

## Explanation of each process step of the Follow up Onboarding process v8

Process step	Role	Its detailed content
Starting points		<ul style="list-style-type: none"> <li>- Centre announces interest in using a service</li> <li>- Platform/ Project (consisting of multiple centres) announce interest in using a service</li> </ul>
Perform required data protection activities	Service provider/ using centre	<ul style="list-style-type: none"> <li>- Check which documents need to be exchanged/created/signed (e.g. using policy regarding data protection) = requirement from legal framework side – this is only a placeholder until we know more details about what needs to be done regarding data protection</li> </ul>
Decide whether to negotiate individual Resource Usage Agreements with each using centre	Service provider	<ul style="list-style-type: none"> <li>- Decide whether an individual Resource Usage Agreement should be negotiated with each using centre</li> <li>- Might be necessary if duties to cooperate (e.g. buy licenses, provide hardware) should be defined with each centre</li> </ul>
Negotiate service usage conditions with using centre	Service provider	<ul style="list-style-type: none"> <li>- Conduct negotiations with using centre</li> <li>- Results are documented in a Resource Usage Agreement (RUA)</li> </ul>
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Consult service provider and using centre	Service Portfolio Manager	<ul style="list-style-type: none"> <li>- Support negotiations between service provider and using centre if required</li> <li>- Share experiences made in other negotiations/ share best practice RUAs already existing in HIFIS context</li> </ul>
Inform HIFIS about Resource Usage Agreement	Service provider	<ul style="list-style-type: none"> <li>- HIFIS needs to put the Resource Usage Agreement in the Contract database – therefore service provider needs to send the RUA to HIFIS</li> </ul>
Check whether disallowed agreements have been made in the RUA	Cloud Platform Manager	<ul style="list-style-type: none"> <li>- Since legal issues might occur if the Resource Usage Agreement includes agreements that are against the nature of HIFIS, it is necessary to check the RUA for disallowed agreements</li> </ul>
Ask service provider to adapt Resource Usage Agreement with using centre	Cloud Platform Manager	<ul style="list-style-type: none"> <li>- If disallowed agreements have been made, the Cloud Platform Manager asks the service provider to adapt the RUA with the using centre</li> </ul>
Put Resource Usage Agreement to Contract database	Cloud Platform Manager	<ul style="list-style-type: none"> <li>- Store Resource Usage Agreement in Contract database (Plony)</li> </ul>
Enable VO of the using centre in Cloud Portal	Cloud Portal Manager	<ul style="list-style-type: none"> <li>- The VO enablement is automatically triggered and conducted by storing the Resource Usage Agreement in Plony</li> </ul>

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Fulfill duties to cooperate and inform service provider when done	Using centre	<ul style="list-style-type: none"> <li>- If defined in RUA, the using centre needs to take the action to fulfill the duties to cooperate (e.g. buy licenses, order + set up hardware)</li> <li>- As soon as duties to cooperate are fulfilled/ using centre is ready for using the service they should inform the service provider</li> <li>- Fulfilled duties to cooperate are documented in an acceptance protocol which is signed by using centre first and then by service provider</li> </ul>
Allow VO of using centre to use the service (organizationally + technically)	Service provider	<ul style="list-style-type: none"> <li>- Service provider now needs to take the necessary steps to make the service available to the using centre's VO</li> <li>- This step includes possible preparation work required on the service provider side to allow VO of using centre to use the service</li> </ul>
Inform service provider and using centre that service is now available for testing via Cloud Portal	Cloud Portal Manager	<ul style="list-style-type: none"> <li>- As soon as both the VO is enabled from service provider side and the VO enablement in Cloud Portal has been successfully triggered by Plony, the Cloud Portal Manager can give the "Ready for testing" information to service provider and using centre</li> <li>- The using centre is then asked to test the service access before informing all of their users about the service</li> </ul>
Test whether access to service works as expected	Using centre	<ul style="list-style-type: none"> <li>- Test the access to the service and give feedback to HIFIS</li> <li>- If tests are not successful, the process routes back to the VO enablement done by the service provider</li> </ul>
Inform users that service can now be used	Using centre	<ul style="list-style-type: none"> <li>- If the tests are successful, the results are documented in an acceptance protocol and the using centre can now inform it's users about the new service being available for use</li> </ul>
Click on „Use Service“	User within using centre	<ul style="list-style-type: none"> <li>- User within using centre wants to use the service and clicks button to start usage</li> </ul>
Perform Service Enablement activities	Service provider	<ul style="list-style-type: none"> <li>- If applicable: service provider may need to perform service enablement activities (defined in Service Canvas)</li> </ul>
Use service	User within using centre	<ul style="list-style-type: none"> <li>- Now user within using centre has all prerequisites to finally start using the service</li> </ul>
Evaluate monitoring data	Cloud Portal Manager	<ul style="list-style-type: none"> <li>- Analyze monitoring data and identify possible trends in service usage</li> </ul>
Inform service provider and using centre if limits are about to be reached	Cloud Portal Manager	<ul style="list-style-type: none"> <li>- If applicable: inform service provider and using Centre if limits defined for usage are about to be reached (e.g. storage capacity, maximum number of users)</li> <li>- Service provider and using centre may then re-negotiate usage conditions (if more capacity is required)</li> </ul>