

Review object

General

Date	November 2022 – February 2023
Review type	Services in Portfolio + service selection criteria + Portfolio processes
Reason for review	Regular interval
Reviewer(s)	WG Service Portfolio <i>Lead: Laura Marie Holz (LH)</i>

Results

Preliminary results	<p>Remove 3 services from Service Portfolio since they were withdrawn by the Service Provider:</p> <ul style="list-style-type: none">- JupyterHub (HMGU)- OpenStack (KIT)- Redmine (HMGU) <p>Update Service Information as indicated by Service Owners</p> <p>Adapt Service Selection criteria:</p> <ul style="list-style-type: none">- Ease requirements regarding degree of automation in user provisioning and deprovisioning – rather ask for commitments <p>Adapt Service Portfolio processes:</p> <ul style="list-style-type: none">- Service Onboarding Process- Service Recruiting (former Request for Service) Process- Service Integration Process- Simplify rights matrix for Operation of Services- Add Service type for “guest services” (tbd) <p>Adapt fields in Plony (modification of explanation texts and field names, deactivation of unnecessary fields, addition of new fields)</p>
Recommendations for HIFIS	Implement changes in Process Framework (+ attachments) and Plony
Recommendations for service provider(s)	/
Final results	Added colored background in Service Recruiting Process to emphasize Demand Management is part of this process (resulting in no changes of process steps/content, only visualization)
Additional comments	/

Approval of Process Framework adaptation (if applicable)

Date	21.02.2023
Approved by HIFIS Coordinators	Yes, via Mail by HIFIS Manager on 21.02.2023

Service Portfolio Review checklist – All services in Service Portfolio

Service Pipeline

Services in Pipeline	Service Provider	Service maturity	All Exclusion Criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
AWI Marketplace	AWI	<ul style="list-style-type: none"> Fully Integrated Service 	(Yes)	Service Readiness: Longer	Yes	/	Accept "Longer" as answer for Service Readiness, since service provider is willing to prepare service and push service integration forward	/
JupyterHub	HMGU	Service offer withdrawn by Provider					Remove service from Portfolio	/
Ocean & climate Sensor Management	AWI	<ul style="list-style-type: none"> Fully Integrated 	(Yes)	Service Readiness: Longer	No, changes required	<ul style="list-style-type: none"> Add "Documentation" link Add information on "Connection to HIFIS Helpdesk" Adapt estimation of "Expected number of using centres" Adapt estimation of "Expected number of users" Adapt explanation regarding 	Conduct suggested changes	/

Services in Pipeline	Service Provider	Service maturity	All Exclusion Criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment	
						<p>“Expected number of users”</p> <ul style="list-style-type: none"> • Add information on “Planned Helmholtz AAI connection” • Add “IPv6 statement” • Add information on “Two Factor Authentication” 			
OpenStack	KIT	Service offer withdrawn by Provider						Remove service from Portfolio	/
Redmine	HMGU	Service offer withdrawn by Provider						Remove service from Portfolio	/
REMS	DKFZ	• Pilot Service	Yes	/	Yes	/	Service just joined the Service Pipeline. Service Information may be updated/adapted during the Service Integration process.	/	
SciFlow	HZB	• Pilot Service	Yes	/	Yes	/	Service just joined the Service Pipeline. Service Information may be updated/adapted	/	

Services in Pipeline	Service Provider	Service maturity	All Exclusion Criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
							during the Service Integration process.	
Storage (HDF)	DESY	<ul style="list-style-type: none"> Pilot service 	(Yes)	Service Readiness: Longer – Comment from U. Jandt: “Service is hopefully to be brought online beginning 2023.”	(Yes)	Comment from U. Jandt: “Service Description and User Onboarding Description will be updated shortly before service is brought online.”	/	/
webODV	AWI	<ul style="list-style-type: none"> Fully Integrated service 	(Yes)	Service Readiness: Longer	No, changes required	<ul style="list-style-type: none"> Adapt information on “Backup Strategy” Adapt “Description (long)” Add “Keywords/ Tags” Add “Documentation” link Add “Link to Service for Usage” Adapt information on “Communication with Users” 	Conduct suggested changes	/

Services in Pipeline	Service Provider	Service maturity	All Exclusion Criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
						<ul style="list-style-type: none"> • Add "How connected to Helmholtz AAI" • Add "Requested AAI attributes" • Add information on "User deprovisioning mechanism" • Add information on "Cloud triggered deprovisioning" • Adapt information on "Service Value" • Add link to "Service Privacy Policy" 		

Service Catalogue

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
B2Share	Jülich	<ul style="list-style-type: none"> Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year, 7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	Yes	/	/	/
bwSync&share (Nextcloud)	KIT	<ul style="list-style-type: none"> Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> Add information on "User Deprovisioning mechanism" 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
Collabtex (Overleaf)	HZDR	<ul style="list-style-type: none"> Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 month (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	Yes	/	/	/	/
Compute Projects	Jülich	<ul style="list-style-type: none"> Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	10 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> Adapt "Description (long)" 	Conduct suggested changes	/
Container- Runtime	Jülich	<ul style="list-style-type: none"> Pilot service (as soon as Legal Framework 	10 months (not critical since services	Yes	/	Yes	/	/	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
		is signed: turns to Fully Integrated service)	cannot become Fully Integrated without Legal Framework signed)						
Data Projects (HDF)	Jülich	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	10 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add "Keywords/ Tags" • Add "Documentation" link • Adapt information on "Communication with Users" • Adapt information on "User Groups" • Add information on "Service production status" • Add information on "VO Capability" • Add information on "Multiple VO Capability" • Add "Requested AAI attributes" 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
							<ul style="list-style-type: none"> • Add information on "Restricted VO Access" • Add information on "Cloud triggered deprovisioning" • Add information on "Multi tenant capable" • Add "IPv6 statement" and "IPv6 statement - Description" • Add information on „Two Factor Authentication" • Add ""Security Incident Contact" and "Security Incident Contact – Email" • Add "Data protection / privacy issue Contact" and "Data protection / privacy issue Contact – Email" 		

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
							<ul style="list-style-type: none"> • Add link to “Service Privacy Policy” • Add information on “Operations performed for service” 		
GPU compute Service	HZDR	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 month (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	Yes	/	/	/
HAICORE	Jülich	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	11 months (not critical since services cannot become Fully Integrated without Legal	Yes	/	Yes	/	/	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
			Framework signed)						
HAICORE	KIT	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	Yes	/	/	/
Helmholtz Codebase (GitLab)	HZDR	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add "Documentation" link • Adapt information on "Communication with HIFIS" • Adapt information on "Communication with Users" 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
HIFIS Events (Indico)	DESY	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	10 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Change documentation link 	Conduct suggested changes	/
HIFIS Helpdesk (Zammad)	HZDR	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	Yes	/	/	/
JuChat (Rocket.Chat)	Jülich	<ul style="list-style-type: none"> • Pilot service (as soon as Legal 	1 month (not critical since	Yes	/	Yes	/	/	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
		Framework is signed: turns to Fully Integrated service)	services cannot become Fully Integrated without Legal Framework signed)						
Jupyter on HAICORE	KIT	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	10 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	Yes	/	/	/
Jupyter (JupyterHub)	DESY	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully 	10 months (not critical since services cannot become Fully	Yes	/	Yes	/	/	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
		Integrated service)	Integrated without Legal Framework signed)						
Jupyter (JupyterHub)	Jülich	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add link to documentation • Update contact for user support • Add keywords/tags 	Conduct suggested changes	/
LimeSurvey	DKFZ	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	11 months (not critical since services cannot become Fully Integrated without Legal	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add "How connected to Helmholtz AAI" • Add information on "VO Capability" • Add information on "Multiple VO Capability" • Add "Requested AAI attributes" 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
			Framework signed)				<ul style="list-style-type: none"> • Add information on "Restricted VO Access" • Add information on "User deprovisioning mechanism" • Add information on "Cloud triggered deprovisioning" • Add information on "Multi tenant capable" • Add "IPv6 statement" and "IPv6 statement - Description" • Add information on "Two Factor Authentication" • Add ""Security Incident Contact" and "Security Incident Contact – Email" • Add "Data protection / privacy issue Contact" and 		

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
							"Data protection / privacy issue Contact – Email" • Add link to "Service Privacy Policy"		
LimeSurvey	HMGU	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	11 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Adapt "Description (long)" 	Conduct suggested changes	/
Mattermost	HZDR	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully Integrated without Legal	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add "Documentation" link • Adapt information on "Communication with HIFIS" 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
			Framework signed)						
Notes (HedgeDoc)	DESY	<ul style="list-style-type: none"> • Pilot service 	10 months	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add “Unique Service Characteristic“ • Add “Keywords/ Tags” 	Conduct suggested changes	/
nubes (Nextcloud)	HZB	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Adapt information on “Backup Strategy” • Adapt “Short text for Service Card in Cloud Portal” • Adapt “Architecture Description“ 	Conduct suggested changes	/
OpenStack (HDF Cloud)	Jülich	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 year 7 months (not critical since services cannot become Fully	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add “Documentation” link • Add 2nd “Link to Service for Usage” • Adapt information on “Communication with HIFIS” 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
			Integrated without Legal Framework signed)				<ul style="list-style-type: none"> • Add "How connected to Helmholtz AAI" • Add information on "Service production status" • Add "Requested AAI attributes" • Add information on "Multi tenant capable" • Add "IPv6 statement" and "IPv6 statement - Description" • Add information on "Two Factor Authentication" • Add ""Security Incident Contact" and "Security Incident Contact – Email" • Add "Data protection / privacy issue Contact" and "Data protection / 		

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
							privacy issue Contact – Email” • Adapt “Dependencies”		
PHILEAS-Storage	Jülich	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	1 month (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Add information on "VO Capability" 	Conduct suggested changes	/
Rancher managed Kubernetes	DESY	<ul style="list-style-type: none"> • Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service) 	7 months (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	No, changes required	<ul style="list-style-type: none"> • Adapt “Service Levels Description” 	Conduct suggested changes	/

Services in catalogue	Service Provider	Service maturity	If Pilot Service, for which time?	All Exclusion criteria still fulfilled	If criteria are not fulfilled, please name here	Service information/ service description up-to-date	If service information/service description was updated, please name updated fields here	Recommendations	Comment
Singularity on HAICORE	KIT	• Pilot service	7 months	Yes	/	Yes	/	/	/
Sync & Share (Nextcloud)	DESY	• Pilot service (as soon as Legal Framework is signed: turns to Fully Integrated service)	1 year 1 month (not critical since services cannot become Fully Integrated without Legal Framework signed)	Yes	/	Yes	/	/	/

Retired services

Retired services	Data deletion done	Recommendations	Comment
/	/	/	/

Service Portfolio Review checklist – service selection criteria

Exclusion criteria

Exclusion criteria	Change(s) of	Old content	New content	Reason for change(s)	Recommendations	Comment
#3 Service Readiness	Explanation text in Plony	Please state whether you are getting your service ready to be integrated start the service integration process into Helmholtz Cloud within 1 month.		Precision	Conduct suggested changes	/
#8 Cloud Capability Quality standards in Service Provisioning	Wording	Service is capable for cloud provisioning Service Provider commits to fulfill quality standards in service provisioning		Wording that better fits what HIFIS expects from service providers (rather commitments than requirements)	Conduct suggested changes	/
	Explanation text in Plony	Please state whether your service fulfills the cloud capability requirements. Please state whether you commit to strive for fulfilling quality standards in service provisioning. Read More Cloud Capability Requirements are Quality Standards in service provisioning are: • Service generally supports automated user provisioning, independent from whether this is already technically implemented or not. “Automated user provisioning” means automated creation of user accounts in the service after successful Login via Helmholtz AAI and authorization. Possibly manual steps in course of the authorization or preceding application processes are not included here. If user accounts and their quota are created automatically after authorization and Login via Helmholtz AAI is generally supported this requirement is fulfilled.		Change wording from “requirements” to “commitments” Transfer to explanation text of #9	Conduct suggested changes	/

Exclusion criteria	Change(s) of	Old content	New content	Reason for change(s)	Recommendations	Comment
		<ul style="list-style-type: none"> • Service generally supports automated user deprovisioning, independent from whether this is already technically implemented or not. Please remark that it is possible to use Helmholtz Cloud Agent for automated user deprovisioning. • Session Management is implemented 	<ul style="list-style-type: none"> • Characteristics of a cloud service • On-demand self-service (still fulfilled if preceding application process for authorization are necessary, as long as these application processes are easily accessible and intuitive in handling for users) • Broad network access (which means accessibility from the internet, regardless of access regulations due to safety mechanisms) • Resource pooling • Rapid elasticity (does not only include the physical scalability of resources but also the proactive and prompt management of available resources, thus resulting in resources being released for further usage as soon as not required anymore by previous users) • Monitored service 	Transfer to explanation text of #10		
	Position in Application Form	Between Ensured Support Statement Service Readiness and Helmholtz AAI Capability Free Provision Statement		Criterion is somewhat interconnected with Service Readiness – therefore should be positioned nearby	Conduct suggested changes	/
#9 Helmholtz AAI Capability User	Wording	Service is capable to use Helmholtz AAI Service supports automatic user provisioning via Helmholtz AAI		Wording that better fits what HIFIS expects from service providers	Conduct suggested changes	/

Exclusion criteria	Change(s) of	Old content	New content	Reason for change(s)	Recommendations	Comment
Provisioning via Helmholtz AAI	Answer possibilities in Plony	<ul style="list-style-type: none"> ● Fully automated provisioning ● Partly automated provisioning ● No Helmholtz AAI Compatibility ● Yes ● No 		Ease requirements for provisioning	Conduct suggested changes	/
	Explanation text in Plony	<p>Please state to which extent your service is capable to use Helmholtz AAI Please state whether your service <u>generally supports</u> automated user provisioning via Helmholtz AAI, independent from whether this is already technically implemented or not. "Automated user provisioning" means automated creation of user accounts and their quota in the service after successful Login via Helmholtz AAI and authorization. Possibly manual steps in course of the authorization or preceding application processes are not included here.</p>		Transfer actual description of criterion to the explanation text in Plony	Conduct suggested changes	/
	Required value per Service Type	<ul style="list-style-type: none"> ● Pilot Service: Fully automated provisioning or Partly automated provisioning Yes/No ● Fully Integrated Service: Fully automated provisioning Yes 		Adapt to new answer possibilities	Conduct suggested changes	/
#10 User Deprovisioning	Answer possibilities in Plony	<ul style="list-style-type: none"> ● Fully automated deprovisioning ● Partly automated deprovisioning or manual deprovisioning ● No deprovisioning supported ● Yes ● No 		Ease requirements for provisioning	Conduct suggested changes	/
	Explanation text in Plony	<p>Please state to which extent your service supports user deprovisioning Please state whether your service <u>generally supports</u> automated user deprovisioning, independent from whether this is already technically implemented or not. Please note that automated user</p>		Transfer actual description of criterion to the explanation text in Plony	Conduct suggested changes	/

Exclusion criteria	Change(s) of	Old content	New content	Reason for change(s)	Recommendations	Comment
		deprovisioning can be handled by the Helmholtz Cloud Agent in future.				
	Required value per Service Type	<ul style="list-style-type: none"> Pilot Service: Fully automated deprovisioning or Partly automated deprovisioning or manual deprovisioning Yes/No Fully Integrated Service: Fully automated deprovisioning Yes 		Adapt to new answer possibilities	Conduct suggested changes	/

Weighting criteria

Weighting criteria	Change(s) of	Old content	New content	Reason for change(s)	Recommendations	Comment
/	/	/	/	/	/	/

Information criteria

Information criteria	Change(s) of	Old content	New content	Reason for change(s)	Recommendations	Comment
/	/	/	/	/	/	/

Service Portfolio Review checklist – Portfolio processes

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
Service Type definitions	Add service type	“Guest Services” which are not connected to Helmholtz AAI (and are not so much Helmholtz Cloud Services but rather resources) but should be displayed/linked in Cloud Portal (e.g. HAICORE services, but also HIFIS Consulting/ Software offers) > to be defined in detail in 2023		Required to differentiate between Helmholtz Cloud services and Services that should be displayed/promoted in Cloud Portal but are no Helmholtz Cloud services	Add service type in Plony (as soon as defined)	Conduct suggested changes	/
Service Onboarding Process	Adapt process step	Put the service to the Service Integration List Pipeline		Correct wrong wording	/	Conduct suggested changes	/
	Adapt explanation of process step	- The Service Integration List equals the service pipeline Service integration list is filled up with further Pipeline includes all upcoming services continuously – integration rank of services may change when services with a higher score come into service pipeline that are not yet available for usage in Helmholtz Cloud Portal		Describe actual handling of what the service pipeline is	/	Conduct suggested changes	/
	Adapt process step	Ask service provider to fill out Service Canvas and Service Description		The Service Description is made up from Service Canvas Fields (not another text apart from Service Canvas)	/	Conduct suggested changes	/
	Adapt explanation of process step	- Service Canvas (thus including Service Description information) is to be available in Plony		Service Canvas is available in Plony since April 2022	Insert link to screenshots from Plony into Process	Conduct suggested changes	/

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
					Framework (since no direct link to Service Canvas in Plony is available)		
	Merge two process steps into one	Fill out Service Canvas incl. Work-out general usage conditions for service, valid for all Helmholtz centres (service description)		General usage conditions are part of Service Canvas fields (e.g. Service Level Description)	/	Conduct suggested changes	/
	Merge explanation of two process steps into one	<ul style="list-style-type: none"> - Service provider fills out Service Canvas - General usage conditions should be defined for every service <ul style="list-style-type: none"> - Especially for mass services the usage conditions (e.g. storage space, support times) need to be clearly defined - General usage conditions should be documented in the fields belonging to the service description 		General usage conditions are part of Service Canvas fields (e.g. Service Level Description) which make up the Service Description	/	Conduct suggested changes	/
	Adapt process step	Check whether all necessary organizational part of service information is there		Adapt to action that is actually performed in reality (in Plony)	/	Conduct suggested changes	/
	Add text to explanation of process step	<ul style="list-style-type: none"> - Check whether organizational part of service information is filled in a meaningful way - Check whether automatic calculation of score according to information given for weighting criteria is conducted correctly through Plony + whether service is put in 		Adapt to action that is actually performed in reality (in Plony)	/	Conduct suggested changes	/

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		the right place of the service integration list according to score					
	Delete process step	Evaluate the service based on the defined Weighting criteria		Done automatically by Plony	Already implemented in Plony	Conduct suggested changes	/
	Delete explanation of process step	—Conduct evaluation of the service based on the Weighting criteria - Points earned in the service selection indicate the integration priority (rank in Service Integration List)		Done automatically by Plony	Already implemented in Plony	Conduct suggested changes	/
	Adapt process step	Hand-over service to Ask Service Integration Manager to check technical part of service information		Adapt to action that is actually performed in reality (in Plony)	/	Conduct suggested changes	/
	Adapt explanation of process step	Hand-over all Check whether technical part of service information to Service Integration (process for Service Integration is to be documented by WG Service Integration) is filled in a meaningful way - Clarify unclear points, if necessary - Give As soon as Service provider the chance to adapt Integration started, the rank of a service in the Service Canvas if something is missing/ not clear enough Integration List doesn't change anymore		Adapt to action that is actually performed in reality (in Plony)	/	Conduct suggested changes	/
Request for Service/ Service	Adapt Process name	Request for Service Process Service Recruiting Process		Precision	/	Conduct suggested changes	/
	Adapt Wording in process	Request for Service Service idea		Precision	/	Conduct suggested changes	/

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
Recruiting Process	Add starting point (2.)	- "Proactive seeking for new services" performed by Service Portfolio Manager		Add proactive Service Recruiting activities established in 2022	/	Conduct suggested changes	/
	Add process step (2.)	- "Talk to scientific user groups and fetch their service ideas" performed by Service Portfolio Manager					
	Add explanation of process step (2.)	- "To get direct feedback from scientists on which services are required most in Helmholtz Cloud - Furthermore, there are already a lot of useful services for scientists available in centres, but they are often only used locally – great potential for HIFIS to provide these useful services to a broader scientific community"					
	Add process step (2.)	- "Gain ideas from strategic initiatives e.g. from Head Office" performed by Service Portfolio Manager					
	Add explanation of process step (2.)	- "Strategic initiatives e.g. led by Helmholtz Head Office can give HIFIS useful insights on which services could be offered in Helmholtz Cloud to support these strategic initiatives and form a sustainable Service Portfolio"					
	Add process step (2.)	- "Initiate broader service idea seeking e.g. surveys" performed by Service Portfolio Manager					
	Add explanation of process step (2.)	- "Conduct e.g. short surveys in Cloud Portal/Plony/centre's intranet to get direct user feedback on which services					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		are desired and to seek the corresponding use cases“					
	Add process step (2.)	- “Refine Service Portfolio to ensure balance and integrity” performed by Service Portfolio Manager					
	Add explanation of process step (2.)	- “In sense of Service Portfolio Management, it is important to continuously review the services in Portfolio and strive to close service gaps to ensure a balanced and integer Service Portfolio“					
	Add process step (2.)	- “Phrase service ideas gained from service recruiting activities” performed by Service Portfolio Manager					
	Add explanation of process step (2.)	- “The results gained during the proactive Service Recruiting activities need to be phrased/developed to concrete service ideas”					
	Add process step (1.)	- “If necessary, coordinate the clarification of requirements/use case behind the demand for the new service” performed by Service Portfolio Manager		Adapt to action that is actually performed in reality	/	Conduct suggested changes	/
	Add explanation of process step (1.)	- “Ask colleagues from Service Integration and Architecture Management whether there are technical points to be clarified - - Ask colleagues from Cluster and Platform Management whether there are organizational points to be clarified”					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	Move process step (1.)	- “Roughly check whether service will fulfill Exclusion criteria” performed by Service Portfolio Manager from position 2 to position 4		Adapt to action that is actually performed in reality	/	Conduct suggested changes	/
	Delete process step	“Ask Requester to fill out Request for Service Form as far as possible” performed by Service Portfolio Manager		Replaced by process step “If necessary, coordinate the clarification of requirements/use case behind the demand for the new service”	/	Conduct suggested changes	/
	Delete process step	“Fill out Request for Service Form and send back to HIFIS” performed by Requester		Request for Service Form was not used and is therefore removed from process	/	Conduct suggested changes	/
	Delete process step	“Offer support for filling out form” performed by Service Portfolio Manager and Service Integration Manager					
	Delete process step	“Review information given in Request for Service Form and clarify unclear points with Requester” performed by Service Portfolio Manager and Service Integration Manager					
	Adapt process step (1. + 2.)	- Put Request for Service to Request for Service List Add service idea to Service Recruiting Mattermost Board		Adapt Wording/ adapt to action that is actually performed in reality	/	Conduct suggested changes	/
	Add process step (1. + 2.)	- “Regularly present service ideas to KoDa” performed by HIFIS coordinator		Adapt to action that is actually performed in reality	/	Conduct suggested changes	/
	Add explanation of process step (1. + 2.)	- “HIFIS coordinators participate in KoDa meetings and should present the service ideas with the highest priority there					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		- Potential service providers are triggered to consider provision of mostly wanted service ideas”					
	Add process step (1. + 2.)	- “Regularly review and revise Service Recruiting Mattermost Board” performed by Service Portfolio Manager		Integrate maintenance/review action to keep service ideas up-to-date	/	Conduct suggested changes	/
	Add explanation of process step (1. + 2.)	- “Review service ideas and drop those with low priority/ those which have already been presented a couple of times in KoDa but no service provider was found/ those that are not promising to find a service provider at all”					
	Delete process step	“Notify service providers whenever new Request for Service is added to List” performed by Service Portfolio Manager		Replaced by process step “Regularly present service ideas to KoDa”	/	Conduct suggested changes	/
Service Integration Process	Delete process step	“Decide to which list the service is added using SI criteria” performed by Service Integration Manager		Since initial Service Portfolio is nearly integrated and future services need to be ready for integration within 1 month, we do not need different lists anymore	/	Conduct suggested changes	/
	Delete process step	“Create sprint backlog for service and plan long term activities (SI long term integration)” performed by Service Integration Manager					
	Delete process step	“Regularly ask service provider about status quo (SI on hold)” performed by Service Integration Manager					
	Delete process step	“Shift service to other list and create sprint backlog as soon as ready (SI on hold)” performed by Service Integration Manager					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	Adapt process step	- Create sprint backlog for service- (SI sprint list)					
	Add interface to sub-process	- KPI Process		Detailed process visualization for KPI process is now documented	Add link to process visualization in Process Framework	Conduct suggested changes	/
	Delete process step	“Ask service provider for final approval for listing in Cloud Portal” performed by Service Integration Manager		Cloud Listing Process was modified/ Service card review is adapted to action that is actually performed in reality	Add status “Service card review” in Plony	Conduct suggested changes	/
	Delete process step	“Decide about final approval for publication in Cloud Portal” performed by Service Provider					
	Delete process step	“Create Cloud Portal entry” performed by Service Integration Manager					
	Delete process step	Ask service provider and Cloud Portal Manager for approval of Cloud Portal entry” performed by Service Integration Manager					
	Delete process step	“Decide about approval of Cloud Portal Entry” performed by Service provider + Cloud Portal Manager					
	Delete process step	“Give feedback/ adaptations desired to Service Integration Manager” performed by Service provider + Cloud Portal Manager					
	Delete process step	“Integrate feedback/ desired adaptations” performed by Service Integration Manager					
	Delete process step	“Release Cloud Portal entry” performed by Service Integration Manager					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	Delete process step	- “Inform Service Portfolio Management about completed integration” performed by Service Integration Manager					
	Add process step	- “Ask Service Portfolio Manager to trigger the preview of the service card in Cloud Portal Integration environment” performed by Service Integration Manager					
	Add explanation of process step	- “The service card review starts at this point of the process – status in Plony changes to “Service card review” - Preview of the service card is necessary to check the content and formatting of service information later published in Cloud Portal “					
	Add process step	- “Set Service status in Plony Test environment to „Online“ and inform Service Integration Manager that preview of service card is now available in Cloud Portal Integration environment” performed by Service Portfolio Manager					
	Add explanation of process step	- “As soon as in status “Online” in Plony Test, the service card will be displayed as a preview in Cloud Portal Integration environment - Service Integration Manager can now check the service card together with the Service provider”					
	Add process step	- “Check service card together with Service Provider in Cloud Portal Integration					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		environment” performed by Service Integration Manager					
	Add explanation of process step	- “Check whether the content of the service card is displayed correctly - Ask service provider for checking the service card preview”					
	Add process step	- “Check service card in Cloud Portal Integration environment” performed by Service Provider					
	Add explanation of process step	- “Check whether the service information later published in Cloud Portal correctly represents the service“					
	Add process step	- “Give feedback/ adaptations desired to Service Integration Manager” performed by Service Provider					
	Add explanation of process step	- “If something needs to be adapted, the Service provider is asked to communicate the adaptations desired to the Service Integration Manager”					
	Add process step	- “Hand over service to Service Portfolio Manager for approval from HIFIS side” performed by Service Integration Manager					
	Add explanation of process step	- “As soon as checked by Service Integration Manager and Service provider, the service card approval from HIFIS side can be initiated by Service Portfolio Manager					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		- In order to initiate approval, service needs to be handed over to Service Portfolio Manager“					
	Add process step	- “Create new Cloud listing request issue in GitLab” performed by Service Portfolio Manager					
	Add explanation of process step	- “For structured discussion and documentation reasons, a new Cloud listing request issue is created in the corresponding GitLab project”					
	Add process step	- “Ask HIFIS group to check service card in Cloud Portal Integration environment” performed by Service Portfolio Manager					
	Add explanation of process step	- “HIFIS Group (consisting of Service Portfolio Manager, Service Integration Manager, Cloud Portal Manager, Architecture Manager and Cloud Platform Manager) is asked to check the service card preview for completeness and correctness - and decide whether anything needs to be adapted or everything is fine”					
	Add process step	- “Integrate feedback/ perform desired modifications” performed by Service Portfolio Manager					
	Add explanation of process step	- “Agreed modifications of service information are performed in Plony until the service card preview is approved by each role in HIFIS Group”					

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	Add process step		- "Hand over service to Service Integration Manager for final approval of Service card from Service provider" performed by Service Portfolio Manager				
	Add explanation of process step		- "As soon as approved from HIFIS side, the last step before publishing the service in Cloud Portal is the final approval from service provider side. - As this is the step completing the service integration, the Service Integration Manager coordinates the final approval with the service provider"				
	Add process step		- "Ask Service provider for final approval of service card in Cloud Portal Integration environment" performed by Service Integration Manager				
	Add explanation of process step		- "Since it is likely that the service card was modified during the approval process by HIFIS Group, the Service provider needs to give the final approval before the service is published in Cloud Portal"				
	Add process step		- "Decide about final approval of service card in Cloud Portal Integration environment" performed by Service Provider				
	Add explanation of process step		- "Review the changes done by HIFIS Group during the approval process and accept or deny the changes made"				

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	Add process step	- "Give feedback/ adaptations desired to Service Portfolio Manager" performed by Service Provider					
	Add explanation of process step	- "If something needs to be adapted, the Service provider is asked to communicate the adaptations desired to the Service Portfolio Manager"					
	Add process step	- "Set service status in Plony production environment to „Integration completed“ and inform Service Portfolio Manager" performed by Service Integration Manager					
	Add explanation of process step	- "With setting the status "integration completed" in Plony, the service integration is done. This is the signal for the Service Portfolio Manager to set the service status to "Online""					
	Add process step	- "Set service status in Plony production environment to „Online"" performed by Service Portfolio Manager					
	Add explanation of process step	- "If everything is fine, the Service Portfolio Manager can change the service status in Plony to "Online", thus resulting in the publishment of the service card in the Cloud Portal"					
Operation of Services	Adapt rights matrix for operation	General concept: <ul style="list-style-type: none"> Service Operation Group (multiple users, chosen by Service Provider) can suggest changes of service information 		Simplification; earlier rights matrix was way too complicated (from process view as well as from technical view for	Implement simplified rights matrix in Plony, update PDF in Process Framework	Conduct suggested changes	/

Portfolio processes	Change(s) of	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
			<ul style="list-style-type: none"> • Corresponding Service Manager can edit/forwards suggested changes to HIFIS • Service Portfolio Manager can accept/deny suggested changes <ul style="list-style-type: none"> • All changes regarding fields transferred to Cloud Portal require discussion/OK from whole HIFIS Group (Portal Manager, Architecture Manager, Service Integration Manager etc.) • Some fields are only relevant for Service Onboarding Process and therefore cannot be edited at all as soon as service is in operation (=Onboarding completed) • Service Integration Manager can also suggest changes and send them to the Service Portfolio Manager for approval 	implementation in Plony)			

Service Portfolio Review checklist – Plony

Part of Plony	Change(s) of Field	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
Service Canvas	Keywords/ Tags	Add keywords: <ul style="list-style-type: none"> • HPC, HTC, Data Analysis • Interactive, Online, Data visualization, JupyterHub, JupyterLab, Markdown, Notes, Real-time, Document, Presentation 		Additional keywords support the user to find services they are searching for	Add keywords in Plony	Conduct suggested changes	/
		Make mandatory so at least a green keyword (service category) has to be set		At least a service category should be chosen for any service so they are roughly classified for users	Make field mandatory in Plony	Conduct suggested changes	/
	Link to Service for Usage	Make mandatory when switching to status “service card review”		Avoid that fields transferred to Cloud Portal are empty	Make field mandatory in Plony	Conduct suggested changes	/
	Connection with HIFIS Helpdesk	Change explanation text: “Do you consider to use the central HIFIS support as support contact point, so that HIFIS-specific questions (e.g. about the AAI) can be filtered there, while technical questions would be redirected to your local service helpdesk?” “Do you consider to use the central HIFIS support as support contact point? Please specify the planned scenario.”		Concretization	Change explanation text in Plony	Conduct suggested changes	/

Part of Plony	Change(s) of Field	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		<p>Change Answer possibilities:</p> <ul style="list-style-type: none"> • Complete (automated) connection • Complete (automated) connection planned with Service Integration Time • No connection • Yes. The local helpdesk/support team uses the HIFIS helpdesk and also handles the tickets there. • Yes. The user opens the ticket at the HIFIS helpdesk, which filters the requests and forwards them to your local helpdesk/support team. • No. The user opens the ticket at the local helpdesk/support system for all incoming technical inquiries.“ • No. First level support is delegated to user groups (VOs). 		Concretization	Change answer possibilities in Plony	Conduct suggested changes	/
	Service Manager	Make field mandatory		Required for escalation purposes if Service Owner doesn't react.	Make field mandatory in Plony	Conduct suggested changes	/
	Provider Manager	Make field mandatory/ automatically fill with KoDa member of the service providing centre		Required for escalation purposes if Service Manager doesn't react.	Make field mandatory in Plony	Conduct suggested changes	/
	Service Levels Description	Make field mandatory		Avoid that fields transferred to Cloud Portal are empty	Make field mandatory in Plony	Conduct suggested changes	/
		<p>Change explanation text: "Please indicate what the provided service level(s) include, e.g. in terms of:</p> <ul style="list-style-type: none"> • Availability of service in % p.a. • guaranteed-Support times 		Concretization/ differentiation of expected content from other fields in Plony	Change explanation text in Plony	Conduct suggested changes	/

Part of Plony	Change(s) of Field	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
		<ul style="list-style-type: none"> • Reaction times in regarding support requests • Maintenance timeframes • regular backups, Service updates/ update policy, limitation of number of users if differentiated in Service Levels • Available roles (e.g. agent, customer) and corresponding functionalities <p>Please do not indicate information on Backup, Limitations or links to Privacy Policies. These are collected in dedicated fields.“</p>					
	Service Privacy Policy Upload	Change from Uploading PDFs to also having the possibility to insert a link		Lots of privacy policies are not available as PDF but rather on a website.	Change field type in Plony	Conduct suggested changes	/
	Ticket system for support	Deactivate		Field usually not filled by Service Provider/ information not required	Deactivate field in Plony	Conduct suggested changes	/
	Multi tenant capable	Deactivate		Field usually not filled by Service Provider/ explanation text needs to be worked out more precisely before reactivating this field	Deactivate field in Plony	Conduct suggested changes	/
	Two Factor Authentication	Deactivate		Should be asked via Helmholtz AAI/ idP	Deactivate field in Plony	Conduct suggested changes	/

Part of Plony	Change(s) of Field	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	How connected to Helmholtz AAI		Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/
	Planned AAI connection	Deactivate		Not necessary to have this field as a dedicated one, content yet documented here is in future documented in field "how connected to Helmholtz AAI"	Deactivate field in Plony	Conduct suggested changes	/
	Service Production Status		Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/
	VO Capability		Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/
		Change explanation text "Please state whether VOs/groups can be identified/filtered by your service. VO capability is relevant for provisioning because it describes different SLAs according to the group / VO. whether you use VOs/groups to control access to the service. If yes, please specify which VOs you use."	Concretization	Change explanation text in Plony	Conduct suggested changes	/	
	Multiple VO Capability		Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/

Part of Plony	Change(s) of Field	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
	Requested AAI Attributes		Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/
	Restricted VO Access		Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/
	User deprovisioning mechanism		Change explanation text: "Please indicate if the service has an automatic mechanism when users want to describe the procedure if users want to completely delete their accounts and associated data from the service. Can they do this automatically e.g. via button click? If multiple manual steps are required, please specify which ones (e.g. deleting VMs in OpenStack, deleting ssh keys, etc). " Or are manual steps required such as sending an email to the helpdesk and follow up actions by admins? For a complete deprovisioning of all user data at your site, would accounts outside the service also have to be deleted (e.g. infrastructure proxies, single sign-on management, LDAP, etc)?"	Concretization	Change explanation text in Plony	Conduct suggested changes	/
	Automated Cloud triggered Deprovisioning		Add "Automated" to field name	Concretization	Change field name in Plony	Conduct suggested changes	/
			Make mandatory when switching to status "service card review"	Avoid empty fields in Plony	Make field mandatory in Plony	Conduct suggested changes	/
			Change explanation text: "Please indicate if it would be possible to automatically deprovision a users of the service (e.g. when users leave their centres) when triggered in the Helmholtz Cloud Portal (e.g. users initiate deprovisioning themselves via	Concretization	Change explanation text in Plony	Conduct suggested changes	/

Part of Plony	Change(s) of Field	Old content	New content	Reason for change(s)	Technical adaptations required	Recommendations	Comment
			the cloud portal). For this purpose the Helmholtz Cloud Agent might have to be installed at your site to ensure the communication between portal and service.”				
	Contact for Cloud triggered Deprovisioning	Add enum field with the following explanation text: “Who needs to be notified (e.g. local helpdesk, Service queue in HIFIS helpdesk) when the deletion of a user is triggered (e.g., users lose their centre membership or users initiate deprovisioning to the service themselves via the cloud portal)?” And the following answer possibilities: “a) As indicated in field „Contact for User Support (1st Level)“ b) As indicated in field „Communication with HIFIS“ c) Service Owner d) Other (+ free text field for specification)“		Add field to get information on who to contact in case of user deprovisioning	Add field to Plony	Conduct suggested changes	/
	Service Operation KPI	Add free text field with following explanation text: “What regular measurement (Service Operation KPI) regarding the usage and the number of users of the service can you identify and provide to HIFIS? Could you separate these KPIs by local usage and usage from the Helmholtz context?”		Add field to already make service provider think about operation KPI at an earlier stage of the Service Onboarding process	Add field to Plony	Conduct suggested changes	/