



## Instructions to manage EGI AoD service-order requests via the EGI Marketplace

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This guide provides instruction to operators of the EGI Applications on Demand service on how to validate user requests to decide whether those can be accepted or rejected in the service.



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## DOCUMENT LOG

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<b>v.2</b>	07/04/2017	First version of the documentation for operators of the service.	Giuseppe La Rocca (EGI Foundation)
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## TERMINOLOGY

The EGI glossary of terms is available at: <https://wiki.egi.eu/wiki/Glossary>

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# 1 Introduction

This document is specifically applicable to ‘**Operators**’ of the EGI Applications on Demand (AoD) service, hereafter referred to as the ‘**Service**’ [R1]. Broadly speaking, the Operators role deals with authorising user’s service requests (orders). In more detail, the Operators are responsible to use a light-weight vetting process to verify users’ identity and research scopes before to grant them access to the available applications and resources.

The process described in this document complies with the following policies:

- Acceptable Use Policy and conditions of use of the EGI Applications on Demand service (Platform for the Long-tail of Science) [R2].
- EGI Applications on Demand service - Security Policy [R3].

In case the outcome of the vetting process is successful, the user will receive a service grant (see Section 2.1) to access the following list applications (and tools):

- The Galaxy and NAMD applications (and tools) available via the **Elastic Cloud Computing Cluster (EC3)** [R4].
- The Autodock Vina open-source program for doing molecular docking available via the **WS-PGRADE/gUSE portal** [R5].

The Chipster software to analyse high-throughput data such as NGS and microarrays available via the **Future Gateway Science Gateway (FGSG)** [R6].

By the time of writing this document, services-order requests can be received through:

- The EGI Marketplace [R7], and
- the EOSC portal Marketplace [R8].

**In this document we will focus more on the procedures for helping the Operators of the Service to validate service-orders requests coming from the EGI Marketplace [R7]. Similar procedures to validate requests coming from the EOSC Portal Marketplace is also available in the EGI documents repository<sup>1</sup>.**

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<sup>1</sup> <https://documents.egi.eu/document/3127>

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## 1.1 Vocabulary

In this document, the following vocabulary is used:

<b>Applicant</b>	A natural person that seeks to gain access to the service by providing information to the Registry.
<b>Application</b>	The information provided by an Applicant and recorded by a Registry that describes the personal information, contact details, and requests to access research applications.
<b>User</b>	An applicant whose identity, and research scope, have been successfully checked and verified during the vetting process
<b>Management</b>	Those individuals or organisational bodies that have control over Resource Centres, Resource Infrastructures, and any associated personnel, and who are capable and authorized to assume risks.
<b>The EGI Service Registry and Marketplace</b>	In short Marketplace [R7], is the platform where an ecosystem of EGI-related services, delivered by EGI providers and partners, can be promoted, discovered, shared, ordered and accessed. By the time of writing, the services available in the EGI Marketplace cover the following areas: Compute, Storage & Data, Applications and Training. From the top-menu of the Marketplace, clicking in the “Applications” category, the researchers can request access to an initial portfolio of applications offered by the EGI Applications on Demand (AoD) service to support the day-by-day work of modern researchers.
<b>The EGI Requirements Tracking (RT)</b>	A collaboration tool [R9] used to store, monitor and resolve requirements and recommendations communicated by user communities and EGI stakeholders. For the Service, this system is used by the Operators to manage service orders submitted by Applicants through the EGI Marketplace. <b>Throughout this document the term "Requirement Tracker" and the acronym "RT" will refer to the "service-orders" queue of the EGI Request Tracker system.</b>
<b>The EGI User Support</b>	Is the body (or bodies) in charge to process Applications. This includes: EGI User community Support Team (UCST), Resource Allocation core activity, and any National International Liaison (NIL) [R8] who can participate in the activity.

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<b>The EGI User Support Operators</b>	In short Operators, are members of the EGI User Support Teams nominated to validate the Applications submitted by the Applicants through the EGI Marketplace.
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Table 1. The terminology adopted in this document

## 2 Procedure

Starting from Sept. 2017 the EGI Applications on Demand is one of the EGI services publicly available in the EGI Marketplace. The EGI Marketplace is the entry point for researchers to discover and access the advanced computing services and tools they need for their work. All services available in this Marketplace are provided by the EGI Federation, partner institutions and commercial cloud service providers.

The procedures described in this document are intended to provide specific recommendations and guidelines for helping members of the EGI User Support team, nominated Operators, to validate service-orders requests coming from the EGI Marketplace [R8].

The complete workflow used by the Operators to manage these requests is described below:

1. The Applicant submits a service order request (Applicant) to use one of the available research applications and tools. The request is confirmed via email by the EGI Marketplace [R8].
2. The Operator is notified by the EGI Marketplace [R8] that a new service order request is received. The details about the service request are tracked in the “service-orders” request of RT [R9].
3. The Operator follows the procedures documented in Section 2.3 to vet the user’s identify, check his/her research scope, and decide whether or not accept the request.
4. In any case, the Applicant is notified by email whether his/her service order request has been approved or not.
5. In case the service order request is approved, a notification email will be sent by the EGI Marketplace [R8] to the User with the instructions to access the requested application(s) hosted in one of the available application hosting frameworks.

### 2.1 Service grant

Each authorized User is offered a predefined quota of resources (service grant) to run the applications of choice. The service can be renewed upon request. The EGI grant includes up to **4 vCPU cores, 8GB of RAM and 100GB of block storage**.

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## 2.2 Important notice

Users interested to access the EGI AoD service **MUST** register to the EOSC Portal Marketplace [R6] and **submit a service order request with the EGI AAI Check-In service** [R11].

## 2.3 Service-order requests management

To facilitate the management of the service-order requests collected through the EGI Marketplace [R8], the following interaction between the EGI UCST members and the Operators of the Service has been set up:

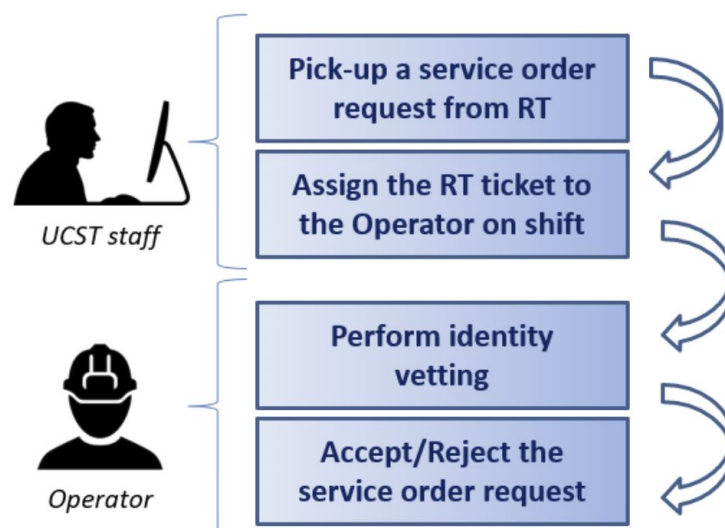


Figure 1. Interaction between the EGI UCST members and the AoDs Operators

## 2.4 Perform the vetting process

The Operators of the Service have to:

- Subscribe the [access-support@mailman.egi.eu](mailto:access-support@mailman.egi.eu) mailing-list to be notified when a new incident, or a new service order is created. To subscribe this mailing list, please contact: [support@egi.eu](mailto:support@egi.eu).
- Register an account in the EGI Helpdesk (GGUS) requesting the Supporter role. Supporters have full read and write access on tickets of other users or on tickets which are assigned to themselves. Instructions to register in the EGI Helpdesk are available at: <https://ggus.eu/?mode=register>.
- Register in the RT “service-request” queue. To be included in this RT [R9] queue, please contact: [support@egi.eu](mailto:support@egi.eu).

From a technical standpoint, the assigned Operator is tasked to:

- Verify the identity of the Applicant along with his/her research activities by following the guidelines described in the vetting process, and
- Process the service requests based on the result of the vetting process.

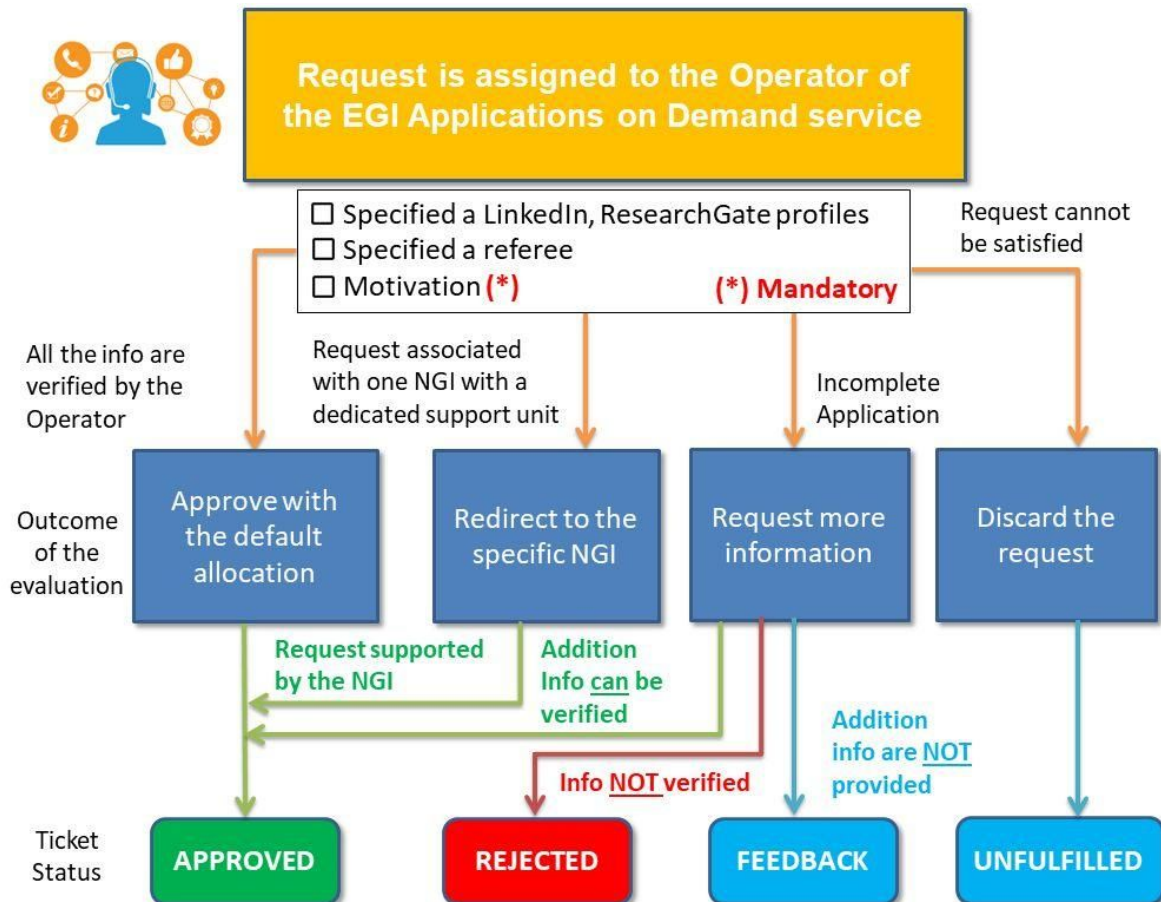


Figure 2. The user's identity vetting process workflow

#### 2.4.1 Notification of new service orders

The Operators will be notified by email when a new service order request is submitted by the Applicant through the EGI Marketplace.

#### 2.4.2 The service-orders queue in the RT system

An example of notifications about service order via RT is the following:

```

Tue Sept 14 15:32:43 2017: Request 13641 was acted upon.
Transaction: Ticket created by service-orders
Queue: service-orders
Subject: Service order, Giuseppe La Rocca, ApplicationsOnDemand
Owner: Nobody
  
```



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Requestors: [marketplace@egi.eu](mailto:marketplace@egi.eu)  
Status: new  
Ticket <URL: <https://rt.egi.eu/rt/Ticket/Display.html?id=13641>>

This transaction appears to have no content

The notification email contains the following information.

- The `service-orders` is the dedicated RT queue which has been configured to collect all the service requests submitted by the users.
- The `Owner` identify the operator userID in charge to resolve this request.
  - By default, it is `Nobody`.
- The `Requestors` identifies the source from where these service requests come from.
  - In our scenario this is [marketplace@egi.eu](mailto:marketplace@egi.eu).
- The `Status` identifies the status of the RT request.
  - By default, this is `NEW`.
- The `Ticket` identifies the URL to the RT ticket.
- Any additional comments/transactions appear in the `Body` of the RT ticket.

#### 2.4.3 Log in the EGI RT system

The full list of service order requests to be processed are available in the `service-orders` queue. Each service order request contains information that will be used during the vetting process to verify the Applicant's identify and his/her research scope.

The Operator logs in the EGI RT [R9] system providing his/her federated credentials. For more details, please refer to Appendix II – Service order request specification.

#### 2.4.4 How to study a service-order request (Applications)

Before to approve any Applications, the Operator must verify whether the information reported by the Applicant are correct. If the information is not enough to verify the identity of the Applicant and/or validate his/her research scope, the Operator can invite the Applicant to provide additional information and/or clarifications. The Operator can ask for additional information and/or clarifications adding a comment in the RT ticket.

If, for several reasons, the additional information provided by the Applicants are lacking or cannot be verified, the Application will be rejected.

From a technical standpoint, study an Application means verify whether the following two conditions are met:

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## 1. Check the Applicant's profile information.

The Operator needs to verify whether the Applicant has:

- Specified references to his/her institution and department.
- Included enough technical details to identify the purpose of the Applicant's research (if the purpose is for-profit, the request is rejected);

If some of this information is missing, the Operator can use the template **E1** in Appendix II to ask for additional information.

**IMPORTANT:** When replying to a RT ticket to request additional information, please remember to write the requestor email into the CC field.

If the Applicant is associated to one of the following NGIs:

NGI	Contacts
France	Genevieve Romier, France, CNRS, genevieve.romier <AT> cc.in2p3.fr
Turkey	grid-teknik <AT> ulakbim.gov.tr (This includes also the NILs)
Italy	Luciano Gaido, gaido <AT> to.infn.it, Davide Salomoni, davide.salomoni <AT> cnaf.infn.it, Laura Perini, laura.perini <AT> mi.infn.it
Belgium	Stéphane Gerard, stephane.gerard <AT> vub.be, Olivier Devroede, olivier.devroede <AT> vub.be

Table 3. The NGIs contacts

The Operator can forward the request to the NIL contact(s) and ask whether they can provide any support. A complete list of NILs contact is available at [\[R10\]](#).

If the Applicant's profile is valid, continue with step. 2.

## 2. Check the User's publications

If the User has already used the Service in the past, and he/she wants now to renew/extend his/her grants, the Operator has to inquiry the User whether any scientific results (e.g. publications in scientific journals, proceedings, presentations, etc.) benefiting from the Service have been produced. In this case the Operator must check whether EGI was properly acknowledged in these works as indicated in the AUP [\[R2\]](#).

If EGI was acknowledged, go to 2.5.1.

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- If EGI was NOT acknowledged, ask the User to clarify.
    - If the explanation provided by the User is plausible then we go to 2.5.1.
    - If not, the Application will be rejected [go to 2.5.2].
      - A template (**E2**) to notify the Applicant is available in Appendix - II.

If the Applicant has never used the Service, go to 2.5.1.

## 2.5 Accept/Reject/Suspend service order requests

### 2.5.1 Validate the Application

If steps 1.) and 2.) are verified, the service order can be **ACCEPTED**.

The workflow to ACCEPT services request is the following:

- Access the RT system and select the service request to be processed from the service-orders queue.
- Update the status of the service request from 'New' to 'Open' and click on Save.
- Update the status of the service request from 'Open' to 'Resolved', set the request status to **APPROVED** and click on Save.
- Set the VO entitlements for the users as described in Appendix III.

The EGI Marketplace [[R8](#)] will notify the User by email about the status of his/her Application.

#### 2.5.1.1 Tracking of the approved service requests

**The EGI User Support operators MUST record the evidence of the vetting process in the corresponding RT ticket as such as the following example:**

The service-order has been APPROVED as the following conditions have been verified:

- The Applicant has specified a valid LinkedIn/ResearchGate/... profiles.
- A referee has been specified in the order and he/she has successfully confirmed the Applicant's research scope.
- The Applicant has successfully acknowledged EGI (if the scientific publications have been produced benefiting from the allotted resources).
- The Applicant's research activity is in line with EGI's scope.

### 2.5.2 Reject the Application

If some of the steps are not verified, the Operator must set the request status to **REJECT**.

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The EGI Marketplace [R8] will notify the User by email about the status of his/her Application.

### 2.5.3 Suspended the Applicant

In case the Applicant misuses the resources allocated for supporting his/her research programme, the Operator can reopen a service order request and update its status to **'SUSPENDED'**.

The EGI Marketplace [R8] will notify the User by email about the status of his/her Application.

### 2.5.4 Waiting for response from the Application

If the Applicant does not respond to queries and/or does not provide the additional information requested, the Operator sets the status of the ticket to **'STALLED'**.

### 2.5.5 Duplicate of service order requests

If the Application is a test request, a duplicate or if it can't be served because of lack of suitable service/provider, the Operator sets the status of the ticket to **'REJECTED'**.

### 3 Appendix I – Service order specification

Order Reference	The service-order unique identified
SLA	URL used to specify a link to the SLA document (manually provided by the operator) when available.
AoDs	Flag used to identify service-orders for the EGI AoD service
Request Status	Status of the request. Possible values: New, Approved, Rejected, Suspended and Feedback. Default value: New
<b>Customer Identifier</b>	
CI-Name	The Applicant's name. Text field.
CI-Surname	The Applicant's surname. Text field.
CI-Email	The Applicant's email address. Text field.
CI-DisplayName	Human readable username Text field.
CI-EGI-UniqueID	Persistent unique identifier assigned to the Applicant by the EGI AAI Check-In service
CI-Country	The Applicant's country. Text field.
CI-Institution	The Applicant's institution. Text field.
CI-Department	The Applicant's department. Text field.
CI-DepartmentWebpage	The Applicant's department web page. URL
CI-LinkedInProfile	The Applicant's LinkedIn profile URL
CI-ResearchGateProfile	The Applicant's ResearchGate profile URL
CI-SupervisorProfile	The referee profile URL.
CI-SupervisorName	The referee name. Text field.
<b>Customer Profile</b>	
CP-CustomerTopology	The Applicant's topology. Possible values: single user, representing a research community/project, representing a private company.
CP-ProjectInformation	URL of the project the Applicant is involved with.
CP-ReasonForAccess	The Applicant's motivation to request the service.
CP-UserGroupName	If the Applicant is already using the EGI infrastructure, this identify the VO name.
<b>Service Order</b>	
SO-service-order-1..10	List of strings to describe the options for each service

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## 4 Appendix II - Templates

[E1] – Template to invite the Applicant to further discuss his/her research programme in case the motivation is not sufficient/lacking to validate the request.

**This is just a template the Operator can use to invite the Applicant to provide additional information needed to validate the service request. The Operator is free to make any changes he/she deems to be appropriate.**

Dear User,

Thank you for expressing your interest in using the EGI Applications on Demand (AoD) service. With the following, we would like to inform you that the access to this service is granted through a light-weight vetting process. The overall goal of this process is to:

- Identify the researcher's profile and the research activity he/she wants to conduct on the resources offered by EGI;
- Check whether the EGI resources will be used for research activities and not-for-profit scope;
- Verify the benefits this collaboration can bring to EGI and the researcher.

Since the information in your service request are a bit lacking, with the following, you are cordially invited to provide the following information:

- 1.) A more detailed description about the research activity you plan to conduct on the resources offered by the service;
- 2.) Which applications/tools you want to use for supporting your research activities;
- 3.) Any additional references (e.g.: LinkedIn, ResearchGate accounts) to verify your professional identify;
- 4.) A referee we can contact to validate your research activities (optional).

Should you have any questions, please reply to this ticket or contact us at: [support@egi.eu](mailto:support@egi.eu).

Many thanks in advance for your understanding and cooperation.

Your Sincerely,  
EGI User Community Support Team

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[E2] – Template to inform the User that the motivation to do not acknowledge EGI has not been accepted.

**This is just a template the Operator can use to inform the User that the motivation to do not acknowledge EGI has not been accepted and the service-request will be rejected. The Operator is free to make any changes he/she deems to be appropriate.**

Dear User,

This is to inform you that your motivation to do not acknowledge EGI in your scientific results (e.g. publications in scientific journals, proceedings, presentations, etc.) has not been accepted and, for this reason, we regret to inform you that your account has been disabled.

Should you have any questions, please contact us at: [support@egi.eu](mailto:support@egi.eu).

Your Sincerely,  
EGI User Community Support Team

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## 5 Appendix III – How to set the VO entitlements

To set the VO entitlements for the User, please use the APIs available on GitHub [[R12](#)].

## 6 References

No	Description/Link
R1	The EGI AoDs wiki, available at: <a href="https://wiki.egi.eu/wiki/AoD">https://wiki.egi.eu/wiki/AoD</a>
R2	Acceptable Use Policy and conditions of use of the EGI Applications on Demand service (Platform for the Long-tail of Science) <a href="https://documents.egi.eu/document/2635">https://documents.egi.eu/document/2635</a>
R3	EGI Applications on Demand service - Security Policy <a href="https://documents.egi.eu/document/2734">https://documents.egi.eu/document/2734</a>
R4	The Elastic Cloud Compute Cluster (EC3), available at: <a href="https://servproject.i3m.upv.es/ec3-ltos/index.php">https://servproject.i3m.upv.es/ec3-ltos/index.php</a>
R5	The WS-PGRADE/gUSE portal, available at: <a href="https://ltos-gateway.lpds.sztaki.hu/web/wizard">https://ltos-gateway.lpds.sztaki.hu/web/wizard</a>
R6	The FutureGateway Science Gateway, available at: <a href="https://fgsg.egi.eu/">https://fgsg.egi.eu/</a>
R7	The EGI Marketplace, available at: <a href="https://marketplace.egi.eu/">https://marketplace.egi.eu/</a>
R8	The EOSC Portal Marketplace, available at: <a href="https://marketplace.eosc-portal.eu/">https://marketplace.eosc-portal.eu/</a>
R9	The EGI RT system, available at: <a href="https://rt.egi.eu/">https://rt.egi.eu/</a>
R10	Confirmed contacts to handle EGI Service Orders <a href="https://wiki.egi.eu/wiki/NGI_International_Liaison#Confirmed_contacts_to_handle_EGI_Service_Orders">https://wiki.egi.eu/wiki/NGI_International_Liaison#Confirmed_contacts_to_handle_EGI_Service_Orders</a>
R11	The EGI AAI Check-In, available at: <a href="https://aai.egi.eu/">https://aai.egi.eu/</a>
R12	The pyEGI-AAI-CheckIn script to set the user's VO entitlements, available at: <a href="https://github.com/glarocca/pyEGI-AAI-CheckIn">https://github.com/glarocca/pyEGI-AAI-CheckIn</a>