



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

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DRAFT

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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.1</b>	7/10/2016	First version based on preliminary versions by Giuseppe La Rocca/EGI.eu; Peter Solagna/EGI.eu and Geneviève Romier/CNRS	Geneviève Romier (CNRS)
<b>v.2</b>	07/04/2017	First version of the documentation for operators of the service.	Giuseppe La Rocca (EGI Foundation)
<b>v.3</b>	15/09/2017	Updated procedure for operators after integration with the EGI Marketplace.	Giuseppe La Rocca (EGI Foundation)
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<b>v.6</b>	27/07/2018	Added workflow to access the HNSciCloud pilot services.	Bob Jones (CERN), Giuseppe La Rocca (EGI Foundation)
<b>v.8</b>	11/03/2019	Integration Exoscale vouchers in the EOSC Portal Marketplace	Giuseppe La Rocca (EGI Foundation)

## 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 the ‘**Operators**’ of the EGI Applications on Demand (AoD) service, hereafter referred to as the ‘**Service**’ [R1]. The Operators role deals with authorising users’ service-order 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 EOSC Portal Marketplace [R8]. Similar procedures to validate requests coming from the EGI 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 EOSC Portal Service Registry and Marketplace</b>	In short Marketplace <a href="#">[R8]</a> , is the platform where an ecosystem of services, delivered by the EOSC providers and partners, can be promoted, discovered, shared, ordered and accessed. By the time of writing, the services available in the EOSC Portal Marketplace cover the following areas: Compute, Data Management, Networking, Processing Analysis, Security & Operations, sharing & Discovery, Storage and Training Support. From the Marketplace the researchers can request access to resources (e.g. compute, storage, gateway, applications) to support their day-by-day work.
<b>The EOSC Issues Tracking System (JIRA)</b>	A collaboration tool used to store, monitor and resolve requirements and recommendations communicated by user communities and EGI stakeholders. For the Service, the JIRA Issue Tracking System <a href="#">[R9]</a> is used by the Operators to manage service orders requests submitted by Applicants through the EOSC Portal Marketplace <a href="#">[R8]</a> .
<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) <a href="#">[R10]</a> who can participate in the activity.
<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 EOSC Portal Marketplace <a href="#">[R8]</a> .

Table 1. The terminology adopted in this document

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## 2 Guidelines for the Operators of the Service

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 EOSC Portal Marketplace [\[R8\]](#).

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

1. The Applicant submits a service order request (Application) to use one of the available research applications and tools. The request is confirmed via email by the EOSC Portal Marketplace [\[R8\]](#).
2. The Operator is notified by the EOS Portal Marketplace [\[R8\]](#) that a new service order request is received. The details about the service request are included in the JIRA Requirements Tracking System [\[R9\]](#).
3. The Operator follows the procedures documented starting from 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 EOSC Portal Marketplace [\[R8\]](#) to the User with the instructions to access the requested application(s) hosted in one of the available application hosting frameworks. These instructions will also include the steps to redeem the voucher, configure the tenant and generate the API\_KEY and SECRET\_KEY in case the User has requested a voucher to access the commercial cloud provider resources using the Elastic Cloud Computing Cluster (EC3) [\[R4\]](#).

### 2.1 Service Grants

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<sup>2</sup>.

Two different service grants are available to any authorized users:

- **EGI grant.** This pre-defined quota of resources includes up to **4 vCPU cores, 8GB of RAM and 100GB of block storage.**

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<sup>2</sup> A user can submit a new service request via the Marketplace.

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- **Exoscale grant.** A voucher of approx. **€400,00 euros**<sup>3</sup>, valid for one year from the date of issue, to access Exoscale, the commercial cloud provider of the HNSciCloud project. These vouchers are sponsored by CERN and STFC to support the uptake of the HNSciCloud pilot services by researchers. The pricing model offered by Exoscale to access the resources of the commercial cloud providers are available at: <https://www.exoscale.com/pricing/>. All the vouchers should be consumed before the end of 2019.

## 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].
- All the applications (and tools) available in the EC3 portal [R4] can be requested with an EGI or Exoscale grants. In this second case, if the service order request is approved, the Operator has to provide the User a valid voucherID (provided by the HNSciCloud PO) to access the commercial cloud provider. The Operator can request the Exoscale vouchers by contacting the HNSciCloud Project Office at: HNSciCloud-PO (HNSciCloud Project Office) [HNSciCloud-PO@cern.ch](mailto:HNSciCloud-PO@cern.ch).
  - The Operator has to periodically contact the User and ask for feedback<sup>4</sup> about the usage of HNSciCloud vouchers.

## 2.3 Service Orders Requests management

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

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<sup>3</sup> The HNSciCloud project (CERN and SFTC) offered EGI 10 vouchers for the long tail of scientists. EGI will assign the vouchers to user based on the result of the vetting process.

<sup>4</sup> HNSciCloud feedback form, available at: <https://forms.gle/cVT7JRd4TFxZiYmQ8>

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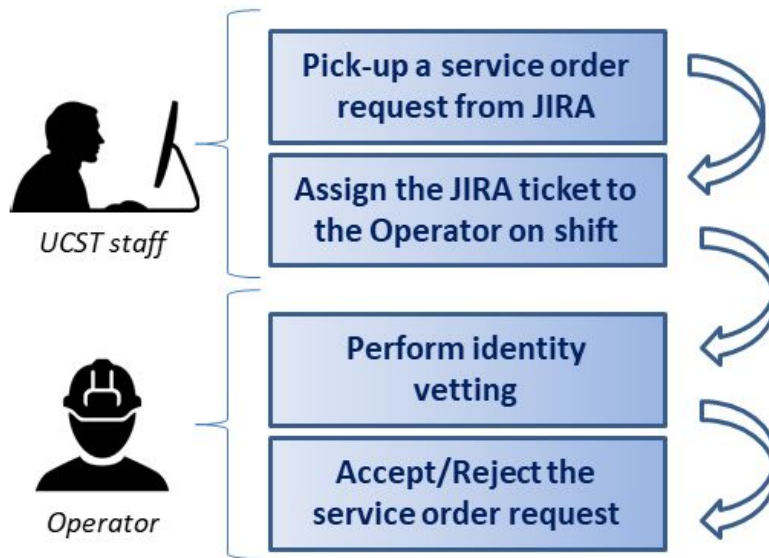


Figure 1. Interaction between the EGI UCST members and the Operators

## 2.4 Perform the vetting process

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.



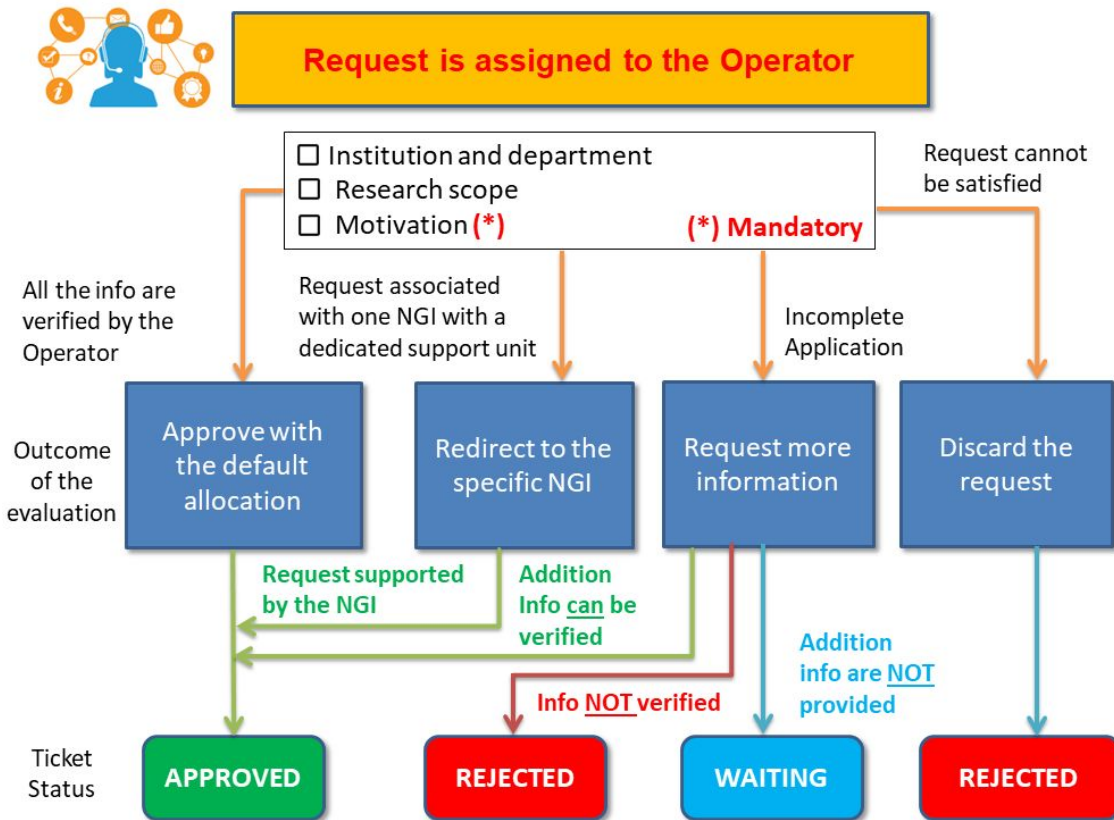


Figure 2. The vetting process high-level overview

#### 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 EOSC Portal Marketplace [R8].

#### 2.4.2 The service-order request in the EOSC JIRA system

A typical service-order request in EOSC JIRA Issues Tracking System [R9] contains the following attributes:

- The `service-order-request` unique identifier.
- A `service-order-info` including the Applicant's account, the service requested and the URL of the JIRA ticket.
- The `Assignee` identify the Operator in charge to resolve this service-order request.
- Any additional comments/transactions appear in the `Add Comment` of the ticket.

#### 2.4.3 Log in the EOSC JIRA system

The full list of service order requests to be processed are available in the JIRA service-orders project [R9]. Each service order request contains additional information (see Appendix I for

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more details) that will be used during the execution of the light-weight vetting process to verify the Applicant's identify and research scope.

#### 2.4.4 How to study an Application

Before to approve any Applications, the Operator has to 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 JIRA 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:

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

Evaluation of the request:

- a. The Operator needs to verify whether the Applicant has:
  - o Specified references to his/her institution and department.
  - o 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 III to ask for additional information.

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 2. The NGIs contacts

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The Operator should try to involve NILs as much as possible. He/she 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 Applicant'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 has to check whether EGI, and the HNSciCloud project in case the User used any vouchers, was/were properly acknowledged in these works as indicated in the AUP [\[R2\]](#).

- If EGI, and the HNSciCloud project, was/were acknowledged, go to 2.5.1
- If EGI, and the HNSciCloud project, was/were NOT been 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 EOSC JIRA Issues Tracking System [\[R9\]](#) and select, from the list, the service-order request to be processed.
- If the Applicant asked for an **EGI grant**:
  - Use the `CI-EOSC-UniqueID` of the Applicant to set the VO entitlements for the Applicant using the REST APIs [\[R12\]](#).
    - Ask EGI team<sup>5</sup> about the credentials to use the REST APIs.
- If the Applicant asked for an **Exoscale grant**:
  - Use the `CI-EOSC-UniqueID` of the Applicant to set the VO entitlements for the Applicant using the REST APIs [\[R12\]](#).
    - Ask EGI team about the credentials to use the REST APIs.

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<sup>5</sup> [support@egi.eu](mailto:support@egi.eu)

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- Edit the JIRA ticket and add the voucherID in the CP-VoucherID attribute.
  - Vouchers can be requested by contacting the HNSciCloud Project Office at: HNSciCloud-PO (HNSciCloud Project Office) [HNSciCloud-PO@cern.ch](mailto:HNSciCloud-PO@cern.ch).
  - Update the status of the service-order request to **APPROVED** and close the ticket.

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

### 2.5.2 Reject the Application

If some of the steps are not verified, the Operator has to update the status of the service request status to **REJECTED**.

### 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'**.

### 2.5.4 Waiting for Response from the Applicant

When the Operator ask for additional information, the status of the ticket is set to **'WAITING for Response'**.

### 2.5.5 Duplicate of the service order request

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 request specifications

<b>Details</b>	
Type	Default value: Service order
Priority	Possible values: Low, Medium and High. Default value: Low.
Order Reference	The service-order unique identified
AoDs Request Status	Possible values: New, Approved, Rejected, Suspended and None Default value: New
<b>Customer Identifier</b>	
CI-Name	The Applicant's name. Text field.
CI-Surname	The Applicant's family name. Text field.
CI-Email	The Applicant's email address. Text field.
CI-DisplayName	Human readable username Text field.
CI-EOSC-UniqueID	Persistent unique identifier assigned to the Applicant by the EGI AAI Check-In service
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
<b>Customer Profile</b>	
CP-CustomerTopology	The Applicant's topology. Possible values: single user, representing a research community/project, representing a private company.
CP-ReasonForAccess	The Applicant's motivation to request the service.
SO-ProjectName	Name of the project. Default :Services
<b>Service order details</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 EGI 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:

- Verify the user's profile and the research scope;
- Check whether the resources requested 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

[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.**

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Dear User,

This is to inform you that your motivation to do not acknowledge EGI and the HNSciCloud project 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

## 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](#)].

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## 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 EOSC JIRA issues tracking, available at: <a href="https://jira.eosc-hub.eu/projects/EOSCSO/summary">https://jira.eosc-hub.eu/projects/EOSCSO/summary</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 service, 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>