

Eligibility Framework (EF) Implementation Project

Project progress report, October 2024

Executive Summary:

The Eligibility Framework Project aims to create a structured taxonomy and resource access management system to allocate resources effectively, minimize costs, and mitigate risks.

Key developments have been made on resource usage monitoring, automated account activation, and an administrative guide. The New Resource Portal development is progressing, a pilot version is being tested.

The organization now has a comprehensive eligibility framework that aligns resource access with user roles and needs, moving to a resource allocation based on user type needs:

- **Computing Account Automatic Activation:** New users' accounts are automatically activated, connecting them to systems and software matching their eligibility. Users can view their access categories, improving clarity on what they can use.
- **Admin eGuide:** Policies and eligibility categories are now clearly defined and accessible in the Admin eGuide (draft), with details on which resources are available to each user category. This transparency supports users in understanding what they're entitled to access.
- **A Resource Usage Monitoring system** is now operational, giving the organization visibility into how resources are utilized. By tracking real usage, it allows us to make precise service cost estimates for licensed services and adjust policies to align with actual needs.
- **New Resource Portal (NRP):** A new portal under development will streamline the eligibility lifecycle by managing policies, services, and user eligibility. As it evolves, it will allow users and managers to oversee both personal and professional resources, accommodating resources like team-managed machines and infrastructure.

The first three components — Computing account automatic activation, the Admin eGuide, and resource usage monitoring—are operational, providing a solid foundation for cost control and clear access guidelines. The New Resource Portal is under active development, with significant progress and plans to bring its full capabilities online over the next 1.5 years.

1. Project Objectives and Scope

- **Policy Definition:** Establish clear policies for access and resource usage.
- **Resource Portal Development:** Implement a New Resource Portal (NRP) to manage eligibility and the lifecycle of computing resources.
- **Usage Monitoring:** Develop monitoring tools for resource usage to optimize costs and adjust policies as needed.
- **Stakeholders:** CERN departments and users involved in resource utilization and administration.

2. Key Milestones and Current Status

| Milestone | Status | Expected Completion |
|--|--|---|
| M1 - Automatic Account Activation (C3A) | Near completion (awaiting final approvals) | December 2024 |
| M2 - Resource Usage Monitoring (RUM) | Completed; operational | Ongoing integration with other services |
| M3 - New Resource Portal (NRP) | First pilot implementation; ongoing IT service integration | OpenStack Integration done; Google Integration Q1 2025; Full decommissioning of Old Portal by Q1 2026 |
| M4 - Admin eGuide and Documentation | Draft available, finalizing | November 2024 for STEPS Committee |
| M5 - Policy Definition | First draft complete | Minor adjustments in November 2024 |

3. Progress Summary

- **Resource Usage Monitoring (RUM):** Fully operational, providing data on resource usage to refine access policies and assess costs.
- **Automatic Account Activation (C3A):** Ready for production, pending final testing for new users and contractor adjustments.
- **New Resource Portal (NRP):** OpenStack integration progressing. Integration of the Google service is planned, and old portal decommissioning is scheduled for Q1 2026.

- **Admin eGuide:** In the final review stage, providing clear eligibility information for users; will be presented to the STEPS technical committee in November. DRAFT versions:
 - Activation of computing accounts: <https://admin-eguide.web.cern.ch/en/procedure/automatic-activation-computing-account>
 - Eligibility - Members of the personnel (MPA&MPE), Temporary personnel and Externals: <https://admin-eguide.web.cern.ch/en/eligibility-members-personnel-temporary-personnel-and-externals-retc-draft-version>
 - Eligibility – Remote participants, contractors and externals: <https://admin-eguide.web.cern.ch/en/eligibility-remote-participants-contractors-and-externals-draft-version>
 - Eligibility – Retirees and others: <https://admin-eguide.web.cern.ch/en/eligibility-retirees-and-others-draft-version>

| | | Admin eguide MPA & MPE | | Admin eguide Remote & contractors | | | | | | Admin eguide retirees & others | | | | | | | |
|--|--------------|---|---|--------------------------------------|-------------------|--------------------------------|--|--|---|--|--|----------|---|----------|--|---|----------|
| | | Limited = limited access controlled by egroups, or for a limited time period | | | | | | | | | | | | | | | |
| Eligible | Not Eligible | MPEs + Trainees: (STAF, FEEL, GRADS + Temp. Labour + EXTN RETC, MPAE: ADMIN, APPR, DOCT, SUMM, TECH, TIME) | | Remote Participants | | | Employees of CERN Contractors (computer users) | | | Employees of CERN Contractors (non- computer users) | | | Retirees | | Other | | |
| Eligible with Guarantor approval | Category | MPEs + Trainees: (STAF, FEEL, GRADS + Temp. Labour + EXTN RETC, MPAE: ADMIN, APPR, DOCT, SUMM, TECH, TIME) | Collaborators + Exchange Scientists (MIPA: COAS, EXAS, PIAS, USER + MPAE: CASS, GPRO, SASS, VISI) | EXTN PART, RETP | EXTN DIST | Future MPEs (UOPR, FTMP) | Employees of CERN Contractors (computer users) | Employees of CERN Contractors (non- computer users) | EXTN Group A (GUID, ILDF, STAG, PROJ, EUPR, SCIE, COMT) | EXTN Group B (CONP, FORM, GACR) | EXTN Group C (ACCO, HOST, KIND, VISI, CLUB) | Retiree | Ex-Member of Personnel (Grace Period 2 months) | Alumni | Ex-Member of Personnel (non- contractors) | Ex-Member of Personnel (Externals + contractors) | Visitors |
| Responsible body (who approves rules of eligibility) | | HR / IPT | HR / EP | EP | GTPA | HR / Users Office | IPT Dept. | IPT Dept. | GTPA | GTPA, HR-LD (FORM, PF (GACR) | GTPA, HR-SA (KIND, CLUB, IPT (VISI) | PF | HR | IR | HR | GTPA + IPT | IR |
| Guarantor (who approves requests) + Licence Manager | | Supervisor | Supervisor / Team Leader | Team Leader | CERN Guarantor | Future Supervisor | Technical Officer + | Technical Officer + | CERN Guarantor / Supervisor | CERN Guarantor | N/A | N/A | N/A | IR | N/A | N/A | N/A |
| Population size JAN 2023 | | 3233 | 12913 | 7168 | 577 | 141 | ca. 300 | ca. 4270 | 697 | 61 | 606 | ca. 3800 | | ca. 8000 | | | |
| Basic resources | | | | Visitors | Visitors | Visitors | | | | | Visitors | | Visitors | Visitors | Visitors | Visitors | Visitors |
| Register device(s) on CERN network / connect to CERN wifi | | | | | | | | | | | | | | | | | |
| Bulletin | | | | | | | | | | | | | | | | | |
| Mattermost, Discourse | | | | | | | | | | | | | | | | | |
| Security Services: firewall (PAN), mail quarantine (xorlabs) | | | | | | | | | | | | | | | | | |
| Tax certificates, attestations, salary slips | | | | | | | | | | | | | | | | | |
| Be part of eGroups | | | | | | | | | | | | | | | | | |
| Indico content (behind SSO) | | | | | | | | | | | | | | | | | |
| Webcasts (behind SSO) | | | | | | | | | | | | | | | | | |
| Login to/Head/Talk/, Drupal, Wordpress, CodIMD | | | | | | | | | | | | | | | | | |
| CERN websites (Alumni, LDs, Pension Fund, CHIS...) | | | | | | | | | | | | | | | | | |
| CDS content (behind SSO) | | | | | | | | | | | | | | | | | |
| Mandatory online safety / security training courses | | | | | | | | | | | | | | | | | |
| Official notifications + News | | | | | | | | | | | | | | | | | |
| Phonebook | | | | | | | | | | | | | | | | | |
| Personal home directory quota (CERNbox, Office A1 M365) | | | | | | | | | | | | | | | | | |
| Central Compute Services (AFS, EOS, LXPLUS, LXBATCH) | | | | | | | | | | | | | | | | | |
| CERNPhone | | | | | | | | | | | | | | | | | |
| Create egroups | | | | | | | | | | | | | | | | | |
| EDH | | | | | | | | | | | | | | | | | |
| ESET Security software (CERN managed devices) | | | | | | | | | | | | | | | | | |
| ESET Security software (BOYD) | | | | | | | | | | | | | | | | | |
| Other Learning courses | | | | | | | | | | | | | | | | | |
| Controlled resources | In Portal? | | | | | | | | | | | | | | | | |
| Computing account / way to authenticate | N | | | | | | | | | | | | | | | | |
| Service Now (be a supporter) | N | | | | | | | | | | | | | | | | |
| Create Tickets, Drupal, Wordpress, CodIMD | Y | | | | | | | | | | | | | | | | |
| Grid certificates | Y | | | | | | | | | | | | | | | | |
| Java JDK JRE | Y | | | | | | | | | | | | | | | | |
| Google Workspace | Y | | | | | | | | | | | | | | | | |
| Overleaf, Gitlab, Altassian, Zoom | Y | | | | | | | | | | | | | | | | |
| Digital Library (ebooks + journals) + (LS Library Catalogue) | Y | | | | | | | | | | | | | | | | |
| Microsoft (Windows + Office A5 M365) | Y | | | | | | | | | | | | | | | | |
| CAD/CAM & Engineering software | Y | | | | | | | | | | | | | | | | |
| Create redirections (mail) | Y | | | | | | | | | | | | | | | | |
| CERN redirection alias as connection string | N | | | | | | | | | | | | | | | | |
| Mailbox + CERN email | Y | | | | | | | | | | | | | | | | |
| Access to CERN resources portal? | | | | | | | | | | | | | | | | | |

4. Challenges and Risks

- **Development Delays:** Timeline for the New Resource Portal remains extended due to underestimation of integration complexities of some services.
- **Dependencies:** Critical dependencies on external systems, including Oracle and AFS, have contributed to delays.

5. Next Steps

1. **Finalize C3A:** Launch the automatic account activation for new users and contractors by December 2024.
2. **Complete NRP Integrations:** Focus on Google service integration by Q1 2025 and accelerate Old Resource Portal migration.
3. **Hackathon Planning:** Organize a hackathon to align with service managers on eligibility API use and refine the lifecycle management model.
4. **Expand Team Resources:** Investigate options for additional skilled resources to address high-priority portal integrations.

Conclusion:

The Eligibility Framework project has made significant advancements in core functionalities like policy definition and documenttaion (Admin eGuide), account activation and usage monitoring. Despite a prolonged timeline for the New Resource Portal, no critical risks threaten overall project viability, and adjustments to manage personnel resources and portal integration will continue to streamline implementation efforts.
