

Plony – Instruction


[LOGIN](#)


WELCOME TO PLONY!

Plony is the Service Database of the [Helmholtz Cloud Portal](#) and provided by [HIFIS](#).
The following modules are currently available:

AVAILABLE FOR PUBLIC

- [Current Service Portfolio](#)

RESTRICTED ACCESS

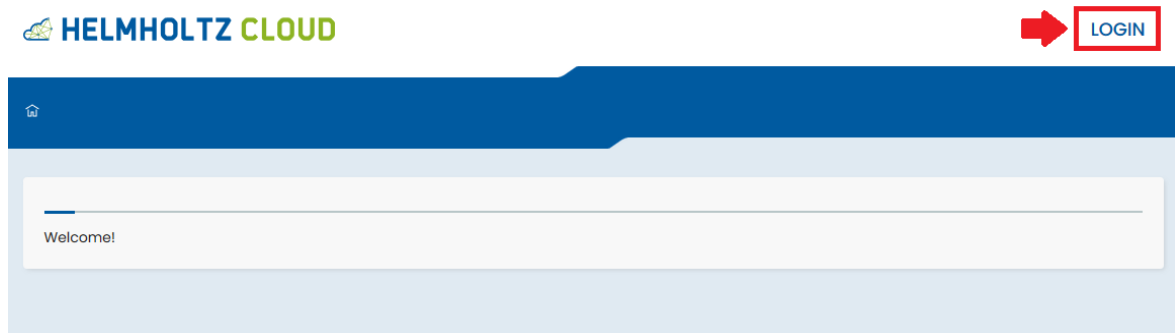
- **Service Onboarding Process**
After Login you can initiate the Service Onboarding Process by clicking on the button “[New Application](#)” on the top right-hand corner. You can also have a look at the status of the Onboarding and view the Service Information you gave during the Process. A step-by-step explanation for Onboarding Process tasks in Plony can be found in the [Service Portfolio instruction](#) (chapters I-IV).
- **Management of Service Information**
As soon as your service is online in Helmholtz Cloud Portal, you can use the change function in Plony to update service information. You can have a look at the chapters V-VII in the Service Portfolio instruction to get more information.

Plony – Instruction.....	1
General.....	2
I. Login to Plony.....	2
II. Overview: My Services.....	3
Service Onboarding Process.....	4
III. New Application (=Application Form).....	5
IV. Service Canvas.....	11
Service Operation.....	19
V. Change of Service Information during Operation(service is in status “online”)	19
VI. Review of Service Information.....	25
VII. Responsibilities Tab.....	28
Contact + Related documents.....	31
VIII. Contact for questions/feedback.....	31
IX. Related Documents.....	31

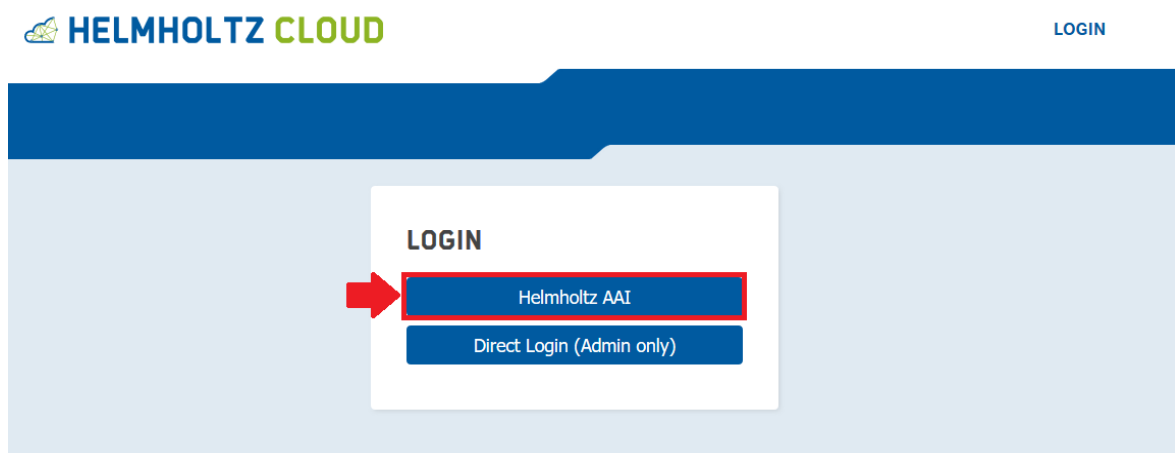
General

I. Login to Plony

1. Go to: <https://plony.helmholtz.cloud>
2. Click on “Login” in the top right-hand corner of the website:

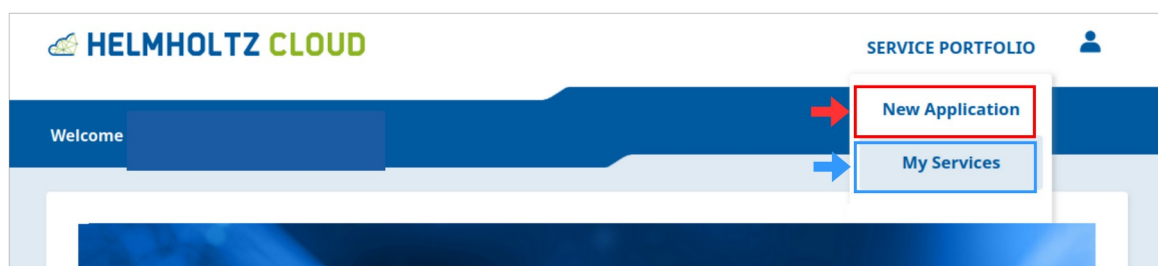


3. Select “Helmholtz AAI” as Login Provider:



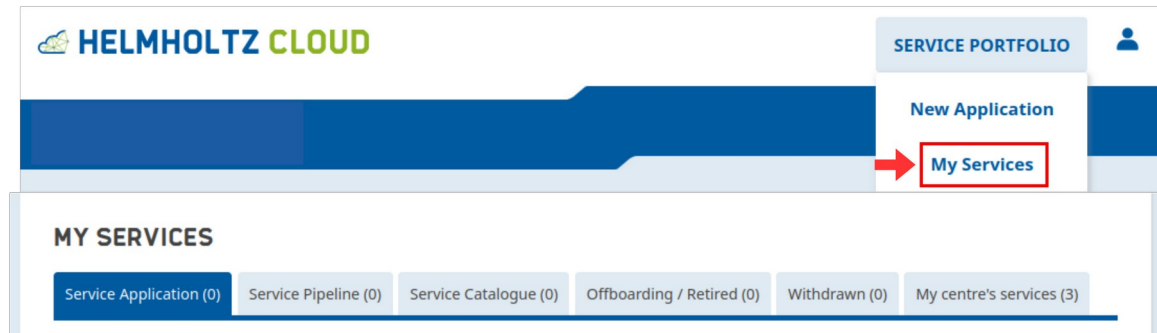
4. Choose your institution and login with the corresponding credentials. Allow Plony to use the data displayed after Login.
5. You are now logged in and directed to the start page of Plony.

When sliding over “Service Portfolio” in the top right hand corner, you can either add a new application by clicking on “**New Application**” (marked in red) or view the status of services already handed in by clicking on “**My Services**” (marked in blue):



II. Overview: My Services

1. Clicking on “**My Services**” in the top right-hand corner (marked in red), you will get an overview of the services you or anyone assigned to your Helmholtz Center sent to HIFIS, sorted in tabs by their current status:



The number in brackets indicate how many services can be found on each tab. The tabs include services with the following status:

- | | |
|---|--|
| <ul style="list-style-type: none">• Service Application:<ul style="list-style-type: none">◦ Application in draft◦ Application received | <ul style="list-style-type: none">• Service Catalogue:<ul style="list-style-type: none">◦ Online/ available◦ Not available◦ Full capacity reached |
| <ul style="list-style-type: none">• Service Pipeline:<ul style="list-style-type: none">◦ Service planned◦ Service information in draft◦ Service information received◦ Service information checked◦ Ready for integration◦ Integration planned◦ Integration in progress◦ Service card review◦ Integration completed | <ul style="list-style-type: none">• Offboarding/ Retired:<ul style="list-style-type: none">◦ Discontinued◦ Retired |
| | <ul style="list-style-type: none">• Withdrawn:<ul style="list-style-type: none">◦ Application withdrawn◦ Service offer withdrawn |
| | <ul style="list-style-type: none">• My centre's services<ul style="list-style-type: none">◦ every status |

You can click on each service to view the corresponding Service Information.

Service Onboarding Process

The Service Onboarding Process in Plony is divided into two forms: the Application Form and the Service Canvas. The structure and functionalities of each form are described in the following chapters.

Please note that a service has a status in Plony from the creation of its Application on. For better overview, you find a matrix of the existing status and the corresponding actions required here:

Overview of Plony Status & Actions required

Status Quo: 14.08.2024

Part of Service Portfolio	Phase of Service Onboarding	Status in Plony	Action Required	
			Service Owner	HIFIS
Pre-Portfolio	Service Application	Application in Draft	Fill out & Send	/
		Application received	/	Check & Approve
Service Pipeline	Service Canvas	Service planned	Start editing	/
		Service Information in Draft	Fill out & Send	/
		Service Information received	/	Check & Approve (organizational)
	Service Integration	Service information checked / Ready for Integration	/	Check & Approve (technical)
		Integration planned	/	Initiate Integration Kickoff
		Integration in progress	Take part in regular integration meetings & Perform Integration tasks	Consult & Push task completion
		Service card review	Review & Adapt	Consult
		Integration completed	/	Check & Approve
	Onboarding completed	Online / Available	Hand in Change Requests	Approve/Deny Change Requests
		Not available	Reactivate Service	/
		Full Capacity reached		
		Discontinued	/	/
		Retired	/	/
Service Catalogue	Onboarding cancelled	Application withdrawn	Request reactivation	Reactivate Application
Retired Services		Service offer withdrawn	Request reactivation	Reactivate Application

III. New Application (=Application Form)

- When clicking on “New Application” you get to the ready-to-fill Application Form. Please note the information given in the **blue box** before you start filling the Application Form:
 - To save your Application draft, you at least need to fill the field “Service name”.
 - To send your Application to HIFIS, you need to fill out all fields and pass the validation defined for each field

NEW SERVICE APPLICATION

To save your application it is only required to fill out the **Service Name field**.
To send in the application later on it is necessary to fill out the **remaining fields** and **pass the validation**.

Your service has specific technical challenges to function as a cloud service? (AAI, authorisation roles, licence limitations...) We, the HIFIS Cloud Team, are ready to help. Contact us at support@hifis.net.

Service name →

Please indicate the name of the service you would like to offer in Helmholtz Cloud. Feel free to also indicate the software behind the service, if your service name does not imply that (e.g. Service name = nubes, Software behind the service = Nextcloud) **Public**

Content of this field will be published in Cloud Portal.

If you need help filling the Application Form, please use the information given in the **green box** and contact support@hifis.net for consultation.

The Service Owner fields are automatically filled with the data belonging to the person logged in (transferred from Helmholtz AAI). So if you start filling out the Application Form, the service will automatically be associated with your account & contact information.

- The fields in the Application Form are structured as follows:

Description (short) →

Please describe the main functionalities and benefits of the service you would like to offer in Helmholtz Cloud. Please note the maximum length of your description must not exceed 250 characters. **Public**

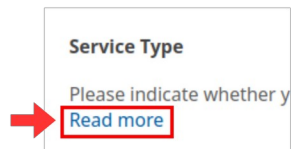
Content of this field will be published in Cloud Portal.

- Each field has a **field name** (marked in blue)
- Next to the field name there is the **input field** (marked in green). This field might be free text or a list one answer has to be selected from.
- Below the field name and input field there is a **short explanation** of what the field means (marked in orange). The explanation is usually phrased as a question that you can simply answer in the input field.
 - For fields which are later displayed on the service card in the Cloud Portal, you find the note “Content of this field will be published in Cloud Portal” in green underneath the short explanation as well as a

Plony Instruction

“Public” rectangle in green on the right side of the short explanation.

- o For fields which require some more information/where a set of requirements is defined in more detail, there is a “Read more” button on the right side next to the explanation. When clicking on the button, a pop up with more information opens up.



Contact Person - Lastname

Please name a contact person (name + mail address) we can get back to in case of questions about this application.

PILOT SERVICE

A service that does not (yet) fulfill all exclusion criteria defined in the process framework for Helmholtz Cloud service portfolio and therefore did not (yet) complete the onboarding process for Helmholtz Cloud. A pilot service is not yet mature enough in regards of organizational and/or technical frame conditions to be provided in Helmholtz Cloud. In order to gain experience in offering the service while observing the potential benefits of a service (and for which user group it might be interesting) it can be offered as pilot service. This enables the service provider to offer the pilot service following a slim onboarding process (with less exclusion criteria) to a limited bunch of users and for a limited time for both users and service provider to experiment on the service. Nevertheless, the long-term target of a pilot service should be to fulfill the requirements to become a fully integrated service, and therefore, to complete the onboarding process for Helmholtz Cloud. Pilot services are limited in provision to one year. Service Providers will be continuously supported to refine their service towards a fully integrated service and will at least be notified about the remaining time after 6 and 9 months of pilot service provision. If a service is not able (and will not be able in foreseeable future) to fulfill the requirements to become a fully integrated service, it may be degraded from pilot to associated service. This is only true if the reason for not becoming a fully integrated service is on the service provider side.

FULLY INTEGRATED SERVICE

A service that fulfills (and continues to fulfill) the exclusion criteria defined in the process framework for Helmholtz Cloud service portfolio and completed the onboarding process for Helmholtz Cloud. A fully integrated service is mature enough to be provided in Helmholtz Cloud and the technical (e.g. backup, support structures, architecture) and organizational (e.g. data protection concerns) frame conditions of service provision are well established, including the ability to give the corresponding information. A fully integrated service may derive from a pilot service, now fulfilling all requirements to become a fully integrated service. Fully integrated services are reviewed regularly as part of Service Portfolio reviews.

OK

Service Readiness

Select ...

3. At the end of the Application Form, there are three buttons:

- **“Save changes”** button leaves application in status “Application in Draft” (marked in red) – you can continue to fill out the Application Form at another point of time
- **“Validate Input”** button verifies whether your service passes all exclusion criteria integrated into the form (marked in blue) – this button is only active after the form was once saved via button “Save changes”
- **“Cancel”** button leads to cancellation of your Application (or cancellation of changes made if you already saved your application once)

User Deprovisioning

Select ...

Please state to which extent your service supports user deprovisioning.

Backup Strategy

Please state whether you have a backup strategy for the service established. If yes, please give us a brief overview of what your backup strategy covers.

Save

Validate Input

Cancel

4. When clicking on “Save changes”, the Application Form switches from edit to view mode:

Welcome

SERVICE 123

Service ID	State	Last edit	Show comments
4	Application in draft	21.03.2022 12:07	

Service Application

Edit

Validate

Send application

Withdraw application

Description

Please describe the main functionalities and benefits of the service you would like to offer in Helmholtz Cloud. Please note the maximum length of your description must not exceed 250 characters.

no value

5. Scrolling down to the end of the Application Form in view mode, you find the same buttons as on top of the service view page:

Backup Strategy
Please state whether you have a backup strategy for the service established, especially for service restore/server backups and user specific data. If yes, please give us a brief overview of what your backup strategy covers.
no value

Edit

Validate

Send application

Withdraw application

→ Top

- **“Edit”** button to get back to edit mode (marked in red) – you can edit all field inputs here and validate your answers
- **“Validate”** button to validate your field’s input (marked in blue) – if validation is not passed, a pop-up will tell you how many errors occurred, and the corresponding fields are marked with red background (see screenshot below)
 - If validation fails, you need to go back to edit mode via the “Edit” button and correct all errors before you can send your Application to HIFIS.
- **“Send application”** button to send Application Form for review to HIFIS (marked in green) – you can only send Application Forms that passed the validation
- **“Withdraw application”** button to withdraw your Application (marked in orange) – you can use this option if you cannot fulfill all exclusion criteria required and the validation of your service therefore continues to fail.
- **“Top”** button to scroll to the top of the page with one click (marked in violet)

6. The text above the field name indicates why the error occurred/ which value is required to pass the validation:

Field cannot be empty. Select 'Provis

Validation not passed
Some fields not passing criteria

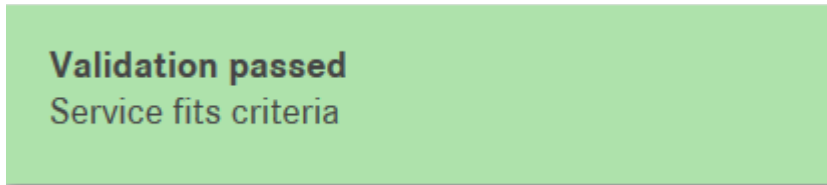
Ensured Support Statement
Please state whether you ensure the support for your service. This includes: 1) The processing of service disruptions as well as the correction of errors in the service (or underlying software); and 2) A clear definition of the support interface (end point of support) with the HIFIS Helpdesk interface.
no value

Field cannot be empty. Select 'Provision Level in Helmholtz Cloud' for more validation info

Cloud Capability
Please state whether your service fulfills the cloud capability requirements. [Read more](#)
no value

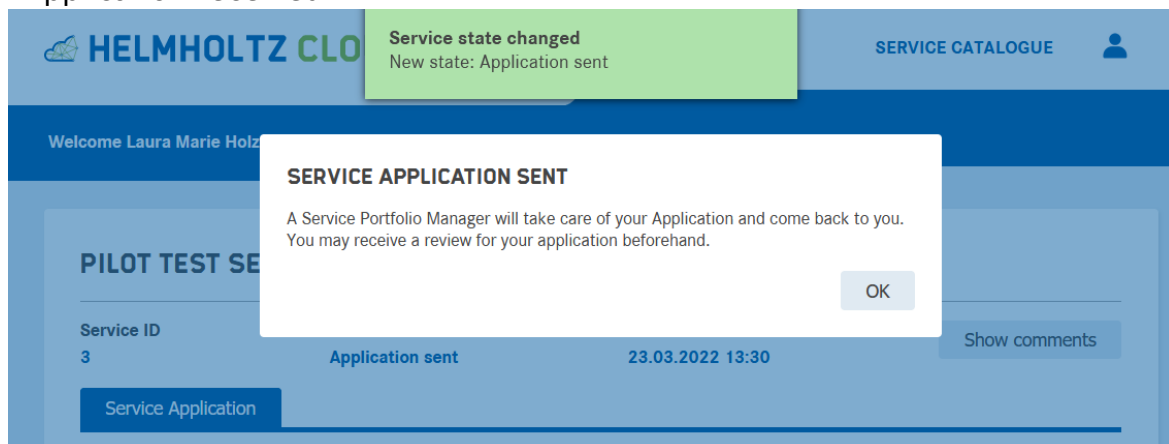
Please note: whether validation passes or fails depends on the value given in field “Service Type” for a number of fields. This is due to the fact that pilot services underlay a slimmer onboarding process with slightly less exclusion criteria than fully integrated services do.

7. As soon as validation is okay, a green pop-up comes up when clicking on "Validate Input" in edit or view mode:




It is then possible to send the Application to HIFIS via the button "Send" in view mode.

8. When having sent the Application to HIFIS, a green pop up comes up stating that the status of your Application Form was successfully changed to "Application received":



Plony Instruction

You cannot edit your Application anymore (unless HIFIS gives the application back to you) – but you can add a comment (marked in blue) if you want to add any information/question/remark to your Application:



The diagram illustrates the process of viewing and adding comments. A button labeled "Show comments" is shown with a blue arrow pointing upwards to a "COMMENTS" modal window. The modal window has a title bar with "COMMENTS" and a close button (X). Inside the modal, it says "No comments to display". Below this, there is a section titled "Write a comment" with a text input field and an "Add Comment" button. The background shows a blurred view of the application form with sections like "Free of Advertisement Statement", "Ensure", "Cloud", and "Helmholtz AAI Capability".

The Service Owner receives a notification mail including a copy of all information filled out in the Application Form.

IV. Service Canvas

As soon as the service application was checked and accepted by a Service Portfolio Manager, the service switches into the status “Service planned” and is now a part of the Service Pipeline:

MY SERVICES

Service Application (0)	Service Pipeline (1)	Service Catalogue (1)
-------------------------	----------------------	-----------------------

SERVICE PLANNED

[Test 2](#)
Desc

The person who filled out the Application form as well as the contact person named in the Application form receive a notification mail stating that the service successfully joined the Helmholtz Cloud Service Portfolio and that it is now required to give some more information on the service.

1. When clicking on the service in the overview “My services”, the service is displayed in the View mode:

HELMHOLTZ CLOUD SERVICE PORTFOLIO

Welcome

TEST 2

Service ID	Status	Last edit	Comments
3	Service planned	13.08.2024 16:39	1

You are the Service Owner of this service.

Service Application Service Canvas

Edit

GENERAL INFORMATION

Service Logo
Please upload your service logo to be used in Helmholtz Cloud Portal in .svg format. If you don't have an individual service logo, we will only use the general software logo underlying your service.
no value

Software Name
Please indicate which software your service is based on.
no value



- The “**Service Canvas**” tab is now visible for your service (marked in red) – you can view all fields belonging to the Service Canvas form
- Nevertheless, you can still check which information you gave us in the “**Service Application**” (marked in blue) – please note that you cannot edit the information given in the Application Form anymore.
- In order to get started with the Service Canvas, you can press the button “**Edit**” (marked in green) – the Service Canvas fields will then be displayed in Edit Mode
- To check the comments regarding your Service, you can use the button “**Comments**” (marked in violet) – the number next to the button indicates how many comments already exist.
- The information marked in **orange** indicates that you are the Service Owner – so the service you are viewing is linked to your user account.

- When clicking on the “Edit” Button, the Service Canvas fields switch to the “**Edit Mode**” (marked in red):

- The status of the service changes to “**Service Information in draft**” (marked in blue) as soon as you switch to Edit Mode for the first time
- You find the **name of the service** you’re about to edit the Service Canvas for right underneath “Edit Service Canvas” (marked in green)
- Underneath the service name, you find the **navigation** for the Service Canvas form (marked in orange). Since the Service Canvas has quite many fields, we splitted them into four tabs for better overview.

- Fields that will be transferred to the Cloud Portal are marked accordingly in the Service Canvas:

- To get a better understanding of how Plony fields are displayed in the service card/service description in the Cloud Portal, there is a Mapping picture available on top of the service (in view and edit mode):


SERVICE PORTFOLIO


Welcome Laura Marie Holz

TEST SERVICE

Service ID	Status	Last edit	Comments
3	Online / Available	10.05.2023 14:28	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Service Card Mapping </div>

Service Application

Service Canvas

Service card


■ Service Logo

■ Software name

■ Service name

■ Short text for service card in Cloud Portal

■ Service Provider



Overleaf
Collabtex

Collaborative document writing with LaTeX

HZDR

Field belongs to: ■ Application Form ■ Service Canvas

Service Description

■ Service name

■ Description (short)

■ Description (long)

■ User Enablement

■ Limitations

■ Service Levels Description

■ Backup Strategy

Collabtex

Online LaTeX-Editor - (also) for collaborative work

This service allows to share and edit a LaTeX document with an unlimited number of collaborators. It is based on the open-source Overleaf Community Edition. It provides a complete, ready to go LaTeX environment that can be used via any web browser. Collaboration is done through a single master version for each document, which can be accessed by any authorized person. Multiple people can work on a document at the same time, and each other's changes are displayed directly. Document history shows which changes were added or removed and by whom. The service is hosted on-premise at HZDR.

How to get Access

This service can be used free-of-charge by anybody within Helmholtz and their partners. Login via the Helmholtz AAI. Your account will automatically be provisioned.

Limitations

- Git Synchronization features are currently not supported.
- New projects can only be created by users within Helmholtz. However, external users can be invited and can edit existing projects.

Availability & Backups

- Helmholtz employees with **registered IdP in Helmholtz AAI** get full access.
- All other users will become external users and need to be invited to shared documents.
- Availability: best effort

Backups:

There is a daily snap shot of the system disk and a full backup of the VM every week. Users are encouraged to save their documents frequently on local storage.

[Go to service](#)

[Provide Feedback](#)

Software
Overleaf

Provider
HZDR

Storage Location
in centre

User Support
support@hlfis.net

Link to Service for Usage

Software name

Service Provider

Storage of Service Data

Contact for User Support (1st Level)

5. There is also a navigation bar on bottom of the Service Canvas Pages:

Connection with HIFIS Helpdesk Select ...

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?

Communication with HIFIS

Please indicate how you wish HIFIS to communicate with you e.g. via mailing list, via functional mail address, via ticketing system or via Service Owner. Please choose max. 2 possibilities.

Save
Save & Close
Validate Input
Previous Page
Next Page
Cancel
Top

- Pressing the button “**Save**” (marked in red) will lead to saving your Service Canvas while staying in the Edit Mode. This automatically happens whenever you switch to another Service Canvas page:

Communication with Users

Service saved

Please indicate how you communicate with your users e.g. ticket system for support cases, email for information, escalation levels defined, feedback channels, communication of downtime announcements.

Ticket system for support

Please give us the following information about your support/ ticket system:
[Read more](#)

- Pressing the button “**Save & Close**” (marked in blue) will lead to saving your Service Canvas while switching to the View Mode, where you can **send the Service Canvas** to HIFIS after it passed the validation (marked in red):

HELMHOLTZ CLO Service saved SERVICE CATALOGUE

Welcome

DEMO SERVICE

Service ID	State	Last edit	Show comments
4	Service information in draft	05.04.2022 12:49	1

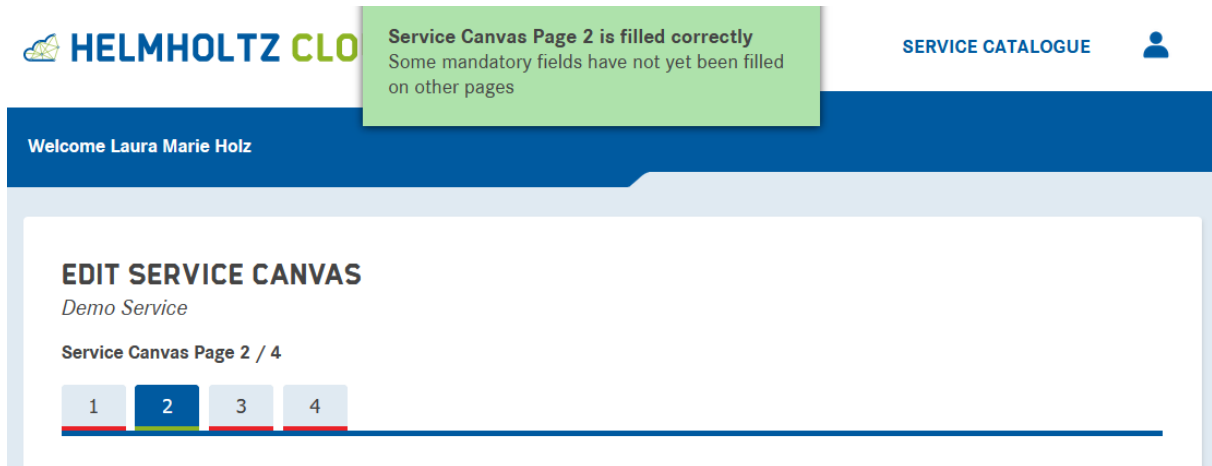
Service Application
Service Canvas

Edit
Validate
Withdraw Service offer
Send Service Canvas

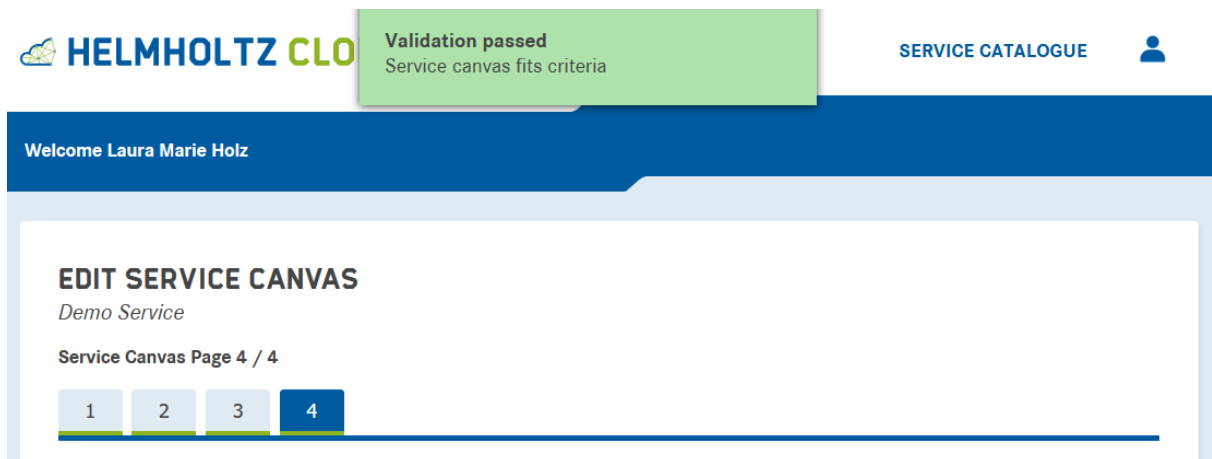
GENERAL INFORMATION

Service Logo
Please upload your service logo to be used in Helmholtz Cloud Portal in .svg format. If you don't have an individual service logo, we will only use the general software logo underlying your service.
no value

- Pressing the button **“Validate Input”** (marked in green) will lead to validating whether all mandatory fields (depending on Service Type) are filled. Having a look at the navigation on top of the Service Canvas, you will see that the tabs which are filled out correctly are marked in green, while those tabs missing mandatory information are marked in red:



- As an equivalent to using the tabs for navigation between Service Canvas pages on top, you can use the buttons **“Previous Page”** and **“Next Page”** for switching between tabs in the bottom navigation (marked in orange).
 - Pressing the button **“Cancel”** (marked in violet) will lead to switching back to the View Mode, while not saving your changes (unless you pressed the “Save” button or switched the tab beforehand).
6. As soon as all mandatory fields are filled, all tabs in the navigation on top of the page are marked in green:



- To send the Service Canvas to HIFIS, switch back to the View Mode (by pressing the button "Save & Close" in the navigation on bottom of the page) and press the button "**Send Service Canvas**" (marked in red):

DEMO SERVICE

Service ID	State	Last edit	Show comments
4	Service information in draft	05.04.2022 16:56	1

Service Application
Service Canvas

Edit
Validate
Withdraw Service offer
Send Service Canvas

GENERAL INFORMATION

A window confirming that your Service Canvas was sent to HIFIS appears:

Service state changed
New state: Service information sent
SERVICE CATALOGUE

Welcome Laura Marie Holz

PILOT TEST SE

Service ID	State	Last edit	Show comments
3	Service information sent	23.03.2022 14:30	

Service Application
Service Canvas

Validate

GENERAL INFORMATION

You cannot edit your Service Canvas anymore (unless HIFIS gives it back to you) – but you can add a comment (marked in violet) if you want to add any information/question/remark to your Service Canvas:

SERVICE PORTFOLIO

Welcome Service Provider

TEST 2

Service ID	Status	Last edit	Comments
3	Service planned	13.08.2024 16:39	1

You are the Service Owner of this service.

Service Application
Service Canvas

COMMENTS

X

Comment

Write a comment

Add Comment

The person who filled out the Service Canvas (Service Owner) receives a notification mail including a copy of all Service Information inserted.

6. If it turns out that, while filling the Service Canvas, you are no longer willing to offer your Service in Helmholtz Cloud, you can use the "Withdraw Service offer" button (marked in red):

DEMO SERVICE

Service ID 4	State Service information in draft	Last edit 05.04.2022 16:56	Show comments	1
-----------------	---------------------------------------	-------------------------------	---------------	---

Service Application

Service Canvas

Edit

Validate

Withdraw Service offer

Send Service Canvas

GENERAL INFORMATION

This leads to the closing of your Service Application. Nevertheless, if you want to reactivate your Service Application, please do not hesitate to contact us.

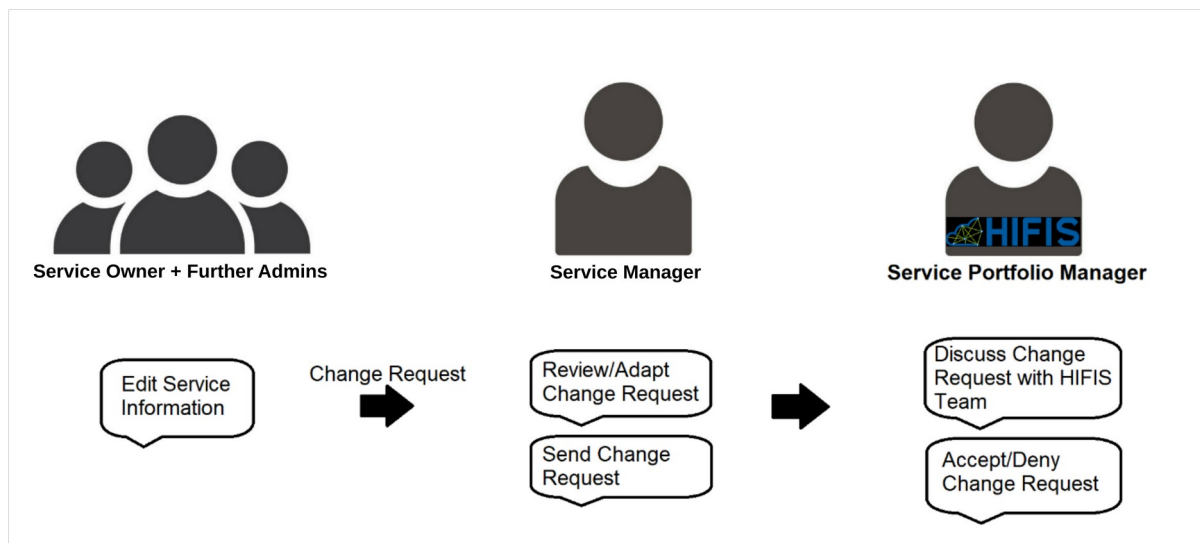
Service Operation

V. Change of Service Information during Operation(service is in status “online”)

The roles involved in the change of service information are:

- The Service Owner and Further Admins (=Service Operation Group)
- The Service Manager (=Object Owner)
- The Service Portfolio Manager

The following overview shows a simplification of the change process:



Editing service information

As Service Owner or Further Admin you can navigate to your service and push the “Edit” Button to edit the service information:

The screenshot shows the NUBES service information page. At the top, there is a header with the service ID (35), status (Online / Available), last edit (22.07.2024 19:37), and a comments section with 4 comments. Below this, there is a tabbed interface with tabs for Service Information, Responsibilities, Change Request, Weighting Criteria, and Documents. The Service Information tab is selected. Under this tab, there are three buttons: Edit (highlighted with a green arrow), Validate, and Expand all. Below the buttons, there are three expandable sections: IDENTITY INFORMATION, EXCLUSION CRITERIA FIELDS, and GENERAL INFORMATION, each with a right-pointing arrow.

The form opened is the Online form. It consists of all service information that is required and should be kept up-to-date, thus including **Application Form fields** (on tab 1, marked in red) as well as all **Service Canvas fields** (on tabs 2-5, marked in green). Some fields from the Onboarding process are only required during the Onboarding and are therefore not part of the Online form.

The Service Owner and the Further Admins can edit any field content (marked in blue). After saving the online form, fields which have yet been edited are marked with the **information banner** "You edited this field as part of change request." (marked in orange).

EDIT ONLINE SERVICE

Test Service

Note: You can edit this Service, but the changes will not be applied on the Service directly, it will be saved as draft. Contact the Service Object Owner (mostly Service Manager) to sent the requested changes to the Service Portfolio Manager for review.

Service Page 1 / 5

1 2 3 4 5

IDENTITY INFORMATION

Service name

Test Service 12345

Please indicate the name of the service you would like to offer in Helmholtz Cloud. Feel free to also indicate the software behind the service, if your service name does not imply that (e.g. Service name = nubes, Software behind the service = Nextcloud)

Content of this field will be published in Cloud Portal.

Public

You edited this field as part of change request.

Description

Description

All changes are bundled to a change request which can be reviewed/adapted and sent to HIFIS by the Service Manager. Please note that the Service Manager is informed via mail whenever the online form is saved via the buttons "Save" or "Save & Close".

You can see the change request if you navigate to the "Change Request" tab:

Service Information Responsibilities **Change Request** Weighting Criteria Documents Manage Status

Here you can see change requests suggested by Service Provider or by HIFIS. The Service Portfolio Manager can accept or discard changes. To edit the suggested changes, go to the Service Information tab and press the Edit Button.

Change request from Service Provider

The following requested changes are not submitted.

Service field	Current value	New value
Description (short)	Desc	Descdsfsdf
Software Name	Software	Software Name
Service name	Test Service 123	Test Service 12

Reviewing/Adapting/Sending Change Requests to HIFIS

The information on being Service Manager (= Object Owner) is displayed on top of the service information (marked in red) when service is displayed in the view mode:

EXAMPLE SERVICE

Service ID 2	State Online / Available	Last edit 27.04.2023 12:42	Comments
------------------------	------------------------------------	--------------------------------------	-----------------

You are the Service Manager of this service.
To edit this Service, click the 'Edit' Button below. You will be redirected to the Online Form.

Service Application

Service Canvas

Weighting Criteria

Ownership


Change Request

Manage Status

Edit

GENERAL INFORMATION

Service Logo
Please upload your service logo to be used in Helmholtz Cloud Portal in .svg format. If you don't have an individual service logo, we will only use the general software logo underlying your service.



Please note: If there is no Service Manager defined, the Service Owner inherits the Service Manager rights (also see Chapter VII „Responsibilities Tab“ for more details).

V7.1, last edit: 11.10.2024

Service Managers can switch to the tab “**Change Request**” (marked in green) to get an overview of all **change requests yet handed in** (marked in red). They can then decide:

- to deny the change request by clicking on “**Reset all changes**” (marked in green)
- to adapt the change request by switching to the tab “Service Canvas” and clicking on edit (see description “Editing service information”)
- to accept the change request and send it to HIFIS for approval by clicking on “**Send change request**” (marked in blue)

Service Managers can also see **change requests handed in by HIFIS** (marked in orange), e.g. by the Service Integration Manager.

EXAMPLE SERVICE

Service ID
2

State
Online / Available

Last edit
27.04.2023 12:42

Comments

You are the Service Manager of this service.
To edit this Service, click the 'Edit' Button below. You will be redirected to the Online Form.

There are requested changes for this Service. You can send the changes for review to the Service Portfolio Manager.

Service Application

Service Canvas

Weighting Criteria

Ownership

Change Request

Manage Status

Here you can see changes, which are requested by the Service Manager (and Service Operation Group member) or by HIFIS-Team. The Service Portfolio Manager can accept or discard changes.

Change request from Service Operation Group
The following requested changes are not submitted.

Service field	Current value	New value
Description	Description	Better Description
Software Name	Software	New Software
Service name	Example Service	Example Service 1234

↑

Reset all changes

Send change request

Change request from HIFIS
Currently no change requests

←

As soon as the Service Manager sent the change request to HIFIS, the service information cannot be edited anymore until the change request is accepted or denied by HIFIS. Anyway, if the Service Manager wants to adapt the change request, they can use the button “**Withdraw change request**” (marked in red):

TEST SERVICE 123

Service ID	Status	Last edit	Comments
2	Online / Available	13.08.2024 17:00	

Service Card Mapping


You are the Service Manager of this service.
To edit this Service, click the 'Edit' Button below. You will be redirected to the Online Form.

Service InformationResponsibilitiesChange RequestWeighting CriteriaDocumentsManage Status

Here you can see change requests suggested by Service Provider or by HIFIS. The Service Portfolio Manager can accept or discard changes. To edit the suggested changes, go to the Service Information tab and press the Edit Button.

Change request from Service Provider

Service field	Current value	New value
Description (short)	Desc	Descdsfsdf

ExportWithdraw change request

Change request from HIFIS
Currently no change requests

The service information can then be adapted and the change request can be sent again to HIFIS.

Additionally, the Service Manager can **export** the change request (marked in green).

Accept/Deny change requests

The Service Portfolio decides about the **acceptance/denial of change requests** (marked in green) handed in. For defined fields it is required to discuss changes with the HIFIS team (which is done apart from Plony).

The Service Portfolio Manager can **modify changes directly** by clicking on the pen (marked in red). If the Service Manager wants to adapt the change request, the Service Portfolio Manager can use the button “**Release change request**” (marked in blue) to give it back to the Service Manager.




When having made the decision to accept/deny changes, the Service Portfolio Manager must press “**Apply**” (marked in violet) (or “**Reset decision**” (marked in orange) if all decision mark ups should be reset.)




EXAMPLE SERVICE

Service ID 2	State Online / Available	Last edit 27.04.2023 12:42	Comments
Service Application	Service Canvas	Weighting Criteria	Ownership
Change Request			
Manage Status			

Here you can see changes, which are requested by the Service Manager (and Service Operation Group member) or by HIFIS-Team. The Service Portfolio Manager can accept or discard changes. As a Service Portfolio Manager you can also release the change request function, so that Service Manager or Service Integration Manager can submit new changes. A release will automatically happen, when no change request is left.

Change request from Service Manager and Service Operation Group

Service field	Current value	New value	Decide
Description	Description	Better Description 	<input checked="" type="radio"/> Accept <input type="radio"/> Discard
Software Name	Software	New Software 	<input type="radio"/> Accept <input type="radio"/> Discard
Service name	Example Service	Example Service 1234 	<input type="radio"/> Accept <input type="radio"/> Discard

 **Release change request**
 **Reset decision**
 **Apply**

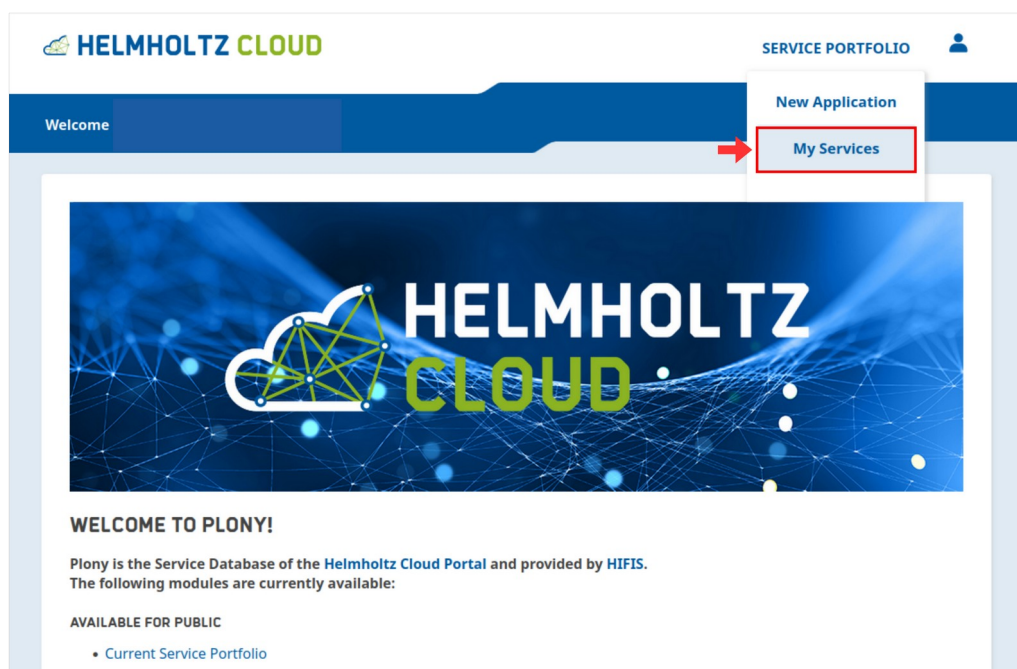
Change request from HIFIS-Team (Service Integration Manager)
Currently no change requests

In the same way as the Service Manager, the Service Portfolio Manager can export the change request using the export button (see screenshot on page 21).

VI. Review of Service Information

At least once a year a Service Portfolio Review makes it necessary for Service Managers to check whether all service information of their service(s) are still up-to-date. Service Portfolio Managers can initiate a review of service information in Plony. A mail notification will then automatically be sent to the Service Manager (=Object Owner).

In order to conduct the review of service information, Service Managers need to Login to Plony via Helmholtz AAI (see Chapter 1 [Login to Plony](#)). When Login was performed, Object Owners need to mouse over “Service Catalogue” and switch to the “My Services” Overview (marked in red):



The Service Manager can then select any service from the list on the tab “Service Catalogue” by clicking on the service name.

Right on top there is the information on which **role one has for the service** (marked in green).

The **Review section** appears right on top of the service information (marked in red). It describes what needs to be done (either confirm that service information is up-to-date or create a change request to adapt service information).

If a change request is pending, it is not possible to press the **button “I confirm that service information is up-to-date”** (marked in orange). In this case, a **warning** (marked in blue) appears to explain why the button is disabled.

TEST SERVICE 123

Service ID	Status	Last edit	
19	Online / Available	11.10.2024 15:07	<div>Comments</div> <div>Service Card Mapping</div>

You are the Service Manager of this service.
 To edit this Service, click the 'Edit' Button below. You will be redirected to the Online Form.

There are requested changes for this Service. You can send the changes for review to the Service Portfolio Manager.

Action Required: Please check whether the service information is up-to-date!
 As the Service Manager you can either confirm that the service information is up-to-date or (ask the Service Owner to) modify outdated service information in the online form. As soon as you send the change request to the Service Portfolio Manager, your review action is done and this information box will disappear.

Currently you cannot confirm that the Service is up-to-date.
 There might be pending change requests - please check the Change Request tab.
 The Service does not pass the validation - please validate the Service and check fields

I confirm that the Service information is up-to-date

Service Information

Responsibilities

Change Request

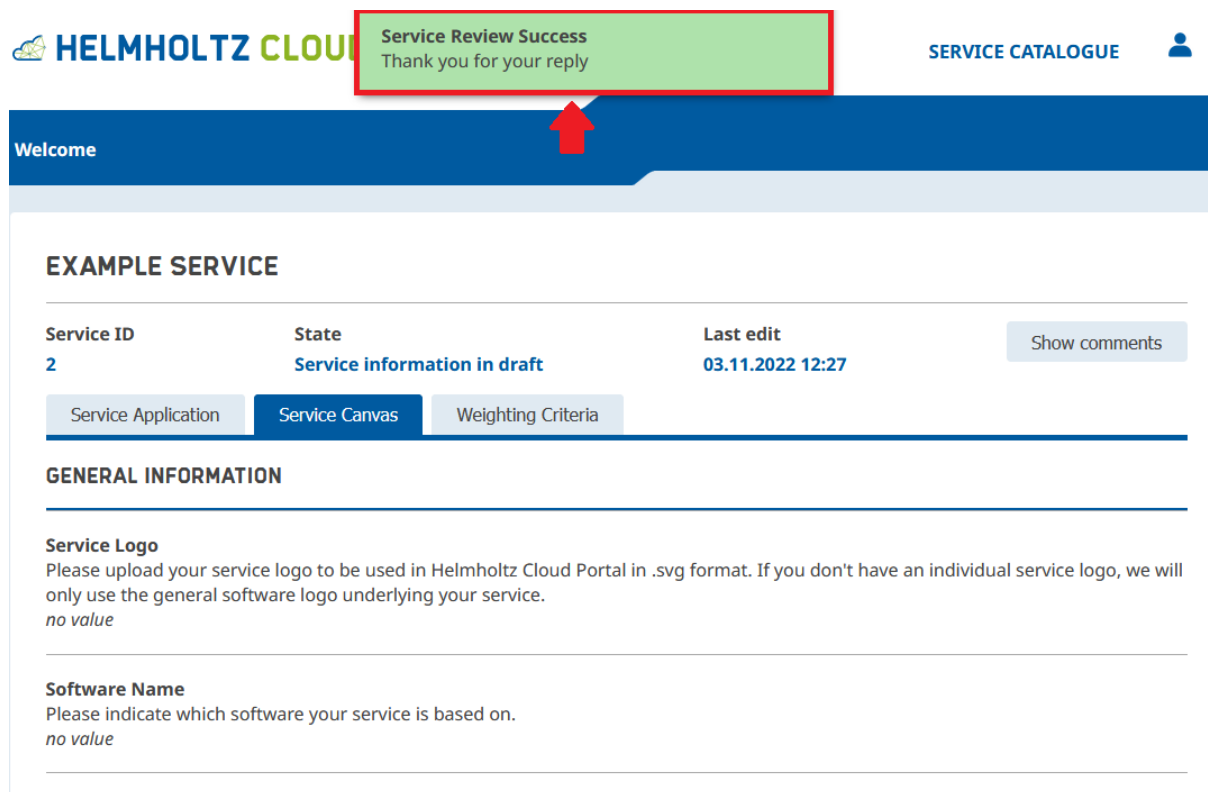
Weighting Criteria

Documents

Manage Status

The Service Owner & Further Admins can edit the service information (as described in chapter V *Change of Service Information during Operation*). The Service Manager can also edit service information, adapt an existing change request or state that all service information is up-to-date (see corresponding button in Service Manager’s review section).

When confirming the correctness of service information or sending the change request to HIFIS, a success message (marked in red) appears and the review section disappears. The Service Portfolio Managers will now see the feedback in their review overview:



The screenshot displays the Helmholtz Cloud Portal interface. At the top, a green success message box with a red border states "Service Review Success" and "Thank you for your reply". Below this, a blue navigation bar contains the "Welcome" text and a red arrow pointing to the success message. The main content area is titled "EXAMPLE SERVICE" and features a table with the following data:

Service ID	State	Last edit	
2	Service information in draft	03.11.2022 12:27	Show comments

Below the table, there are three tabs: "Service Application", "Service Canvas" (which is active), and "Weighting Criteria". The "GENERAL INFORMATION" section follows, containing two fields:

- Service Logo**: Please upload your service logo to be used in Helmholtz Cloud Portal in .svg format. If you don't have an individual service logo, we will only use the general software logo underlying your service. *no value*
- Software Name**: Please indicate which software your service is based on. *no value*

VII. Responsibilities Tab

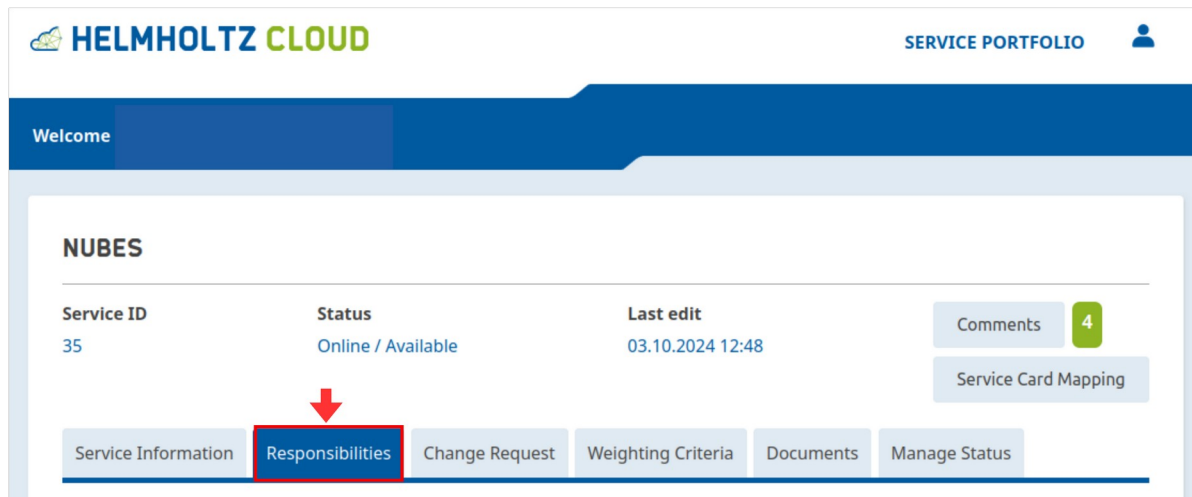
The Responsibilities Tab of a service is visible for the following roles:

Service Provider

- Service Owner
- Further Admins
- Service Manager
- Provider Manager

HIFIS

- Service Portfolio Manager
- Service Integration Manager



Each role on the Responsibilities tab is structured in the same way. It includes:

- the **role name** and a short **role description** (marked in orange)
- the **actions the role can perform** in Plony, e.g. creating change request or changing roles (marked in blue)
- the **person** who currently has the role (marked in green)
- the possibility to **edit the person** who has the role (marked in red), if applicable

The screenshot shows the 'Responsibilities' tab in the Plony interface. It displays a list of roles with their descriptions, actions, and the current person holding the role. Annotations with arrows highlight specific elements: an orange arrow points to the 'Service Owner' role description, a blue arrow points to the actions for the 'Service Owner', a green arrow points to the person 'Max Mustermann', and a red arrow points to the 'Edit' button for the 'Service Owner'.

Role	Description	Actions	Person	Edit Button
Service Owner	The Service Owner is the first contact person for the service towards HIFIS. The Service Owner is usually the main admin of a service and knows the service on a detailed level. If no Service Manager is set, then the Service Owner owns also their permissions.	<ul style="list-style-type: none"> can add/remove further admins can create a new change request 	Max Mustermann max.mustermann@helmholtz.de	Edit
Further Admins	The Further Admins are usually in the same team as the Service Owner, also know the service on a detailed level and have admin rights.	<ul style="list-style-type: none"> can add/remove further admins can create a new change request 	no entries	Edit
Service Manager	The Service Manager usually leads the Service Owner and further Admins and is entitled to submit change requests handed in by them.	<ul style="list-style-type: none"> can add/remove further admins can request change of Service Owner can request change of himself can submit change requests and send them to HIFIS 	Marta Musterfrau marta.musterfrau@helmholtz.de	
Provider Manager	The Provider Manager is usually the lead of the IT department and will be contacted if neither Service Owner nor Service Manager respond.		Charlotte Chef charlotte.chef@helmholtz.de	

The Service Owner inherits all rights of the Service Manager if no Service Manager is defined.

Please note that the list of persons displayed when using the “Edit” Button to change who has the role is limited to persons belonging to the own Helmholtz centre due to data protection reasons. Only persons who have a Plony account are displayed in the list. A Plony account is automatically created when a person initially logs in using Helmholtz ID.

Plony Instruction

Whenever there is an inconsistency regarding the Responsibilities a warning on top of the services will appear:

TEST

Service ID	Status	Last edit	Comments
5	Service information sent	10.10.2024 16:40	Service Card Mapping

Inconsistencies with regard to the Service Owner. This can mean that

- the Service Owner does not yet have a Plony Account. The Service Owner needs to login to Plony via Helmholtz AAI to create an account.
- the Service Owner has a Plony account but it isn't linked to the Service. Please get back to Service Portfolio Management, manual allocation is necessary.

Please check the "Responsibilities" tab for the current Service Owner.

Service Application

Service Canvas

Responsibilities

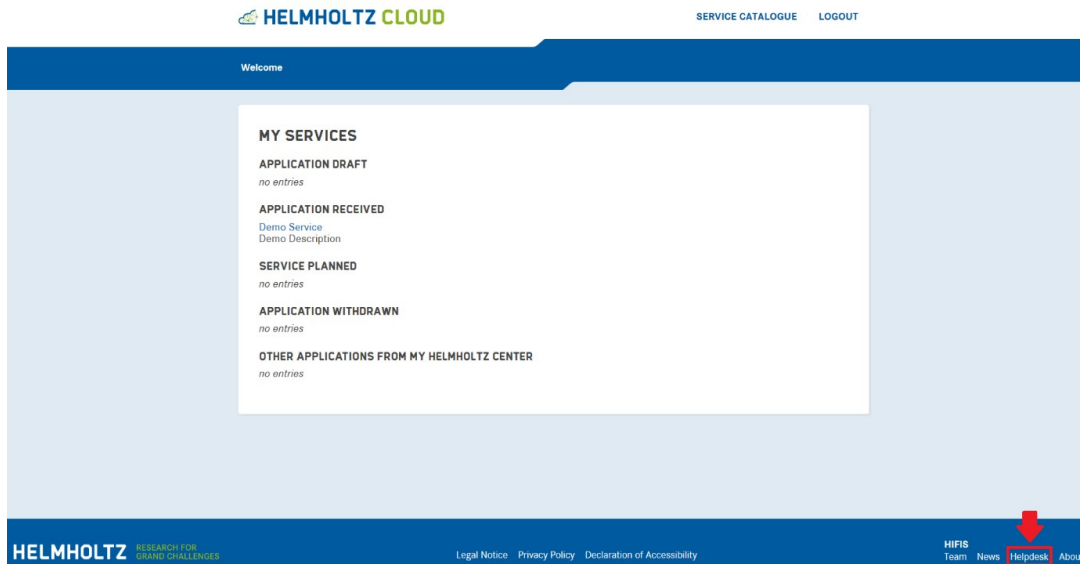
Weighting Criteria

Please follow the instructions in the warning to fix the inconsistency.

Contact + Related documents

VIII. Contact for questions/feedback

If you need help or have questions regarding Plony, please do not hesitate to contact us via the “Helpdesk” button in the footer on bottom of the website:



IX. Related Documents

- [Process Framework](#)
 - o Includes all processes regarding the Helmholtz Cloud Service Portfolio with process visualizations, step-by-step descriptions and responsible roles
- [Service Selection Criteria List](#)
 - o Includes all Service Selection Criteria (Exclusion + Weighting Criteria)