



Empowering
innovation intermediaries
to generate sustainable
initiatives to incentivise
and accelerate
the commercialisation
of space innovation

D2.2 InnORBIT Digital Toolbox



This project has received funding from the European Union's Horizon 2020 Framework Programme for Research and Innovation under Grant Agreement no 101004212.

Empowering innovation intermediaries to generate sustainable initiatives to incentivise and accelerate the commercialisation of space innovation

COORDINATION AND SUPPORT ACTION

D2.2 InnORBIT Digital Toolbox

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DISSEMINATION LEVEL		
PU	Public	X
PP	Restricted to other programme participants (including the EC Services)	
RE	Restricted to a group specified by the consortium (including the EC Services)	
CO	Confidential, only for members of the consortium (including the EC)	



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LIST OF ABBREVIATIONS

- AB – Advisory Board
- BSP – Business Support Programme
- CBP – Capacity Building Programme
- CEE – Central Eastern Europe
- FAQ – Frequently Asked Questions
- IR – Investment Readiness
- SEE – Southeast Europe
- SME – Small and Medium Enterprises
- UX – User Experience

Executive Summary

This report was elaborated in the frame of the InnORBIT project and aims to present the **InnORBIT Digital Toolbox** components, use cases, users, its functionality and future steps to take in the Toolbox's improvement. The essential features of the InnORBIT Digital Toolbox were described in Digital Toolbox Specifications (D2.1). Further input from the consortium partners and experts on the Toolbox requirements and functionalities have been identified or decided during the development of the Toolbox, including the **Co-creation Workshop** held on 9th of June 2021. Input from a multitude of work packages and tasks, predominantly WP1 Tasks 1.1-1.4 has been used in order to develop the InnORBIT Digital Toolbox regarding process, user journeys and organisation of content.

The objectives of the InnORBIT Digital Toolbox are to provide a reliable information repository and exchange platform for its users, facilitate the delivery of the **Capacity Building** and **Business Support** Programmes, foster communication, and provide partners and stakeholders with centralised, easily accessible information related to space initiatives, start-ups and scale-ups. In accordance with the project needs, the Toolbox includes a profiling and needs assessment component, an e-learning tool, a forum, embedded in the InnORBIT website.

Following the InnORBIT Digital Toolbox Specifications and in mind with the recommendations from consortium partners and experts, the current Toolbox version consists of:

- A landing page integrated with the InnORBIT website and providing links to the different components and tools;
- An e-learning component which will host all online courses produced by the project and made available to the selected start-ups and scale-ups;
- Application processes for the different initiatives as well as screening and identification of the training needs of the start-ups and scale-ups;
- A repository of links and resources accessible to the start-ups and scale-ups participating in the initiatives (e.g. to funding and financing opportunities, to multiple reference material on useful topics, podcasts, etc.)
- A social networking tool allowing promoting networking and interaction between various stakeholders taking part in the initiatives.

During the development of the Toolbox, two additional functionalities have been implemented to increase the user experience.

- Find funding: functionality implemented to increase the user experience (UX) and improve the process of finding events and funding opportunities
- Find partners: functionality implemented to make initiatives and intermediaries more visible and improve the UX and finding process

The InnORBIT Digital Toolbox will be continuously monitored and maintained, and further improvements will be implemented depending on the users' feedback.

1 Introduction

The InnORBIT project aims to support 50 start-ups and scale-ups to grow and commercialise space solutions through 20 sustainable initiatives. The focus of the project is on Southeast Europe (SEE) and Central Eastern Europe (CEE) countries. The project also develops in parallel a Capacity Building Programme (CBP) and a Business Support Programme (BSP) that were discussed and developed alongside the Toolbox in view with the identified in D1.2 needs and challenges of innovation ecosystems and intermediaries for taking up activity in the EU space sector. Some further recommendations for the toolbox functions and structure were elaborated during the Co-Creation Workshop whose outcomes are detailed in D1.3 Co-design of capacity building and business support programmes. The two developed programmes contribute to the overall support of the InnORBIT project towards intermediaries to scout, screen and select start-ups and scale-ups, and towards the start-ups and scale-ups themselves.

The Digital Toolbox is designed to support the InnORBIT service portfolio that includes training, mentoring, networking, support to access funding opportunities, and partake in space related events. The Digital Toolbox design used previous experience and, along with the new ideas proposed by InnORBIT consortium, is based on some elements of similar digital platforms used in InvestHorizon 2.0 and MPowerBio developed by Tech Tour. Previous experience also helped us define the user journeys that were critical to testing and refining the Toolbox after incorporating the tester users' feedback. The processes for user journeys and the feedback from partners were instrumental in a monitoring framework that has been developed, described in D2.3, which will help the partners to gather evidence on the performance of the proposed solutions, bring improvements and follow up with intermediaries in SEE and CEE.

The InnORBIT Digital Toolbox is the central part of this report and comes in support to the foreseen initiatives. The report goes into detail about the Toolbox, objectives, requirements, architecture, and components. Moreover, testing scenarios for each of the components (CBP, BSP, Forum) have been developed.

Part of the Toolbox specifications along with part of the CBP and BSP specifications have been discussed and decided upon during and after the Co-Creation Workshop, as presented in D1.3 "Co-design of capacity building and business support programmes". This deliverable includes the following:

- Section 1 – Introduction: introduces the contents and structure of this document (page 4)
- Section 2 – InnORBIT Digital Toolbox: describes the InnORBIT Digital Toolbox components, functionalities, objectives, and requirements (page 5 onwards)
- Section 3 – InnORBIT Toolbox Testing and Validation: introduces testing scenarios for the Toolbox components (page 18 onwards)
- Section 4 – Conclusions and next steps: describes the next steps in the development of the InnORBIT Digital Toolbox (page 19)

Annexed in this document are: (i) User needs as Annex I and (ii) User journeys and testing guide as Annex II.

2 InnORBIT Digital Toolbox

2.1 Objectives

InnORBIT is a project meant to empower innovation intermediaries (SME associations, clusters, etc.) to establish and run local initiatives sustainably. The initiatives will support space innovation. The InnORBIT Digital Toolbox will serve as a digital hub, hosting registration to incubation/acceleration programmes and integrating the InnORBIT e-learning tools, methodologies, as well as other relevant space initiatives at a regional, national and European level. Activities under the framework of the Toolbox will continue throughout the project with the user-driven development and integration of the InnORBIT services that are supported by operation, maintenance and fine-tuning processes, leveraging feedback collected from users and stakeholders.

The InnORBIT Digital Toolbox offers online digital tools that have the potential to diminish geographical barriers and provide better, more structured access to knowledge and existing opportunities for exchange amongst space and space-related technology stakeholders. This capacity becomes even more important in the context of InnORBIT as space innovators are challenged to find, trust and collaborate with their partner across different sectors and countries. The InnORBIT Digital Toolbox is implemented as a suite of digital tools and services to provide pan-European access to space ecosystems, stimulate traction for their activities and facilitate the work of their members encompassing:

- **Registration & profiling:** to enable users to register their profile providing meaningful information and data about their innovations and their needs
- **E-learning tool:** to provide access to the material developed during to the project
- **Forum:** to promote networking among innovation intermediaries as well as with other space and non-space entities interested in rolling out and scaling space innovations (entrepreneurs, innovators, investors, etc.)
- **Project Website:** to provide online presence for the project and its activities as well as giving visibility about the success stories and successful space innovators.

These digital tools are designed to support the delivery of the services that InnORBIT will offer to the space and space-related technology stakeholders (SMEs and intermediaries):

- **Capacity Building Programme:** supports and empowers innovation intermediaries to establish and run local initiatives, delivering the Business Support Programme
- **Business Support Programme:** comes in entrepreneurs' support, aiding in starting and scaling-up commercial activities, creating value from space innovation

Besides delivering of the Business Support and Capacity Building programmes, the Digital Toolbox will facilitate the overall objectives of the InnORBIT project. It will foster communication, provide a reliable platform bringing together trustful members, and decrease overall barriers. It will enable end users to find initiatives much faster, take part in space related events, identify funding opportunities, and join the InnORBIT Community.

Moreover, developing the InnORBIT Digital Toolbox provides all partners and stakeholders a place where all information is centralised and easily accessible, addressing a multitude of user needs: event promotion, success stories, best practices, knowledge repository, registering & profiling, and self and expert assessment tools.

The Toolbox and its functions will evolve as the InnORBIT project, and its services are being provided thus responding to the feedback and recommendations from the users. A Fine Tuning and Maintenance Plan (D2.3) will guide the required changes along the way for more refined processes and better user experience.

Improving the processes and the technical aspects (format, operation) of the desired content of the Toolbox will be implemented also in accordance with the indicators set in the monitoring framework.

2.2 Digital Toolbox Requirements

The InnORBIT Digital Toolbox offers a suite of digital tools and services to provide pan-European access to the ecosystem, stimulate traction for activities and facilitate work between users and stakeholders representing space and space-related technology domain considering their needs or responding to feedback and recommendations received through the different communication channels (metrics, “contact us”, surveys, etc.). A process was elaborated for the specific Toolbox users to follow their interest and needs. It is defined in a user-friendly manner and contains information and features that support the facilitation of InnORBIT services and stakeholder engagement:

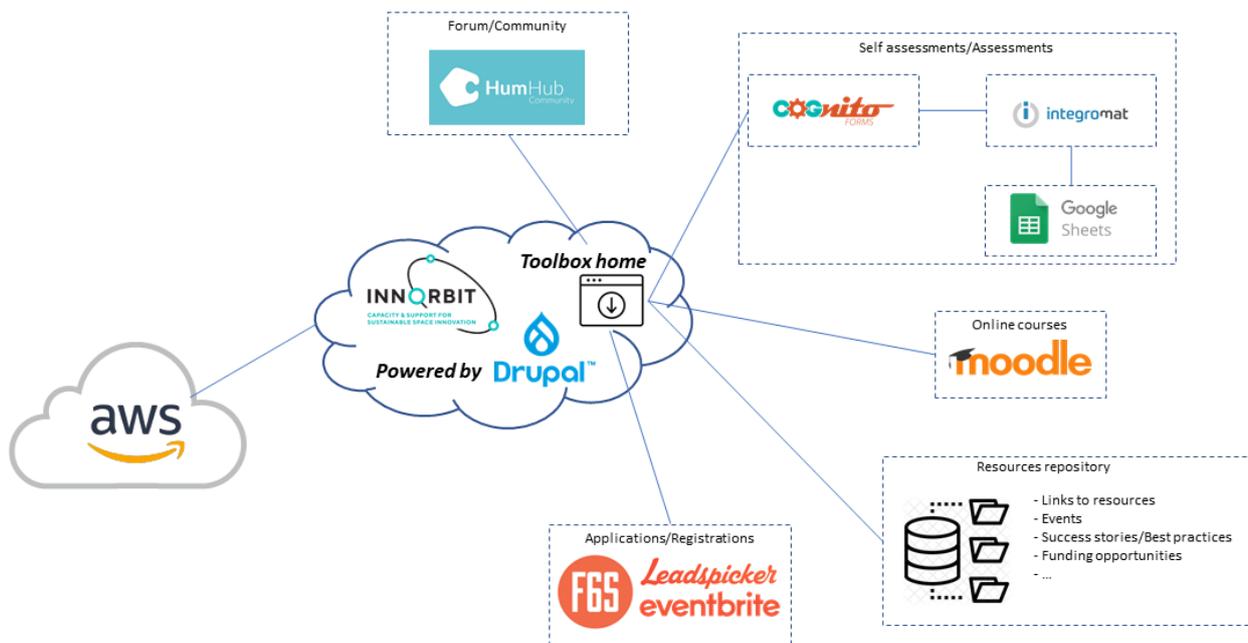
- **A general public visitor of the page:** to be informed about the project objectives, scope and other information that may engage in further inquiries or search related to InnORBIT project services
- **Innovation Intermediaries:** During the 1st pilot phase, these are the project’s consortium partners, ALG, COR and ROS and in the 2nd phase external intermediaries will be attracted to receive training and support in selecting, organising and running tailored initiatives (incubators, accelerators, etc.) for stimulating and accelerating space innovation. They will also have access to scout for, screen and select the entrepreneurs, start-ups and scale-ups to participate in the initiatives. The intermediaries will be authorised to input content for events, funding opportunities, local initiatives, run and participate in the forum, etc. The 3 intermediaries in the 1st Pilot & the 17 additional intermediaries in the 2nd pilot round will have different access rights especially for providing content.
- **SMEs:** to receive information about InnORBIT and take business support services for increased growth with the support of EU level initiatives and actions. The user engages by registering, receiving access to more detailed information on events and takes part in the Business Support Programme e-learning courses and other business trainings (bootcamps, e-learning), mentoring, networking. An SME can also self-assess their investment readiness and, upon review from an intermediary, have recommendations for selection of services and consequently identify, prepare for and access financing and funding opportunities.
- **Author:** the author has more permissions than the intermediaries has access to more items than intermediaries, uses free access to all pages which are public, registers for events or applies for initiatives, accesses the success stories & best practices, events pages, and funding opportunities pages in case these pages are restricted to only registered users and has access to available courses published on Moodle. Register and access the space related to the initiatives they take part in on the community forum set up for the project. They will be able to access content that is shared with them.
- **Administrator:** manages the processes and technical maintenance of the InnORBIT Digital Toolbox, feeds it with content, receives users’ feedback, responds to inquiries and addresses issues that may occur. The Project Coordinator, the Dissemination Manager and TTG technical staff has the Admin rights.

Annex I “User Needs” is a reference to detailed users’ needs that were identified to define the InnORBIT Digital Toolbox processes.

2.3 Architecture and specifications

The InnORBIT Digital Toolbox is powered by a multitude of components and services, working together to support the space industry. All services are centralised and accessible through the InnORBIT public website. The overall architecture can be seen below, in Figure 1.

Figure 1: InnORBIT Digital Toolbox Architecture



The InnORBIT Digital Toolbox landing page (<https://dev.InnORBIT.eu/Toolbox>) has been created and will serve as the central point, linking all the components of the digital Toolbox. In order to promote relevant information and news, several pages have been created on the InnORBIT website: Services, News, Events, Resources, InnORBIT Initiatives).

Moreover, external tools have been used in order to extend beyond the promotional functionality, and these tools offer the following features:

- Offer online courses in two different e-learning [Moodle](#) instances, with the following names: Business Support Programme and Capacity Building Programme
- Foster direct interest by companies for local initiatives by providing a profile through the platform [Leadspicker](#).
- Motivate SMEs to register to events organised by the local initiatives set by InnORBIT via an Eventbrite integration
- Stimulate companies to self-assess their investment readiness and experts to assess the IR and provide feedback in terms of a service roadmap.
- Enable InnORBIT's stakeholders to network, discuss and access group shared resource via a forum created on the open-source [HumHub](#) platform.

2.4 Components and functionalities

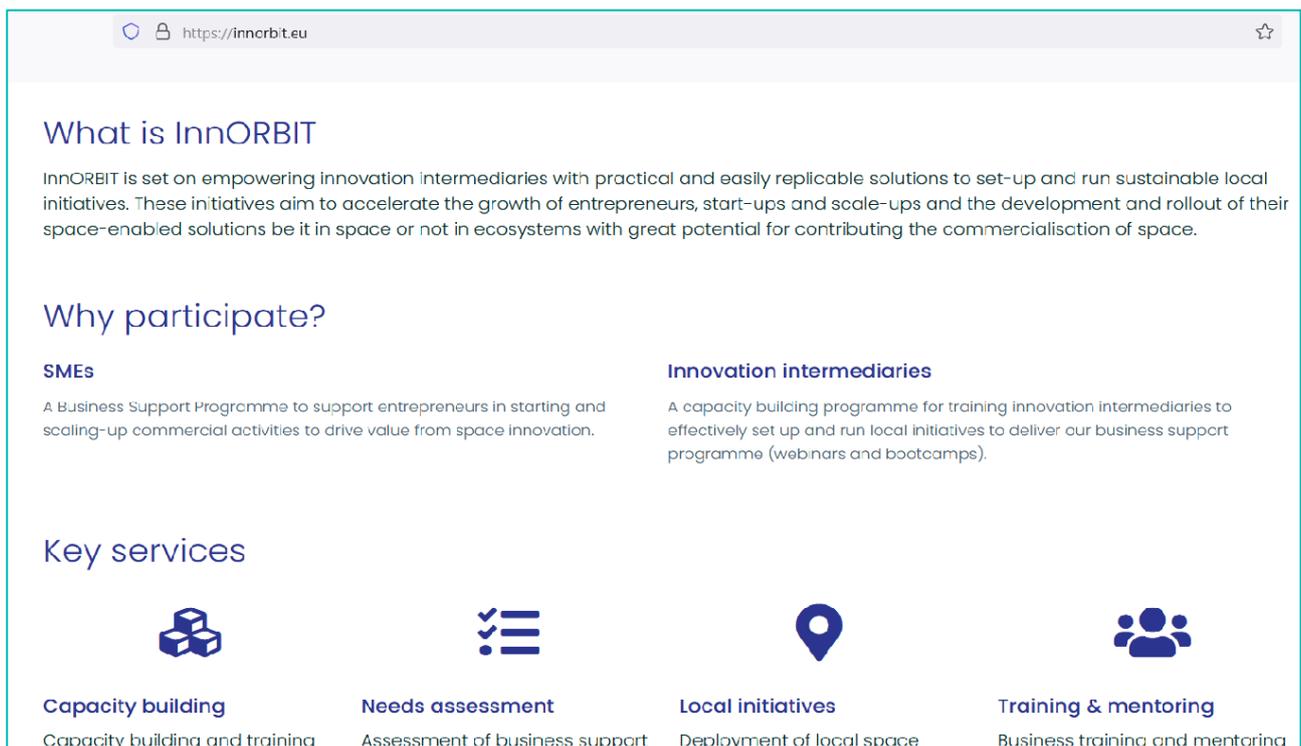
2.4.1 InnORBIT Website

The InnORBIT webpage is the information gate for all the users that will navigate through the InnORBIT objectives, scope, services, and opportunities that it offers for training and engagement with stakeholders' practices and communities. The InnORBIT website (<https://InnORBIT.eu/>) has been created and deployed using relevant technical tools to accommodate the specifications of the Digital Toolbox. The website is using Drupal¹, a free, open-source web content management framework. It provides a back-end framework and solution for at least 12% of the top 10,000 websites worldwide (Ranging from blogs to corporate, political and government sites).

2.4.1.1 Landing Page

The landing page provides a short description of what InnORBIT is, the benefits for SMEs and innovation intermediaries and the key services. Moreover, it showcases the latest news, events, initiatives, social media posts related to InnORBIT, and introduces all partners involved. Lastly, it allows visitors to subscribe to the InnORBIT newsletter.

Figure 2: Snapshot of the InnORBIT Landing Page 1



¹ <https://www.drupal.org/>

Latest news

Some news

27.09.2021

Some bla bla news

Algebra holds Hackathon event!

22.09.2021

Students had a great day!

Test News Item

17.09.2021

Hello world here's some edits ...

See more

Latest events



ALG Event Test

14.10.2021 - 29.10.2021 Online

InnORBIT Event Category 1



Some event - edit

28.09.2021 - 29.09.2021 Physical

Partner Event Category 1

InnORBIT Co-Creation Workshop test intermediary

13.09.2021 - 20.09.2021 Online

InnORBIT Event Category 1, Category 2

See more

Social media

Tweets by @Innorbit_H2020



InnORBIT Project
@Innorbit_H2020

We recommend: The Untold Stories Budapest 2021 conference on September 21-22 organised by our partners in @SE_Networks.

The event offers a great opportunity for startups to network with and learn from industry experts.

[Event agenda and registration - lnkd.in/d8-2ncT2](#)



Latest Initiatives

Test Initiative Item

30.09.2021

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Mauris

Some initiative - edit

27.09.2021

Some initiative descr - edit

Random space initiative 2

20.09.2021

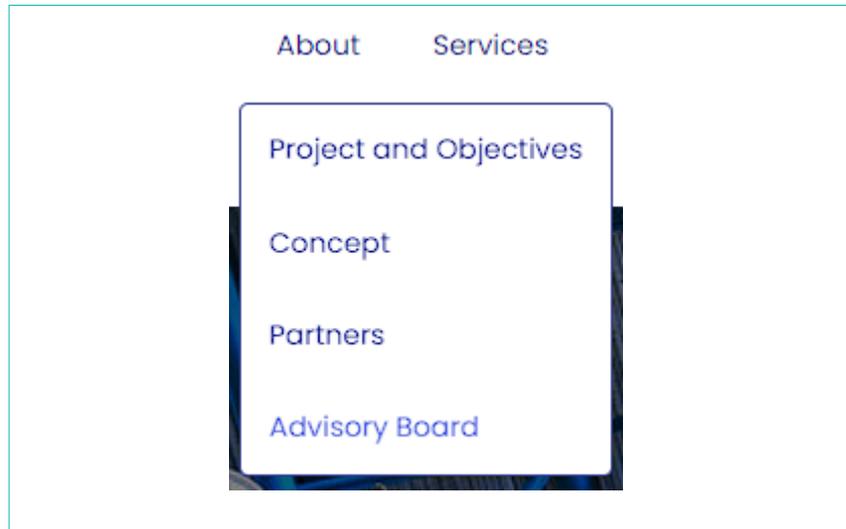
Random space initiative created by an author.

Figure 3: Snapshot of the InnORBIT Landing Page 2

2.4.1.2 About Section

This section is comprised of four different sub-pages: Project and Objectives, Concept, Partners, and Advisory Board. It provides overall information about the InnORBIT project and objectives, and it introduces the advisory board members.

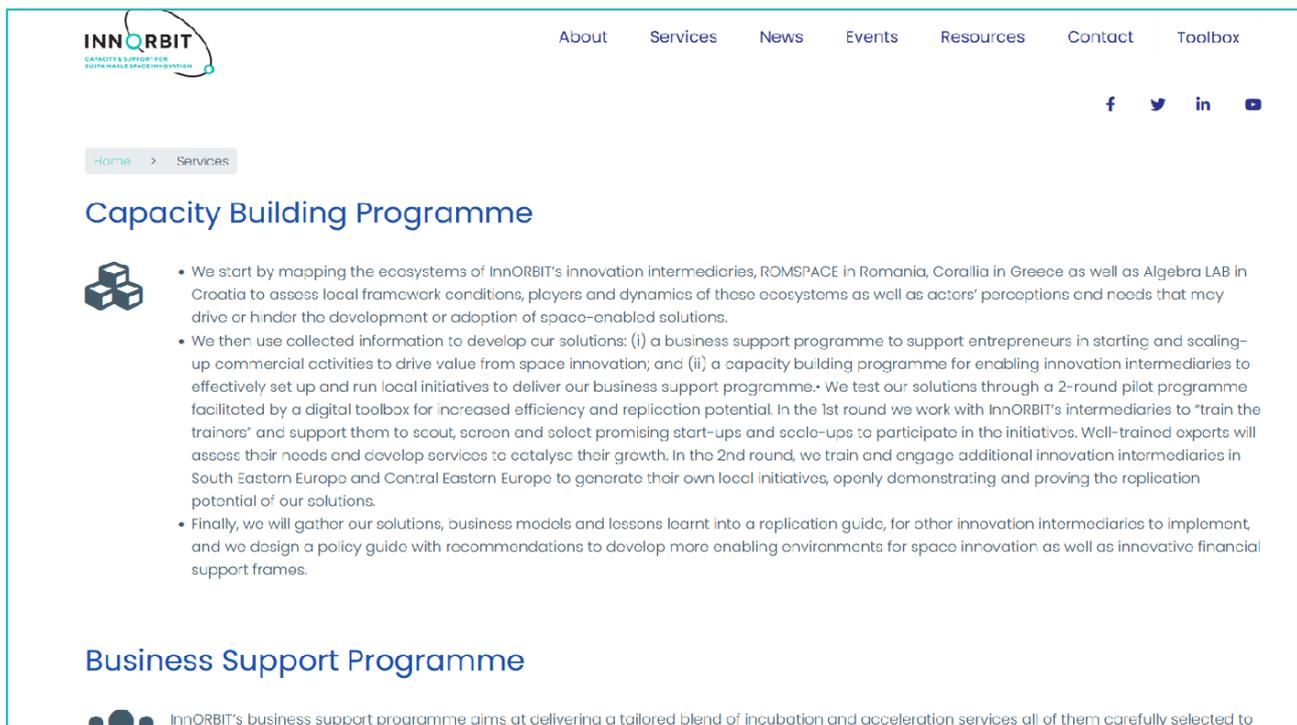
Figure 4: About menu



2.4.1.3 Services Page

The services page goes into more detail describing the Capacity Building and Business Support Programmes.

Figure 5: Screenshot of Services page



2.4.1.4 News Section

The news section is comprised of two different sub-pages, clustering all available (past and present in descending order) news related to InnORBIT and further facilitating the InnORBIT Newsletter subscription.

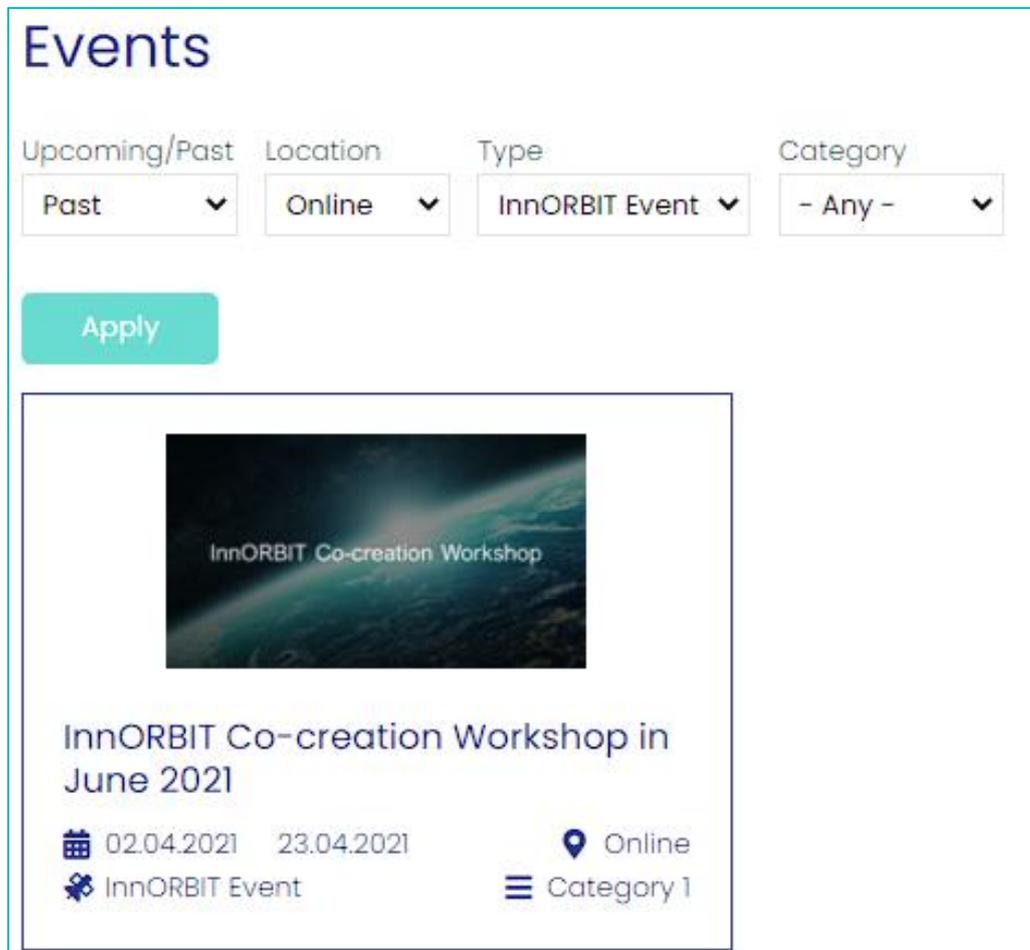
Figure 6: News sub-pages



2.4.1.5 Events Page

The events page centralises all past and future events related to InnORBIT. It gives users the possibility to filter the events by upcoming/past, location (online, physical), type (InnORBIT events, partner events), and category (Training, Investment, Networking, Partnering Events). All the current types and categories are provisional and will be improved in accordance with the needs of the project; intermediaries and the user experience will be refined as the project progresses.

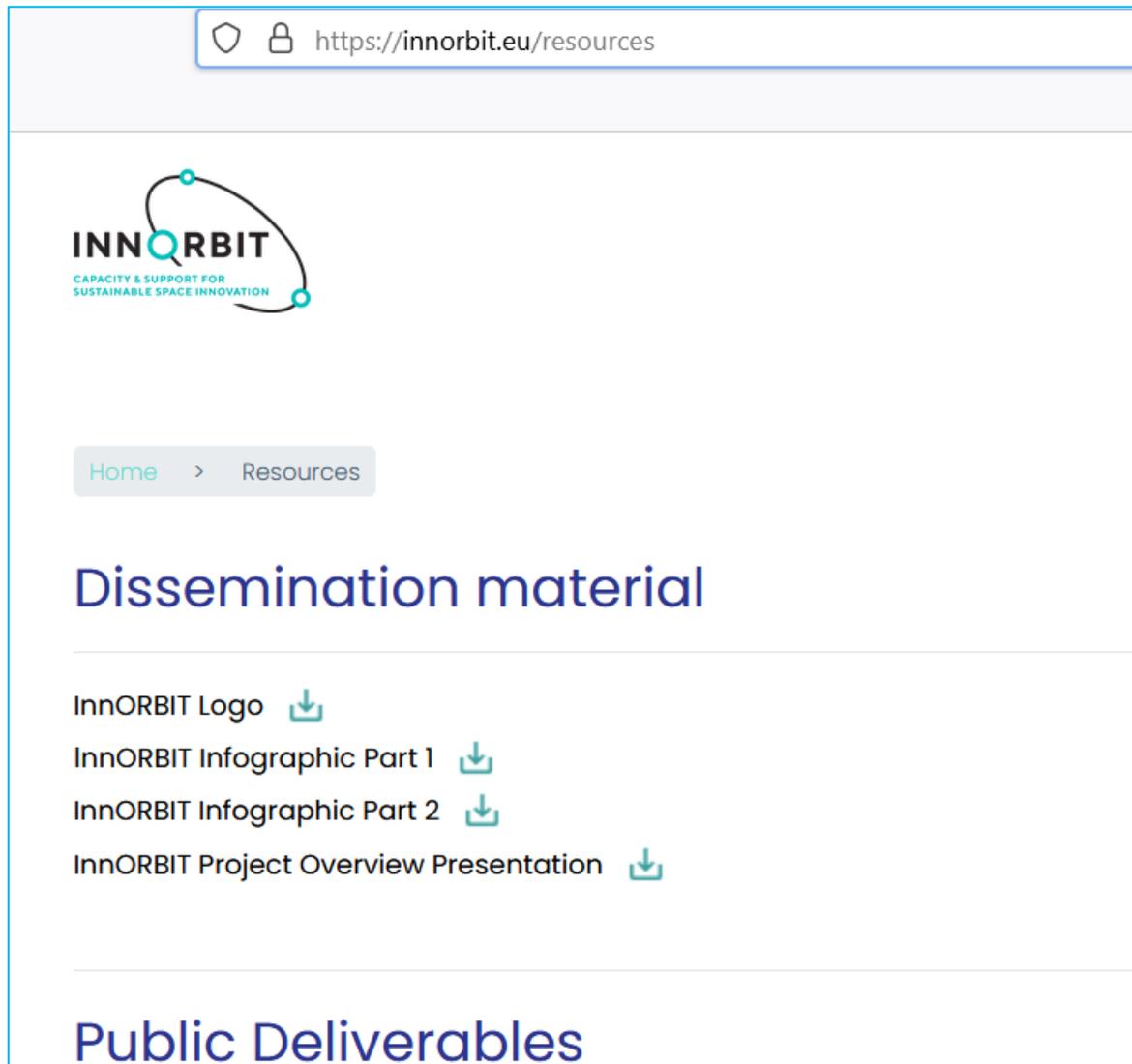
Figure 7: Events page and filtering system



2.4.1.6 Resources Page

The resources page centralises all publicly available deliverables and dissemination materials (active links), making them downloadable.

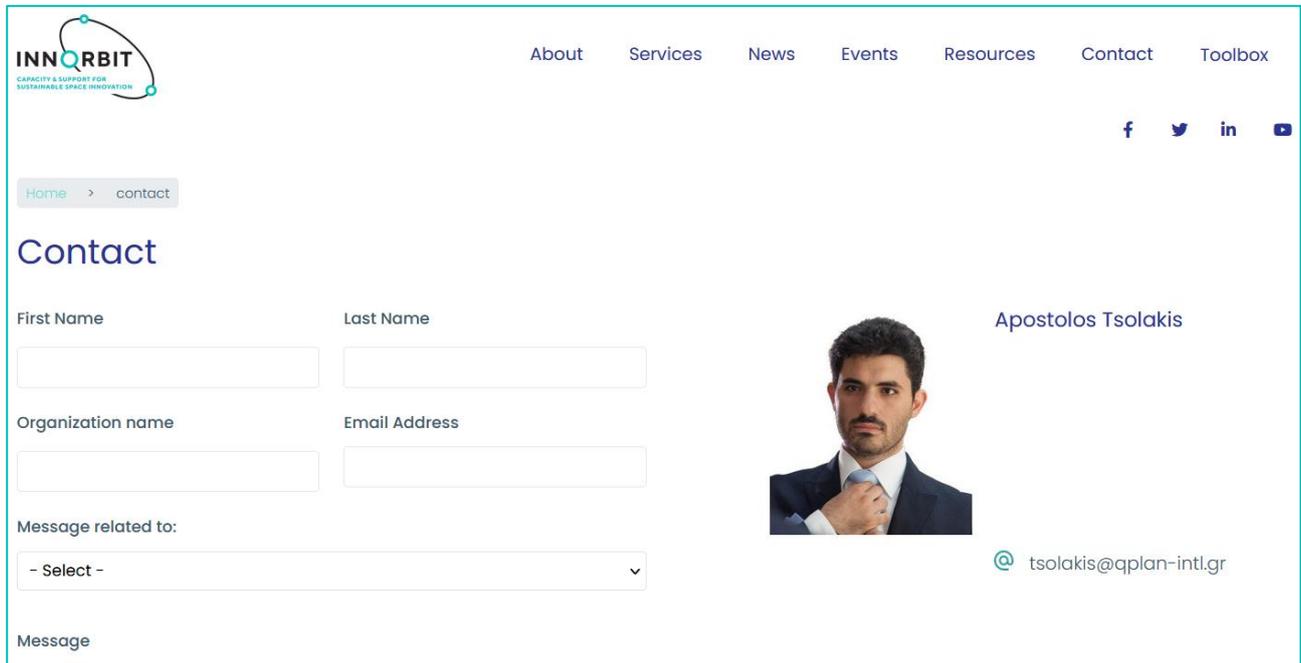
Figure 8: Resources page



2.4.1.7 Contact page

On Contact page, visitors will be able to get in contact with the responsible partner, via a webform.

Figure 9: Contact page

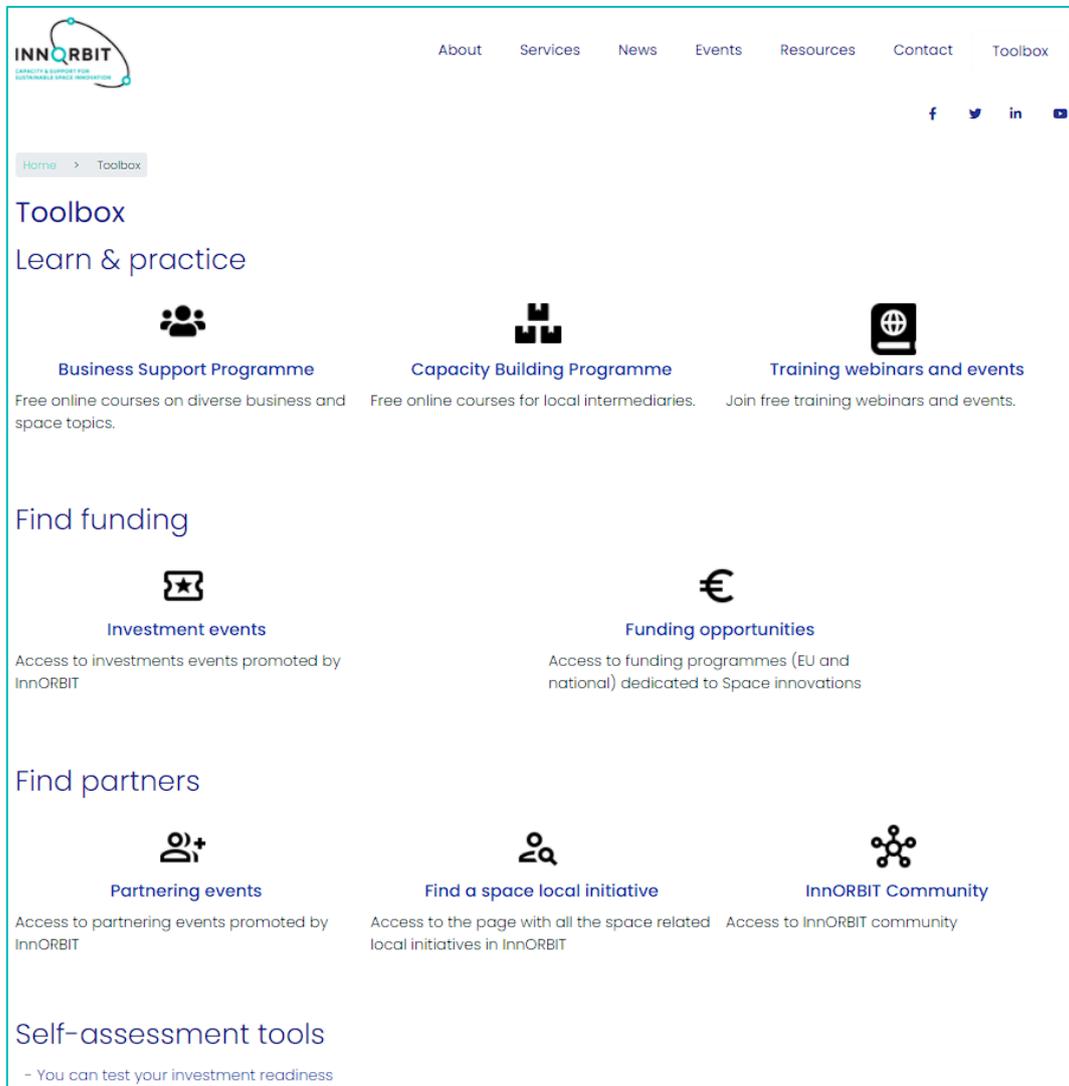


The screenshot shows the contact page of the INNORBIT website. At the top left is the INNORBIT logo. A navigation menu at the top right includes links for About, Services, News, Events, Resources, Contact, and Toolbox. Social media icons for Facebook, Twitter, LinkedIn, and YouTube are positioned below the navigation. A breadcrumb trail shows 'Home > contact'. The main heading is 'Contact'. The form contains fields for 'First Name', 'Last Name', 'Organization name', and 'Email Address'. Below these is a dropdown menu for 'Message related to:' with the option '- Select -'. A 'Message' label is at the bottom left. On the right side, there is a profile picture of Apostolos Tsolakis, his name, and his email address 'tsolakis@qplan-intl.gr' with an '@' icon.

2.4.2 Digital Toolbox

The InnORBIT Digital Toolbox user journey starts with opening the landing page, and, depending on users' interest or role, continue to use the services or the info that the project offers.

Figure 10: InnORBIT Toolbox landing page



2.4.2.1 Profiling and Needs Assessment

The profiling and needs assessment for SMEs is done to match relevant support services with concrete needs of a company. The process starts with company applying for InnORBIT Services.

Figure 11: Application Form for Companies

Local initiative 1 application

First Name

Last Name

Email

Company Name

We need to know its investment readiness level and the areas where the company needs most support.

Figure 12: IR Needs Assessment Landing Page



[About](#) [Services](#) [News](#) [Events](#) [Resources](#) [Contact](#) [Toolbox](#)

[f](#) [t](#) [in](#) [v](#)

[Home](#) > [IR Needs Assessment](#)

IR Needs Assessment

General Information
Assessment Form
Results



General Information

Your Names *

Job Title

Your Email *

Company Name *

Website *

The needs assessment is based on InvestHorizon 2.0 methodology that uses 6 intrinsic readiness dimensions (Management, Product, Business, Competition, Investment and Communications).

Figure 13: Example of Self-Assessment Questions

IR Needs Assessment	
General Information	Assessment Form
Assessment Form	
1. Management	
The Entrepreneur/CEO is knowledgeable, experienced and motivated	Score * <input type="text" value="3"/>
The Team (CTO/CSO, CFO, COO/Production, Sales, HR) is complete, knowledgeable, experienced, motivated and diverse	<input type="text" value="6"/>
The Board functions well with regular well prepared meetings and calls with experienced shareholder and independent representatives	<input type="text" value="5"/>
Sub Total Strengths & Weaknesses MANAGEMENT (%)	Sub Total SW 46,67
The HR and Leadership Gaps (Human Resources vs. Needs) are identified for Leadership (CEO, ...) and Staff with skills, culture and process definition	<input type="text" value="5"/>
An HR Plan is in place to strengthen Leadership and also to scale Staff with processes for recruitment, training, development and incentives	<input type="text" value="5"/>
Sub Total Opportunities & Threats MANAGEMENT (%)	Sub Total OT 50,00
2. Product	
There is a prototype Product with a defined Value Proposition fitting a specific Pain/Problem of a targeted group of customers	Score * <input type="text" value="0"/>

For each company, the Readiness Level (RL) is assessed on a self-assessment basis as well as by the Intermediaries who have access to company’s data upon their consent.

On completion of the self-assessment form, the system generates a self-assessment report with a notification about its overall score, also by e-mail. After a company fills in the required information in each set of questions, the system produces a score expressed in percentage. Scores below 75% are considered as weak Investment Readiness Level and require attention in the relevant weak area that the self-assessment identified. Recommendation to visit the InnORBIT webpage is automatically generated in the report. The Intermediaries can see the overall score that allows them to assess SME’s need (based on the weakest score/s in one of the assessed components of IR score).

In the following months the results of the scoring will lead to the Initiatives that are included in the toolbox. Each new initiative could be tagged with a specific category in order to be filtered in the results.

Figure 14: IR Needs Assessment Results

IR Needs Assessment

General Information
Assessment Form
Results

Results

Please review your scores and click the **Submit** button if you are happy with them. If you want to change anything, click **Back**.

Strengths and Weaknesses

MANAGEMENT (%)	70,00	COMPETITION (%)	50,00
PRODUCT (%)	50,00	INVESTMENT (%)	60,00
BUSINESS (%)	63,33	COMMUNICATIONS (%)	70,00

Opportunities and Threats

MANAGEMENT (%)	70,00	COMPETITION (%)	50,00
PRODUCT (%)	55,00	INVESTMENT (%)	30,00
BUSINESS (%)	55,00	COMMUNICATIONS (%)	70,00

Your IR Level is below 75%.

Our advice is to visit Innorbit webpage - <https://innorbit.eu> for more resources and knowledge to help you raise your score.

Back
Submit

Save

2.4.2.2 e-Learning Tool

The Learn & Practice tool centralises access to two separate external Moodle platforms, named the Business Support Programme and the Capacity Building Programme, each with their own content and active links to relevant courses.

Figure 15: e-Learning Tool

Toolbox

Learn & practice



Business Support Programme

Free online courses on diverse business and space topics.



Capacity Building Programme

Free online courses for local intermediaries.



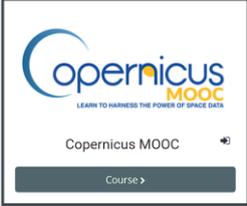
Training webinars and events

Join free training webinars and events.

Figure 16: CBP Course Categories

Course categories

- › Knowledge Hub (1)
- › Space 101 for trainers (3)
- › Running Space Entrepreneurship programmes (1)
- › Miscellaneous (4)



Copernicus MOOC

Course >

All courses

Figure 17: CBP Copernicus MOOC Course 1

Understanding Copernicus data and services – An introduction to Copernicus data and the Copernicus ecosystem

-  Introduction to Copernicus
 Mark as done
-  HANDBOOK_Module 1
 Mark as done
-  Copernicus Europe Eyes on Earth
 Mark as done
-  Accessing Copernicus data and services
 Mark as done
-  HANDBOOK_Module 2
 Mark as done

Figure 18: CBP Copernicus MOOC Course 2

Learning through success stories

-  Renewable energy
 Mark as done
-  Handbook module 3.pdf
 Mark as done
-  Security and Emergency Management
 Mark as done
-  HANDBOOK_Module 4
 Mark as done
-  Resource management
 Mark as done

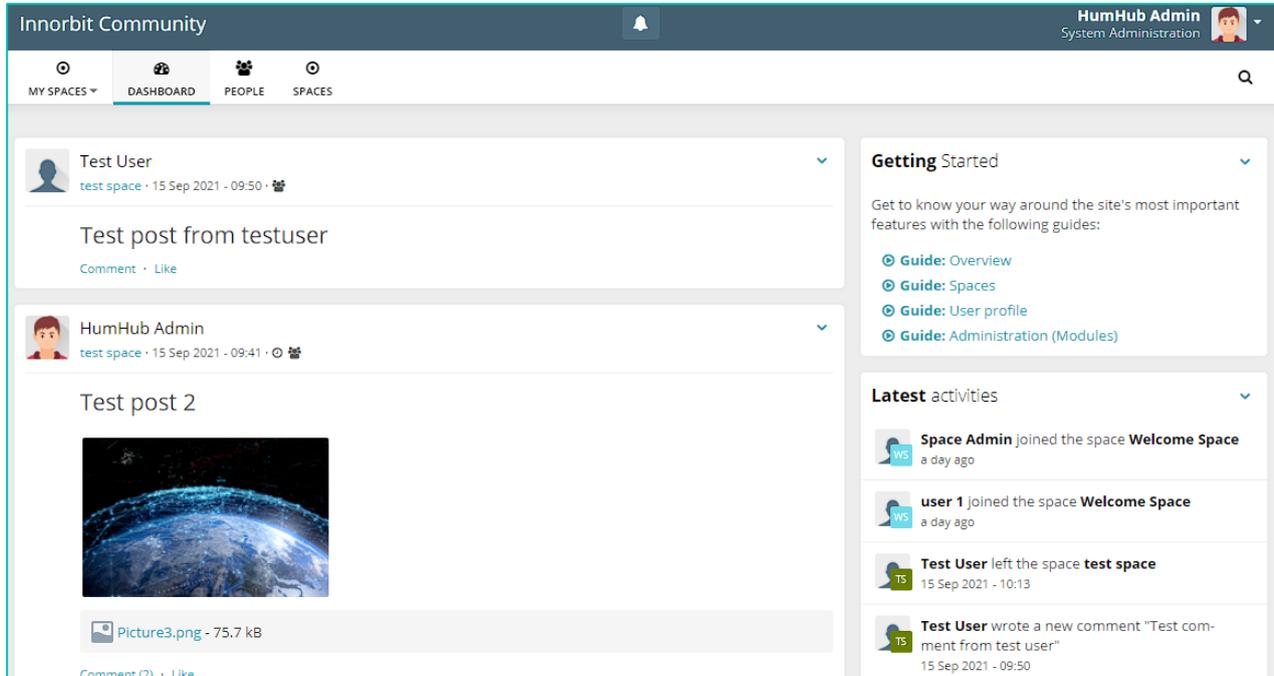
Do It Yourself!

-  Ideation – Build up your idea for a Copernicus-enabled product or service
 Mark as done
-  HANDBOOK_Module 9
 Mark as done
-  Prototyping – Test and validate your Copernicus-enabled product or service
 Mark as done
-  Handbook_Module 10
 Mark as done
-  Developing – Successfully develop your Copernicus-enabled product or service
 Mark as done

2.4.2.3 Forum (InnORBIT Community)

The InnORBIT Community Forum has been created using the open-source platform HumHub. Here, stakeholders will be able to interact with each other, follow relevant threads, create threads, and receive updates.

Figure 19: InnORBIT Community Dashboard (admin view)



For an in-depth view of the forum functionalities, please refer to the Testing the InnORBIT Community (Forum) section in Annex II.

2.4.3 Additional Tools

InnORBIT consortium mapped the local innovation ecosystems, framework conditions and opportunities, also involving stakeholders and experts in a Co-Creation Workshop and refer to previous work done and conclusions in D1.1 The European space support landscape: Insights from Central Eastern and South Eastern Europe, D1.2 Needs and challenges of innovation ecosystems and intermediaries for taking up activity in the EU space sector and D1.3 Co-design of capacity building and business support programmes. These exchanges identified an interest in expanding the Toolbox features with two more that will allow SMEs and Intermediaries to have information on funding opportunities and partners, thus improving the user experience.

2.4.3.1 Find Funding (Events & Funding Opportunities)

The “Find funding” functionality has been implemented in order to increase the UX and improve the process of finding events and funding opportunities for the SMEs. Intermediaries feed the sections with relevant content. This not only allows users to expedite processes, but also allows the partners to gather information on users’ interests.

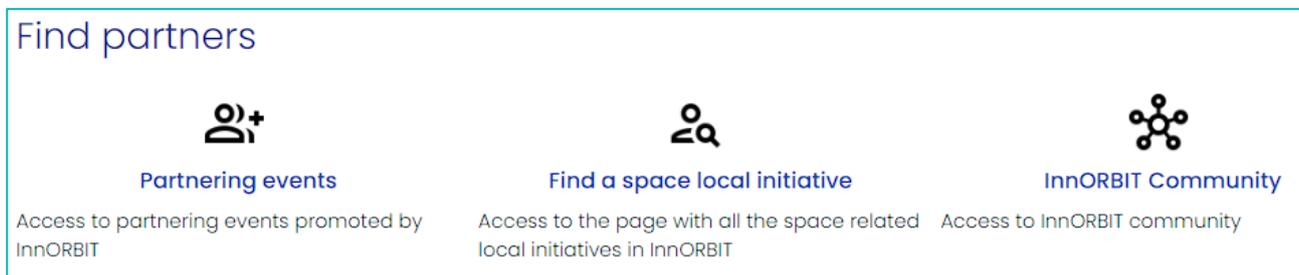
Figure 20: Find Funding Additional Functionality



2.4.3.2 Find partners (Initiatives, Partnering Events)

The “Find partners” functionality has been implemented to make initiatives and intermediaries more visible and again, to improve the UX and the process of finding initiatives.

Figure 21: Find Partners Additional Functionality



3 InnORBIT Toolbox Testing and Validation

InnORBIT Toolbox testing and validation was implemented with three main goals:

- Confirm that all functions of the InnORBIT Digital Toolbox correspond with the requirements and specifications set in D2.1 InnORBIT Toolbox Specifications
- Check if all features of the Toolbox work properly, fix bugs and make the Toolbox fully operational
- Receive initial feedback from the testers in different use case scenarios on all features of the Toolbox and make the first recommendations for maintenance and improvement.

The validation from the InnORBIT Advisory Board will take place before the deployment of the 1st iteration of the local space support initiatives after the Toolbox is already in operation phase.

The InnORBIT testing was done in accordance with individual user journeys that were elaborated for each type of user. The Toolbox is developed based on the InnORBIT DoA. The InnORBIT Toolbox Specifications (D2.1) were developed after numerous exchanges with consortium partners in regards to the practical application of functionalities. It will provide support to the various stakeholders who will visit or use the InnORBIT web platform. There are 4 user types that were be tested:

1. **Admin:** Are the users who maintain, provide and/or edit webpage and toolbox content, including events, local initiatives, and news; they publish newsletters; are the primary contact for other users or for trouble shooting; and they follow the registrations (intermediaries, local initiatives, and SMEs) and subscriptions

2. **Intermediary:** Are the users who follow registrants (SMEs); create, edit, or delete initiatives, events, and funding programmes; have access to SMEs self-assessment results; propose improvements to the functionalities; act as a secondary contact for the local initiatives and the SMEs; sign up and participate (or facilitate) the InnORBIT Forum (Community); and follow and sum up the surveys in downloadable file

3. **Authors:** Are the users has access to more items than intermediaries, uses free access to all pages which are public, registers for events or applies for initiatives, accesses the success stories & best practices, events pages, and funding opportunities pages in case these pages are restricted to only registered users and has access to available courses published on Moodle.

4. **External user (SMEs and local initiatives):** They register on the web page; receive confirmation for registrations; receive confirmation to subscriptions for the newsletter; fill in the self-assessment form; open and follow e-learning courses; and fill in the surveys

Tech Tour Global developed a Testing Guide with detailed instructions for the consortium partners. The specific instructions are detailed in Annex II.

The testing results were recorded by the testers and were considered to make the Toolbox operational.

4 Conclusions and next steps

In this report, we have presented the development of the first complete version of the InnORBIT Digital Toolbox. The main purpose of the developed digital functions and services will be used to connect innovators and SMEs with local initiatives and provide them with opportunities for exchange, self-assessment, funding and learning in accordance with their needs. On the other hand, intermediaries will have the opportunity to build their capacity, provide information about local initiatives, share knowledge, and recommend suitable events and actions to the SMEs.

Four different types of users are supported with regard to their specific roles in the system: Admin, Intermediary, SME and Author. Each user has a different use case scenario. This is the key to the services and access provided for each user type. The user stories are at the core of the development process. Based on them we defined concrete technical tasks and planned the development cycles. The first version of the Toolbox covers all major functionalities such as registration & profiling, e-learning tool, forum, and project website.

During the first iteration (of the 2) of the deployment of local space support initiatives, Capacity Building for the innovation intermediaries of our consortium (COR, ALG and ROS) will be implemented specifically in the areas of methodologies, tools, and processes of InnORBIT. This way, the Toolbox will support them in establishing local space support initiatives and delivering the project's business support programme to entrepreneurs, start-ups, and scale-ups. The feedback collected during these iterations from participating stakeholders will facilitate improvements to the methodology, capacity building and business support programme processes, which are subsequently tested in a real-life context in a feedback loop. Each iteration consists of training the innovation intermediaries to successfully leverage InnORBIT's solutions and concludes with a (virtual) validation workshop with members of the Advisory Board (AB), enabling us to assess the Toolbox performance and collect ideas for its continuous improvement. After the requirements will be refined, we will adjust processes for every major feature of the Toolbox.

The current testing methodology is covered in the current deliverable. The strategy for maintenance and fine-tuning of the InnORBIT Digital Toolbox is described in detail in D2.3 "Fine-tuning and maintenance plan for the InnORBIT Digital Toolbox".

Annex I - User Needs

User	Toolbox Function
General Public	Inform and guide about InnORBIT project objectives, concept, scope, structure and activities, achievements, make inquiries. This includes access to the page promoting the InnORBIT local initiatives & events pages.
Innovation Intermediaries	<p>Access with an editor account the platform and be able to create or edit:</p> <ul style="list-style-type: none"> • News • Events • Success stories & best practices • Local initiatives • Funding opportunities <p>Experts from intermediaries will also be able to access the data provided by the SMEs and the results from the self-assessment forms, as well as information that will enable them to customise the business support services offered to the SMEs.</p> <p>Intermediaries will also have administrator access to the features related to their initiative (or country) on the social network set up for the project. They will be able to manage members' applications, engagement, and content related to their region of operation.</p>
SMEs involved in the InnORBIT initiatives	<p>Free user access to all pages which are public, register for events or apply for initiatives.</p> <p>Access the success stories & best practices, events pages, and funding opportunities pages in case these pages are restricted to only registered users.</p> <p>Perform a self-assessment (using the available assessment forms), have access to available courses published on Moodle.</p> <p>Register and access the space related to the initiatives they take part in on the community forum set up for the project. They will be able to access content that is shared with them.</p>
Author	<p>The interface is slightly different, and the author has more permissions than the intermediaries. This role is meant for a couple of partners in the consortium who need access to more items than intermediaries.</p> <p>Free user access to all pages which are public, register for events or apply for initiatives.</p> <p>Access the success stories & best practices, events pages, and funding opportunities pages in case these pages are restricted to only registered users.</p> <p>Perform a self-assessment (using the available assessment forms), have access to available courses published on Moodle.</p> <p>Register and access the space related to the initiatives they take part in on the community forum set up for the project. They will be able to access content that is shared with them.</p>
Admin	Feed in with content, monitor and track usage, metrics, etc. that feed into the monitoring framework and feedback loop; troubleshooting, answer inquiries.

Annex II - InnORBIT User Journey and Testing Guide

InnORBIT User Journey

Testing Guide

This document provides guidance for all user types that will visit or use the InnORBIT web portal. The objective is to have all functionalities of the web portal, including the InnORBIT Toolbox, tested and to gather internal feedback from the InnORBIT consortium in a simulation of user roles.

The InnORBIT testing was done in accordance with individual user journeys that were elaborated for each type of user. The Toolbox is developed based on the InnORBIT DoA. The InnORBIT Toolbox Specifications (D2.1) were developed after numerous exchanges with consortium partners in regards to the practical application of functionalities. It will provide support to the various stakeholders who will visit or use the InnORBIT web platform. There are 4 user types that were tested:

1. **Admin:** Are the users who maintain, provide and/or edit webpage and toolbox content, including events, local initiatives, and news; they publish newsletters; are the primary contact for other users or for trouble shooting; and they follow the registrations (intermediaries, local initiatives, and SMEs) and subscriptions
2. **Intermediary:** Are the users who follow registrants (SMEs); create, edit, or delete initiatives, events, and funding programmes; have access to SMEs self-assessment results; propose improvements to the functionalities; act as a secondary contact for the local initiatives and the SMEs; sign up and participate (or facilitate) the InnORBIT Forum (Community); and follow and sum up the surveys in downloadable file
3. **External user (SMEs and local initiatives):** They register on the web page; receive confirmation for registrations; receive confirmation to subscriptions for the newsletter; fill in the self-assessment form; open and follow e-learning courses; and fill in the surveys

Testing of the InnORBIT Web Portal functionalities (SME)

For all the following functionalities, please perform a basic content check, looking for any grammar mistakes or wrong content. All available links should also be checked to see if they lead to the right page. This should be considered as a SME check, meaning that you are testing the website from the point of view of an SME or another visitor.

About

The about page contains information regarding the project, its objectives, the concept and lists all the partners involved as well as the members of the advisor board.

Administrators can edit the content of this page.

Services

The “Services” page showcases and describes the Capacity Building Programme and the Business Support Programme.

Administrators can edit the content of this page.

News

Here, SMEs and any visitor will be able to see the latest news related to InnORBIT.

The news will be added using the intermediary and author accounts, with the process being explained further below.

Newsletter

On this subpage, visitors will be able to subscribe to the InnORBIT newsletter and to see the list of previous newsletters. Authors can edit the content of the page to add newsletters in the list.

Events

This page will contain all InnORBIT related events, which will be added using the intermediary and author accounts, with the process being explained further below. Clicking on a specific event opens the full event page.

For this page, please also test the following as external visitor:

- The filtering system
 - Upcoming/ Past
 - Location
 - Type
 - Category
- Filtering output: make sure that the filters output the correct events based on the criteria selected.

Any recommendations for filter fields to add to events?

Recommendations:

Please also do a test as an intermediary and as an author and add an event and edit an existing event:

Does it work as expected?

Anything to change in the events pages

Recommendations:

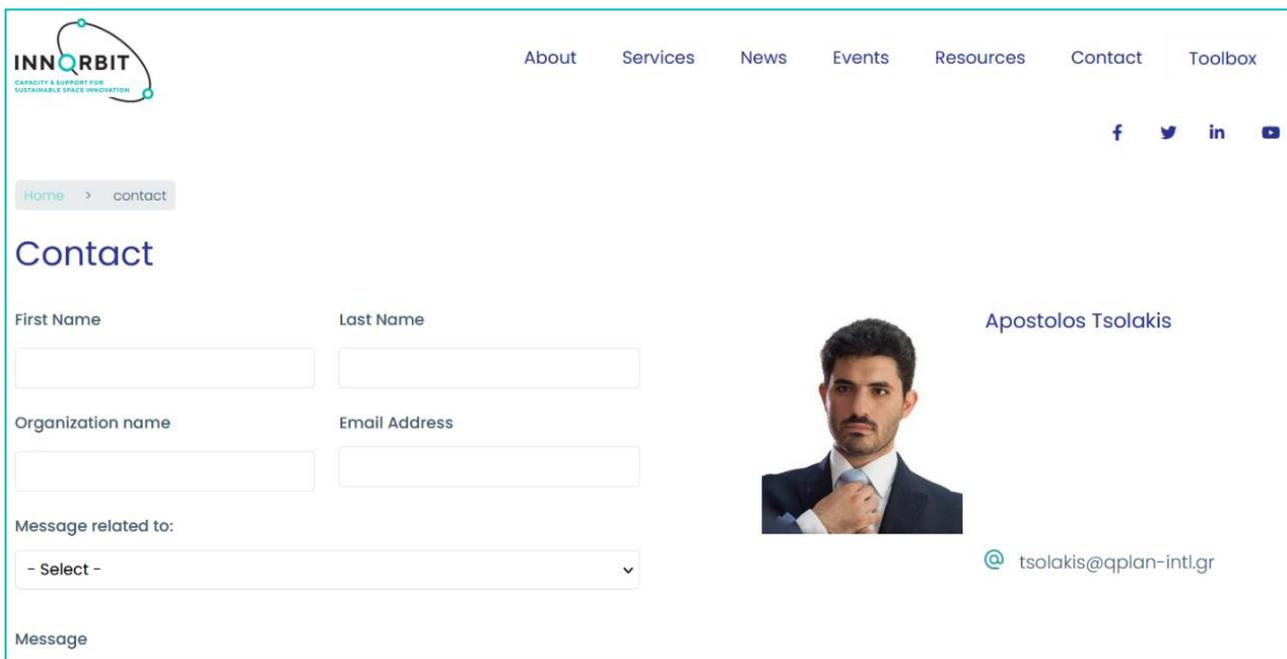
Resources

Resources will contain downloadable materials and publicly available reports.

Authors and administrators can edit the content of this page.

Contact

The contact form can be found here, which will be used to get in contact with the main InnORBIT coordinator.



The screenshot shows the InnORBIT website's contact page. At the top left is the InnORBIT logo. A navigation menu includes 'About', 'Services', 'News', 'Events', 'Resources', 'Contact', and 'Toolbox'. Social media icons for Facebook, Twitter, LinkedIn, and YouTube are on the right. A breadcrumb trail shows 'Home > contact'. The main heading is 'Contact'. The form contains fields for 'First Name', 'Last Name', 'Organization name', and 'Email Address'. Below these is a dropdown menu for 'Message related to:' with '- Select -' as the current selection. A 'Message' text area is at the bottom left. On the right, there is a profile picture of Apostolos Tsolakis, his name, and his email address 'tsolakis@qplan-intl.gr' with a social media icon.

Figure 22: Contact webform

Toolbox

FAQ

The FAQ will serve as an immediate, contactless support landing page for visitors. The content here will be updated regularly based on the questions and complaints received throughout the project's lifetime.

What Q&As can we include in the FAQs before it goes live?

Recommendations:

Forum

This tab will lead straight to the InnORBIT Community (forum). Tests are in the next section.

Toolbox landing page

This is a landing page, centralising links to diverse functionalities of the Toolbox.

Learn & Practice: will link later to Moodle but we still need to decide where we will link to (BSP, CBP or both?)

Any recommendation where we should link this?

Maybe 2 links: to the BSP and to the CBP with short descriptions?

Recommendations:

Find funding

provides quick links to pre-filtered investment events (type investment events) and to funding programme (opportunities).

Investment events: External visitors will access the Events page which is filtered and only shows investment events. Authors and the administrator can create new events or edit existing events. Please test as Author to make sure you can add events.

Any fields you feel should be added to events?

Any new categories of events?

Recommendations?

Funding opportunities: External visitors will access the funding opportunities list and can click on a funding opportunity to find out more details.

Authors will be able to add or edit funding opportunities.

Find partners: provides quick links to pre-filtered partnering events (type partnering events), local initiatives and the InnORBIT Community.

Partnering events: External visitors will access the Events page which is filtered and shows only partnering events. Authors and administrator can create new events or edit existing events.

Same Functionality as Investment Events. Just test that when you click on the link, you go to the events page, and it is filtered by the category named partnering events.

Recommendations:

InnORBIT Initiatives

Here, users will be able to see and search through all available and past initiatives related to InnORBIT.

For this page, as an external visitor, you should be able to see the list of initiatives, filter the list according to the available criteria (responsible intermediary, services delivered, status) and see the list of corresponding initiatives. You can click on an initiative and see its full details.

As external visitor, go to the local initiatives page, test the filtering.

Click on an initiative to see its full description.

Are the filtering fields ok? Do we need additional ones?

Is the information provided about an initiative suitable? Do we need to add new fields?

Other recommendations:

Testing accounts

Intermediary

Check whether can have access to the admin page, that we can publish, edit or unpublish news, newsletters, events, and initiatives, and that we can filter and edit events and initiatives..

1. News
 - a. Add

When adding news, please access the “Add Content” functionality under “Shortcuts” on top right. In the next screen, select “News: InnORBIT” and apply by clicking “Filter”. This way you will be able to create a news item.

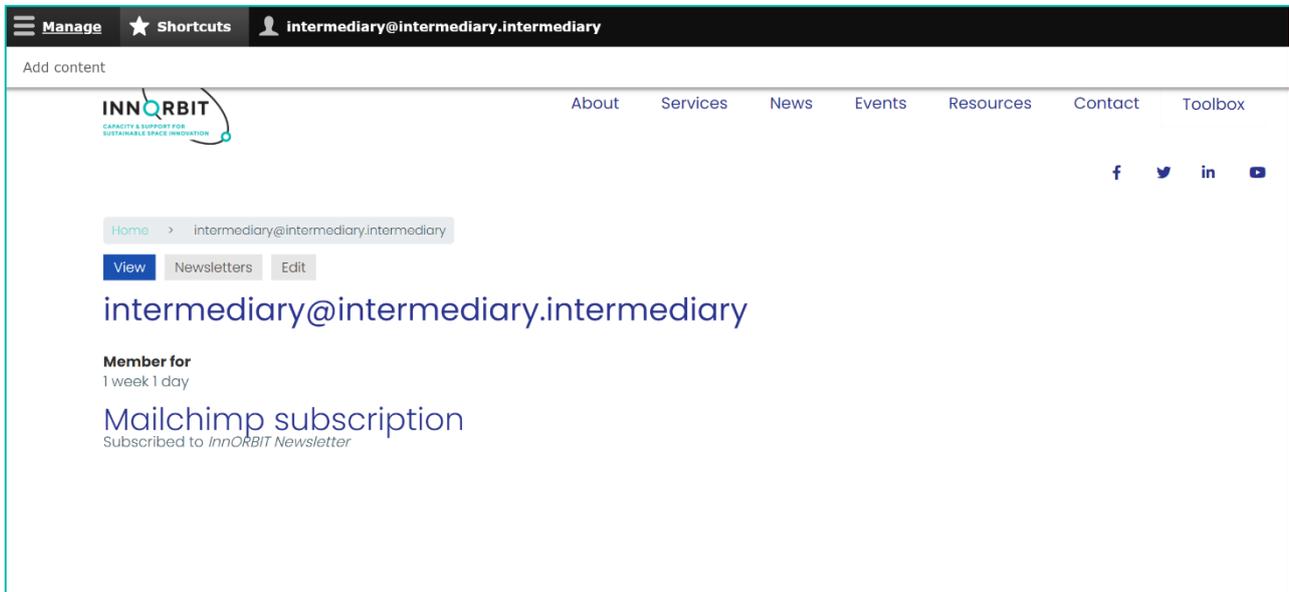


Figure 23: How to add news 1

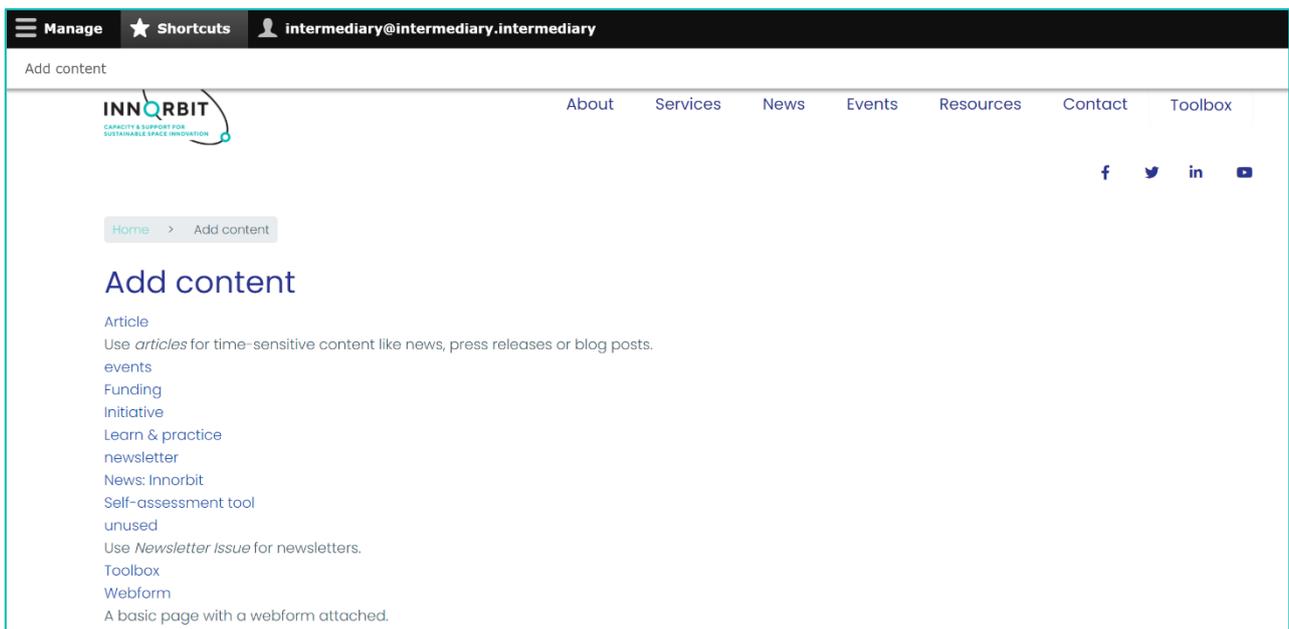


Figure 24: How to add news 2

On the left side of the screen, you will see the following:

- Title: only seen by admins, used for internal purposes
- **News Title:** this is the title that will be seen publicly on the website
- Summary (click “Edit Summary” next to Body to access): this will be the text showing on the news page, next to all other news
- Body
- Text format: to be kept “Basic HTML”

- News image
- Date
- Age
- **Save as: Draft/ For review/ Published. Please make sure to select the appropriate one**

As an intermediary or as author:

Create a news item

Does it work?

Any recommendations?

b. Edit News items:

Go on the [News Page](#), click the item that you want to edit, and edit it by clicking the edit button.

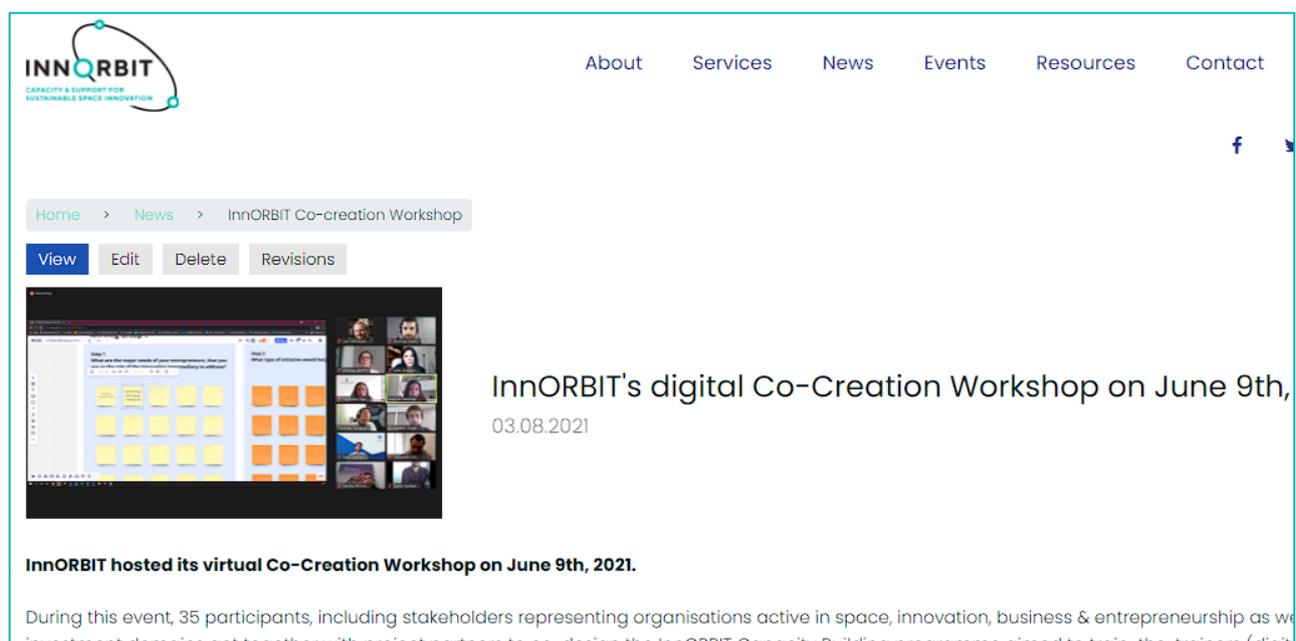


Figure 25: How to edit news

As an intermediary or as author:

Edit a news item

Does it work?

Any recommendations?



2. Events

When you want to add events, click the “+Add content” button, scroll and select “events”. Adding or editing events is 90% similar with adding and editing news, with the following additional fields to fill in.

- Event location
- Event type
- Event categories

As an intermediary or as author:

<p>Create an event item</p> <p>Does it work?</p> <p>Any recommendations?</p>
--

To edit an existing event, go the events page, click on the event you want to edit and open it. Click on the edit button

As an intermediary or as author:

<p>Go to a specific event item and click on edit, make some changes, and save it.</p> <p>Does it work?</p> <p>Any recommendations?</p>
--

3. Initiatives

The initiatives page will show all InnORBIT initiatives. For each initiative, we can create a full description including a link to apply.

To add an initiative, go through the same menu as before, click “+Add Content” and select “Initiative”. Again, the fields that will have to be filled in are similar with the ones from Events and News, with a few additional fields:

- Responsible intermediary

- Services delivered: the categories have not yet been decided. Please provide some options in your feedback.
- Status: Open, Closed, Upcoming
- As an intermediary or as author:

Create an initiative item

Does it work?

Any recommendations?

The intermediaries list (to select from) still needs to be defined, please recommend content for the list:

The services list (to select from) still needs to be defined, please recommend content for the list:

The Statuses list (to select from) still needs to be defined, please recommend content for the list:

Suggestion: Open, Closed, Upcoming

To edit an existing initiative, go to the initiatives page, click on the initiative you want to edit. This will open the full description of the initiative. Click on the edit button:

Open a specific initiative and edit its content and save

Does it work?

Any recommendations?

Any recommendations on the role of intermediaries: limit or give more permissions?

Do we need to foresee a role of “consortium intermediary” and a role of “external intermediary” with different permissions?

If yes, what should external intermediaries not be able to do?

Author

All the above functionalities can also be tested with an author user. The interface is slightly different, and the author has more permissions than the intermediaries.

This role is meant for a couple of partners in the consortium who need access to more items than intermediaries.

Test the above functionalities with author's permissions.

SME (external user):

Check that there is access to the webpage, that all features (links) open; that you can filter events and initiatives, that you can register, that you can express interest in an initiative or an event and that you receive confirmation, that you can subscribe to the InnORBIT newsletter, and receive confirmation of it, that you can contact the project in the Contact Form and receive confirmation that his/her request has been received; and that there is access to the Toolbox.

Please refer to the first section, "Testing of the InnORBIT Web Portal functionalities (SME)" for a step-by-step testing guide.

Testing the InnORBIT Capacity Building Programme - e-Learning Tool (Learn and Practice)

Functionalities gathered from the user journeys for the CBP:

- Promotion/visibility for the CBP
- Application (Expression of interest) for intermediaries
- Access to EoI responses
- Selection, invitation, and onboarding that go through emails and calls
- Create an account for the intermediary on the CBP (with student role)
- Enrol the intermediary in the recommended courses

Credentials needed for the testing (withheld in this publication for security reasons)

On the website (to access the pages and the application forms:

Author

Or

intermediary

On the CBP (Moodle)

Visibility on the website

The CBP and BSP are described in the services page.

From our point of view, the description is not attractive for future participants and should be revised.

As external website visitor, access the development page.

Is the content meaningful and does it really show the value proposition?

Do we need to make any changes? If yes, please provide the message to be posted.

Would you like us to include links to the CBP and BSP in the Toolbox landing page?. We could add in the Learn and practice section:

Creating the Expression of interest webform

For the moment, only Drupal administrators can create webforms (for expression of interest) and assign specific users a role allowing to access and export the results. We can extend later and allow other roles (like Authors) to create forms and collect results.

As it will be done by administrators, nothing to test here. However, we will have to define the fields in the expression of interest. For now, it is a very simple form.

One form will be created per local initiative.

Filling in an expression of interest

Go to the initiatives page.

From the list, click on the initiative “test 3” in which we have included a link to an expression of interest

Once the full description of the local initiative is open, you can see the full description and click on the apply here link. Click on it.

You are redirected to a simple form where you can provide your information.

Fill in and submit the form.

The form is entirely customisable: fields, confirmation, what we do with the data, access permissions, ...

As external website visitor, did you succeed to fill in your expression of interest?

Any recommendations on the process?

Any customisation to the expression of interest form?

Access/export responses

For this specific form, we have given access to the user intermediary. This user can also export the results.

Login on Drupal with the relevant username and password.

Together with the form you will see several buttons to manage the form: test, results, build, settings

Test the different buttons to see what you can do

The button “results” allows to see submissions and to download them in a csv.

Home > local initiative 1 application

View Test Results Build Settings References

Local initiative 1 application

First Name

Last Name

Email

Company Name

Submit

Figure 26: Initiative Application Form

Logged in as an Intermediary, test the above steps

Any recommendations on the process?

Any customisation to the expression of interest form?

Create some courses in the CBP to have some content (FSTP)

Before going further in the tests, it would be great that FSTP tests and uploads couple of courses on the CBP (Moodle)

Go to the CBP Moodle instance.

To login, please click the red “Log in” button and use the credentials provided.



Figure 27: CBP Login

Login with a manager credentials.

Add a course

From the homepage, please access the site administration menu (right bottom of the screen). Then click on “Courses”, you will see the following image.

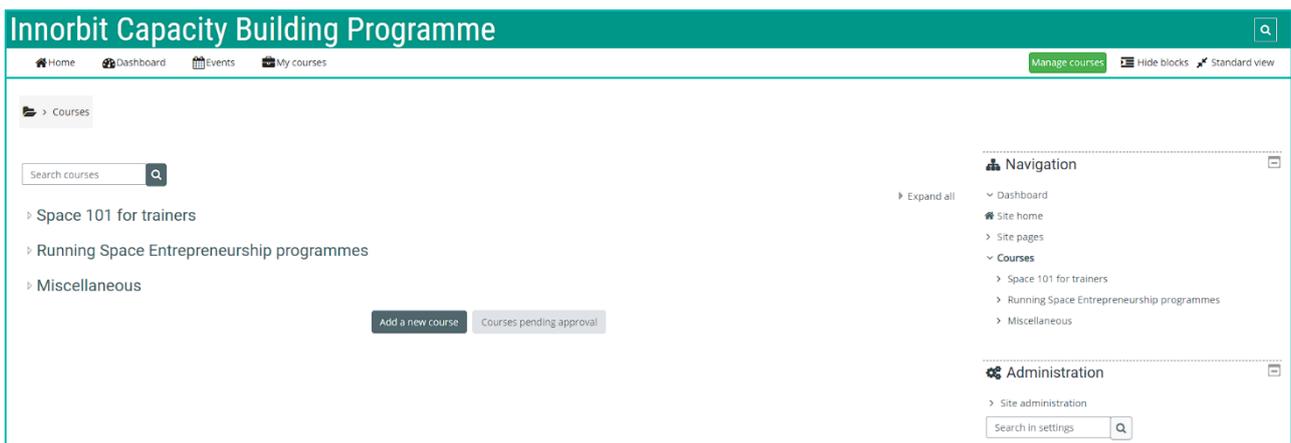


Figure 28: CBP - How to add a Course

To add a new course, simply click “Add a new course”. Here you have a number of steps to go through in order to finalise the course.

- a. General: here you will input general information such as course name, short name, category (if the wrong one is selected, please click the small X, and select the proper category. The final categories have not yet been decided. In your feedback, please provide some options), visibility, start-end date, and ID
- b. Description: here you will be able to have a course summary and attach images
- c. Course format: select the format, number of sections, manage hidden sections and the overall layout of the page
- d. Appearance: here you can force a language (not recommended), decide the number of latest announcements visible only to enrolled “students”, show/not show the gradebook, activity reports and dates
- e. Files and uploads
- f. Completion tracking
- g. Groups

- h. Role renaming: here you can rename the roles used during the course. For example, changing “student” to “Intermediary”
- i. Tags: not available yet

After adding 3-4 courses:

Did you succeed to upload the courses?

Any recommendations on the process?

Create an account on Moodle (the CBP) as student

For each selected intermediary, the manager will create an account on the CBP/

Log in using the manager credentials.

On the right bottom side, click on site administration and navigate to Site Administration > Users > Browse list of users or create user



Figure 29: CBP – Creating an Account

Create a new user with the data you have about the selected intermediary.

Did you succeed to create some users?

Any recommendations on the process?

Enrol the intermediary in the recommended courses

A test course “Test C 1” has been created in the Miscellaneous category in order to showcase the functionality.

To navigate to a respective course, find courses in the “Navigation” menu and click it. Now you will see the 3 categories -> click Miscellaneous or any of the categories the course is in. Click the course name and you will be taken to the course’s interface.

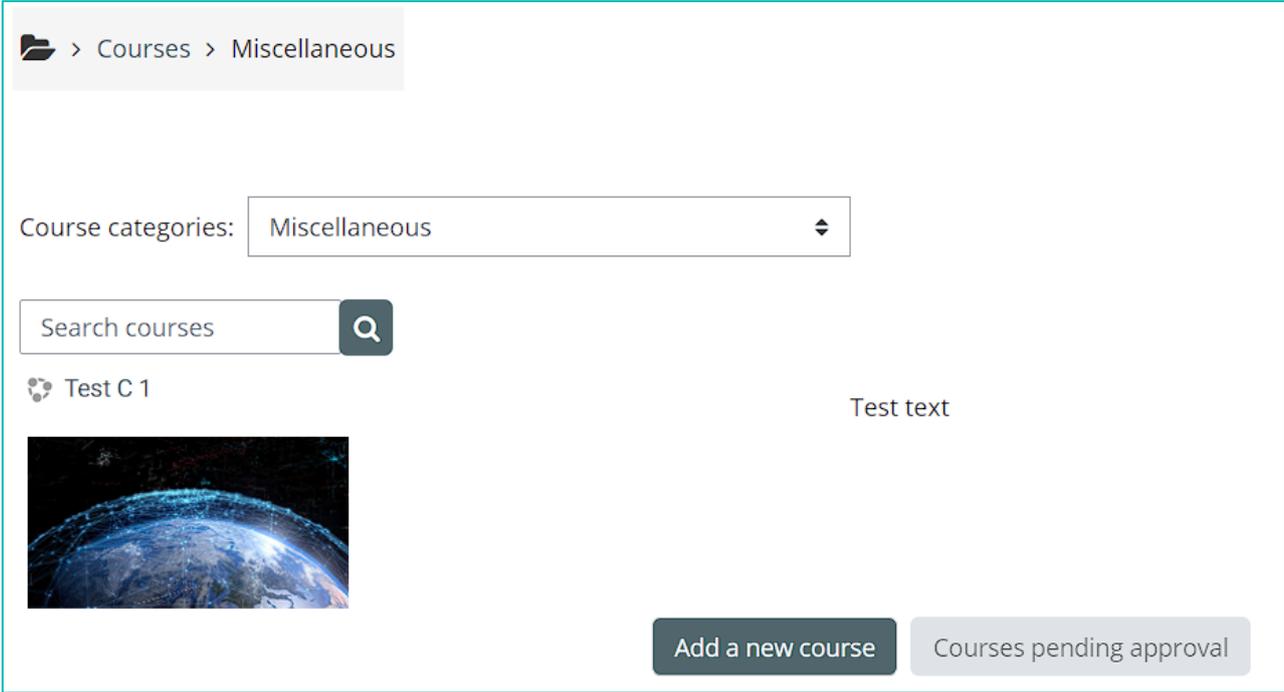
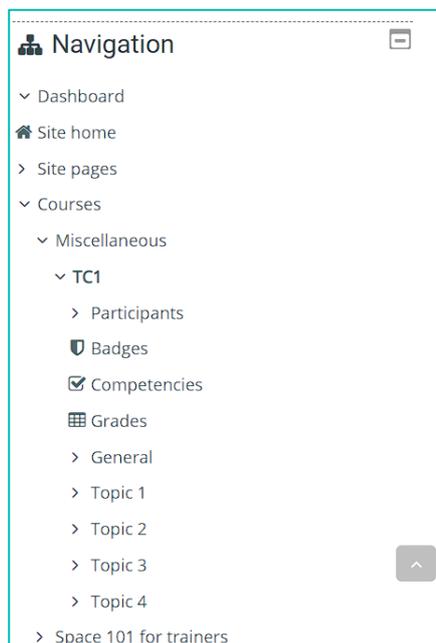


Figure 30: CBP – How to enrol intermediaries to Courses 1

In order to enrol intermediaries, find “Participants” in the right-hand side “Navigation” menu. Click it and you will be taken to the participant’s interface.

Figure 31: CBP – How to enrol intermediaries to Courses 2



Here you simply have to click “Enrol users” and fill in the 5 fields (click show more) and click “Enrol users”:

- Select users: you can either type each user or select them from the drop-down menu by clicking the small arrow. Multiple users can be added at the same time. (Bulk add)
- Assign role: manager, teacher, student, or non-editing teacher
- Starting/ Ending dates: in case you want the enrolment to have a cut-off date
- Enrolment duration: tick in case you want the enrolment to have a certain duration, starting from the starting date selected

Did you succeed enrolling users?

Any recommendations on the process?

The intermediary takes the courses

After an intermediary has been enrolled to a course, it will be visible in “My courses” tab.

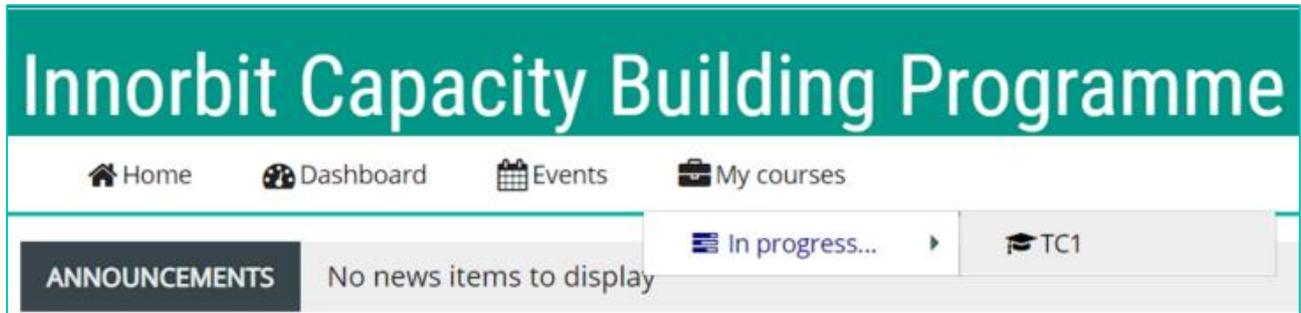


Figure 32: How to check enrolled Courses

Clicking the course name will take the intermediary to the course, where all topics and announcements will be visible. A test activity (quiz) has been created to better showcase the functionality. There are a multitude of activities to choose from when managing the course as a teacher.

Have you been able to complete the quiz and navigate through the different menus and functions?

Any recommendations on the process?