

## Explanation of each process step of the future Onboarding process for new services in Helmholtz Cloud v10

Process step	Role	Its detailed content
Starting points		<ul style="list-style-type: none"> <li>- New service should be offered via Helmholtz Cloud</li> <li>- Triggered by a service provider who wants to offer a new service</li> <li>- New service required in Helmholtz Cloud"/&gt; </li></ul>
Fill out Application Form for new services	Service provider	<ul style="list-style-type: none"> <li>- Application Form is available in Plony</li> <li>- Application Form includes all necessary information on a service to evaluate whether it passes all <b>Exclusion criteria</b></li> </ul>
Check whether service fulfills Exclusion criteria	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Check whether the Application Form includes all necessary information (is complete/filled out correctly)</li> <li>- Clarify unclear points, if necessary</li> <li>- Check if service passes all Exclusion criteria (partly automated check via Plony, thus reducing the effort required for evaluation to a minimum)</li> </ul>
Document the criteria the service fails to fulfill	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Could be e.g. an export of Application Form from Plony showing which Exclusion criteria are not fulfilled</li> </ul>
Give feedback to the service provider and offer chance to adapt application	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Inform service provider about evaluation results and underline which Exclusion criteria were not fulfilled/what needs to be done to fulfill these criteria</li> <li>- Offer the possibility to review and adapt the application and therefore apply again</li> </ul>
Decide whether to adapt or withdraw the application	Service provider	<ul style="list-style-type: none"> <li>- Decide whether the Exclusion criteria not yet fulfilled can be fulfilled / actions that are required to be done can/want to be performed</li> </ul>
Inform HIFIS about application withdrawal	Service provider	<ul style="list-style-type: none"> <li>- Inform HIFIS that application will not be adapted and set status to "Application withdrawn"</li> </ul>
Adapt application and apply again	Service provider	<ul style="list-style-type: none"> <li>- Adapt application in Plony and send it again to HIFIS</li> </ul>
Put the service to the Service Pipeline	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- The Service Pipeline includes all upcoming services that are not yet available for usage in Helmholtz Cloud Portal</li> </ul>
Ask service provider to fill out Service Canvas	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Service Canvas (thus including Service Description information) is available in Plony</li> <li>- Provide support if required to fill out the Service Canvas</li> </ul>
Fill out Service Canvas incl. general usage conditions for	Service provider	<ul style="list-style-type: none"> <li>- Service provider fills out Service Canvas</li> <li>- General usage conditions should be defined for every service</li> </ul>

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service, valid for all Helmholtz centres (service description)		<ul style="list-style-type: none"> <li>- Especially for mass services the usage conditions (e.g. storage space, support times) need to be clearly defined</li> <li>- General usage conditions should be documented in the fields belonging to the service description</li> </ul>
Send Service Canvas to Service Portfolio Manager	Service provider	<ul style="list-style-type: none"> <li>- Send filled out service information to Service Portfolio Manager via button "Send" in Plony</li> </ul>
Check organisational part of service information	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Check whether the Service Canvas includes all necessary information (is complete/filled out correctly)</li> <li>- Check whether organizational part of service information is filled in a meaningful way</li> <li>- Check whether automatic calculation of score according to information given for weighting criteria is conducted correctly through Plony + whether service is put in the right place of the service integration list according to score</li> <li>- Clarify unclear points, if necessary</li> <li>- Give service provider the chance to adapt the Service Canvas if something is missing/not clear enough</li> </ul>
Ask service provider to give necessary information/ modify Service Canvas	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Ask service provider to modify Service Canvas information according to feedback from HIFIS Service Portfolio Management/ Service Integration Management</li> </ul>
Ask Service Integration Manager to check technical part of service information	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Check whether technical part of service information is filled in a meaningful way</li> <li>- Clarify unclear points, if necessary</li> <li>- Give service provider the chance to adapt the Service Canvas if something is missing/not clear enough</li> </ul>
Service Integration process	Service Integration Manager	<ul style="list-style-type: none"> <li>- Please check the corresponding process documentation for more details</li> </ul>
Inform service providers that Onboarding process is completed	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Give information to service providers that their service will soon be available in Helmholtz Cloud Portal and that the Onboarding process is completed</li> <li>- Set time to "react" before service will be released (no decision to be made, only info)</li> </ul>
Announce the availability of new service	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Officially announce the newly "released" service on HIFIS Website/in Helmholtz Cloud Portal</li> </ul>