Plony – Instruction

HELMHOLTZ CLOUD   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.
- **Contact Database**
  The contact database is restricted to HIFIS management. It contains the HIFIS stakeholders and follows the GDPR principle of data minimization.
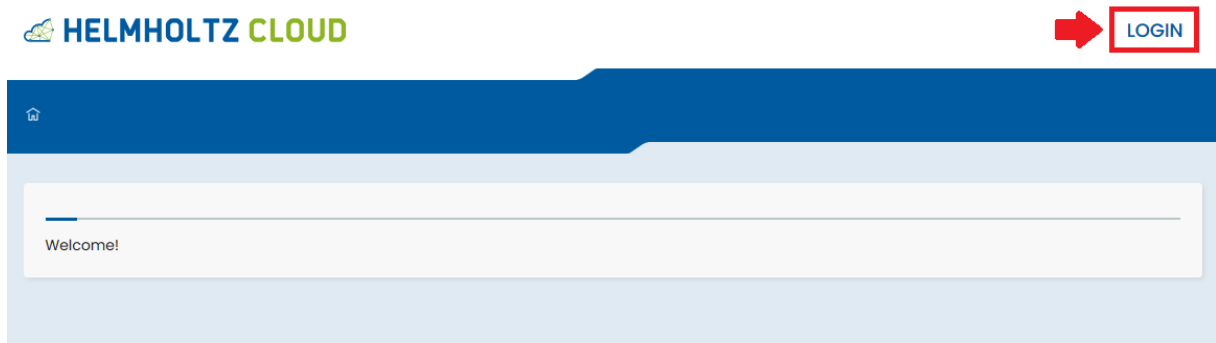
If you have any question or require support, feel free to contact us via the Helpdesk.

Thank you for your input to Helmholtz Cloud!

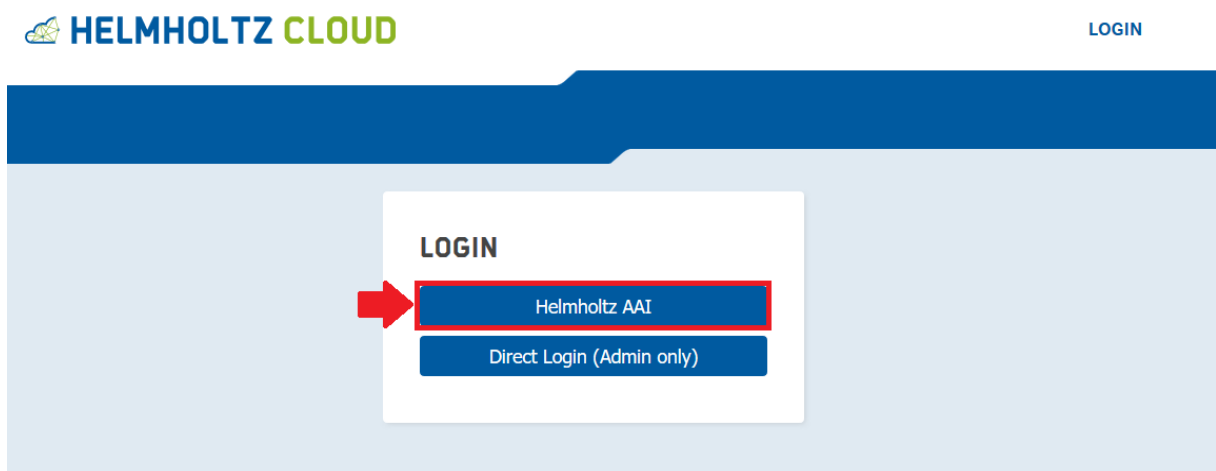## I. Login to Plony

1. Go to: https://plony.helmholtz-berlin.de

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 Catalogue" 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 (marked in green), sorted by their current status (marked in blue). You can also see your personal Applications in draft (marked in orange):
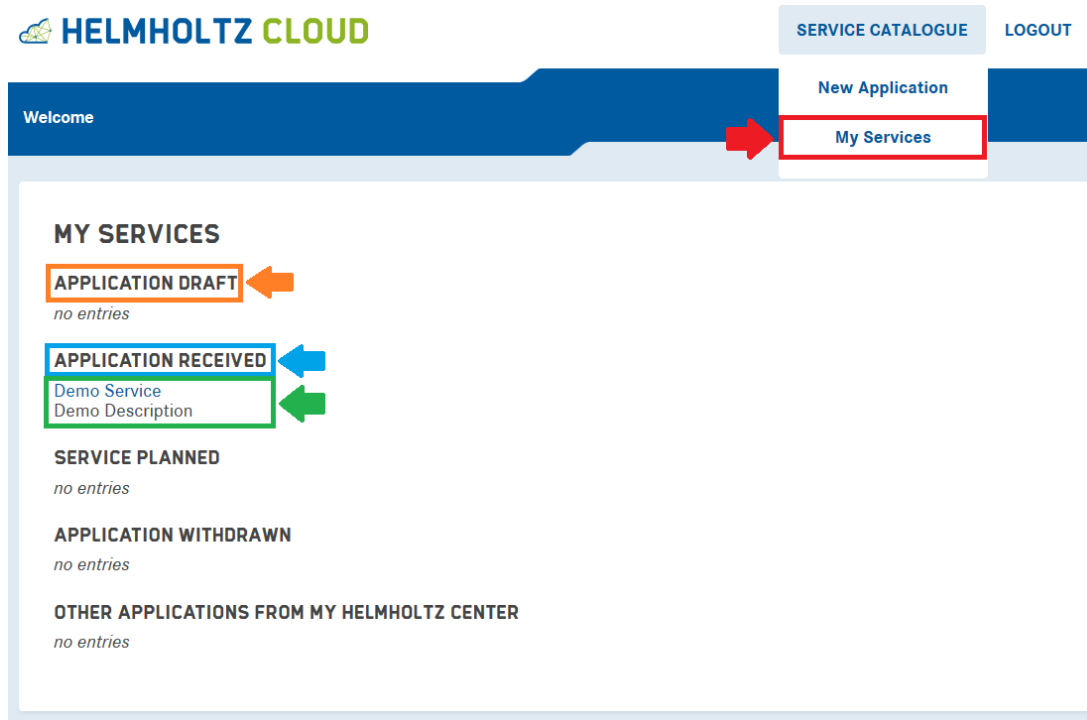
You can click in each service to view the corresponding Service Information.

III.   New Application (=Application Form)

1. 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

2. The fields in the Application Form are structured as follows:

   - Each field has a **field name** (marked in red)
   - Next to the field name there is the **input field** (marked in blue). 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 green). The explanation is usually phrased as a question that you can simply answer in the input field.
   - 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 (marked in orange). When clicking on the button, a pop up with more information opens up.

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

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)

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

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:

- "**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:

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 Maturity at Provider" 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:

Validation passed
Service fits criteria
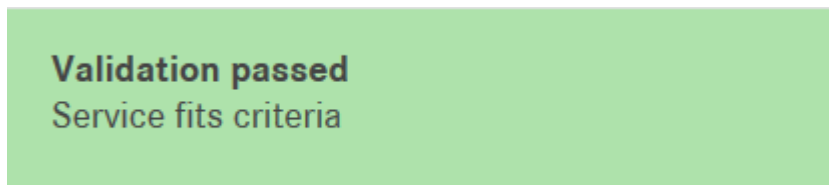
It is then possible to send the Application to HIFIS via the button "Send" in view mode.

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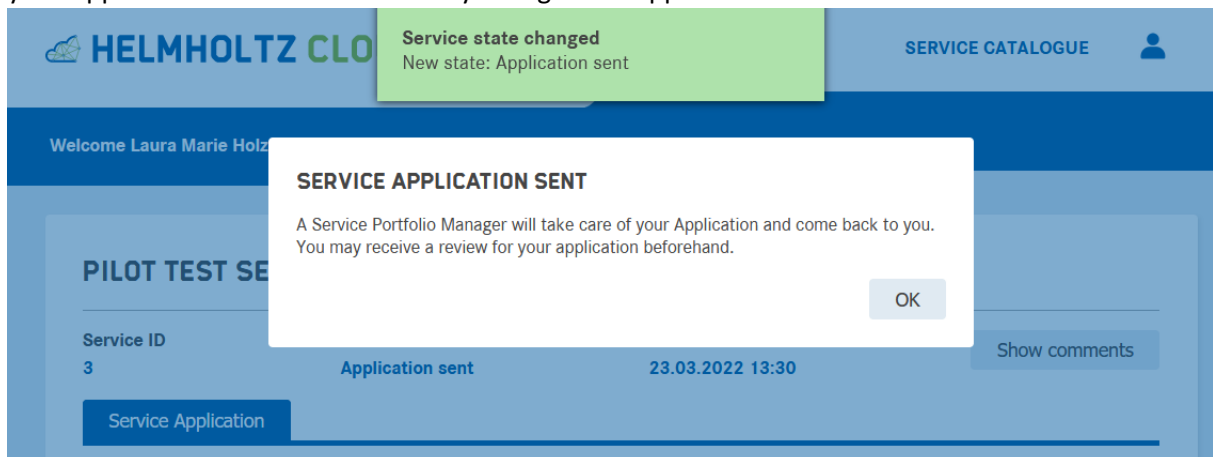
You cannot edit your Application anymore (unless HIFIS gives the application back to you) – but you can add a comment (marked in blue) if you want to add any information/question/remark to your Application:

The person who filled out the Application form as well as the contact person named in the Application form additionally receive a notification mail including a copy of all Application data inserted.

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":
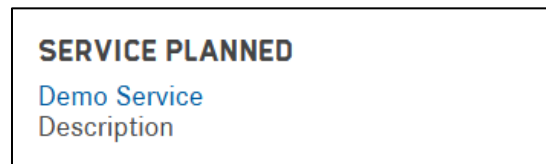
SERVICE PLANNED
Demo Service
Description

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:
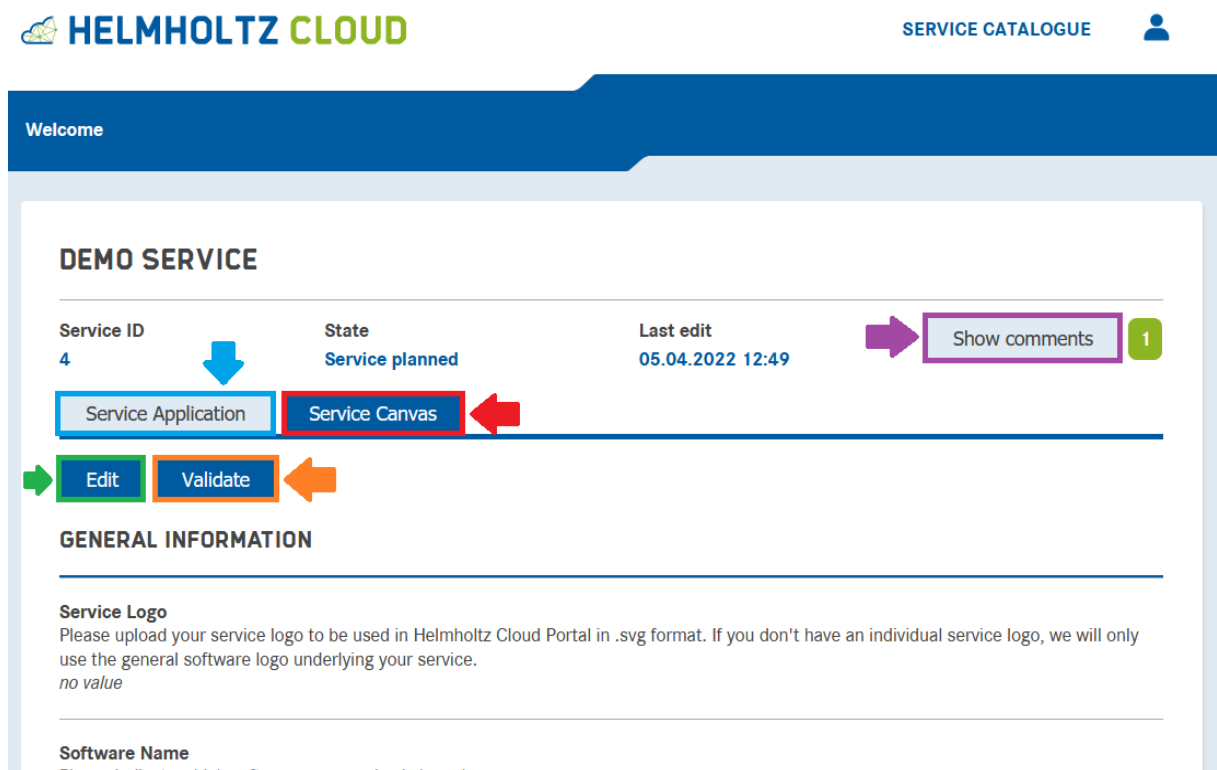
- The "**Service Canvas**" tab is now visible for your service (marked in red) – you can view all fields belonging to the Service Canvas form
- Nevertheless, you can still check which information you gave us in the "**Application Form**" (marked in blue) – please note that you cannot edit the information 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
- If you want to "**Validate**" the information you inserted in the Service Canvas, you can use the corresponding button (marked in orange). You can also validate in the Edit Mode.

- To check the comments regarding your Service Application, you can use the button "**Show comments**" (marked in violet) – the number next to the button indicates how many comments already exist.

2. 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.

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

4. 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):

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

- 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:

- 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 he validation (marked in red):

- 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 beforehand).

6. As soon as all mandatory fields are filled, all tabs in the navigation on top of the page are marked in green:

7. 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):

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

You cannot edit your Service Canvas anymore (unless HIFIS gives it back to you) – but you can add a comment (marked in blue) if you want to add any information/question/remark to your Service Canvas:
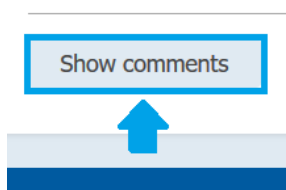
The person who filled out the Service Canvas as well as the Service Owner named in the Service Canvas additionally receive a notification mail including a copy of all Service Information inserted.

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):

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 for reactivation of your Application.

V. Change of Service Information during Operation

The roles involved in the change of service information are:

- The (members of the) Service Operation Group
- The Object Owner (often: the Service Manager)
- The Service Portfolio Manager

The following overview shows a simplification of the change process:
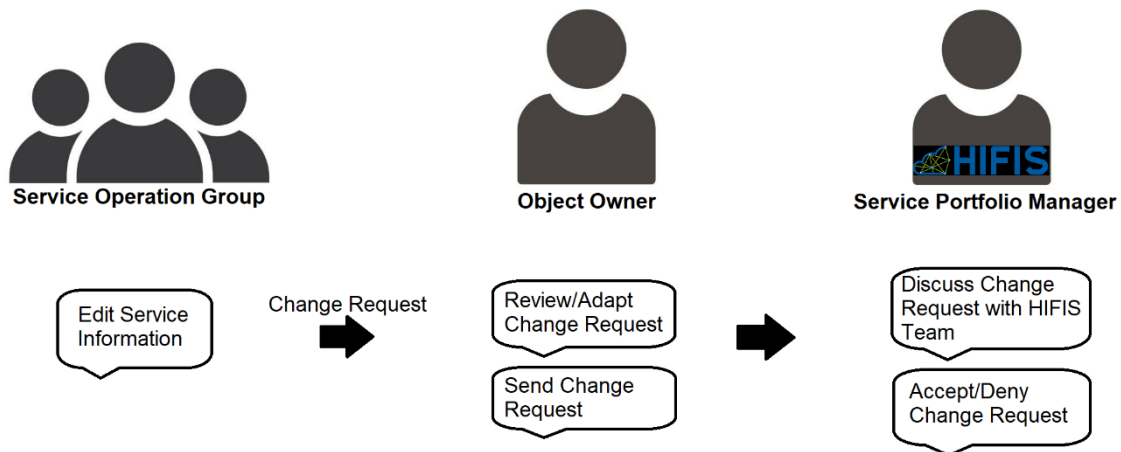
The Service Operation Group: Editing service information

There are two points in Plony where the information on being member of the Service Operation Group is displayed:

1. In the "My Services" Overview under the Headline "Service Operation Group Member" (marked in red)

2. On top of the service information (marked in red) when service is displayed in the view mode:

The second point (2.) is also where Members of the Service Operation Group can take action: they can edit service information by clicking on the "**Edit Button**" (marked in Green).

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.

Members of the Service Operation Group 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).

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

The Object Owner: Reviewing/Adapting/Sending Change Requests to HIFIS

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

Object Owners can switch to the tab "**Change Request**" (marked in green) to get an overview of all **change requests yet handed in** (marked in red). The object owner 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 "The Service Operation Group: Editing service information")
- to accept the change request and send it to HIFIS for approval by clicking on "**Send change request**" (marked in blue)

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

As soon as the Object Owner 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 Object Owner wants to adapt the change request, they can use the button "**Withdraw change request**" (marked in red):

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

The Service Portfolio Manager: 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 Object Owner 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 Object Owner.

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.)

VI.   Review of Service Information

At least once a year a Service Portfolio Review makes it necessary for Service Owners 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 Object Owner.

In order to conduct the review of service information, Object Owners 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):
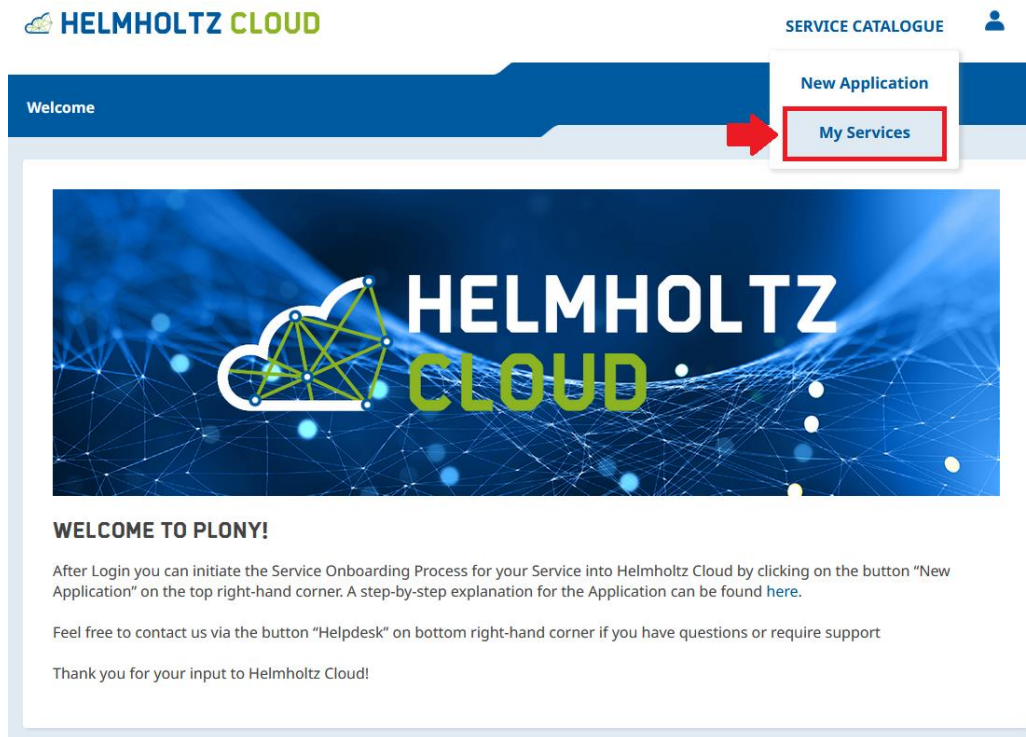
The Object Owner can then select any service from the list by clicking on the service name (marked in red):
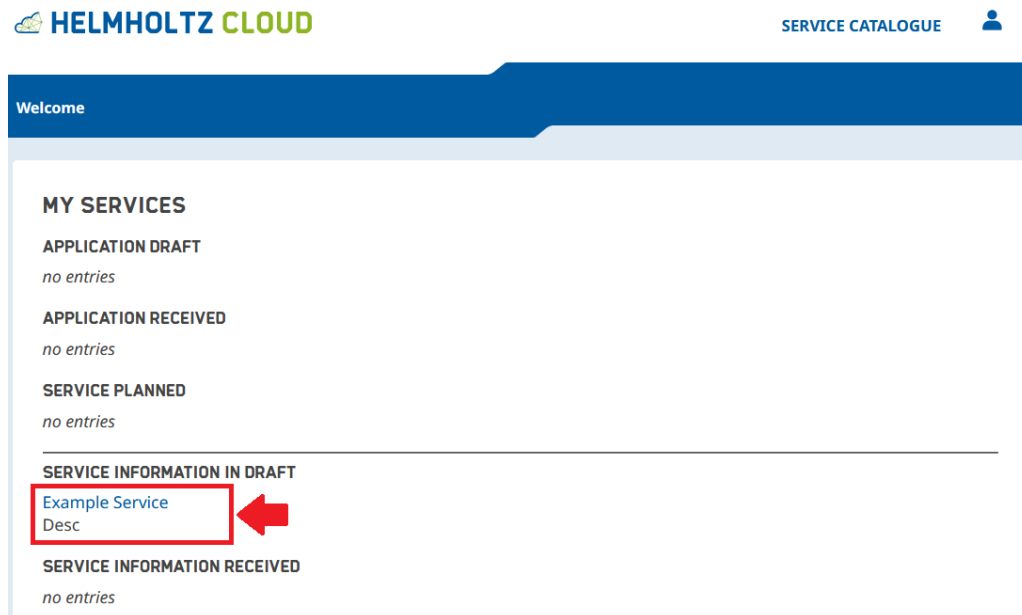
The Review section appears right on top of the service information **Object Owners** (marked in green) as well as members of the **Service Operation Group** (marked in red) can see the review section with individual text/functionalities:

EXAMPLE SERVICE

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

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

Action Required: Please check whether the service information is up-to-date!
Please confirm that the service information is up-to-date or modify the relevant fields in the online form and send it as a change request to the Service Portfolio Manager.

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

Service Application	**Service Canvas**	Weighting Criteria	Ownership	Change Request	Manage Status

Edit

GENERAL INFORMATION

TEST SERVICE

Service ID	State	Last edit	
3	**Online / Available**	**26.04.2023 13:55**	Comments

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

Action Required: Please check whether the service information is up-to-date!
As a Service Operation Group member you can either inform the Service Manager, that the Service is up-to-date or modify the relevant fields in the online form. After you had finished modifications, you can ask the Service Manager, to send the changes as a change request to the Service Portfolio Manager.

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.

The members of the Service Operation Group can edit the service information (as described in chapter *V Change of Service Information during Operation).* The Object Owner can also edit service information, adapt an existing change request or state that all service information is up-to-date (see corresponding button in Object Owner'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:

VII.   Service Ownership

Each member of the Service Operation Group as well as the Object Owner and the Service Portfolio Manager can see the "Ownership" tab in the view mode of the service.

Members of the Service Operation Group can only see who is currently the Object Owner and who is member of the Service Operation Group.

The Object Owner can see who is currently Object Owner (marked in red) and who is member of the Service Operation Group and can add/delete members of the Service Operation Group (marked in green):

The Service Portfolio Manager can who is currently Object Owner, change the Object Owner and see who is member of the Service Operation Group as well as add/delete members of the Service Operation Group.

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:
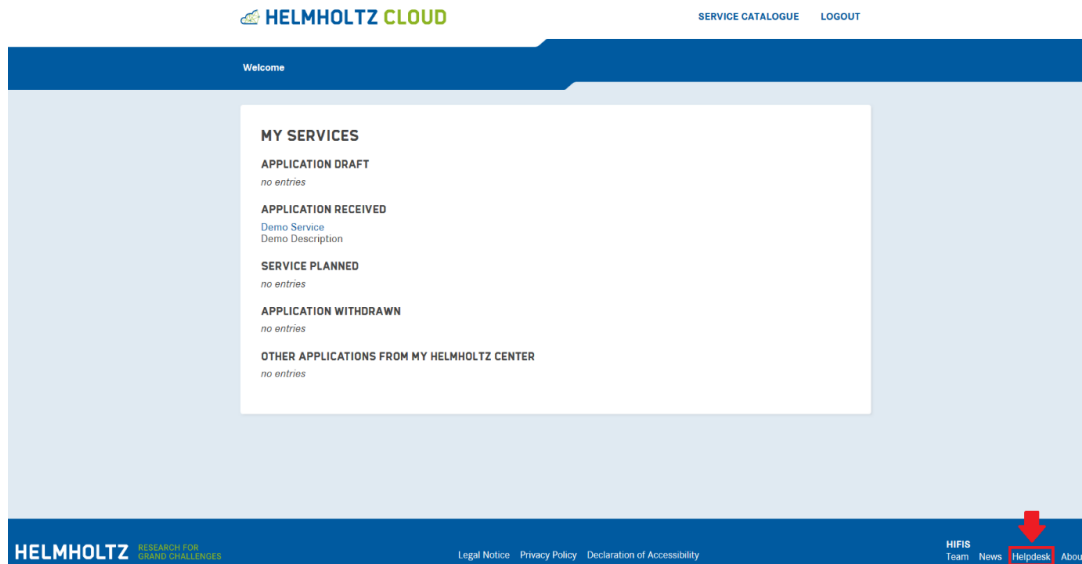
IX. Related Documents

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