 5 Closing phase / fulfilments

A user should be aware that he/she will be strongly recommended to prepare a publication plan of his/her research carried out at the infrastructure during the access to strengthen the excellence of research in Robotics.

Furthermore, as ethics compliance requirement, each user should be aware that he/she could be required to submit a final report on ethics fulfilments in the case that his/her experiment should raise ethics issues not beforehand expected.

Additionally, at the end of the visiting period, and after having performed the agreed research activity, within 30 days after the end of the project, the user is required to submit to the contact person of the host infrastructure a final short report on his/her access. The final short report should describe the overall experience at the host infrastructure, and the experiments carried out during the access without necessarily containing the results of the analysis of the experiments.

Finally, within 60 days after the end of the project, the user will be invited to take a post-access survey on the overall evaluation of the stay at the host infrastructure.

The post-access survey aims at obtaining statistics on two of the main goals of the project:

- Setting up the Robotics Research Infrastructure: Definition of common procedures and mechanisms to enable the user to obtain access to the research infrastructure;

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- Definition and Management of Joint Training Initiatives: Definition and delivery of training to potential users and staff.

The user will receive an email with the link to fill the post-access survey, that will be completely anonymous.

The post-access survey will aim at evaluating, and improve where necessary:

- the preliminary phase, including the ease of reservation of the host institution facilities, the completeness of the general information on how to reach and access the host institution venue;
- the administrative and logistics services offered by the host institution;
- the technical and safety training performed before accessing the robotic platform;
- the on-site technical and administrative assistance received during the stay.

The outputs of the post-access survey will be collected and analysed within the WP2 activities and will be also used for dissemination purposes of the TERRINet Project.

## 6 Annexes

All the documents mentioned in this deliverable are listed below.

Each partner of the Consortium who makes some platforms available for access within the framework of the TERRINet Project has provided its own administrative documents containing useful information on procedures and guidelines to access their own infrastructures. Such documents are considered as Annexes of this deliverable and will be appropriately provided to users granted with access.

DOCUMENT 1 - How to reach The BioRobotics Institute

DOCUMENT 2 - General information on access to Guest House, Canteen, Library facilities

DOCUMENT 3 - Reimbursement Form

DOCUMENT 4 - Registration Form

DOCUMENT 5 - Board of activities

DOCUMENT 6 - Trans-national Access Activities Agreement visiting users + n.2 Annexes

- Financial guidelines;
- Guidelines for research ethics.

DOCUMENT 7 – Privacy Statement visiting users

DOCUMENT 8 - Minutes of workers' training + n.1 Annex

- Laboratory Safety Instructions.
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