



KER 2: EOSC Service Management System



eosc-hub.eu



@EOSC_eu

Dissemination level: Public

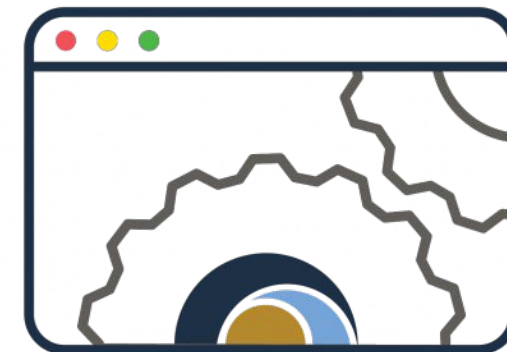
Disclosing Party: Project consortium

Recipient Party: European Commission





Description	<p>The EOSC IT Service Management System (SMS): coherent and standards-based set of procedures and processes to manage the complete lifecycle of services offered to customers</p> <ul style="list-style-type: none"> • Directed by policies and are structured and organised by processes and procedures • Maintenance of customer focus while sharing the load and responsibilities dynamically across providers • Shared awareness across organisations – e.g. coordinate updates, maintenance breaks to minimise disruptions
Type	Policies, procedures and policies for service management
Key innovation	Management of the service under the scope of the EOSC SMS in a consistent manner - especially in cases where the service consists of components provided by different service providers .
Additional background	<ul style="list-style-type: none"> • EOSC SMS based on extensive knowledge of participants' own federated SMSes • EOSC SMS created alongside existing partners' SMSes • Augmentation <i>not</i> replacement





Service Planning and Delivery

- Service Portfolio Management
- Service Level Management
- Service Reporting Management
- Service Availability and Continuity Management
- Capacity Management
- Information Security Management
- Service Order and Customer Relationship Management
- Supplier and Federation Member Relationship Management

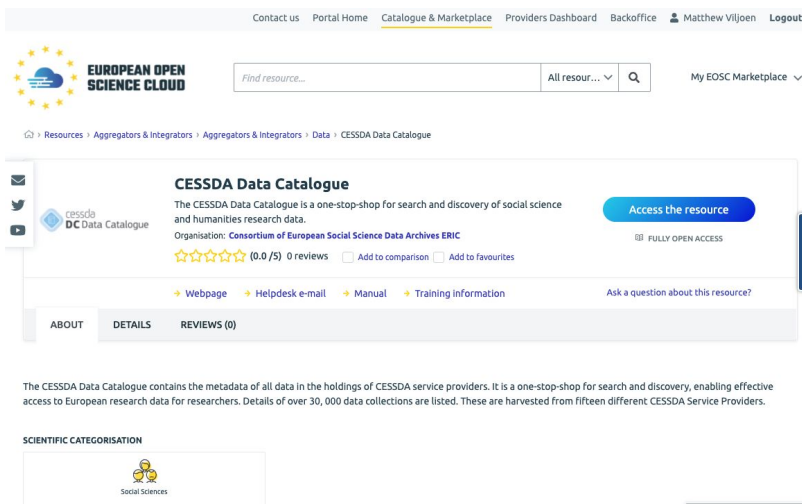
Service Operation and Control

- Incident and Service Request Management
- Problem Management
- Change Management
- Configuration Management
- Release and Deployment Management
- Continual Service Improvement

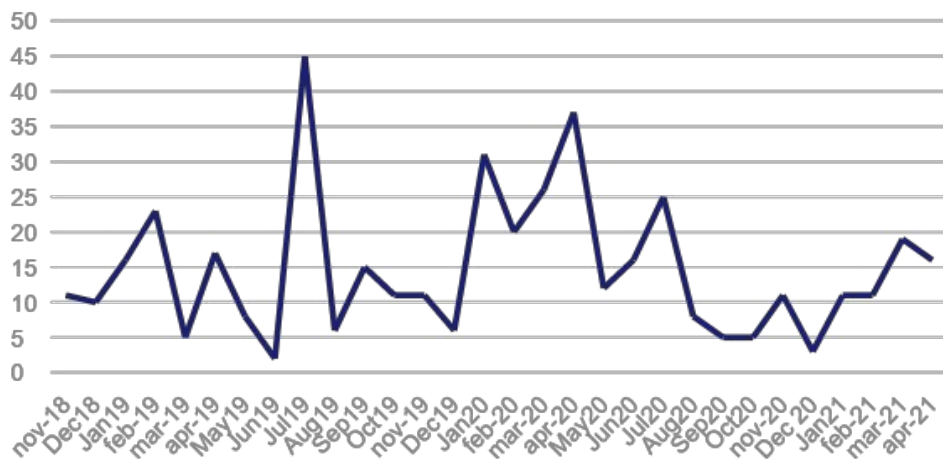




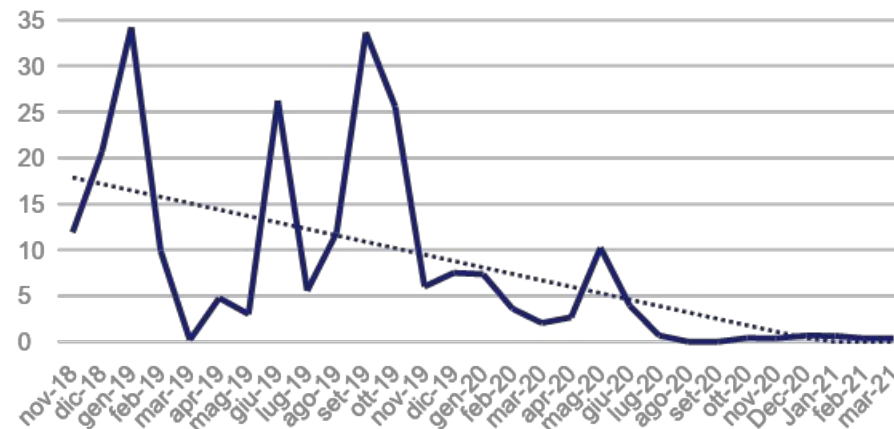
Innovation



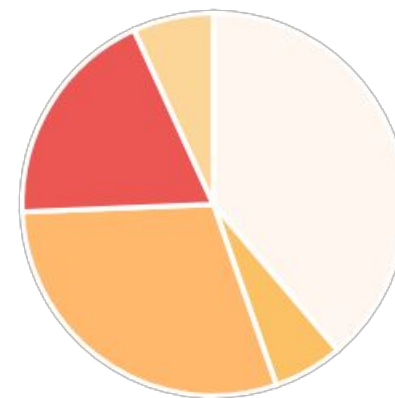
Received orders (total 442, average 15 per month)



Average response time to orders (days)



Orders status distribution (87% of orders served)



Approved
 In progress
 Ready
 Rejected
 Waiting for respond

Procedures

- SOCRM1 Service Order Management
- SOCRM2 Responding to EOSC-hub 'Contact Us' requests
- SOCRM3 Recording and managing stakeholder information
- SOCRM4 Provide technical support
- SOCRM5 Customer Relationship Management

SOCRM1 Service Order Management
Created by Giovanni Morelli, last modified by Debora Testi on 2020 Sep 11

Document control

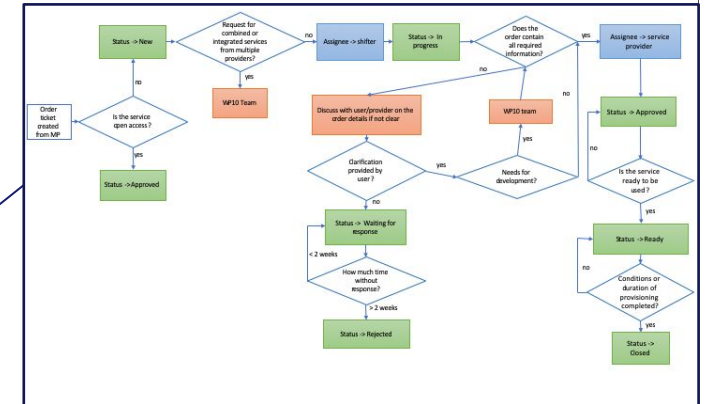
Area	SOCRM
Procedure status	FINALIZED
Procedure owner	@ Debora Testi ; @ Gergely Sipos
Approval status	APPROVED
Approved version and date	v80 22 Apr 2020
Statement	Procedure for managing orders relating to services
Next procedure review	Together with process review in 2021

Procedure reviews
The following table is updated after every review of this procedure.
> [Click here to expand...](#)

Table of contents

- o Document control
- o Procedure reviews
- o Table of contents
- o Overview
- o Definitions
- o Entities involved in the procedure
- o Triggers
- o Order management in summary
- o Orders From the Marketplace (MP)

Workflow



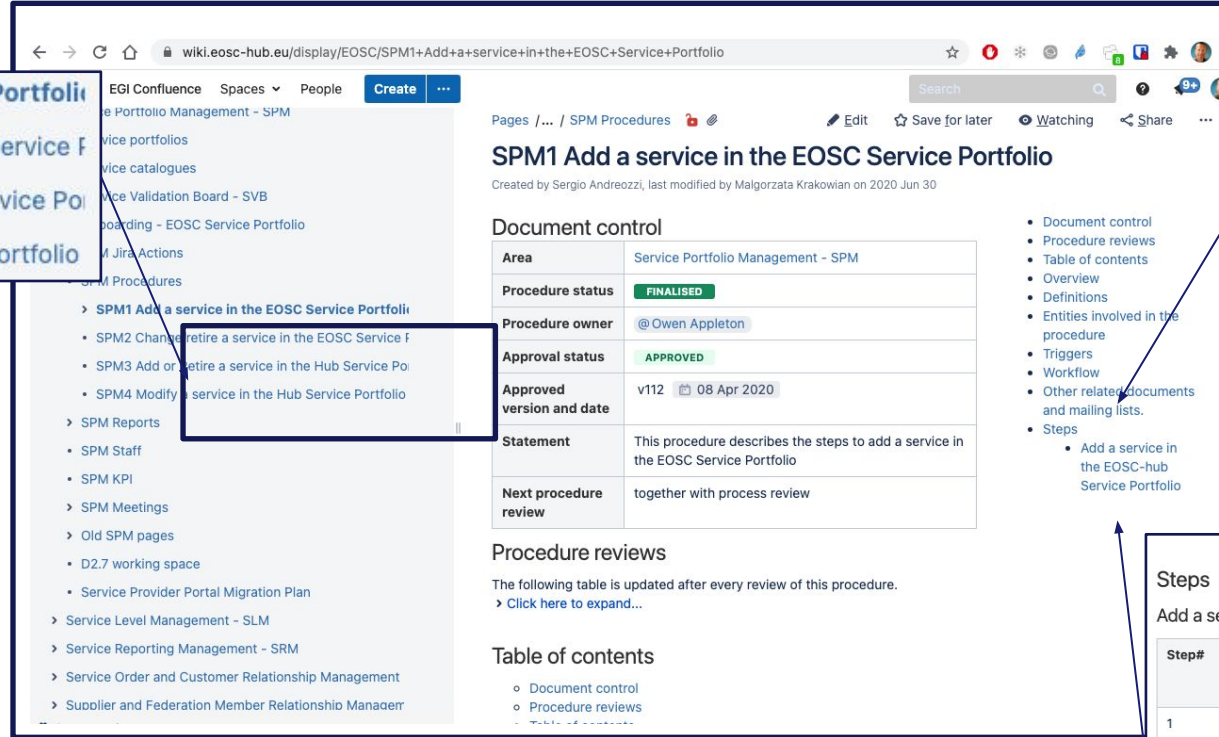
Step-by-step instructions

Step#	Trigger	Abstract Actor	Abstract Action(s)	Operational Actor	Concrete Action(s)
1	Notification email to orders@mailman.eosc-hub.eu inform that a "new" order has been submitted	Order Management System	<ul style="list-style-type: none"> Creation of order notification email. Creation of order object into JIRA. 	Order Shifter	<ul style="list-style-type: none"> Open order notification email. Visit link that points to the details in the JIRA ticket All order tickets can be seen at https://jira.egi.eu/issues/?filter=11703
2	Order assignment	Order Management System	<ul style="list-style-type: none"> Order Status changed to in "IN PROGRESS" Order is assigned 	Order Shifter	<ul style="list-style-type: none"> Assign the ticket to Order Shifter Change order status to "IN PROGRESS" Check also the parent project and related orders

Clearly defined and documented procedures within wiki (Confluence)
 Coordination of order management team
 Enabling repeatability and progressive improvement of practice

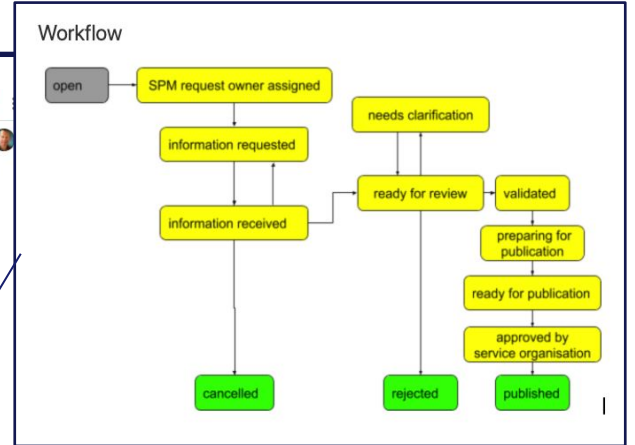
Procedures

- › SPM1 Add a service in the EOSC Service Portfolio
- SPM2 Change/retire a service in the EOSC Service Portfolio
- SPM3 Add or Retire a service in the Hub Service Portfolio
- SPM4 Modify a service in the Hub Service Portfolio



The screenshot shows a Confluence page with the following sections:

- Document control:**
 - Area: Service Portfolio Management - SPM
 - Procedure status: FINALISED
 - Procedure owner: @Owen Appleton
 - Approval status: APPROVED
 - Approved version and date: v112 (08 Apr 2020)
 - Statement: This procedure describes the steps to add a service in the EOSC Service Portfolio
 - Next procedure review: together with process review
- Procedure reviews:** The following table is updated after every review of this procedure. > Click here to expand...
- Table of contents:**
 - Document control
 - Procedure reviews

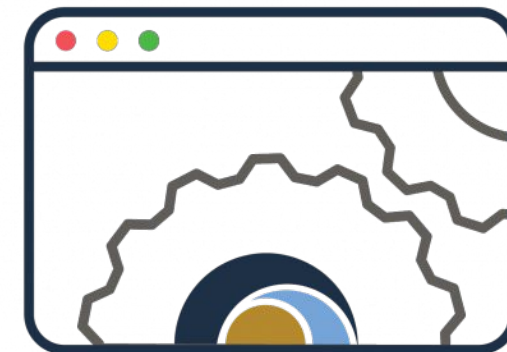


Steps

Add a service in the EOSC-hub Service Portfolio

Step#	Summary	JIRA Status	Responsible	Action	Due date to be assigned
1	Create ticket, send out SDT	Open → SPM Shifter Assigned → Information Requested	Service shifter (though others can do it)	<ul style="list-style-type: none"> Record the request by creating a <i>JIRA issue</i> in the <i>dedicated JIRA project</i> The name of the <i>JIRA issue</i> should be the name of the service name as provided in the initial request Create a copy of 	3 working days - but should be done immediately

<h2>Motivation</h2>	<ul style="list-style-type: none"> • To ensure robust and resilient service delivery of services within the hub to the EOSC federated infrastructure; • To facilitate communication between customer and providers by introducing single point of contact (helpdesk, marketplace etc.); • To disseminate and share service delivery best practices among providers; • To facilitate alignment of service management activities of all of the service providers, supporting different levels of integration with the centralised services; • To integrate the services provided by the different providers into the common marketplace and monitoring frameworks in a way that provides value for EOSC.
<h2>Implementation aspects</h2>	<ul style="list-style-type: none"> • <i>New SMS created from scratch</i> within Confluence/Jira. Policies, procedures, documentation along with clearly defined workflows (e.g. order management, onboarding, change control)
<h2>Contribution to EOSC</h2>	<p>The KER implemented a prototype SMS for the provision of EOSC core services under a unified management system. It will be further adopted and managed by EOSC Future. EOSC SMS as a result of EC funded projects can be used as an example for others how to set up a management system considering federated aspects.</p>



What benefits does it bring?

Exploitation audience	Benefit
EOSC-Core	<ul style="list-style-type: none">• Robust/resilient service delivery of services within the Core.• Increase maturity of the service providers in service delivery and customer focus.
Service Providers	<ul style="list-style-type: none">• Systematic way of onboarding• Access to new users• Integration with core services (e.g. AAI, monitoring..)• Dissemination and share service delivery best practices among providers
Researchers and research communities	<ul style="list-style-type: none">• Discovery & use of production-level services• Single point of contact (helpdesk, marketplace etc.)• Easier access to service (harmonised policies)• Better user experience in ordering and usage of the services.



Exploitation

EOSC SMS:

- An example of a federated management system supporting service delivery that may be adopted within any EOSC context
- Will be further developed within EOSC-Future
- Provides a blueprint for service delivery within other communities:
 - . EOSC NEANIAS project SMS
 - . SKA ESDC, see [AENEAS D6.2](#))
- Includes work immediately usable by other communities (e.g. security policies and harmonized AUP)
- Example of continuity of service: SMS forms a basis of continuing OLAs for EOSC that are currently being negotiated into the future

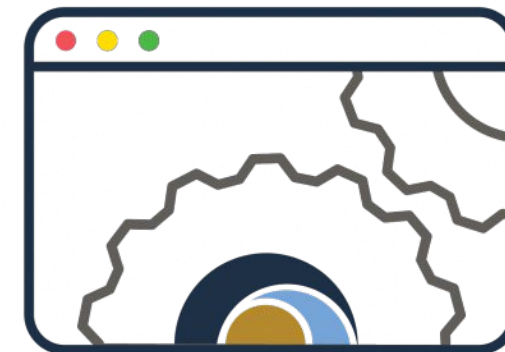
The **template collection** that will make implementing a similar SMS system is being made available under **CC-BY 4.0 license**.

The **underlying standard (FitSM)** is licensed under **Creative Commons**.

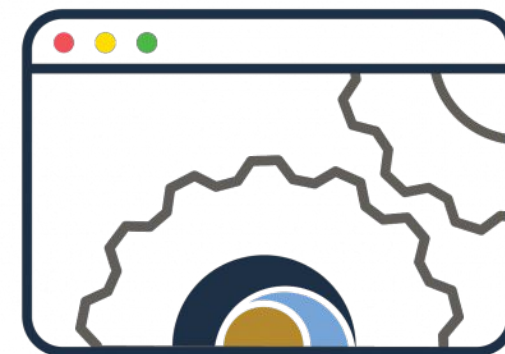
The **EOSC-hub specific procedure descriptions** (project internal use) are protected by copyright, with a **standardised copyright notice mentioning the project and EC grant number**.

The **contents of the SMS** are not public but are intended to be **available to future Hub Operators**, as a **set of documents with a CC-BY license**, including templates relating to policies, processes, procedures, role descriptions, reports and records.

EOSC-hub website	https://www.eosc-hub.eu/key-exploitable-results/eosc-service-management-system-sms
Publications	EOSC-hub Integration handbook for service providers Operation handbook for EOSC service providers
Newsletter	https://www.eosc-hub.eu/news/what-hub-eosc-hub https://www.eosc-hub.eu/news/eosc-hub-service-catalogue-launched https://www.eosc-hub.eu/news/eosc-hub-releases-integration-handbook-service-providers
Selected presentations at events	<ul style="list-style-type: none"> • Presentation and panel “EOSC service provider onboarding: Why joining the EOSC portal?” during the EOSC-hub week 2019 (November 2019, Prague, Czech Republic) with 60 participants • Presentation “Onboarding to EOSC: Current status and Future Issues” during the EOSC Symposium (November 2019, Budapest, Hungary) with 200 participants covering most of the EOSC related projects • Several presentations during the EOSC-hub week 2020 (online event, approximately 800 registered participants, sessions typically with 150 participants)



WPs in leading roles	WP1 and WP4
WPs providing contributions	WP2, WP5
Background information	<u>D1.7 - Report on EOSC-hub Service Management System</u> <u>D2.6 - First Service roadmap, service portfolio and service catalogue</u> <u>D4.1 - Operational requirements for the services in the catalogue</u> <u>D4.2 - Operational Infrastructure Roadmap</u> <u>D4.3 - Procedures and policies for the production infrastructure</u>



**Thank you
for your attention!**

Questions?



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