

User facing Processes - Order Management and Helpdesk

17 November 2022

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with

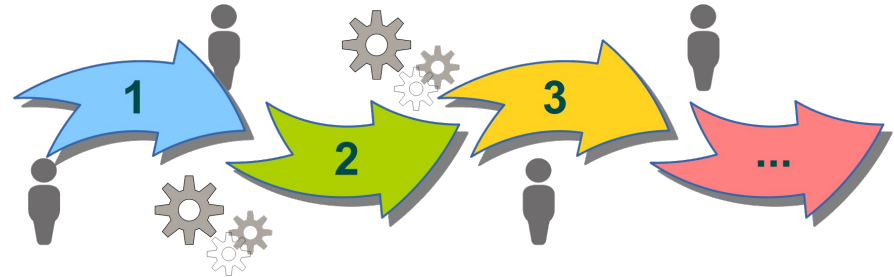


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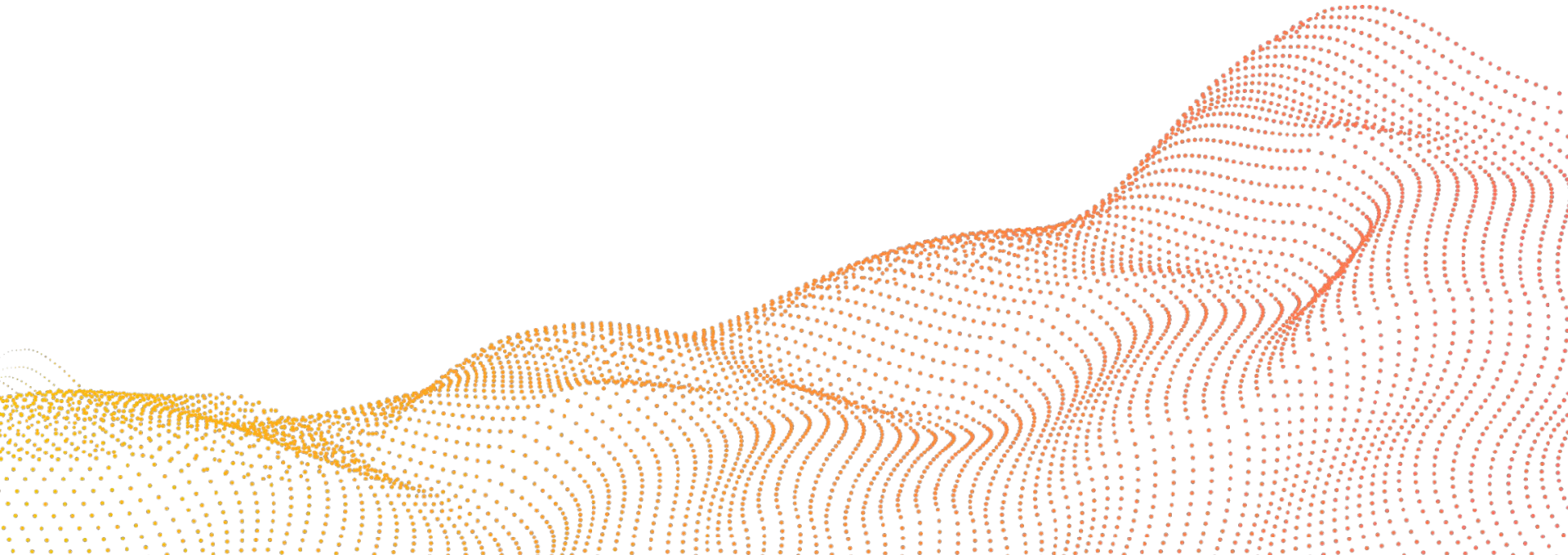


Introduction

- 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**

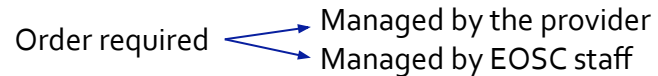
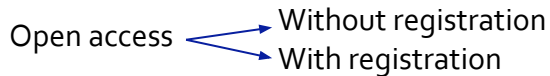


Order management process



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 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

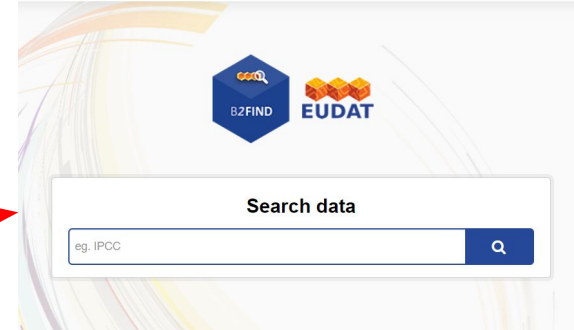

Offer selection Access Instructions Final details

This is an open access offer of the B2FIND - For Researchers service. Press **Go to the service** button to reach the service website. You may also add the service to a **Project** in order to:

- Gain EOOSC experts support
- Easily access the selected service
- Organise your services and orders into logical blocks

To find out more about Projects in EOOSC Marketplace, please refer to our FAQ.

[Go to the service](#)



Search data

eg. IPCC

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

Lagunas de Sierra Nevada / Glacier Lagoons of Sierra Nevada


Access Instructions | Final details

This is an open access offer of the Lagunas de Sierra Nevada / Glacier Lagoons of Sierra Nevada service. Press **Go to the service** button to reach the service website. You may also add the service to a **Project** in order to:

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[Go to the service](#)



Observatorio Cambio Global Sierra Nevada | Lagunas de Sierra Nevada | Con la colaboración de | FECYT | UNIVERSIDAD DE GRANADA

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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

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 SCIGNE 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, Fundacion Centro Tecnológico de Supercomputacion de Galicia



Access the resource

ORDER REQUIRED

☆☆☆☆☆ (0.0 / 5) 0 reviews Add to comparison Add to favourites

[Webpage](#) [Helpdesk](#) [Helpdesk e-mail](#) [Manual](#)
[Training information](#)

[Ask a question about this resource?](#)

Offers

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

ORDER REQUIRED

General purpose

Base performance instance type. Features:
Accessible in opportunistic or reserved ways, CPU cores could be overcommitted. Ideal for: Web services, Micro-services, Development...

Show more

TECHNICAL PARAMETERS

Number of CPU Cores	1 - 8
Amount of RAM per CPU core	1 - 4 GB
Local disk	10 - 40 GB
Number of VM Instances	1 - 50

Show more

Selected offer ✓

ORDER REQUIRED

Compute-intensive

Optimised instance for computing tasks.
Features: High performance CPU cores, Until 64 CPU cores, Real CPU cors (non-overcommitted), Low latency network, Reserved instances. Ideal for: Batch...

Show more

TECHNICAL PARAMETERS

Number of CPU Cores	8 - 64
Amount of RAM per CPU core	2 - 8 GB
Local disk	10 - 40 GB
Number of VM Instances	1 - 50

Show more

Select an offer

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

Select number of cores you want

AMOUNT OF RAM PER CPU CORE

- 1 GB
 2 GB
 4 GB

Select amount of RAM per core

DEMO

Created at 29.05.2020 — Single user — CINECA

EDIT

DUPLICATE

RESOURCES

PROJECT DETAILS

CONTACT WITH EOSC EXPERTS

Ordered resources

B2SAFE

BEING PROCESSED

EGI Cloud Compute

BEING PROCESSED

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

[EOSC MarketPlace] New request of resource Inbox x

Operations-portal <cic-information@in2p3.fr>

to me ▾



Dear resource Provider,

A new request of resource has been made which requires your attention.
Please see details below. You can follow and validate this request [here](#)

Details of the Service Order

ava : 90

rel : 95

end : 05/07/2021

start : 05/07/2020

-- This email has been generated automatically from Operations Portal. For any question, feedback you can contact us @ cic-information@cc.in2p3.fr

Orderable via EOSC channel – provider side

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

- Review details of the access request including the contact information of the user making the request
- Review exchanged messages with the EOSC Order Management team
- 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)

Service order, Debora Testi, EGI Cloud compute

Access type : opportunistic
Start date : 15/11/2020
End date : 15/12/2020
Service Area : Compute
ServiceOption : EGI Cloud compute
Service : General purpose

Generic provider :
Email :

Information about user :
Name : Debora Testi
Email : d.testi@cineca.it
Institution : CINECA

Request	Value
Number of CPU Cores	2
Amount of RAM per CPU core	1
Local disk	10
Number of VM instances	1

Resource center	Contact	Resources Cloud	Start	End	Ava	Rel	Action
EGI Cloud compute	debora.testi@gmail.com	Number of CPU Cores : 1 Amount of RAM per CPU core : 10 Local disk : 10 Number of VM instances : 1	15/11/2020	15/12/2020	90%	95%	Validate the resource request Reject the resource request

Send a message to the EOSC order management team

[Send](#)

Latest messages 2

- e3f6f384-e92c-4dc0-b037-fd6786a48154 added a comment - 14:22:48 16-11-2020
send
- e3f6f384-e92c-4dc0-b037-fd6786a48154 added a comment - 17:08:33 12-11-2020
please check this requests

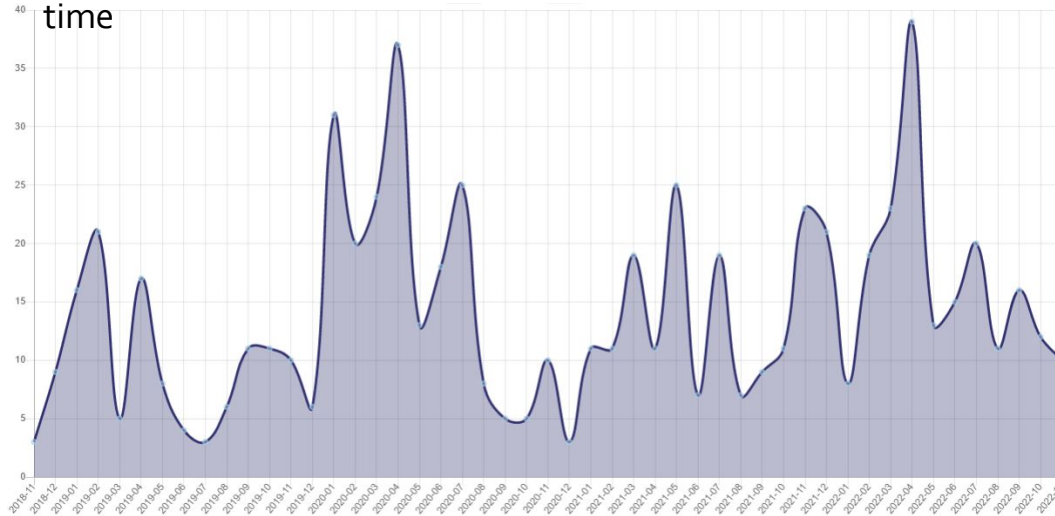
Comments from Marketplace 1

- Operations Portal added a comment - 17:06:20 12-11-2020
yes we are processing it
- EOSC marketplace added a comment - 17:05:16 12-11-2020
have you seen my request?

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

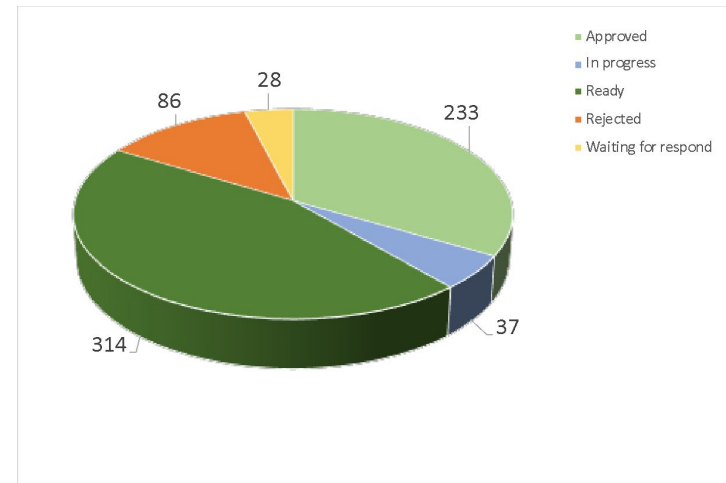
Some statistics

Orders received via the EOSC portal over time

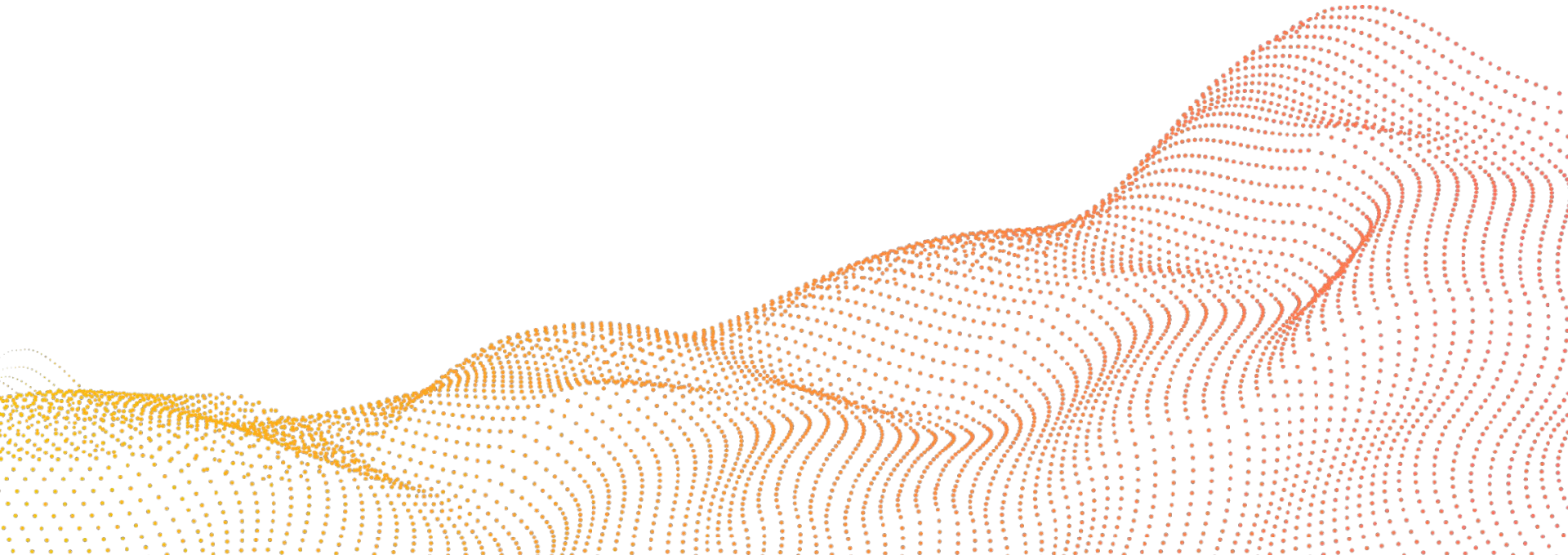


Statistics refer only to requests made via EOSC orderable channel

Status of EOSC Portal



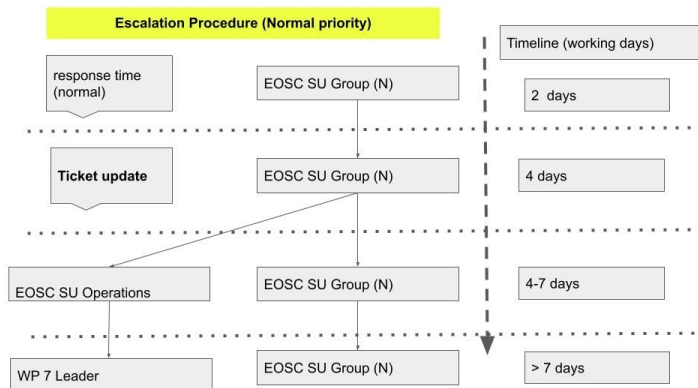
Incident Service Request Management



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

Communicate, Assist, Co-create

Rich functionality:

- Dashboard UI
- Smart search
- Customizable fields
- Escalation
- Reporting
- Knowledge Base
- Integration via API

The screenshot displays the EOSC Helpdesk interface. On the left is a dark sidebar with navigation options like 'Dashboard', 'Overviews', 'Knowledge Base', and 'Feedback Form'. The main area is divided into three panels. The top panel shows a 'Reporting' dashboard with a 'TICKET COUNT' table and a 'CREATOR CHANNELS' list. The middle panel is a 'Knowledge Base' with a search bar and a list of articles, including 'Re: Responsible for support group in EOSC He...'. The right panel shows a ticket conversation for 'EOSC Ticket2022031809001' with two messages: one from 'Profes' at 9:30 and one from 'SC' at 9:40. The ticket details on the far right include 'TYPE: Service Request', 'GROUP: EOSC Integration with EOSC-Cov...', 'OWNER: Sally Chambers', 'STATE: closed', and 'PRIORITY: 2 normal'.

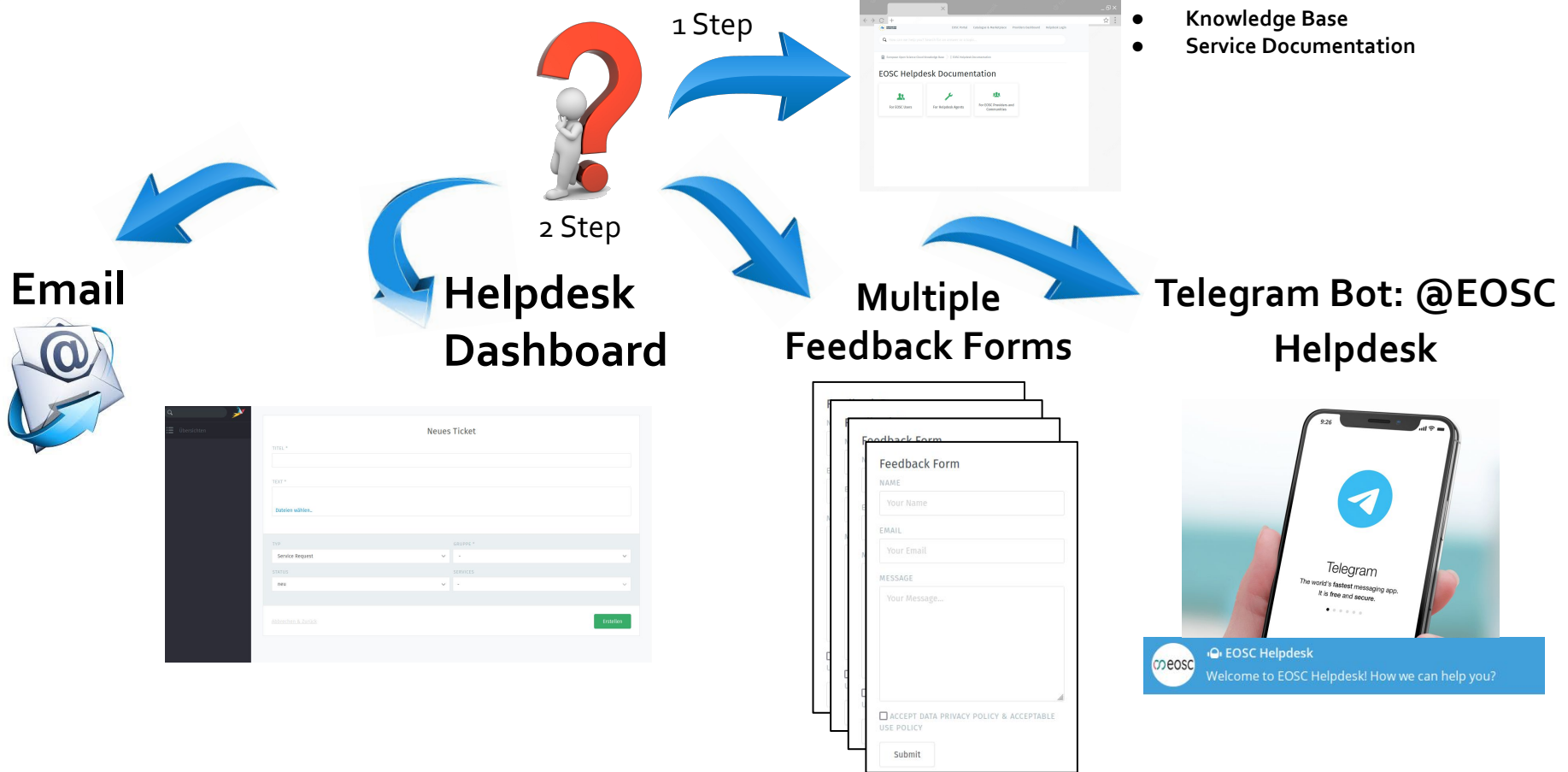
EOSC Helpdesk Reference Card

Reference card

Helpdesk URL	https://eosc-helpdesk.eosc-portal.eu
Helpdesk Email	help@eosc-future.eu
Helpdesk page in EOSC Portal	https://eosc-portal.eu/contact-us
Helpdesk Knowledge Base	https://eosc-helpdesk.eosc-portal.eu/help
Interoperability guidelines	https://zenodo.org/record/7308617#.Y24fR37MK EJ

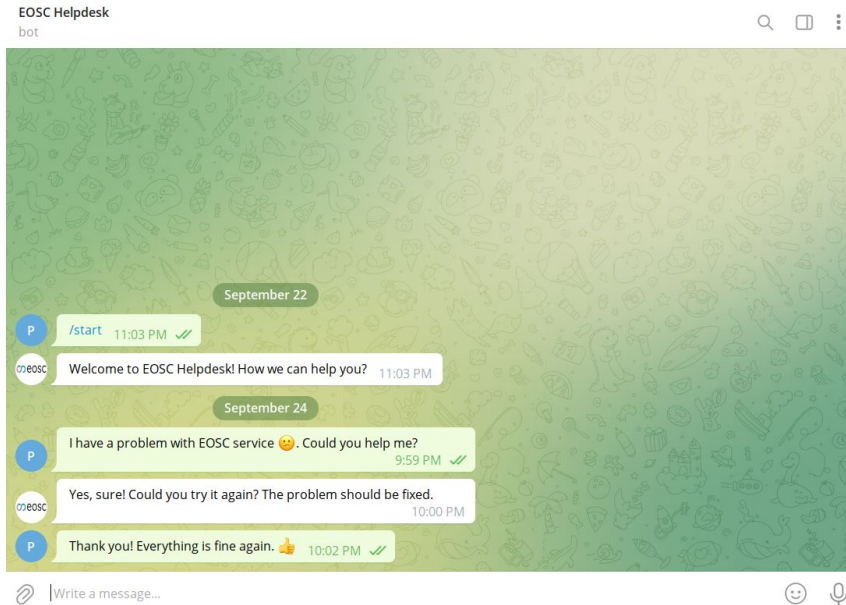


EOSC Helpdesk for Users: Request Submission

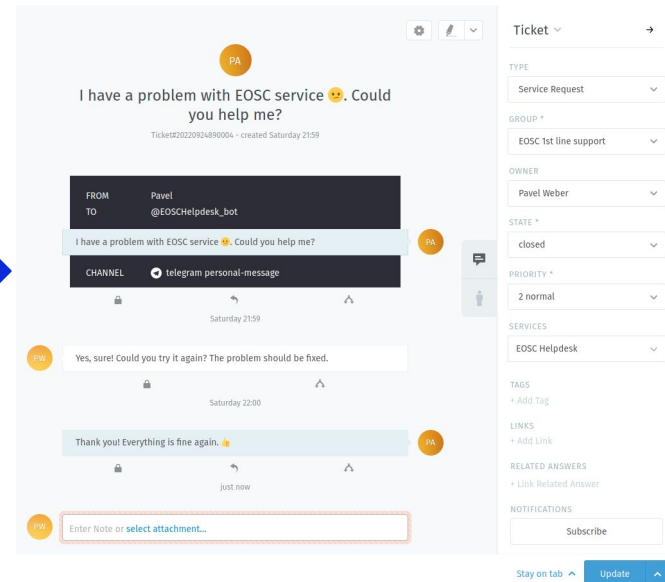


EOSC Helpdesk: Submission via Telegram

Telegram chat



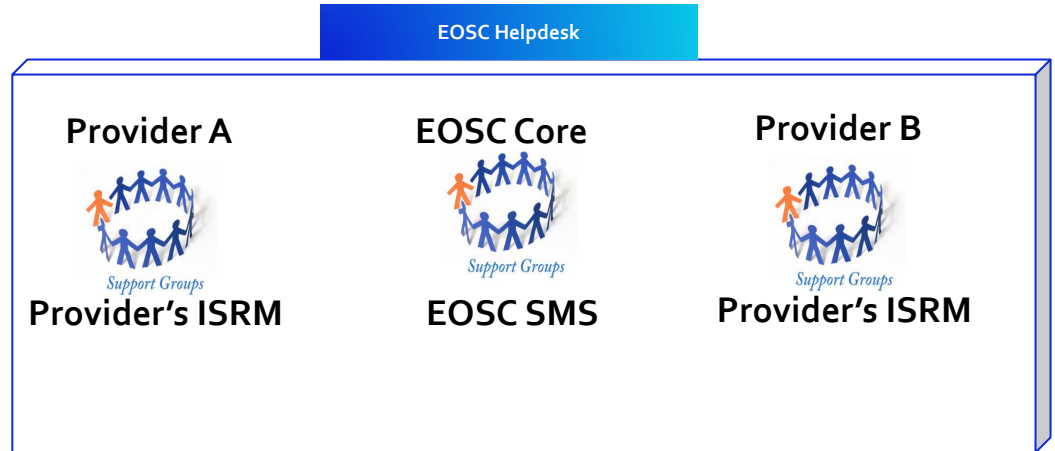
Helpdesk Ticket Interface



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



EOSC Helpdesk: Typical Workflows

1a. Users contacts central EOSC entry point

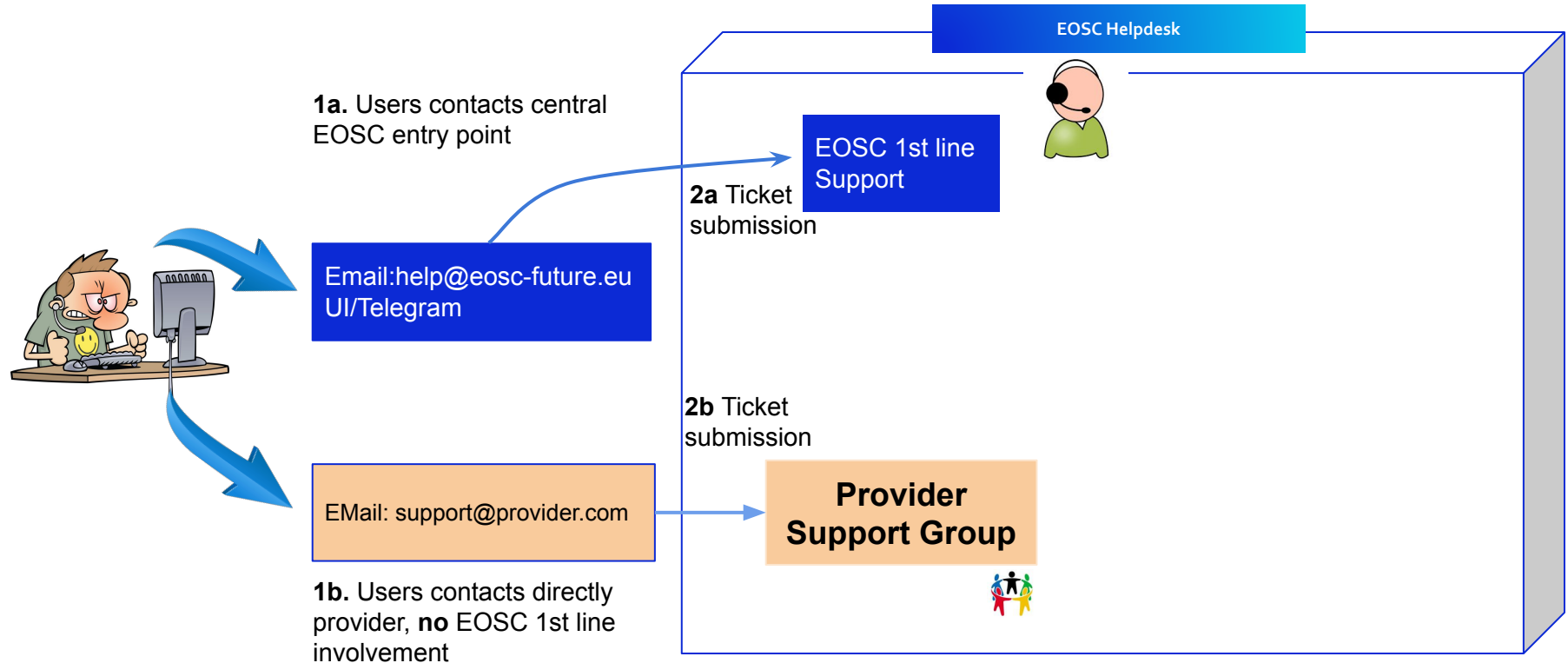


Email: help@eosc-future.eu
UI/Telegram

Email: support@provider.com

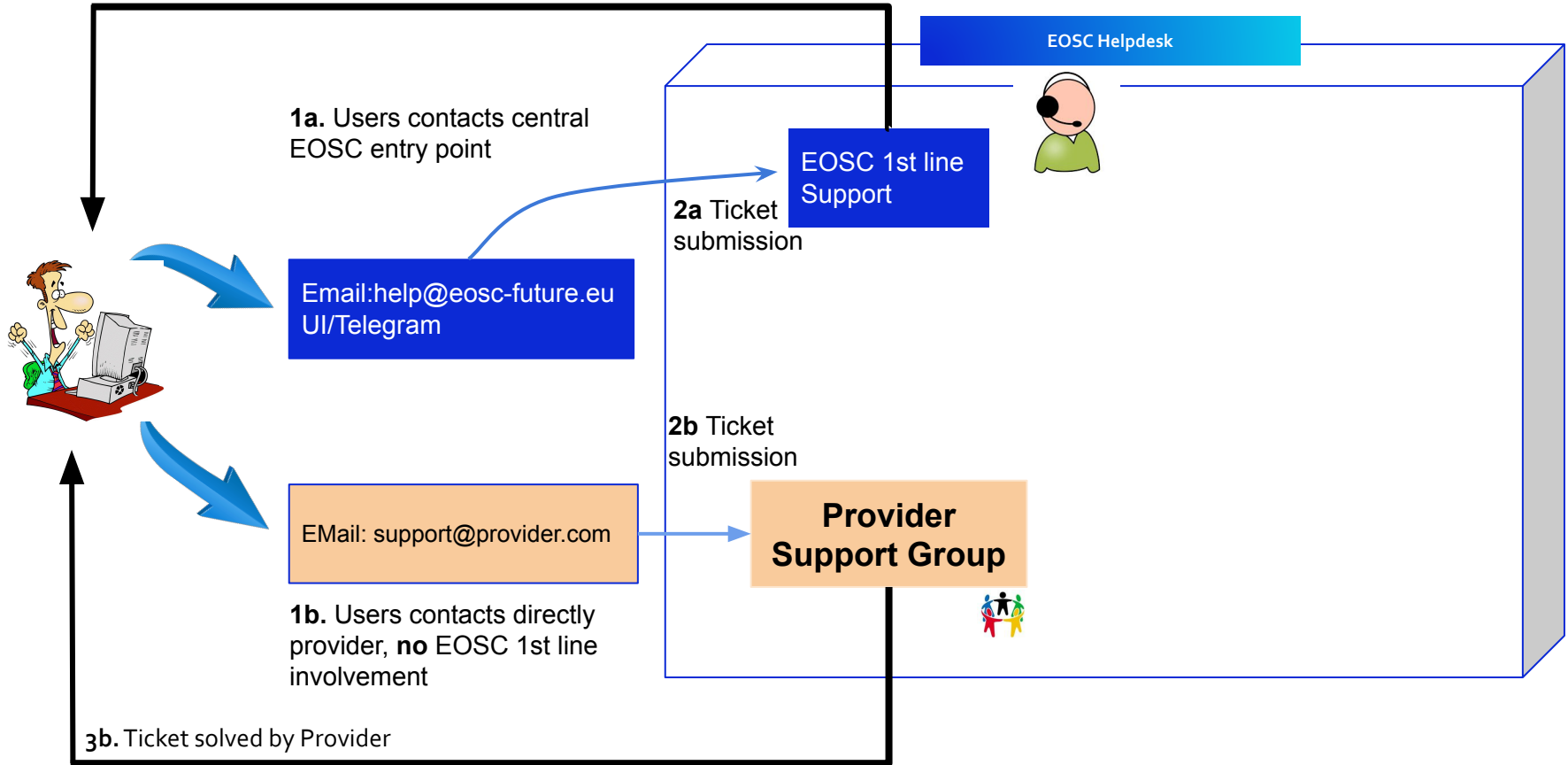
1b. Users contacts directly provider, **no** EOSC 1st line involvement

EOSC Helpdesk: Typical Workflows

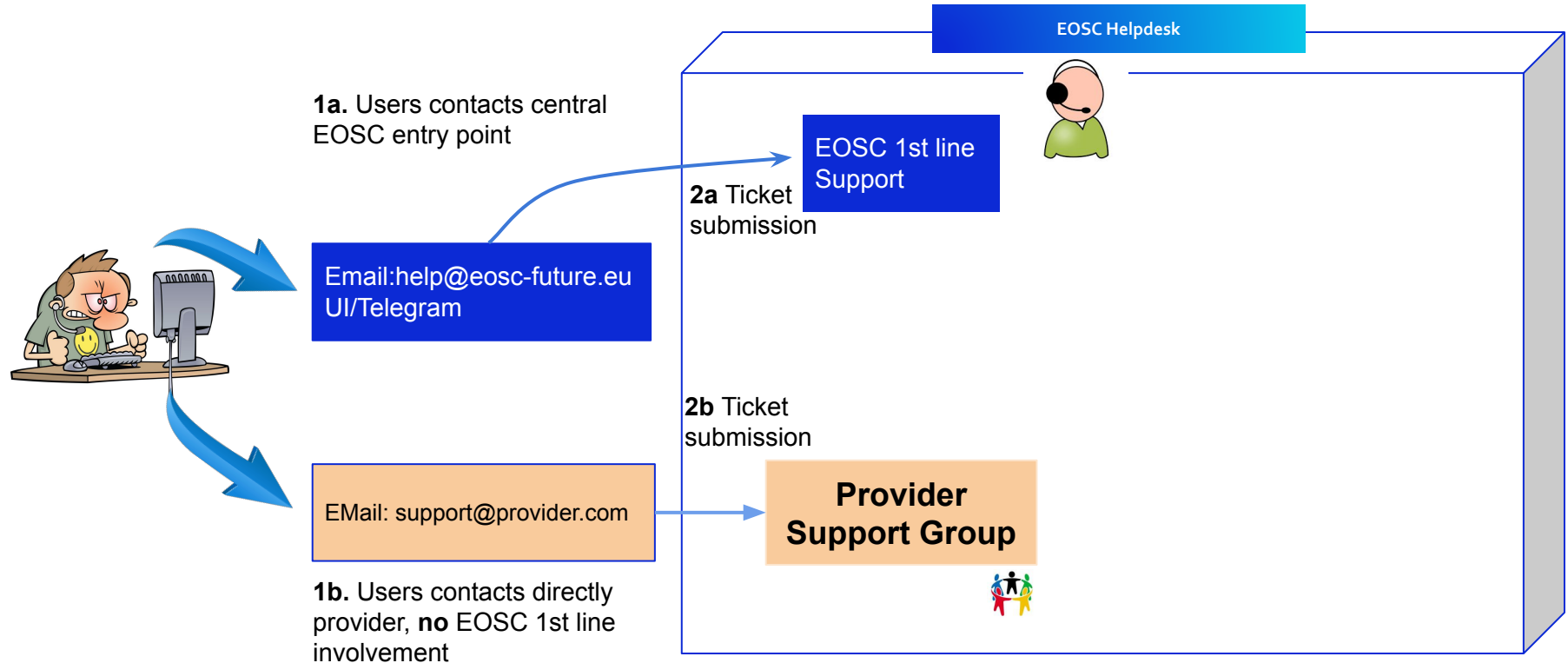


EOSC Helpdesk: Typical Workflows

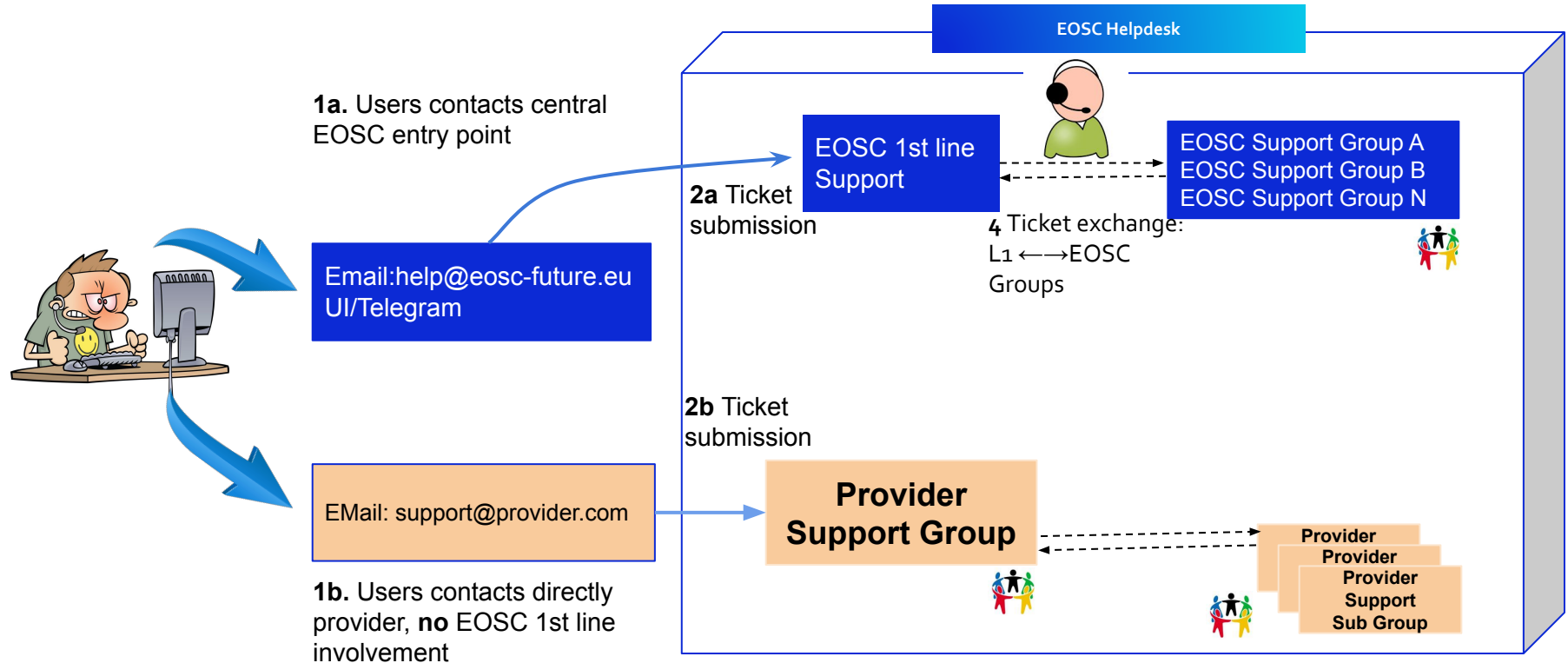
3a. Ticket solved by EOSC L1



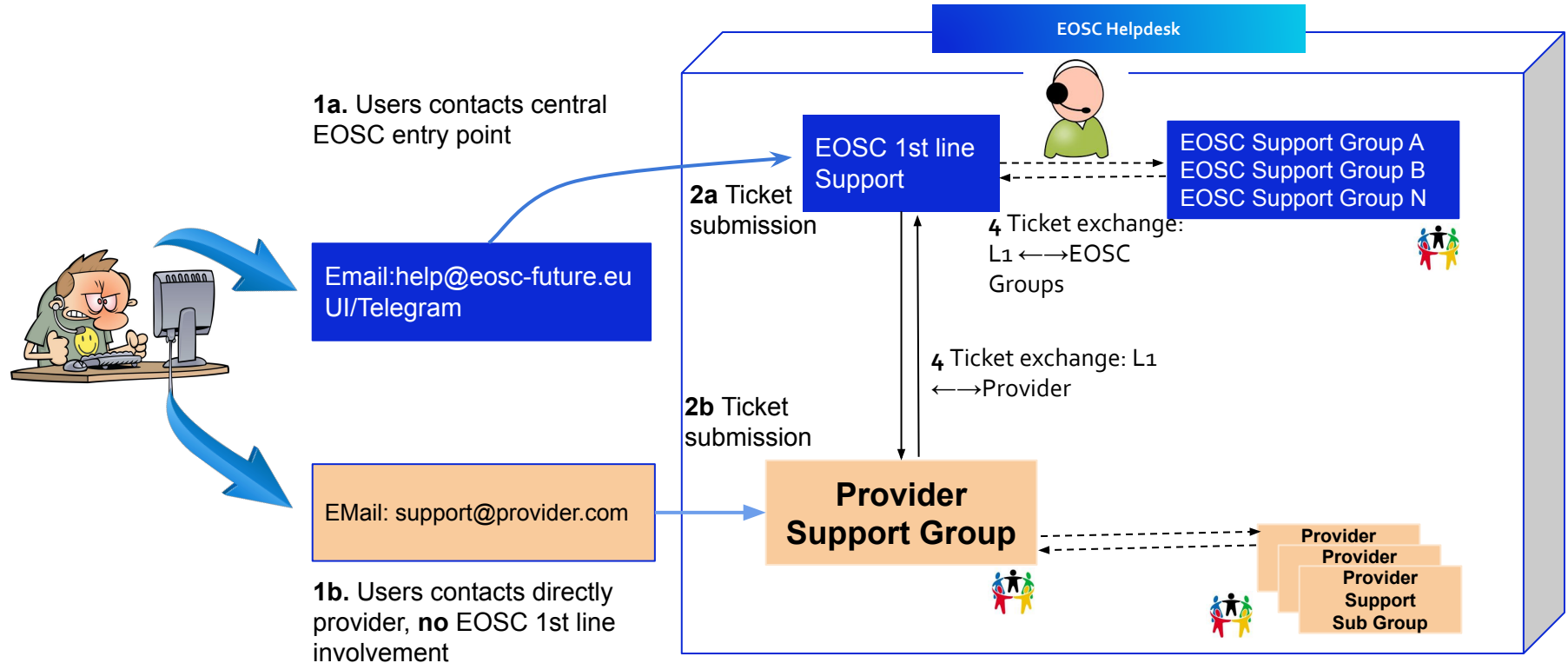
EOSC Helpdesk: Typical Workflows



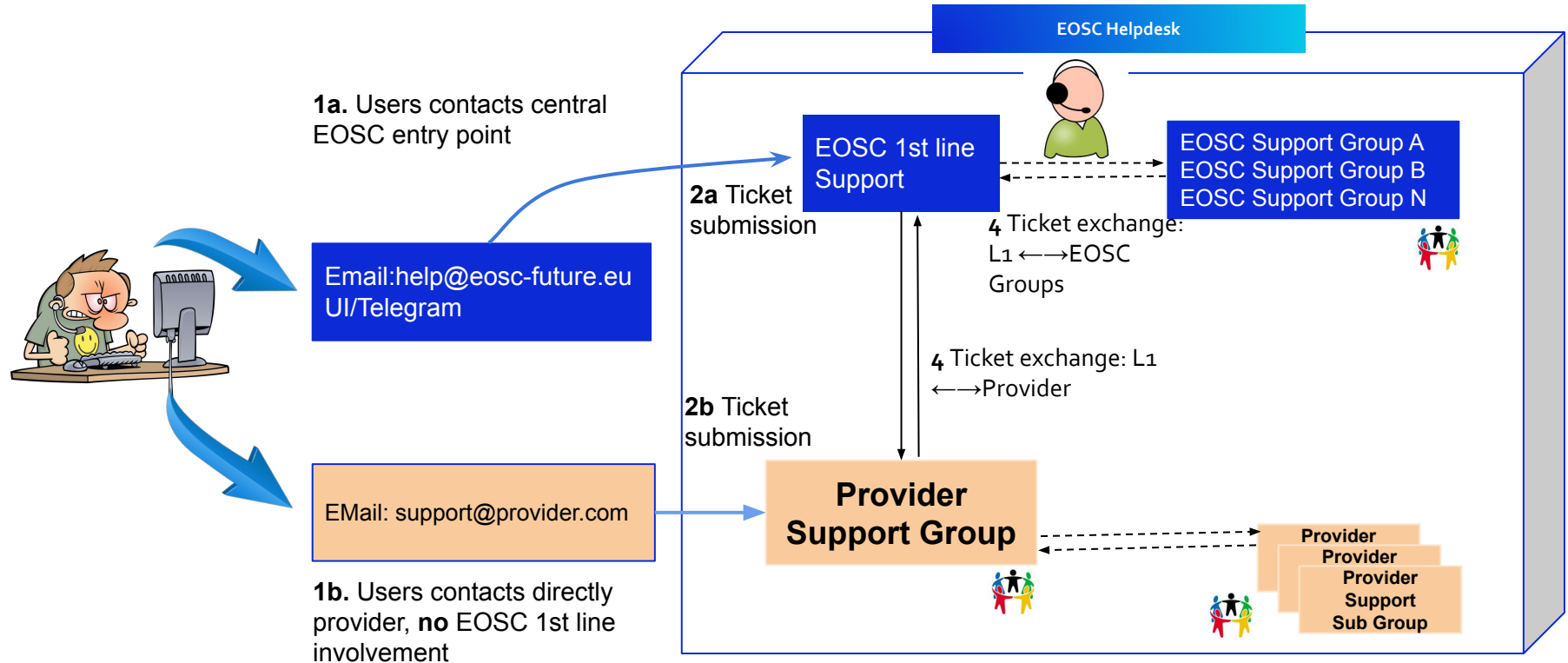
EOSC Helpdesk: Typical Workflows



EOSC Helpdesk: Typical Workflows

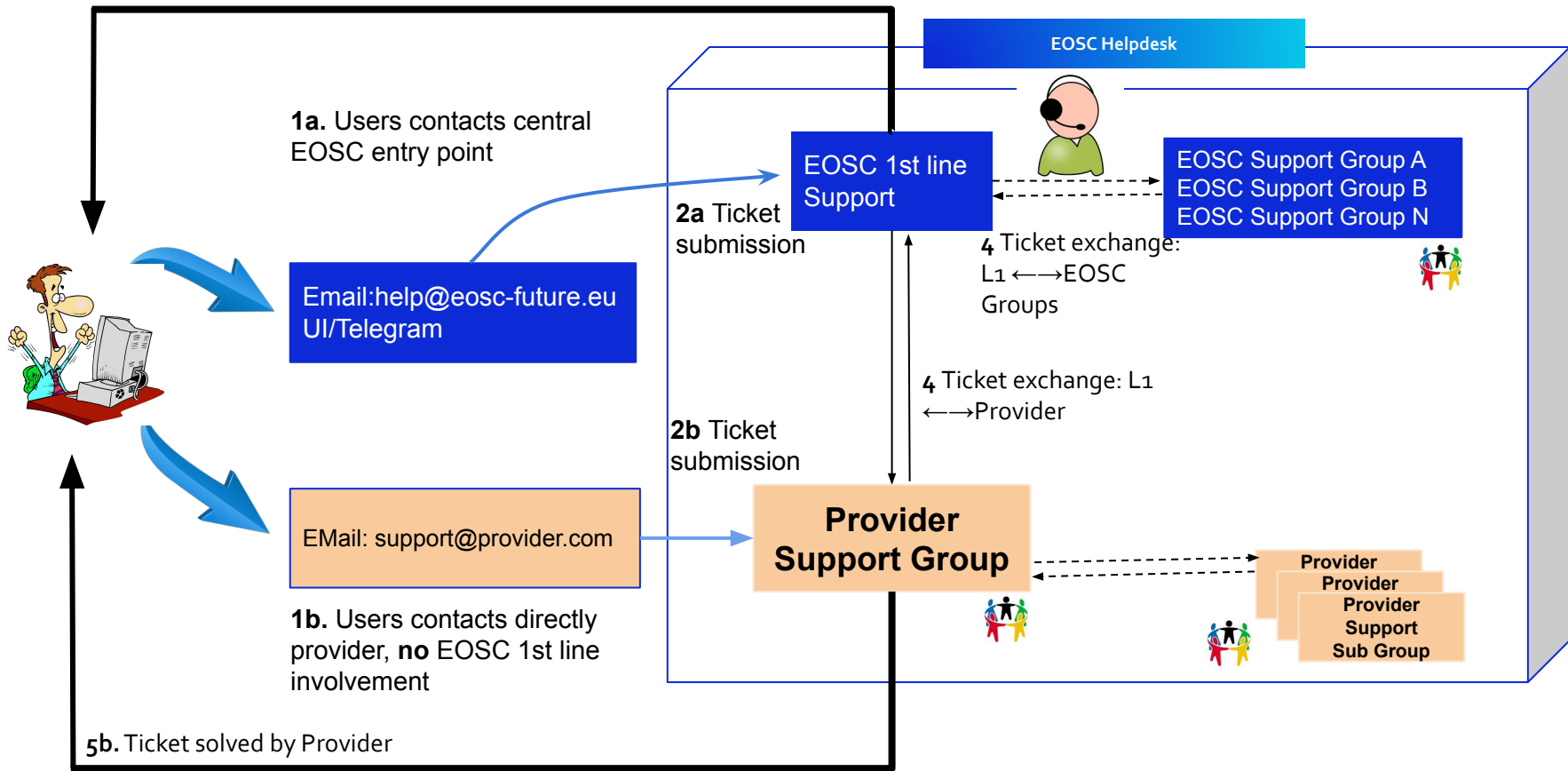


EOSC Helpdesk: Typical Workflows



EOSC Helpdesk: Typical Workflows

5a. Ticket solved by EOSC L1



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

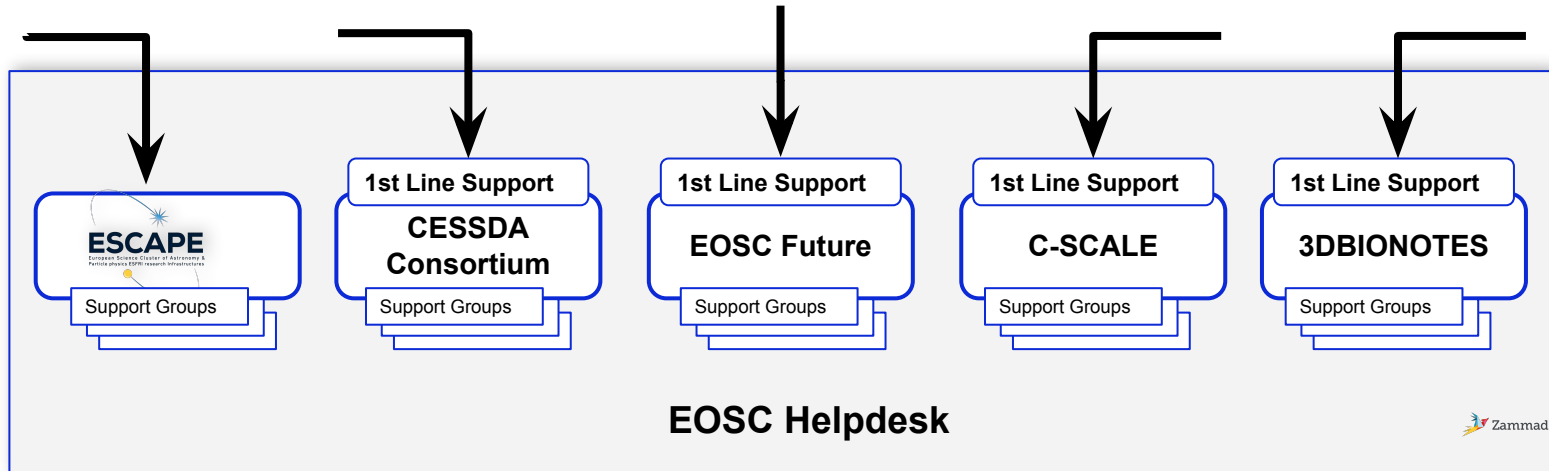
Advanced configuration - Minimum configuration **plus**:

- Other submission methods: Webforms, Telegram..
- Escalation procedure: First response time e.g. 1day, 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

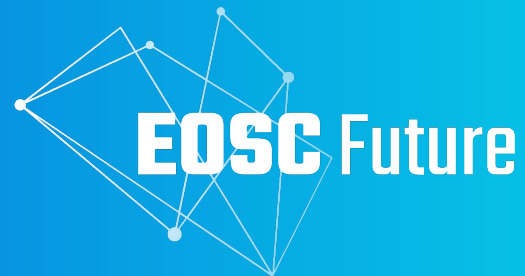
- Communities: EOSC Future, CESSDA, C-SCALE (implementation), ESCAPE Projects (implementation), 3DBioNotes (implementation)
- 60 Groups
- 300 Users, 60 Agents



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





Thank you
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