User facing Processes - Order Management and Helpdesk
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Debora Testi (CINECA), Pavel Weber (KIT)
Introduction

- Incident & Service Request Management and Order Management are two major user facing processes.
- Process is a set of activities with clearly defined responsibilities, that bring a specific objective from set of defined inputs:
  - Policies
  - Procedures
  - Inputs
  - Outputs
  - Roles
  - Tools/Applications
- ISRM and Order Management are user facing processes:
  - Multiple communication channels
  - Many actors with different roles: Users, Providers, Shifters, Supporters
  - Challenging environment: multiple organisations, units, services, components, dependencies
Order management process
User access for EOSC services

• Order management includes a set of procedures and policies with the aim to efficiently process the requests for services

• Order management tools are:
  • User facing: EOSC Marketplace
  • Back-end: SOMBO

• When a new service is registered, the provider chooses the desired integration level with order management

Open access
Without registration
With registration

Order required
Managed by the provider
Managed by EOSC staff
Open access services

• Do not require the provider to approve the request to access the service

• It might require users to login, but access rights are automatically granted
Orderable via provider channel

- Users need to request access, but authorization is handled through the provider’s own access management interfaces
- EOSC Portal redirects the user to the service homepage where these interfaces to request access are offered
Orderable via EOSC channel

• Users need to request access to the service and can do this through the EOSC order management
  • Requests will be forwarded to the providers
  • Providers have responsibility for responding to user access requests

• Services that work at this level can be part of cross-provider workflows because the Marketplace can handle together the access requests of all the services/resources that are required for the workflow

• EOSC can reach its full potential with providers integrated at this level into the order management system
Orderable via EOSC channel – user side

EGI Cloud Compute

Run virtual machines on demand with complete control over computing resources

Organisation: EGI Foundation
Provided by: CESNET, 100 Percent IT, Institute of Physics of Cantabria (IFCA), Italian National
Institute of Nuclear Physics, Deutsches Elektronen-Synchrotron, National
Distributed Computing Infrastructure, The SCSIGE Platform, Fraunhofer SCAI,
Institute of Informatics - Slovak Academy of Sciences, GSI Helmholtzzentrum
für Schwerionenforschung GmbH, Institute of Information and Communication
Technologies, Turkish Academic Network and Information Center, Institute of
Accelerating Systems and Applications, Fundación Centro Tecnológico de
Supercomputación de Galicia

Access the resource

ORDER REQUIRED

Offers

To gain the access to the resource, please select an offer that suits your needs best.

EGI Cloud Compute - General purpose

Offer selection

Access Instructions

Please specify parameters. It is necessary to handle your request.

Parameters

NUMBER OF CPU CORES
- 1
- 2
- 4
- 8

AMOUNT OF RAM PER CPU CORE
- 1 GB
- 2 GB
- 4 GB

Select number of cores you want
Select amount of RAM per core

Selected offer

Add resource to this project
Order management workflow

1. Service Order management team (relying on shifters) removes spams, and goes back to those users for clarification if needed (e.g. a lot of services in the same request, unusual combinations of services)

2. Checked requests are forwarded to the providers through the “Service Order Target” email addresses registered when the services were onboarded in the EOSC Portal
Orderable via EOSC channel – provider side

Such an email contains a link to the order management system where the provider can:

a. Review details of the access request including the contact information of the user making the request

b. Review exchanged messages with the EOSC Order Management team

c. **Approve or reject** the request so that the Order management team can consequently update the status of the request (also visible for the user in the EOSC portal)

**IMPORTANT**: with this form, providers cannot interact with the user, but they can rely on any channel/tool normally used to interact with users
Some statistics

Orders received via the EOSC portal over time

Statistics refer only to requests made via EOSC orderable channel
Incident Service Request Management
Introduction to ISRM

- **Objective of the Process:** To restore normal / agreed service operation within the agreed time after an incident, and to respond to user service requests
- Ticket scheme definitions
- Four main procedures
- Tool for ISRM: EOSC Helpdesk

**Escalation Procedure Diagram**

**ISRM Process Description**

- Incident and Service Request Management - ISRM
  - EOSC Helpdesk First Line Support
  - Helpdesk Guidelines
- ISRM Procedures
  - ISRM1 How to Record, Classify, Prioritize, Escalate, Resolve
  - ISRM2 MI: Perform a Major Incident review
  - ISRM3 Escalation Procedure
  - ISRM4 MI: Classifying and managing major incidents
- ISRM Reports (TBD)
  - Major incidents database
  - Ticket Priority
  - Ticket Status
  - TPM FAQ
EOSC Helpdesk

Backbone service which facilitates:
● Instant communications
● Proactive support of EOSC users
● Support activities of EOSC providers and communities

Rich functionality:
● Dashboard UI
● Smart search
● Customizable fields
● Escalation
● Reporting
● Knowledge Base
● Integration via API
### EOSC Helpdesk Reference Card

#### Reference card

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<tr>
<td><strong>Helpdesk URL</strong></td>
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<tr>
<td><strong>Helpdesk Email</strong></td>
<td><a href="mailto:help@eosc-future.eu">help@eosc-future.eu</a></td>
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<td><strong>Helpdesk page in EOSC Portal</strong></td>
<td><a href="https://eosc-portal.eu/contact-us">https://eosc-portal.eu/contact-us</a></td>
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<tr>
<td><strong>Helpdesk Knowledge Base</strong></td>
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<td>[<a href="https://zenodo.org/record/7308617#.Y24fR37MK">https://zenodo.org/record/7308617#.Y24fR37MK</a> EJ](<a href="https://zenodo.org/record/7308617#.Y24fR37MK">https://zenodo.org/record/7308617#.Y24fR37MK</a> EJ)</td>
</tr>
</tbody>
</table>
EOSC Helpdesk for Users: Request Submission

1 Step

Knowledge Base
Service Documentation

2 Step

Email
Helpdesk Dashboard

Multiple Feedback Forms
Telegram Bot: @EOSC Helpdesk
EOSC Helpdesk: Submission via Telegram

1. User sends a message in Telegram
2. Ticket is created at L1 → responsible Unit e.g. Monitoring support
3. Agent of Monitoring support gets notification via EMail with initial message
4. Agent answers a) via Helpdesk Dashboard UI; b) via EMail
5. User receives answer in Telegram chat
EOSC Helpdesk: Organisation of Support Groups

- EOSC Helpdesk used by some Provider as a Service
- EOSC CORE:
  - Multiple Groups
  - EOSC SMS rules
- Provider A, B etc.:
  - Multiple Groups
  - Provider defines own rules to manage the tickets

Support Group - is a group of experts who provide support and assistance for defined class of incoming requests
EOSC Helpdesk: Typical Workflows
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1a. Users contacts central EOSC entry point

Email: help@eosc-future.eu
UI/Telegram

1b. Users contacts directly provider, no EOSC 1st line involvement

EMail: support@provider.com
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2a. Ticket submission

2b. Ticket submission

**Provider Support Group**
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2a. Ticket Support

Ticket submission

2b. Ticket submission

EOSC 1st line

3a. Ticket solved by EOSC L1

3b. Ticket solved by Provider

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4. Ticket exchange: L1 ←→ EOSC Groups

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**Provider Support Group A**

**Provider Support Group B**

**Provider Support Group N**
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2a. Ticket submission

2b. Ticket submission

5a. Ticket solved by EOSC L1

5b. Ticket solved by Provider
Integration with EOSC Helpdesk for Provider (SMS Focus)

Information to be provided to configure Provider’s support area in EOSC Helpdesk:

**Minimum configuration:**
- Number of Support Groups with Names e.g.: Catalogue Support, Data Transfer
- Number of Agents per Group, access rights
- Submission method Email - EOSC L1 or Standalone Email

**Advanced configuration - Minimum configuration plus:**
- Other submission methods: Webforms, Telegram..
- Escalation procedure: First response time e.g. 1 day, update time 5 days
- Escalation calendar (country dependent, including public holidays)
- Filters for incoming tickets: e.g. subject contains “Catalogue” → Catalogue Support
- Custom fields, email signatures, custom workflows etc.

Connection or Integration with EOSC Helpdesk won’t solve the problems or requests of your users, but it will help to establish process based user support for your community and it will help to establish a communication channel with EOSC.
EOSC Helpdesk: Now

- Communities: EOSC Future, CESSDA, C-SCALE (implementation), ESCAPE Projects (implementation), 3DBioNotes (implementation)
- 60 Groups
- 300 Users, 60 Agents

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EOSC Helpdesk: 2023

- Integrate more communities and EOSC Providers in EOSC Helpdesk
- More customization capabilities for Helpdesk as-a-service integration
- Analysis and implementation of further SMS requirements of EOSC communities
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