

**EGI-Engage**

Infrastructure tests and best usage practices
for life science service providers

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Abstract

The ELIXIR Competence Centre (CC) aims to bring the EGI resources, especially the EGI Federated Could, better available to the ELIXIR user community. This document sums up the experiences of those ELICIR CC members who are providing resources for EGI Federated Cloud and/or have utilized EGI resources for providing life science services. The document captures the goals, current status and plans for the ELIXIR Compute Platform, and provides guidelines for interested service providers to join the platform with cloud services.

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**TERMINOLOGY**

A complete project glossary is provided at the following page: <http://www.egi.eu/about/glossary/>

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**Executive summary**

ELIXIR[[1]](#footnote-1) is a pan-European research infrastructure in agreement between 17 European governments to build a sustainable European infrastructure for biological information, supporting life science research and its translation to medicine, agriculture, bioindustries and society.

EGI[[2]](#footnote-2) is a pan-European e-infrastructure that delivers integrated computing services to European researchers, driving innovation and enabling new solutions to answer the big questions of tomorrow.

The ELIXIR Competence Centre (CC) of the EGI-Engage project evaluates, adopts and promotes technologies and resources from EGI to the wider ELIXIR research community. This report is the second outcome of this effort. The document (1) describes the concept of the ELIXIR Compute Platform and responsibilities of service providers participating in it, (2) provides a status update about the completed, ongoing and planned integration of resources in this platform, and (3) presents integration guidelines for life science providers who are wishing to participate in this infrastructure.

The ELIXIR Compute Platform is a reference technical architecture to support a vast range of data analysis activities. EGI is currently contributing to the platform development with several services and technologies from EGI – all relating to the management and access of a cloud federation.

This document gives in overview of the state of EGI Federated Cloud integration of the ELIXIR CC members: Two sites (CESNET and GRNET) are already fully integrated, one site is in piloting state (EMBL-EBI) and one preparing (CSC). Instructions for integrating new resources to EGI Federated Cloud are summed up and the experiences from the integration process are discussed.

A special focus is given to the recent work related to the integration of the Authentication and Authorization Infrastructures (AAI) of EGI and ELIXIR. This integrated AAIwill play a key role in the seamless integration of ELIXIR and EGI services for serving life science communities.

# Introduction

ELIXIR[[3]](#footnote-3) is a pan-European research infrastructure in agreement between 17 European governments to build a sustainable European infrastructure for biological information, supporting life science research and its translation to medicine, agriculture, bioindustries and society.

EGI[[4]](#footnote-4) is a pan-European e-infrastructure that delivers integrated computing services to European researchers, driving innovation and enabling new solutions to answer the big questions of tomorrow.

Life science is a fast moving field. For the EGI services to become relevant and help keep European Life Sciences competitive globally, it is important to develop mechanisms that allow the research infrastructure to flexibly meet new challenges and respond to new scientific and technical developments.

The ELIXIR Competence Centre (CC) of the EGI-Engage project evaluates, adopts and promotes technologies and resources from EGI to the wider ELIXIR research community. This is achieved with an iterative approach:

1. Bringing together designated life science experts from ELIXIR and technical experts from EGI within the CC.
2. Identify life science use cases that could benefit from EGI services and could make big impact on ELIXIR and EGI communities. Analyse the e-infrastructure requirements of the use cases.
3. Implement the use cases as demonstrators based on EGI’s e-infrastructure services. Collaborate during implementation with relevant EGI and ELIXIR partners, such as the EUDAT[[5]](#footnote-5) to create a generic infrastructure, the ‘ELIXIR Compute Platform’ that can underpin demonstrators and production applications from/for the ELIXIR community.
4. Demonstrate and evaluate the implementations. Disseminate the experiences gained with the use cases towards ELIXIR, EGI and other relevant communities. Decide about the long-term adoption of EGI services within ELIXIR based on the pilot experiences.

This document is a deliverable produced by stage 3 of this process. It captures the goals, current status and plans for the ELIXIR Compute Platform, and provides guidelines for interested service providers to join the platform with cloud services.

The document was written by life science and e-infrastructure experts from ELIXIR and EGI who are brought together within the CC.

# The ELIXIR Compute Platform; Role of service providers

During 2015 the ELIXIR community – in collaboration with various e-infrastructures and other service providers – initiated the development of the reference architecture for ELIXIR, called the ‘ELIXIR Compute Platform’ (ECP). The prime role of the ECP is to support the use cases of the ELIXIR-EXCELERATE H2020 project, however, the platform is expected to serve other ELIXIR-related use cases from ELIXIR and other biomedical sciences Research Infrastructures. The demonstrator use cases of the CC (documented in M6.3) will also use this platform.

The need for an ELIXIR reference technical architecture was first discussed during a BioMedBridges e-Infrastructure workshop in May 2014, where reference was made to the MONARC report[[6]](#footnote-6) that formed the basis of the Tiered model that was initially adopted by WLCG community to serve the needs of High Energy Physics. Following on from work by the ELIXIR Authentication and Authorization Infrastructure (AAI), Storage and Cloud Task Forces to define a set of Technical Use Cases, a workshop was held in Amsterdam (12-13th March 2015) to discuss with representatives of ELIXIR nodes, European e-Infrastructures and other service providers, how the ELIXIR‑EXCELERATE Scientific Use Cases could be mapped onto the Technical Use Cases and thereby define the ELIXIR Compute Platform. Through a series of presentations and breakouts the technical aspects of the Scientific Use Cases were identified and mapped to a number of Technical Use Cases. As a result of these discussions, a number of recommendations have been made for technical solutions that together will provide an ELIXIR Compute Platform. The platform can not only support the ELIXIR-EXCELERATE Scientific Use Cases, but a vast range of other data analysis activities that will be found within the ELIXIR research community. Such as:

* Hosting portals that enable users to select and launch virtual machines onto an available cloud resource (e.g. for training activities).
* Hosting web tools that deploy a network of virtual machine images onto distributed cloud resources operated for ELIXIR users for large scientific analysis.
* Provisioning ‘Desktop as a Service’ where researchers are able to obtain a desktop image (e.g. BioLinux) in a cloud that they can use for their data analysis activities that is always on for their use.

The role of ELIXIR and the ELIXIR-EXCELERATE proposal is not to undertake middleware development. Instead the focus is on leveraging the investment that has already been made in services that can be integrated for our needs and steer future development priorities. Essentially, our role is to define a minimal ‘neck’ of an hourglass that ELIXIR Researchers and Application Developers can build upon and that ELIXIR Nodes and other infrastructure service providers can deploy and support. The ECP is envisaged to consist of the following service groups:

* Basic Identity Environment: authentication and authorization related infrastructure (“AAI”) to provide user identity and access management services[[7]](#footnote-7) for ‘ELIXIR infrastructure services’ (all other services). The basic ELIXIR AAI environment is available since the end of 2015 and further developments and refinements are coming during 2016. ELIXIR with working with EGI to connect the ELIXIR AAI and EGI AAI services to offer seamless access to EGI services for life science users. Section 5.1 provides a summary of this work.
* Core Enabling Infrastructure Services: provide capabilities to store and effectively transfer data (storage management and file transfer services). ELIXIR and EUDAT are working together in the EUDAT2020 project to identify, test and deploy services for this area.
* Basic Infrastructure Services: Cloud IaaS, Cloud Storage or HTC/HPC Cluster resource may be operated from within the ELIXIR community. ELIXIR is working with EGI in the context of the CC to implement this service area using technologies and know-how from the EGI Federated Cloud solution[[8]](#footnote-8). Priority focus is on cloud provisioning, and this is exactly in the main scope of this document: Providing guidelines for cloud resource providers about how to federate their services into the ELIXIR Compute Platform. Section 4 provides the related guidelines for service providers who are wishing to participate in the provisioning of the basic infrastructure services.
* Integrating Infrastructure Services: providing a federating structure that ensures a consistency of operation and behaviour across all resources and services of the ECP. ELIXIR and EGI are working together to implement this service area using technologies and know-how from the EGI Federated Operations solution[[9]](#footnote-9). The use of the GOCDB service registry together (through the ELIXIR AAI) is the high priority integration activity. This would enable simple and reliable discovery of the integrated infrastructure services discoverable by life science users and applications. Section 5.2 of this report summarises the outcome of this work.
* Higher-Level Services: solutions that expand the platform to better serve specific use cases or use case categories. Competition among similar solutions is expected in this area. ELIXIR is working with EGI to bring in solutions into this area. High priority activity in the CC is integrating and using the EGI Virtual Machine/Virtual Appliances Marketplace[[10]](#footnote-10) of AppDB in the ELIXIR Compute Platform. Section 5.3 of this report summarises the outcome of this work.

# Integration status and plans

## CSC

CSC provides an IaaS cloud service called cPouta for its customers (https://research.csc.fi/cpouta). This OpenStack based cloud service, funded by the Finnish Ministry of Culture and Education, allows users to launch their own virtual machines to a server environment running in the CSC computing center in Kajaani.

Currently the service contains nearly 3500 computing cores, used by over 200 computing projects. The majority of users are academic researchers working in Finland. Access is granted by the CSC resource allocation board, but cPouta also serves international collaboration projects, including some ELIXIR pilots. There are also some commercial users, who buy the cPouta capacity directly from CSC.

As a member of EGI, CSC is interested in being part of the EGI Federated Cloud to offer resources for ELIXIR and possibly also to other communities. However, as cPouta IaaS cloud is a production service that primarily supports Finnish researchers, thus offering this to international communities through the EGI Federated cloud should not affect CSC's service level. In particular, EGI requirements of usage policies or maintenance work must not have a restricting impact on CSC's services.

The recent development in the EGI Federated Cloud environment should make it easier for CSC to start acting as a resource provider for EGI federated cloud. For example, features that previous caused Nova/Keystone compatibility issues are no longer used in the EGI Federated Cloud. However, to utilize these improvements CSC will first need to upgrade the local OpenStack several version steps (up to Kilo or Liberty version) which will require several months to be implemented.

After this upgrade both the technical and policy issues related to quotas, accounting and billing integration will need to be readdressed and solved.

Operating an OpenStack cloud is resource intense. Adding extra integrations to a production OpenStack cloud increase the complexity of maintaining the cloud. To ensure the long term viability of this platform, CSC would like to be sure that it doesn't add undue burden to the maintenance and update processEMBL-EBI

## CESNET

CESNET operates a sizable national HPC infrastructure in Czech Republic providing resources to local academic communities, including cloud-based resources, various types of storage, and identity management services. On an international level, CESNET is a member of EGI (NGI\_CZ), as a resource provider and a technology provider, specifically in the context of EGI Federated Cloud.

As a resource provider, CESNET is fully integrated and offering the following cloud services compliant with EGI Federated Cloud:

* Virtual machine management via OCCI
* Accounting via APEL/SSM
* Information discovery via BDII
* Virtual machine image management via HEPiX vmcatcher/vmcaster
* AAI

As a technology provider, CESNET develops and maintains the following EGI Federated Cloud integration components and tools:

* OCCI components for virtual machine management (rOCCI-{core, api, cli, server})
* OpenNebula APEL connector (oneacct-export)
* OpenNebula Perun connector (fctf-perun)
* OpenNebula vmcatcher handler (itchy, nifty)
* OCCI monitoring probes for Nagios

CESNET can support the appliances and virtual organizations required by the ELIXIR Compute platform. (Currently there is one ELIXIR virtual organisation, but more are expected in the future.)

## CNRS

The French Institute of Bioinformatics (IFB) is a national service infrastructure in bioinformatics and the French node of ELIXIR. The IFB’s principal mission is to provide core bioinformatics resources to the French life science community (academic and private partners) coupled to the required computing and storage capacity in a national bioinformatics cloud. To address the most common needs, a selection of major scientific software tools was made and they were installed in pre-configured virtual images (cloud appliances), ready to run on the IFB’s cloud. To date, 36 appliances cover different domains of the life sciences, for example users can deploy a cloud virtual pipeline for microbial genomes analysis. The long-term objective is to create a federation of clouds that rely on the interconnected IT infrastructures of the IFB’s platforms, providing personalized services to analyze life science data.

Currently, the IFB cloud is based on the StratusLab cloud middleware and comprises 200 computing cores, two terabytes (TB) of RAM and 50 TB of storage. We plan to increase these resources to 5,000 cores with 500 TB of storage by the end of 2016. The IFB’s IT infrastructure is hosted at IDRIS, one of the major national high-performance computing centers (GENCI). This ensures the stability of the IFB’s infrastructure by providing a reliable power supply, cooling system and large network bandwidth commonly found in such environments.

CNRS IFB cloud can not be yet easily integrated to EGI FedCloud due the facts that (i) it is in production status for the French life science community, and (ii) it is currently relying on StratusLab middleware which does not currently have connectors to participate the EGI FedCloud.

A way of providing resources to the CC-ELIXIR may be through

1. the collaboration of one of the IFB platform that is collaborating with a site of the French NGI already integrated in the EGI FedCloud.
2. If the development effort is justified, then developing the necessary connectors for StratusLab to participate in the EGI technology-based ELIXIR Compute Platform.

## GRNET

GRNET operates Infrastructure as a Service ~okeanos via large datacenters (84 racks, 1200+ servers, 10000 Virtual Machines active, 5 Petabytes of storage). GRNET is also developing Synnefo, the cloud software for ~okeanos. The service was initially conceived and designed with the Greek Research and Academic community in mind, which comprises the natural user base of GRNET. Soon it became evident though that there is a wider potential and that this effort can be exploited in a broader environment. Towards this, ~okeanos has joined the EGI Federated Cloud activities with the aim to enhance its interoperability features and enable the offering of computing resources to the high-productivity federated infrastructure offered by EGI. ~Okeanos is fully integrated with EGI Federated Cloud and is offering the following services:

* OCCI via the SNF-OCCI an implementation of the OCCI specification on top of synnefo’s API kamaki
* CDMI via the SNF-CDMI an implementation of the CDMI specification on top of synnefo’s API kamaki
* Accounting via the SNF-SSM implementation of the SSM accounting mechanism.
* VM Image management via SNF-VMCATCHER.

GRNET supports the virtual organisations and virtual machine images required by the ELIXIR Competence Centre. The plans for the next year is to update snf-occi to support OCCI 1.2 specification and to extend it capabilities.

## SURFsara

What’s your status and plans for federating cloud and storage resources into the ELIXIR Compute Platform? What are the open questions (if any)?

## JetStream

The Jetstream system received official acceptance after review by the National Science Foundation at the beginning of May 2016. Since this was announced an ELIXIR start up allocation has been approved by XSEDE. An initial meeting with the Jetstream administrators was conducted on May 18th to discuss the goals of the Jetstream interoperability project and the use of the EGI FedCloud integration appliance. While there were some policy concerns surrounding the XSEDE allocation process, no immediate technical concerns were expressed by the administrators. An initial attempt to run the EGI FedCloud integration appliance will happen in late May with result reported to the ELIXIR Competence Centre. Once the integration appliance has successfully been installed ELIXIR application testing can occur.

# Integration guidelines for service providers

The ELIXIR Compute Platform uses the integration approach and integration technologies from the EGI Federated Cloud to establish the ‘basic infrastructure services’ layer (See section 2 for details). This section provides service deployment and configuration guidelines for cloud providers who are wishing to participate in the ELIXIR Compute Platform ‘basic infrastructure services’ layer. The section begins with a description of the EGI Federated Cloud concept, then provides integration information for OpenStack, OpenNebula and Synnefo cloud service providers[[11]](#footnote-11).

## Generic concepts and installation guidelines

The EGI Federated Cloud integrates public and community clouds into a scalable computing platform for data and/or compute driven applications and services. Its architecture is based on the extension of the Cloud Management Frameworks deployed at the resource centres to provide a set of agreed uniform interfaces to the user communities and to the EGI Core infrastructure federator services. The federation of IaaS Resource Providers in EGI is built upon the extensive autonomy of resource centres in terms of ownership of the exposed resources. EGI does not mandate deploying any particular or specific Cloud Management Framework, providers should deploy the solution that fits best their individual needs whilst ensuring that the offered services implement the required interfaces. Connectors currently exist to federate OpenNebula, OpenStack and Synnefo clouds. Connectors to federate other types of clouds (e.g. StratusLab) can be developed as a joint effort of EGI with the user and service provider communities.

The cloud resource provider installation manual[[12]](#footnote-12) provides all the steps to deploy and configure the software components to support the federation on the supported Cloud Management Frameworks. Whenever possible these software components are designed and developed to not interfere the usual deployment of the cloud services but to use the already existing public interfaces and simply act as a client for those. The following services help to achieve the federation:

* **Federated AAI**, using X.509 proxy certificates and VOMS extensions with information on the VO of users. Integration with the new EGI AAI is currently under development.
* **Accounting**, usage information is collected via a secure messaging infrastructure in a centralised repository and displayed in a web portal where both individual users and communities can monitor their own resource/service usage across the whole federation.
* **Service Registry**, where providers register the different services offered to the federation.
* **Information Discovery**, so users and tools can retrieve a real-time view of the actual capabilities of the infrastructure.
* **VM Image catalogue and replication**. EGI AppDB provides a catalogue of Virtual Machine Images that encapsulate software appliances relevant for a given community. These images are automatically replicated to the local catalogues of the CMFs supporting the community.
* **Availability Monitoring**, to collect availability and reliability statistics about the providers that can be used to monitor SLAs and OLAs agreed with user communities and resource providers.
* **Standard Interfaces for IaaS**. OCCI and CDMI provide an interoperable interface across the different CMF, so users and applications can interact with the services offered with a single API.

Cloud providers joining the Federated Cloud follow EGI procedure to register and certify a Resource Centre (RC)[[13]](#footnote-13), which makes the EGI infrastructure aware of the new resources you offer, and takes care of validating and testing the behaviour of the services. In the context of the registration, the Resource Centre will become part of a Resource Infrastructure such as a National Grid Initiative (NGI), an EIRO, or a multi-country Resource Infrastructure. ELIXIR is currently reviewing these certification procedures to understand which elements are needed to the support the ELIXIR Compute Platform.

## Installation guideline for OpenStack providers

Integration with of OpenStack providers on EGI’s FedCloud is supported on OpenStack releases from Havana to Mitaka (current release). The installation manual available at EGI’s wiki[[14]](#footnote-14) describe all the technical steps to perform this integration from a working OpenStack deployment. The list of components that must be installed depends on the services to be offered:

* Keystone must be always available.
* VM Management features (OCCI access or OpenStack access) requies Nova, Cinder and Glance.
* Object storage features required Swift.

Figure 1 below shows the different components and their relation with the OpenStack and EGI services:

* Keystone-VOMS Authorization plugin allows users with a valid VOMS proxy to access the OpenStack deployment. This plugin requires modification of a regular Keystone installation.
* OpenStack OCCI Interface (ooi) translates between OpenStack API and OCCI. This is a WSGI application similar to other OpenStack services, it can be scaled horizontally to accommodate high loads.
* cASO collects accounting data from OpenStack using public APIs.
* SSM sends the records extracted by cASO to the central accounting database on the EGI Accounting service (APEL).
* BDII cloud provider registers the site configuration and description through the EGI Information System to facilitate service discovery.
* vmcatcher checks the EGI App DB for new or updated images that can be provided to the user communities (VO) supported and with the vmcatcher hooks (glancepush and OpenStack handler for vmcatcher) push updated images from to Glance, using Openstack Python API



Figure 1. Architecture of an OpenStack site within the EGI Federated Cloud

There are two options for integration: using individual components or by using a configurable Virtual Appliance that encapsulates the components that just use the public APIs of OpenStack (marked as EGI integration tools in the image). Both options are detailed in the installation manual.

## Installation guideline for OpenNebula providers

An EGI Cloud Site based on OpenNebula is an ordinary OpenNebula installation with some EGI-specific integration components. There are no additional requirements placed on internal site architecture. The installation manual available at EGI’s wiki[[15]](#footnote-15) describe all the technical steps to install the federation components on top of an OpenNebula deployment. CDMI storage endpoints are currently not supported for OpenNebula-based sites.

Figure 2 shows the components and their relation with OpenNebula and EGI services:

* rOCCI-server, which provides a standard OCCI interface. It translates between OpenNebula API and OCCI. It must be configured to use its opennebula backend, and to use voms for authentication.
* local perun scripts, which allow Perun[[16]](#footnote-16) to set up, block and remove user accounts from OpenNebula, thus managing the full life cycle of a user account.
* vmcatcher, which checks the EGI App DB for new or updated images that need to be supported on the site. It downloads images and registers them with OpenNebula, so that they can be used in resource instantiation. Vmcatcher configuration is explained bellow.
* oneacct scripts, which collect accounting data from OpenNebula and publish those into EGI's APEL instance. Oneacct configuration is explained at the FedCloud Accounting page.
* BDII cloud provider, which registers the site's configuration and description through the EGI Information System to facilitate service discovery.



Figure 2. Architecture of an OpenStack site within the EGI Federated Cloud

Those OpenNebula-based service providers who want to support ELIXIR should follow the generic integration guidelines outlined in previous sections. In order to enable the ELIXIR Compute Platform, the following additional configuration is required:

1. Establish CA trust for proxy certificates issued by CILogon (https://snf-676811.vm.okeanos.grnet.gr/ca/demoroot.html)

$ cd /etc/grid-security/certificates

$ ls -la | grep Globus

lrwxrwxrwx 1 root root 22 Feb 25 09:54 93df451c.0 -> GlobusSimpleCaDemo.pem

-rw-r--r-- 1 root root 1931 Feb 25 09:53 GlobusSimpleCaDemo.pem

1. Enable VO 'vo.elixir-europe.org' locally

See <https://wiki.egi.eu/wiki/HOWTO16#OpenNebula_2>

1. Enable propagations from Perun

Notify the Perun team via GGUS, state interest in 'vo.elixir-europe.org' being propagated to your EGI Federated Cloud site (provide site ID and endpoint URL).

1. Subscribe to 'vo.elixir-europe.org' VO-wide image list

See https://wiki.appdb.egi.eu/main:guides:vmcatcher\_site\_setup

After the first successful propagation from Perun (user accounts) and AppDB (virtual appliances), your site will be a fully functional member of the ELIXIR Compute Platform.

## Installation guideline for Synnefo providers

An EGI Cloud Site based on Synnefo[[17]](#footnote-17) is an ordinary Synnefo installation with some EGI-specific integration components. There are no additional requirements placed on internal site architecture. You will need however to install the following extra services.

* SNF-OCCI[[18]](#footnote-18): Which is an an implementation of OCCI 1.1 (OCCI 1.2 support will be available shortly) as a bridge to kakaki, synnefo cli.
* ASTAVOMS[[19]](#footnote-19): is the extension to synnefos astakos authentication services that handles a pool of user accounts to that are bind to a user authenticated via VOMS.
* SNF-CDMI[[20]](#footnote-20): Which is an implementation of CDMI Spec on top of pithos ~Okeanos storage service.
* SNF-SSM[[21]](#footnote-21): Which is a script that publishes to apel ssm usage records.
* SNF-VMCATCHER[[22]](#footnote-22): Which is the implementation of vmcatcher to use kakaki and snf-image to import images on your Synnefo installation.

Please note that astavoms is required for both SNF-OCCI and SNF-CDMI to work as they redirect to that service to authenticate a user. Note that Synnefo does not support VMs with Logical Volumes.

# Report on AAI integration

This subsection provides details about the integration activities that were performed by EGI and the ELIXIR AAI Task Force to integrate EGI services with the ELIXIR Authentication-Authorisation Infrastructure (AAI). The AAI integration was implemented through the recently released EGI AAI proxy service[[23]](#footnote-23). The GOCDB service registry, and the AppDB Virtual Machine Image catalogue were selected as priority services to conduct the integration. Besides these OpenStack was also integrated with the EGI AAI proxy.

These integrations enable members of the ELIXIR Community to interact with GOCDB, AppDB and OpenStack resources using their ELIXIR user identities:

* In GOCDB these ELIXIR service providers can register and manage the registration of basic infrastructure resources (cloud and storage).
* In AppDB ELIXIR application developers can register Virtual Machine Images and Virtual Appliances for publishing these on the ELIXIR cloud sites and for sharing these with the broader life science community.
* In OpenStack ELIXIR members can instantiate applications from the pre-deployed Virtual Machine Images and Virtual Appliances.

The next subsections provides details on how the integration was achieved and what are the next steps.

## Integration of ELIXIR AAI with EGI AAI proxy

The ‘EGI AAI proxy’ is a new service in the EGI service portfolio which enables access to EGI services and resources with federated authentication mechanisms. Specifically, the proxy service is operated as a central hub between federated Identity Providers (IdPs) residing ‘outside’ of the EGI network of services, and Service Providers (SPs) that are part of EGI. The main advantage of this design principle is that all entities need to establish and maintain technical and trust relation only to a single entity, the EGI AAI proxy, instead of managing N-to-M relationships. The proxy acts as a Service Provider towards the Identity Providers and as an Identity Provider towards the Service Providers.

Using the EGI AAI proxy, users are able to authenticate with the credentials provided by the IdP of their Home Organisation through eduGAIN, as well as using social identity providers, eGOV IDs, or other selected external identity providers. To achieve this, the EGI AAI has built-in support for SAML, OpenID Connect and OAuth2 providers and already enables user logins through Facebook, Google, LinkedIn, and ORCID. In addition to serving as an authentication proxy, the EGI AAI provides a central Discovery Service (Where Are You From – WAYF) for users to select their preferred IdP.

The EGI AAI proxy is also responsible for aggregating user attributes originating from various authoritative sources (IdPs and attribute provider services) and delivering them to the connected EGI service providers in a harmonised and transparent way. Service Providers can use the received attributes for authorisation purposes, i.e. deciding what the user is allowed to use/do with the service. The EGI services require a minimum set of attributes from the EGI AAI proxy about the user to grant access[[24]](#footnote-24).

Within ELIXIR the ELIXIR AAI service operates as both an IdP and attribute provider service. It’s assumed that this service will manage user accounts and personal attributes for every ELIXIR user. During the last months the EEGI AAI proxy has been integrated with the ELXIR AAI with the goal to enable members of the ELIXIR Community access EGI services. Two EGI service – the GOCDB service registry and the AppDB Virtual Machine marketplace – were chosen as priority services for the ELIXIR integration. The integration work was achieved by connecting the SP proxy element of the EGI AAI proxy with the IdP proxy of the ELIXIR AAI with exchanging their SAML metadata in XML format.

The typical Single Sign-On (SSO) flow in the integrated system begins with the ELIXIR user accessing an EGI application (GOCDB or AppDB) through a web browser (SP-initiated SSO). Since the user is not logged in at the SP yet, the SP sends the user to the EGI IdP proxy to authenticate. The user is then redirected to the EGI central Discovery Service page where he/she is able to select to authenticate at ELIXIR. This results in a SAML authentication request from the EGI AAI proxy to the ELIXIR AAI (it’s IdP proxy component). Compliance of the EGI SP proxy with the GÉANT Data Protection Code of Conduct (CoCo) and the REFEDS Research and Scholarship (R&S) allows the ELIXIR AAI IdP proxy to release the minimum set of attributes required for a user to make use of the EGI service.

The released attribute set includes an opaque (eduPersonalUniqueId), as well as a username-based (eduPersonPrincipalName) user identifier scoped at elixir-europe.org. The first name (givenName), surname (sn) and email (mail) of the user are also provided. To indicate the set of rights to specific EGI resources, the ELIXIR IdP proxy releases an eduPersonEntitlement attribute. This is a multi-valued attribute, with each value formatted as a URI. The structure of the value itself however, is based on an agreement between ELXIR and EGI, since there are currently no commonly accepted standards or recommendations regarding the representation of entitlements. The eduPersonEntitlement content is still under discussion, finalisation is expected by the end of May.

The ELIXIR IdP builds an assertion containing the attributes above, which is sent to the SP proxy component of the EGI AAI proxy. Based on the authentication method selected by the user, the EGI proxy assigns a Level of Assurance (LoA)[[25]](#footnote-25), which is conveyed to the SP through the eduPersonAssurance attribute and the Authentication Context Class of the SAML authentication response. EGI AAI currently distinguishes between three LoA levels, namely, Low, Substantial and High. Some EGI SPs have been configured to provide limited access (or not to accept at all) credentials with the Low LoA. Details regarding LoA levels in case of GOCDB and AppDB are reported in the next subsections.

## Integration of GOCDB with the EGI AAI proxy

GOCDB has been integrated with the EGI AAI proxy. This allows users without a client x509 certificate to access GOCDB provided the user authenticates to the AAI proxy using an authentication scheme that provides an adequate level of assurance (LoA). As a central configuration management database, GOCDB requires the highest level of assurance. For example, if the user authenticates to the ProxyIdP using a scheme that provides a low or medium level of assurance such as social-media/Facebook, then access to GOCDB is denied. Conversely, if a project integrates a trusted identity provider with the ProxyIdP where the user authenticates using a scheme that provides a high LoA (e.g. institutional credentials), access is granted. During the login process, the LoA category that is assigned to the user's authenticated session (e.g. low, substantial, high) is communicated to the GOCDB. The ELIXIR AAI IdP provides the highest level of assurance to GOCDB.

Based on the provided assurance level, GOCDB can make its own internal authorisation decisions. If a user is granted access, they use the existing GOCDB role mechanisms to request roles and permissions. The list of available roles, with their permissions is provided in Appendix 1. There is no automatic mapping between ELIXIR roles and GOCDB roles.

* 1. User logs in to GOCDB service registry with ELIXIR account (<http://goc.egi.eu>)
	2. User requests a role. The request is passed to the existing users who already own the necessary roles to approve or reject the role request. Currently Steven Newhouse from EMBL-EBI and Miroslav Ruda from CESNET who have roles over the ELIXR group. (Once this initial community admin group is established within GOCDB by the GOCDB admin, the group can subsequently self-manage their user memberships.)
	3. User is granted with the approved role at next login, and can perform authorised operations.

## Integration of AppDB with the EGI AAI proxy

EGI AppDB is planned to be used as a marketplace of Virtual Machine Images (VMIs) within the ELIXIR Compute platform. A user can have three roles when accessing the EGI AppDB marketplace:

* Visitor: Can browse publicly visible VMIs, can download them for local use. Visitors do not have to login.
* Member of a scientific community: Can register new VMIs and VMI versions in the marketplace and (optionally) can submit these to community coordinator for inclusion in the community image list. Community members have to login to AppDB and must have user attribute that express affiliation to the community.
* Coordinator of a scientific community: Can add VMIs to the community image list to trigger the replication of these VMIs to the cloud sites that support the community. Community image list includes VMs that are of high relevance to the scientific community. Community coordinators have to login to AppDB and must have attributes that express affiliation to a community and coordinator role within that community.

The goal of the AppDB–ELIXIR AAI integration was to enable authorized access to the marketplace for members of the ELIXIR community - i.e. for those possessing ELIXIR accounts.

The integration of AppDB with the EGI ProxyIdP has been completed, so AppDB can login and authorise users coming through the EGI AAI proxy. Authorization of user actions is based on relevant entitlements returned by the EGI AAI proxy (including LoA entitlement).

The integration is currently stalled on waiting for the agreement on the normalized entitlement schema between the ELIXIR AAI and EGI AAI proxy. Once entitlement normalization is complete, the EGI AAI subsystem of AppDB will be able to move to production and eventually expand the existing authentication and authorization methods (EGI SSO, x.509) with new options.

## Integration of OpenStack with the EGI AAI proxy

Until recently OpenStack resources of the EGI Federated Cloud were able to authenticate and authorize users solely through X.509 proxy certificates. This prevented users without a client X.509 certificate to interact with the providers. The latest versions of the OpenStack identity service (Keystone) now includes support for federated users: Keystone can act as a Service Provider (SP) that consumes identity properties issued by an external Identity Provider, such as SAML assertions or OpenID Connect claims. The OpenStack web dashboard (Horizon) has introduced also support for this kind of authentication and authorisation. Based on this new OpenStack feature EGI has connected OpenStack with the EGI AAI proxy. The integration is achieved with a new configuration of the Keystone federation that uses EGI AAI as a SAML IdP. Detailed instructions are available in the OpenStack guides[[26]](#footnote-26).

The below screenshot shows the SAML-enabled OpenStack dashboard with its drop down menu of available authentication providers. When selecting the egi.eu IdP proxy option, user will be redirected to the EGI AAI proxy and can follow the process described in section 5.1 to authenticate with an ELIXIR account.



Figure 3. EGI AAI IdP proxy configured in OpenStack

Site administrators need to set up the rules that map the attributes released from the EGI AAI proxy to local OpenStack identity objects. There are many ways to setup and combine these rules. For the EGI integration the following objects are used:

* eduPersonalUniqueId, is mapped to the user id in Keystone.
* eduPersonEntitlement defines the OpenStack groups the user is allowed to access,
* Level of Assurance may restrict grant access to users with the desired LoA

Once the eduPersonEntitlement contents are agreed, recommended mappings will be provided for administrators to easily integrate their resources. Users authenticated through this mechanism can be managed by the OpenStack administrator as any other user.

# Summary and next steps

Based on the joint work of ELIXIR and EGI communities, the basic building blocks of the ELIXIR compute platform have been established:

1. The ELIXIR AAI and EGI AAI systems have been connected, and ELIXIR users can login with ELIXIR accounts to the EGI GOCDB and AppDB services.
2. Guidelines and tools have been improved for OpenStack, OpenNebula and Synnefo cloud providers to participate in the EGI Federated Cloud, and particularly in its ELIXIR Virtual Organisation.
3. 3 cloud providers (CESNET, EMBL-EBI and GRNET) are deployed and are ready to join the ELIXIR Compute Platform virtual organisation(s).

The next step for the CC is to bring the reported building blocks together, and implement the scientific from M6.3 on top of it. Particularly the CC members - with the support of the broader ELIXIR and EGI communities -must:

1. Finalise the AAI integration of ELIXIR and EGI, so ELIXIR users can be assigned with user roles and can be authorised within EGI GOCDB and AppDB.
2. Join the ELIXIR Virtual Organisation with the three existing sites (CESNET, EMBL-EBI, GRNET).
3. Work with other cloud providers in the CC to eliminate the issues that are blocking them to join the ELIXIR Compute Platform (CSC, CNRS, SURFsara).
4. Create the VMs that are required for the M6.3 scientific use cases, then roll these out to the ELIXIR VO. Document the experiences in D615 (due in January 2017).

Besides the above tasks the following actions can help even further in expanding the uptake of the ELIXIR Compute Platform. These can mostly run based on the experiences gained from the CC use cases, but some can already start and run in parallel with those:

1. Decide on how to structure the ELIXIR Compute Platform. How many, and what kind of Virtual Organisations to create? What user roles and respective capacity/service limitations to use?
2. Finalise the ELIXIR access to OpenStack clouds through the ELIXIR-EGI AAI integration. This could lower the barriers even further for ELIXIR users to access resources in the ELIXIR Compute Platform. Depending on the experiences introduce similar ‘direct’ connection to the other cloud types.
3. Based on the operational experiences gained from the CC use cases, create documentations for the broader ELIXIR community on how to join and operate resources in the ELIXIR Compute Platform.
4. User roles and permissions in GOCDB

In GOCDB, users request Roles over domain objects such as Projects, NGIs, Sites and ServiceGroups. A Role enables Actions on target objects (often, the target is the same as the domain object). Some Roles allow actions over different targets.

The Role-Action mapping matrix is shown below. The matrix was copied from GOCDB page <https://goc.egi.eu/portal/index.php?Page_Type=View_Role_Action_Mappings>.

**ServiceGroup Roles**

| **RoleType** | **Action** | **On (Target of Action)** |
| --- | --- | --- |
| Service Group Administrator | ACTION\_EDIT\_OBJECT | ServiceGroup |
| Service Group Administrator | ACTION\_GRANT\_ROLE | ServiceGroup |
| Service Group Administrator | ACTION\_REJECT\_ROLE | ServiceGroup |
| Service Group Administrator | ACTION\_REVOKE\_ROLE | ServiceGroup |

**Project Roles**

| **RoleType** | **Action** | **On (Target of Action)** |
| --- | --- | --- |
| COD Staff | ACTION\_EDIT\_OBJECT | Project |
| COD Staff | ACTION\_GRANT\_ROLE | Project |
| COD Staff | ACTION\_REJECT\_ROLE | Project |
| COD Staff | ACTION\_REVOKE\_ROLE | Project |
| COD Staff | ACTION\_GRANT\_ROLE | Ngi |
| COD Staff | ACTION\_REJECT\_ROLE | Ngi |
| COD Staff | ACTION\_REVOKE\_ROLE | Ngi |
| COD Staff | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |
| COD Administrator | ACTION\_EDIT\_OBJECT | Project |
| COD Administrator | ACTION\_GRANT\_ROLE | Project |
| COD Administrator | ACTION\_REJECT\_ROLE | Project |
| COD Administrator | ACTION\_REVOKE\_ROLE | Project |
| COD Administrator | ACTION\_GRANT\_ROLE | Ngi |
| COD Administrator | ACTION\_REJECT\_ROLE | Ngi |
| COD Administrator | ACTION\_REVOKE\_ROLE | Ngi |
| COD Administrator | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |
| EGI CSIRT Officer | ACTION\_EDIT\_OBJECT | Project |
| EGI CSIRT Officer | ACTION\_GRANT\_ROLE | Project |
| EGI CSIRT Officer | ACTION\_REJECT\_ROLE | Project |
| EGI CSIRT Officer | ACTION\_REVOKE\_ROLE | Project |
| EGI CSIRT Officer | ACTION\_GRANT\_ROLE | Ngi |
| EGI CSIRT Officer | ACTION\_REJECT\_ROLE | Ngi |
| EGI CSIRT Officer | ACTION\_REVOKE\_ROLE | Ngi |
| EGI CSIRT Officer | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |
| Chief Operations Officer | ACTION\_EDIT\_OBJECT | Project |
| Chief Operations Officer | ACTION\_GRANT\_ROLE | Project |
| Chief Operations Officer | ACTION\_REJECT\_ROLE | Project |
| Chief Operations Officer | ACTION\_REVOKE\_ROLE | Project |
| Chief Operations Officer | ACTION\_GRANT\_ROLE | Ngi |
| Chief Operations Officer | ACTION\_REJECT\_ROLE | Ngi |
| Chief Operations Officer | ACTION\_REVOKE\_ROLE | Ngi |
| Chief Operations Officer | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |

**NGI Roles**

| **RoleType** | **Action** | **On (Target of Action)** |
| --- | --- | --- |
| NGI Operations Manager | ACTION\_EDIT\_OBJECT | Ngi |
| NGI Operations Manager | ACTION\_NGI\_ADD\_SITE | Ngi |
| NGI Operations Manager | ACTION\_GRANT\_ROLE | Ngi |
| NGI Operations Manager | ACTION\_REJECT\_ROLE | Ngi |
| NGI Operations Manager | ACTION\_REVOKE\_ROLE | Ngi |
| NGI Operations Manager | ACTION\_EDIT\_OBJECT | Site |
| NGI Operations Manager | ACTION\_SITE\_ADD\_SERVICE | Site |
| NGI Operations Manager | ACTION\_SITE\_DELETE\_SERVICE | Site |
| NGI Operations Manager | ACTION\_GRANT\_ROLE | Site |
| NGI Operations Manager | ACTION\_REJECT\_ROLE | Site |
| NGI Operations Manager | ACTION\_REVOKE\_ROLE | Site |
| NGI Operations Manager | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |
| NGI Operations Deputy Manager | ACTION\_EDIT\_OBJECT | Ngi |
| NGI Operations Deputy Manager | ACTION\_NGI\_ADD\_SITE | Ngi |
| NGI Operations Deputy Manager | ACTION\_GRANT\_ROLE | Ngi |
| NGI Operations Deputy Manager | ACTION\_REJECT\_ROLE | Ngi |
| NGI Operations Deputy Manager | ACTION\_REVOKE\_ROLE | Ngi |
| NGI Operations Deputy Manager | ACTION\_EDIT\_OBJECT | Site |
| NGI Operations Deputy Manager | ACTION\_SITE\_ADD\_SERVICE | Site |
| NGI Operations Deputy Manager | ACTION\_SITE\_DELETE\_SERVICE | Site |
| NGI Operations Deputy Manager | ACTION\_GRANT\_ROLE | Site |
| NGI Operations Deputy Manager | ACTION\_REJECT\_ROLE | Site |
| NGI Operations Deputy Manager | ACTION\_REVOKE\_ROLE | Site |
| NGI Operations Deputy Manager | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |
| NGI Security Officer | ACTION\_EDIT\_OBJECT | Ngi |
| NGI Security Officer | ACTION\_NGI\_ADD\_SITE | Ngi |
| NGI Security Officer | ACTION\_GRANT\_ROLE | Ngi |
| NGI Security Officer | ACTION\_REJECT\_ROLE | Ngi |
| NGI Security Officer | ACTION\_REVOKE\_ROLE | Ngi |
| NGI Security Officer | ACTION\_EDIT\_OBJECT | Site |
| NGI Security Officer | ACTION\_SITE\_ADD\_SERVICE | Site |
| NGI Security Officer | ACTION\_SITE\_DELETE\_SERVICE | Site |
| NGI Security Officer | ACTION\_GRANT\_ROLE | Site |
| NGI Security Officer | ACTION\_REJECT\_ROLE | Site |
| NGI Security Officer | ACTION\_REVOKE\_ROLE | Site |
| NGI Security Officer | ACTION\_SITE\_EDIT\_CERT\_STATUS | Site |
| Regional Staff (ROD) | ACTION\_EDIT\_OBJECT | Ngi |
| Regional Staff (ROD) | ACTION\_EDIT\_OBJECT | Site |
| Regional Staff (ROD) | ACTION\_SITE\_ADD\_SERVICE | Site |
| Regional Staff (ROD) | ACTION\_SITE\_DELETE\_SERVICE | Site |
| Regional First Line Support | ACTION\_EDIT\_OBJECT | Ngi |
| Regional First Line Support | ACTION\_EDIT\_OBJECT | Site |
| Regional First Line Support | ACTION\_SITE\_ADD\_SERVICE | Site |
| Regional First Line Support | ACTION\_SITE\_DELETE\_SERVICE | Site |

**Site Roles**

| **RoleType** | **Action** | **On (Target of Action)** |
| --- | --- | --- |
| Site Administrator | ACTION\_EDIT\_OBJECT | Site |
| Site Administrator | ACTION\_SITE\_ADD\_SERVICE | Site |
| Site Administrator | ACTION\_SITE\_DELETE\_SERVICE | Site |
| Site Security Officer | ACTION\_EDIT\_OBJECT | Site |
| Site Security Officer | ACTION\_SITE\_ADD\_SERVICE | Site |
| Site Security Officer | ACTION\_SITE\_DELETE\_SERVICE | Site |
| Site Security Officer | ACTION\_GRANT\_ROLE | Site |
| Site Security Officer | ACTION\_REJECT\_ROLE | Site |
| Site Security Officer | ACTION\_REVOKE\_ROLE | Site |
| Site Operations Deputy Manager | ACTION\_EDIT\_OBJECT | Site |
| Site Operations Deputy Manager | ACTION\_SITE\_ADD\_SERVICE | Site |
| Site Operations Deputy Manager | ACTION\_SITE\_DELETE\_SERVICE | Site |
| Site Operations Deputy Manager | ACTION\_GRANT\_ROLE | Site |
| Site Operations Deputy Manager | ACTION\_REJECT\_ROLE | Site |
| Site Operations Deputy Manager | ACTION\_REVOKE\_ROLE | Site |
| Site Operations Manager | ACTION\_EDIT\_OBJECT | Site |
| Site Operations Manager | ACTION\_SITE\_ADD\_SERVICE | Site |
| Site Operations Manager | ACTION\_SITE\_DELETE\_SERVICE | Site |
| Site Operations Manager | ACTION\_GRANT\_ROLE | Site |
| Site Operations Manager | ACTION\_REJECT\_ROLE | Site |
| Site Operations Manager | ACTION\_REVOKE\_ROLE | Site |

1. <http://www.elixir-europe.org/> [↑](#footnote-ref-1)
2. <http://www.egi.eu/> [↑](#footnote-ref-2)
3. <http://www.elixir-europe.org/> [↑](#footnote-ref-3)
4. <http://www.egi.eu/> [↑](#footnote-ref-4)
5. <http://www.eudat.eu/> [↑](#footnote-ref-5)
6. It is worth noting that the MONARC report is now considered outdated as following the initial experience of running the WLCG and the advances in the capability of the international networks, an evolved technical architecture is now being established that is less hierarchical in its data flows. [↑](#footnote-ref-6)
7. ELIXIR AAI – Requirements and Design: <https://docs.google.com/document/d/1CMY1np3GyvPD8LcKvXljXcRO04V2zu3n_Jcg19jgNOw/edit> [↑](#footnote-ref-7)
8. <https://www.egi.eu/solutions/fed-cloud/index.html> [↑](#footnote-ref-8)
9. <https://www.egi.eu/solutions/fed-ops/index.html> [↑](#footnote-ref-9)
10. <https://appdb.egi.eu/browse/cloud> [↑](#footnote-ref-10)
11. OpenStack, OpenNebula and Synnefo are those cloud management frameworks for which integration components already exists. Integrator components can be developed for additional cloud system if needed. [↑](#footnote-ref-11)
12. https://wiki.egi.eu/wiki/MAN10 [↑](#footnote-ref-12)
13. https://wiki.egi.eu/wiki/PROC09\_Resource\_Centre\_Registration\_and\_Certification [↑](#footnote-ref-13)
14. https://wiki.egi.eu/wiki/MAN10#Integrating\_OpenStack [↑](#footnote-ref-14)
15. https://wiki.egi.eu/wiki/MAN10#Integrating\_OpenNebula [↑](#footnote-ref-15)
16. https://perun.metacentrum.cz/ [↑](#footnote-ref-16)
17. https://www.synnefo.org [↑](#footnote-ref-17)
18. <https://github.com/grnet/snf-occi> [↑](#footnote-ref-18)
19. [↑](#footnote-ref-19)
20. <https://github.com/grnet/snf-cdmi> [↑](#footnote-ref-20)
21. <https://github.com/grnet/snf-ssm> [↑](#footnote-ref-21)
22. https://github.com/grnet/snf-vmcatcher [↑](#footnote-ref-22)
23. The EGI AAI Proxy service was developed by the JRA1.1 task of EGI-Engage: [https://wiki.egi.eu/wiki/EGI-Engage:WP3#TASK\_JRA1.1\_Authentication\_and\_Authorisation\_Infrastructure](https://wiki.egi.eu/wiki/EGI-Engage%3AWP3#TASK_JRA1.1_Authentication_and_Authorisation_Infrastructure) [↑](#footnote-ref-23)
24. The required attributes are eduPersonalUniqueId and the username-based eduPersonPrincipalName user identifier (scoped at [elixir-europe.org](http://elixir-europe.org) in case of ELIXIR). [↑](#footnote-ref-24)
25. LoA expresses the ability to determine, with some level of certainty, that the electronic credential representing an entity (human or a machine) with which it interacts to effect a transaction, can be trusted to actually belong to the entity. [↑](#footnote-ref-25)
26. <http://docs.openstack.org/developer/keystone/federation/federated_identity.html> [↑](#footnote-ref-26)