

# Moab Accounting Manager

## Administrator Guide 7.2.6

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# Welcome

Welcome to *Moab Accounting Manager*, version 7.2.6. This guide is intended as a reference for system administrators.



# Chapter 1: Overview

Moab Accounting Manager is an accounting management system that allows for usage tracking and charging for resource or service usage in cloud and technical computing environments. It acts much like a bank in which credits are deposited into funds with constraints designating which entities may access the funds. As resources or services are utilized, funds are charged and usage recorded. It supports familiar operations such as deposits, withdrawals, transfers, and refunds. It provides balance and usage feedback to users, managers, and system administrators.

Since the accounting and billing models vary widely from organization to organization, Moab Accounting Manager has been designed to be extremely flexible, featuring customizable usage and fund configurations, and supporting a variety of tracking, charging and allocation models. Attention has been given to scalability, security, and fault tolerance.

## Background

Moab Accounting Manager was originally developed as open source software called the Gold Allocation Manager at Pacific Northwest National Laboratory (PNNL) under the Department of Energy (DOE) Scalable Systems Software (SSS) SciDAC project. It has been extended and enhanced by Adaptive Computing Enterprises, Inc. (formerly Cluster Resources, Inc.) and is in production use at many commercial, government and educational sites.

## Conceptual Overview

Moab Accounting Manager was designed to be used in cloud and technical computing environments for usage tracking, charge accounting and allocation enforcement. Usage tracking involves simply recording resource or service usage in customizable usage records. Charge accounting involves calculating and recording charges for usage for invoicing or cost tracking. Charge accounting may be enabled with the establishment of a bottomless fund and the defining of charge rates. Allocation enforcement involves establishing limits on the use of system resources. Allocation enforcement can be enabled by defining separate funds having limited debit or credit balances.

In this overview, we will assume that you want to track or charge for the usage of some salable or usable item(s). An item may be a resource such as computer cycles used within a job or virtual machine, or it may be a service or something else. The use of an item will result in a usage record. The usage record will track how much and what aspects of the item were used, to whom and what the usage was attributed, and (optionally) how much the usage cost.

With MAM, it is possible to allocate how much of the resources or services can be used by different entities. This is done by associating a cost for the usage by deciding on a currency unit (referred to

generically as credits), whether based on a real currency such as dollars, or a reference currency such as billing units or processor seconds. Next, you will define charge rates in this currency for the components of your usage (resource or service costs, multipliers, fees, etc.).

Pools of funds called allocations may be created via deposits and can be debit or credit based, finite or infinite, and may be limited to a time frame in which they can be used. These allocations are deposited into logical containers called funds which have constraints that distinguish who or what can use the funds and for what purposes.

A resource or service manager interacts with Moab Accounting Manager to ensure sufficient funds and to track and charge for usage. A typical usage pattern might be as follows. Before you use a resource or service, a quote is obtained to see how much it will cost and to verify that you have sufficient funds and access to the item. If you agree to the quoted price, you can commit your request for the usage. When it is time for you to start using the resource or service, a hold (called a lien) is placed against your funds for the quoted amount (in part or in whole). As you use the item, an appropriate fund will be charged and the lien adjusted. When the final charge is made for actual usage, the remainder of the lien is removed. A usage record is updated and the transaction and charge history is recorded throughout this process. The actual sequence of interactions is very flexible and will be defined by the architecture between the resource or service manager and the accounting system (Moab Accounting Manager).

To recap: Funds, which are containers for a reference currency referred to as credits, are differentiated by constraints that define the entities (such as users, accounts, machines, classes, organizations, etc.) that can use the credits. Deposits of time-bounded credits are made into funds creating allocations. Charge rates are created which define how much it will cost to use certain resources or services. Use of a resource or service results in a usage record, and will normally involve a quote detailing the cost of the item before it is used, a lien against your fund while it is being used, and a charge against your fund after usage has ended. Other bank-like operations that can be performed on funds include withdrawals, transfers, refunds, balance checks, statement reports, etc. All modifying actions against funds or other objects are recorded in the transaction history. The current or past state of any object in Moab Accounting Manager can be queried to produce reports.

## Features

Feature	Description
<b>Dynamic Charging</b>	Rather than post-processing resource usage records on a periodic basis to rectify fund balances, charging can occur incrementally throughout usage or at usage completion.
<b>Liens</b>	A hold (called a lien) is placed against the funds for the estimated amount of credits before the usage begins, followed by appropriate charges during and/or at the end of the usage, thereby preventing accounts from using more resources or services than were allocated to them.
<b>Customizable Usage Records</b>	Usage record fields can be configured by the site to track custom usage properties.

Feature	Description
<b>Flexible Fund Allocation</b>	A uniquely flexible design allows resource or service credits to be allocated to arbitrary entities and purposes.
<b>Expiring Allocations</b>	Credits may be restricted for use within a designated time period allowing sites to implement a use-it-or-lose-it policy to prevent year-end resource exhaustion and establishing an allocation cycle.
<b>Flexible Charging</b>	The billing system can track and charge for composite time-based or non-time-based resource or service usage, and apply flexible charge multipliers and fees.
<b>Guaranteed Quotes</b>	Users and resource brokers can determine ahead of time the cost of using resources or services.
<b>Credit and Debit Allocations</b>	Allocations feature an optional credit limit allowing support for both debit and credit models. This feature can also be used to enable overdraft protection for specific funds.
<b>Infinite Allocations</b>	Deposits can be made with infinite amounts or infinite credit limits when used with a supporting database.
<b>Powerful Querying</b>	A powerful querying and update mechanism (based on SQL queries) that facilitates flexible reporting and streamlines administrative tasks.
<b>Nonintrusiveness</b>	Object-level, attribute-level and correlated defaults may be established for arbitrary objects such as users, accounts and organizations. Additionally, these objects may be configured to be automatically created the first time they are seen by the resource management system. These features allow the accounting system to be used with less impact and involvement from users and administrators.
<b>Consistency</b>	Moab Accounting Manager has been engineered for robustness, consistency and resiliency. Complex operations are atomic and are automatically rolled back on failure.
<b>Security</b>	Multiple security mechanisms for strong authentication and encryption.
<b>Role-Based Authorization</b>	Fine-grained (instance-level) Role Based Access Controls are provided for all operations which allows users to view and manipulate only those objects permitted to them.

Feature	Description
<b>Dynamic Customization</b>	Sites can create or modify record types on the fly enabling them to meet their custom accounting needs. Dynamic object creation allows sites to customize the types of accounting data they collect without modifying the code. This capability turns this system into a generalized information service. This capability is extremely powerful and can be used to manage all varieties of custom configuration data, or to function as a persistence interface for other components.
<b>Web Interface</b>	A powerful dynamic web-based GUI is provided for easy remote access for users, managers and administrators which displays only the actions allowed by their role.
<b>Journaling</b>	A journaling mechanism preserves the indefinite historical state of all objects and records. This powerful mechanism allows historical bank statements to be generated, provides an undo/redo capability and allows commands to be run as if it were any arbitrary time in the past.
<b>Event Scheduler</b>	An event engine can be used to schedule arbitrary MAM commands to run periodically or at a designated time in the future.

## Interfaces

Moab Accounting Manager provides a variety of means of interaction, including command-line interfaces, graphical user interfaces, application programming interfaces, and communication protocols.

### Command-Line Clients

The command-line clients provided feature rich argument sets and built-in documentation. These commands allow scripting and are the preferred way to interact with Moab Accounting Manager for basic usage and administration. Use the `--help` option for usage information or the `--man` option for a manual page on any command.

*Example 1-1: Listing Users Using a Command-Line Client*

```
glsuser
```

### Interactive Control Program

The `goldsh` command uses a control language to issue object-oriented requests to the server and display the results. The commands may be included directly as command-line arguments or read from stdin. Use the `ShowUsage:=True` option after a valid Object Action combination for usage information on the command.

*Example 1-2: Listing Users Using the goldsh Control Program*

```
goldsh User Query
```



The goldsh control program allows you to make powerful and sweeping modifications to many objects with a single command. Do not use this command unless you understand the syntax and the potential for unintended results.

## Web-based Graphical User Interface

A powerful and easy-to-use web-based GUI permits browser access by users, managers and administrators according to their role definitions.

*Example 1-3: Listing Users via the Web GUI*

Click on **Manage Users** -> **List Users**

## Perl API

You can access the full functionality via the Perl API. Use perldoc to obtain usage information for the Moab Accounting Manager Perl Gold modules.

*Example 1-4: Listing Users Using the Perl API*

```
use Gold;
my $request = new Gold::Request(object => "User", action => "Query");
my $response = $request->getResponse();
foreach my $datum ($response->getData())
{
    print $datum->toString(), "\n";
}
```

## Java API

Although deprecated, the Java API may still be usable to interact with Moab Accounting Manager. The javadoc command can be run on the contrib/java/gold directory to generate documentation for the Gold java classes.

*Example 1-5: Listing Users Using the Java API*

```
import java.util.*;
import gold.*;
public class Test
{
    public static void main (String [] args) throws Exception
    {
        Gold.initialize();
        Request request = new Request("User", "Query");
        Response response = request.getResponse();
        Iterator dataItr = response.getData().iterator();
        while (dataItr.hasNext())
        {
            System.out.println((Datum) dataItr.next().toString());
        }
    }
}
```

## SSSRMAP Wire Protocol

It is also possible to interact with Moab Accounting Manager by directly using the SSSRMAP Wire Protocol and Message Format over the network. Documentation for these protocols can be found at [SSS](#)

## [Resource Management and Accounting Documentation.](#)

### Example 1-6: Listing Users via the SSSRMAP Wire Protocol

```
POST /SSSRMAP HTTP/1.1
Content-Type: text/xml; charset="utf-8"
Transfer-Encoding: chunked
190
<?xml version="1.0" encoding="UTF-8"?>
<Envelope>
<Body actor="scottmo" chunking="True">
<Request action="Query" object="User"></Request>
</Body>
<Signature>
  <DigestValue>azu4obZswzBt89OgATukBeLyt6Y=</DigestValue>
  <SignatureValue>YXE/C08XX3RX4PMU1bWju+5/E5M=</SignatureValue>
  <SecurityToken type="Symmetric" name="scottmo"></SecurityToken>
</Signature>
</Envelope>
0
```

## Documentation

The documentation for Moab Accounting Manager includes this Administrator Guide, release notes, built-in man pages, module documentation and online documentation.

- **Moab Accounting Manager Administrator Guide** — The Moab Accounting Manager Administrator Guide is a comprehensive manual for users and administrators of Moab Accounting Manager and includes information about features, interfaces, installation, getting started, usage, configuration and customization. The Administrator Guide can be found under the `$PREFIX/doc` directory in `.pdf` and `.html` formats. These documents are also available online.
- *Release Notes* — The Release Notes describe the primary features and fixes included in the release, along with notes to aid in migration from previous versions and can be found under the `doc` directory in the distribution tarball.
- *Command Line built-in Man Pages and Usage Synopsis* — All command-line clients support a `--man` option that provides full documentation of the command options and a `--help` option that provides a brief usage synopsis.
- *Module Perl Pod Documentation* — Documentation for Moab Accounting Manager Perl modules can be viewed by changing directory to the `$PREFIX/lib` directory and running `perldoc <modulename>`, e.g. `perldoc Gold::Request`.
- *Online Documentation* — The Moab Accounting Manager Administrator Guide can be found online at <http://www.adaptivecomputing.com/documentation>. The Gold project web page at <http://www.adaptivecomputing.com/resources/docs/gold/files/index.php> and includes the original Gold project documentation.



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# Chapter 2: Installation

If you are performing a fresh installation of Moab Accounting Manager, follow the instructions in this chapter. If you are upgrading an existing version of Moab Accounting Manager to a new maintenance or fix version where there are no database schema changes, follow the instructions contained in [Upgrading on page 25](#). If you are upgrading an existing version of Gold Allocation Manager or Moab Accounting Manager to a new major or minor release where there are database schema changes, follow the instructions in [Migrating on page 27](#).

Moab Accounting Manager uses the standard `configure`, `make`, and `make install` steps for installation. However, there are a number of preparation, prerequisite, setup, and customization steps that need to be performed.

This document provides general installation guidance and provides a number of sample steps referenced to a particular installation on a Linux platform using the bash shell. These steps indicate the userid in brackets performing the step. The exact commands to be performed and the user that issues them will vary based on the platform, shell, installation preferences, etc.

## Select a database

Moab Accounting Manager makes use of a database for transactions and data persistence. Three databases have been tested for use with Moab Accounting Manager thus far: PostgreSQL, MySQL, and SQLite. Postgres and MySQL are external databases which run in a distinct (possibly remote) process and communicate over sockets. These databases must be separately installed, configured, and started. SQLite is an embedded database bundled with SQL queries being performed within the `goldd` process itself through library calls. The following information may help you make a choice of databases to use.

Database	Description
<b>PostgreSQL</b>	<p>PostgreSQL is an open source database. PostgreSQL version 7.2 or higher is required. The PostgreSQL database has been thoroughly tested in production with Moab Accounting Manager and all product functionality is available since it was developed using the PostgreSQL database. Postgres supports multiple connections so Moab Accounting Manager is configured to be a forking server when using PostgreSQL.</p> <p>PostgreSQL is recommended since it is an excellent database, has been more thoroughly tested than the others, and supports all Moab Accounting Manager features.</p>

Database	Description
<b>MySQL</b>	<p>MySQL is an open source database. MySQL version 4.0.6 or higher is required. Prior versions did not support UNION which is used by Moab Accounting Manager in time travel. It is possible to use 4.0 with a minor code tweak to the OFFSET line in Database.pm.</p> <p>MySQL 4.1 is required in order to have support for the (undocumented) Transaction Undo and Redo functionality since subqueries were not supported until this version.</p> <p>Infinite Allocations are not supported with MySQL as it does not implement the IEEE Standard 754 for Floating Point Arithmetic.</p>
<b>SQLite</b>	<p>SQLite is an open source embedded database bundled with Moab Accounting Manager. It does not require any configuration and reads and writes from a file. Initial testing has shown Moab Accounting Manager to perform at least as fast as PostgreSQL for small databases.</p> <p>SQLite 3.2.8 is required in order to be able to customize objects after installation. Previous versions did not support the ALTER TABLE ADD COLUMN functionality.</p> <p>Due to the lack of ALTER TABLE DROP COLUMN functionality, migration of Moab Accounting Manager data to newer schema versions cannot be supported. Hence, when upgrading from one major version to another, a fresh database bootstrap is required.</p> <p>Since SQLite supports only a single connection, Moab Accounting Manager is not configured to be a forking server when using SQLite. This should probably not be an issue for small to medium sized clusters.</p> <p>Due to a lack of support for multi-column IN clauses, the (undocumented) Transaction Undo and Redo functions are not available.</p> <p>Infinite Allocations are not supported with SQLite as it does not implement the IEEE Standard 754 for Floating Point Arithmetic.</p>

## Install prerequisites

Before installing Moab Accounting Manager, you will need to satisfy the following prerequisites:

### Open the server port

Moab Accounting Manager uses a configurable server port (default 7112) for client-server communication. If you have a firewall enabled, you must either disable the firewall (for example, iptables, ip6tables) or configure the firewall to allow the server port.

For RedHat-based systems:

```
[root]# service iptables stop
[root]# chkconfig iptables off
```

If you are using hte IPv6 firewall:

```
[root]# service ip6tables stop
[root]# chkconfig ip6tables off
```

## Disable SELinux

In some distributions (such as RedHat-based systems), Security-Enhanced Linux (SELinux) blocks the use of `setuid perl` (used in client authentication). If you are using `setuid perl` as the security promotion method (this is the default if available), you will need to disable SELinux.

For RedHat-based systems:

```
[root]# vi /etc/sysconfig/selinux
SELINUX=disabled
[root]# setenforce 0
```

## C Compiler [REQUIRED]

A C compiler is required in the configure step and to compile the `gauth` promotion method if designated.

For RedHat-based systems:

```
[root]# yum install gcc
```

For SuSE-based systems:

```
[root]# zypper install gcc
```

For Debian-based systems:

```
[root]# apt-get install gcc
```

## Perl [REQUIRED]

The Moab Accounting Manager server and clients are written in Perl. Perl 5.8 or higher is required. It is usually at a sufficient level at most modern operating systems. Use `perl -v` to see what level of Perl is installed.

## Suidperl 5.8 or higher [OPTIONAL]

Command line clients and Perl API scripts use a security promotion method (`gauth` or `suidperl`) to authenticate and encrypt communications with the server. It is recommended that you install and use `setuid perl` as the security promotion method if it is available for your system. Otherwise configure will compile and use `gauth` as the security promotion method. Use `suidperl -v` to see if `suidperl` is installed. See the description for the **security.promotion** configuration parameter in the Client Configuration section for more information about the two security promotion methods.

For RedHat-based systems:

```
[root]# yum install perl-suidperl
```

For SUSE-based systems:

```
[root]# chmod 4755 /usr/bin/sperl*
```

For Debian-based systems:

```
[root]# apt-get install perl-suid
```

**i** Systems with perl 5.12 or higher do not support `suidperl`. These systems will need to use the `gauth` security promotion method.

## Database Server [OPTIONAL]

If you intend to use the PostgreSQL, the MySQL, or other external database, you will need to install it. PostgreSQL is recommended since it is an excellent database supporting all necessary features and has been more thoroughly tested than the others. The only thing needed for SQLite is the `sqlite3` client for bootstrapping.

For PostgreSQL on Redhat-based systems:

```
[root]# yum install postgresql postgresql-libs postgresql-server postgresql-devel
perl-DBD-Pg
```

For PostgreSQL on SuSE-based systems:

```
[root]# zypper install postgresql postgresql-libs postgresql-server postgresql-devel
perl-DBD-Pg
```

For PostgreSQL on Debian-based systems:

```
[root]# apt-get install postgresql postgresql-common postgresql-client postgresql-
server-dev-9.1 libdbd-pg-perl
```

For MySQL on Redhat-based systems:

```
[root]# yum install mysql mysql-devel mysql-server perl-DBD-MySQL
```

For MySQL on SuSE-based systems:

```
[root]# zypper install mysql libmysqlclient-dev mysql-server mysql-devel perl-DBD-
mysql
```

For MySQL on Debian-based systems:

```
[root]# apt-get install mysql-common mysql-server libmysqlclient-dev libdbd-mysql-perl
```

For SQLite on RedHat-based systems:

```
[root]# yum install perl-DBD-SQLite
```

For SQLite on SuSE-based systems:

```
[root]# zypper install perl-DBD-SQLite
```

For SQLite on Debian-based systems:

```
[root]# apt-get install sqlite3 libdbd-sqlite3-perl
```

## libxml2 [REQUIRED]

LibXML2 is needed by the XML::LibXML perl module to communicate via the SSSRMAP message format. The `libxml2` development package is needed for the XML::LibXML perl module to install properly.

For RedHat-based systems:

```
[root]# yum install libxml2-devel
```

For SUSE-based systems:

```
[root]# zypper install libxml2 libxml2-devel
```

For Debian-based systems:

```
[root]# apt-get install libxml2-dev
```

## gnu readline [OPTIONAL]

The interactive control program (goldsh) can support command-line-editing capabilities if readline support is enabled.

For RedHat-based systems:

```
[root]# yum install ncurses-devel readline-devel
```

For SUSE-based systems:

```
[root]# zypper install ncurses-devel readline-devel
```

For Debian-based systems:

```
[root]# apt-get install ncurses-dev libreadline-dev
```

## Apache Httpd Server with mod\_ssl [OPTIONAL]

Moab Accounting Manager provides a web-based GUI so that managers, users, and administrators can interact with the accounting and allocation system. The web interface utilizes Perl CGI and SSL and needs to have an httpd server (preferably apache) installed. mod\_ssl is also needed and is often bundled as part of the apache2 server.

For RedHat-based systems:

```
[root]# yum install httpd mod_ssl
```

For SUSE-based systems:

```
[root]# zypper install apache2
```

For Debian-based systems:

```
[root]# apt-get install apache2
[root]# a2enmod ssl
[root]# a2ensite default-ssl
```

## OpenSSL [REQUIRED]

OpenSSL is used to encode the secret key and is used in the web interface to encrypt communications with the server. OpenSSL is preinstalled on most modern operating systems.

For RedHat-based systems:

```
[root]# yum install openssl
```

For Debian-based systems:

```
[root]# apt-get install libssl-dev
```

## Perl Module Dependencies [REQUIRED]

Moab Accounting Manager requires the use of a number of Perl modules. These modules may be installed by the vendor package manager. Alternatively, the required modules can be installed from CPAN by typing `make deps` after the `make` step.

For RedHat 5-based systems:

```
[root]# yum install perl-CGI-Session perl-Config-Tiny perl-Crypt-CBC perl-Crypt-DES
perl-Crypt-DES_EDE3 perl-DateManip perl-DBI perl-Digest-HMAC perl-Digest-SHA1 perl-
Error perl-Log-Dispatch-FileRotate perl-Log-Log4perl perl-Term-ReadLine-Gnu perl-
TermReadKey perl-XML-LibXML
```

For RedHat 6-based systems:

```
[root]# yum install perl-CGI perl-CGI-Session perl-Config-Tiny perl-Crypt-CBC perl-
Crypt-DES perl-Crypt-DES_EDE3 perl-Date-Manip perl-Time-HiRes perl-DBI perl-Digest-
HMAC perl-Digest-SHA1 perl-Error perl-Log-Dispatch-FileRotate perl-Log-Log4perl perl-
Term-ReadLine-Gnu perl-TermReadKey perl-XML-LibXML
```

For SuSE-based systems:

```
[root]# zypper install perl-CGI-Session perl-Config-Tiny perl-Crypt-CBC perl-Crypt-DES
perl-Crypt-DES_EDE3 perl-Date-Manip perl-DBI perl-Digest-HMAC perl-Digest-SHA1 perl-
Error perl-Log-Dispatch-FileRotate perl-Log-Log4perl perl-TermReadLine-Gnu perl-
TermReadKey perl-XML-LibXML
```

For Debian-based system:

```
[root]# apt-get install libcgi-session-perl libcompress-zlib-perl libconfig-tiny-perl
libcrypt-cbc-perl libcrypt-des-perl libcrypt-des-ede3-perl libdate-manip-perl libdbi-
perl libdigest-hmac-perl libdigest-sha1-perl liberror-perl liblog-dispatch-filerotate-
perl liblog-log4perl-perl libterm-readline-gnu-perl libterm-readkey-perl libxml-
libxml-perl
```



The Perl Digest::SHA1 package is called `libdigest-sha-perl` in Ubuntu 12.



If any of the Perl module packages fail to install or are unavailable for your system, you can install it from CPAN by running `cpan MODULENAME`, where `MODULENAME` is the respective perl module name from the list in the `make deps` step.

## Preparation

To build and install Moab Accounting Manager, you first need to unpack the tar archive and change directory into the top directory of the distribution. For maximum security, it is recommended that you



install and run Moab Accounting Manager under its own non-root userid. This user will be referred to as the accounting admin user.

```
[root]# useradd -m moab
[root]# passwd moab
[root]# su - moab
[moab]$ mkdir ~/src
[moab]$ cd ~/src
[moab]$ tar -zxvf mam-7.2.tar.gz
[moab]$ cd mam-7.2
```

## Configuration

To configure Moab Accounting Manager, run the `configure` script provided with the distribution.

The following is a list of configure options:

Option	Description
<b>-h,--help</b>	Run <code>./configure --help</code> to see the list of configure options.
<b>--prefix=PREFIX</b>	Base installation directory where all subdirectories will be installed unless otherwise designated (defaults to <code>/opt/mam</code> ).
<b>--exec-prefix=EPREFIX</b>	Directory where architecture-dependent subdirectories (such as <code>bin</code> , <code>sbin</code> , <code>lib</code> ) will be installed (defaults to <code>EPREFIX</code> ).
<b>--bindir=DIR</b>	Client scripts and user executables will be installed to this subdirectory (defaults to <code>EPREFIX/bin</code> ).
<b>--sbindir=DIR</b>	System scripts and binaries (including <code>goldd</code> , <code>goldsh</code> , <code>gauth</code> ) will be installed to this subdirectory (defaults to <code>EPREFIX/sbin</code> ).
<b>--libdir=DIR</b>	Object code libraries and Gold Perl modules will be installed in this subdirectory (defaults to <code>EPREFIX/lib</code> ).
<b>--localstatedir=DIR</b>	Home directory where per-configuration subdirectories (such as <code>etc</code> , <code>log</code> , <code>data</code> ) will be installed (defaults to <code>PREFIX</code> ).
<b>--sysconfdir=DIR</b>	Subdirectory where configuration and stateful files reside (defaults to <code>LOCALSTATEDIR/etc</code> ).
<b>--datarootdir=DIR</b>	Directory where documentation subdirectories (such as <code>doc</code> , <code>man</code> ) reside (defaults to <code>PREFIX/share</code> ).

Option	Description
<b>--docdir=DIR</b>	Directory where application documentation (pdf, html) resides (defaults to DATAROOTDIR/doc/mam).
<b>--with-db-name=NAME</b>	Name of the SQL database that the server will sync with (defaults to mam).
<b>--with-db-type= e=Pg mysql SQLite</b>	Use <code>--with-db-type</code> to specify the database server type you intend to use with Moab Accounting Manager. Currently only PostgreSQL ( <code>Pg</code> ), MySQL ( <code>mysql</code> ) and SQLite ( <code>SQLite</code> ) have been tested for use with Moab Accounting Manager. Postgres and MYSQL are external databases which runs in a distinct (possibly remote) process and communicates over sockets while SQLite is an embedded database with SQL queries being performed within the <code>goldd</code> process itself through library calls. Initial testing has shown SQLite to be at least as fast as PostgreSQL for small installations. The default is to use PostgreSQL.
<b>--with-user=USER</b>	Use <code>--with-user</code> to specify the accounting admin userid that the server will run under and who will have full administrative privileges (defaults to the user running the configure command). It is recommended that this be a non-privileged user for the highest security.
<b>--with-promotion= gauth suidperl</b>	Command-line clients and scripts using the API need to use a security promotion method to authenticate and encrypt the communication using the symmetric key. The default is <code>suidperl</code> if it is installed on the system, otherwise the default is <code>gauth</code> . See the description for the <code>security.promotion</code> configuration parameter in the <a href="#">Client configuration on page 149</a> section for more information about the two security promotion methods.
<b>--with-gold-libs= local site</b>	Use <code>--with-gold-libs</code> to indicate whether you want to install the Gold modules in a local gold directory ( <code>\${exec_prefix}/lib</code> ) or in the default system <code>site-perl</code> directory (defaults to <code>local</code> ).
<b>--with-cgi-bin=DIR</b>	If you intend to use the web GUI, use <code>--with-cgi-bin</code> to specify the directory where you want the Moab Accounting Manager CGI files to reside (defaults to <code>/var/www/cgi-bin/mam</code> ).
<b>--with-context= hpc cloud</b>	By specifying the accounting context some client commands can be adjusted to show the proper fields for that context. The default is <code>hpc</code> .
<b>--with[out]-gui= SKIN</b>	If you do not intend to use the CGI web GUI, you can specify <code>--without-gui</code> to not install the CGI scripts. Otherwise, the default is to install the GUI CGI scripts using the <code>viewpoint</code> skin. You may supply an option argument to specify the desired skin (either <code>viewpoint</code> or <code>legacy</code> ). The <code>viewpoint</code> skin design is more compatible with Viewpoint (if you intend to access the web GUI from within Moab Viewpoint). The <code>legacy</code> skin is normally used standalone. The default is <code>viewpoint</code> .

To assume the defaults for a PostgreSQL database, use the following:

```
[moab]$ ./configure --with-db-type=Pg
```

To assume the defaults for a MySQL database, use the following:

```
[moab]$ ./configure --with-db-type=mysql
```

## Compilation

To compile the program, type `make`.

```
[moab]$ make
```

**i** If you only need to install the clients on a particular system, you would instead type `make clients-only`. If you only need to install the web GUI on a particular system, you would instead type `make gui-only`.

## Installing the Perl module dependencies from CPAN

If you prefer to install the Perl module dependencies via CPAN rather than using the vendor package manager as described previously, you can run the `make deps` command at this stage (as root).

```
[moab]$ su -c "make deps"
```

**i** If you only need to install the clients on a particular system, you must type `make deps-clients-only` instead. If you only need to install the web GUI on a particular system, you must type `make deps-gui-only` instead.

**i** After running `make deps` initially, it is useful to run it again to see if all of the dependencies were installed cleanly. If not, you will need to intercede in the dependency installation. You can verify that this step is complete when `make deps` shows all modules as being up to date.

**i** On CentOS 5, any CPAN errors you may encounter can be overcome by running `cpan Attribute::Handlers` and then `make deps` again.

This step should install the following Perl modules from CPAN:

- `Attribute::Handlers`
- `CGI::Session`
- `Compress::Zlib`
- `Config::Tiny`

- Crypt::CBC
- Crypt::DES
- Crypt::DES\_EDE3
- Date::Manip
- DBI
- DBD::Pg, DBD::MySQL or DBD::SQLite
- Digest::HMAC
- Digest::SHA1
- Error
- Log::Dispatch
- Log::Dispatch::FileRotate
- Log::Log4perl
- Module::Build
- Module::Implementation
- Params::Validate
- SOAP
- Term::ReadLine::Gnu
- Term::ReadKey
- XML::SAX
- XML::LibXML::Common
- XML::LibXML
- XML::NamespaceSupport

## Installation

Use `make install` to install Moab Accounting Manager. You may need to do this as root if any of the installation or log directories do not already have write permission as the accounting admin user.

```
[moab]$ su -c "make install"
```

**i** If you only need to install the clients on a particular system, you must type `make install-clients-only` instead. If you only need to install the web GUI on a particular system, you must type `make install-gui-only` instead.

To delete the files created by the product installation, you can use `make uninstall`.

## Database setup

If you have chosen to use PostgreSQL or MySQL, you will need to define a database user, create the Moab Accounting Manager database, and configure the database server to support transactions and connections from the server host. No setup is needed if you are using SQLite.

### Initialize the database

If you are using the PostgreSQL database, the database must be initialized before it can be configured.

For PostgreSQL on RedHat 6-based and Fedora systems:

```
[root]# service postgresql initdb
```

For PostgreSQL on RedHat 5-based, SuSE-based, and Debian-based systems, this is achieved by starting the database service:

```
[root]# service postgresql start
```

### Configure trusted connections

If you are using the PostgreSQL database, set the host-based client authentication as appropriate. Edit or add a line in the `pg_hba.conf` file for the interface from which the Moab Accounting Manager server will be connecting to the database.

For PostgreSQL on RedHat-based and SuSE-based systems:

```
[postgres]$ vi /var/lib/pgsql/data/pg_hba.conf
host all all 127.0.0.1/32 md5
host all all ::1/128 md5
```

You will also need to configure PostgreSQL to accept connections from your host. The `listen_addresses` in the examples below represent the network interface on which the Postgres engine will listen for new connections. For most installations where Moab is on the same machine as MAM, the listen address is `localhost`.

For PostgreSQL on RedHat-based and SuSE-based systems:

```
[postgres]$ vi /var/lib/pgsql/data/postgresql.conf
listen_addresses = 'localhost'
```

For PostgreSQL on Debian-based systems:

```
[postgres]$ vi /etc/postgresql/9.1/main/postgresql.conf
listen_addresses = 'localhost'
```

### Enable support for transactions

If you are using the MySQL database you will need to configure the server to support transactions (MySQL 5.5.5 and later supports transactions by default).

For RedHat-based or SuSE-based systems:

```
[root]# vi /etc/my.cnf
default-storage-engine = INNODB # Place under the [mysqld] section
```

For Debian-based systems:

```
[root]# vi /etc/mysql/my.cnf
...
# Place under the [mysqld] section
default-storage-engine = INNODB
```

## Start the database

Configure the database to start on system startup. Start (or restart) the database server with the new configurations in effect.

For PostgreSQL database on RedHat-based and SuSE-based systems:

```
[root]# chkconfig postgresql on
[root]# service postgresql restart
```

For PostgreSQL database on Debian-based systems:

```
[root]# service postgresql restart
```

For MySQL database on RedHat-based systems:

```
[root]# chkconfig mysqld on
[root]# service mysqld restart
```

For MySQL database on SuSE-based systems:

```
[root]# chkconfig mysql on
[root]# service mysql restart
```

For MySQL database on Debian-based systems:

```
[root]# service mysql restart
```

## Create the database

Create the Moab Accounting Manager database and add the accounting admin user as a database administrator. This must be performed as the database user (postgres or mysql).

For PostgreSQL database:

```
[postgres]$ psql
create database "mam";
create user moab with password 'changeme';
\q
```

For MySQL database:

```
[root]# mysql
create database `mam`;
grant all on *.* to 'moab'@'localhost' identified by 'changeme';
exit
```

## Bootstrap

You will need to populate the Moab Accounting Manager database with an SQL dump that defines the objects, actions, and attributes necessary to function as an Accounting and Allocation Manager. Use `cloud.sql` if you are in a cloud context or `hpc.sql` if you are in an HPC context.

For PostgreSQL database:

```
[moab]$ psql mam < hpc.sql # or cloud.sql
```

For MySQL database:

```
[moab]$ mysql mam < hpc.sql # or cloud.sql
```

For SQLite database:

```
[moab]$ sqlite3 /opt/mam/data/mam.db < hpc.sql # or cloud.sql
```

## General setup

Edit the configuration files as necessary. At a minimum, you should set your database user and password to match the values you selected during the database setup. Most of the other defaults should be sufficient to get you up and running. See the [Configuration files on page 147](#) chapter for information on the configuration files and parameters.

```
[moab]$ vi /opt/mam/etc/goldd.conf
database.user = moab
database.password = changeme
```

Edit your environment files as appropriate to configure the PATH. Then add the PATH in your current environment.

```
[root]# cp etc/profile.d/*sh /etc/profile.d
```

## Startup

Edit your startup files as appropriate to start the Moab Accounting Manager server. Sample init.d scripts are provided in `etc/init.d/` that can be customized and copied into `/etc/init.d/mam`.

- For RedHat-based systems:

```
[root]# cp etc/init.d/mam.redhat /etc/init.d/mam
[root]# chkconfig --add mam
[root]# service mam start
```

- For SuSE-based systems:

```
[root]# cp etc/init.d/mam.suse /etc/init.d/mam
[root]# chkconfig --add mam
[root]# service mam start
```

- For Debian-based systems:

```
[root]# cp etc/init.d/mam.debian /etc/init.d/mam
[root]# update-rc.d mam defaults 95
[root]# service mam start
```

Alternately, you can start the golddd server daemon manually as the accounting admin user.

```
[moab]$ golddd
```

## Web server setup

If you want to use the web GUI, you will need to configure your Apache HTTP server to use SSL. The following shows some sample steps to configure the web GUI. The actual steps you will need to use will vary according to your distribution and environment. The web server configuration must be modified to support the invocation of cgi-bin scripts over an SSL connection using a private key and a signed certificate.

### Configure apache to use SSL

Edit the apache configuration files to use SSL, CGI and to define aliases.

- For SUSE-based systems:

```
[root]# vi /etc/sysconfig/apache2
APACHE_SERVER_FLAGS="-DSSL"
```

Configure the SSL virtual host definition.

- For RedHat-based systems:

```
[root]# vi /etc/httpd/conf.d/ssl.conf
```

- For SUSE-based systems:

```
[root]# cp /etc/apache2/vhosts.d/vhost-ssl.template /etc/apache2/vhosts.d/mam-ssl.conf
[root]# vi /etc/apache2/vhosts.d/mam-ssl.conf
```

- For Debian-based systems:

```
[root]# vi /etc/apache2/sites-enabled/default-ssl
```

Add or edit the SSL virtual host definition as appropriate for your environment:



```

<VirtualHost _default_:443>
...

# Configure your cgi-bin directory
<Directory "/var/www/cgi-bin">
    Options ExecCGI
    AddHandler cgi-script .cgi
    AllowOverride All
    Order allow,deny
    Allow from all
</Directory>

# Create an alias for /cgi-bin pointing to your cgi-bin directory
# If you chose to install to a cgi-bin subdir, you may want to create an
# alias for that as well. Comment out any related ScriptAlias entries.
Alias /cgi-bin/ /var/www/cgi-bin/
Alias /mam/ /var/www/cgi-bin/mam/
# Add index.cgi to the DirectoryIndex so you can use the shorter dir name
DirectoryIndex index.cgi

...
</VirtualHost>

```

## Install a Signed Certificate

For the highest security, it is recommended that you install a public key certificate that has been signed by a certificate authority. The exact steps to do this will be specific to your distribution and the chosen certificate authority. An overview of this process for CentOS is documented at [http://www.centos.org/docs/5/html/Deployment\\_Guide-en-US/s1-httpd-secure-server.html](http://www.centos.org/docs/5/html/Deployment_Guide-en-US/s1-httpd-secure-server.html).

Alternatively, if your network domain can be secured from man-in-the-middle attacks, you could use a self-signed certificate. Often this does not require any additional steps since in many distributions (e.g., RedHat-based), the Apache SSL configuration provides self-signed certificates by default.

The following steps assume you are using self-signed certificates:

Create self-signed SSL certificate and key files. Some distributions (e.g. RedHat) ship with ready-made certificates.

For SUSE-based systems:

```

[root]# cd /etc/apache2
[root]# openssl genrsa -out ssl.key/server.key 1024
[root]# openssl req -new -key ssl.key/server.key -x509 -out ssl.crt/server.crt

```

## Restart the HTTP Server

Startup or restart the Apache HTTP server.

For RedHat-based systems:

```

[root]# service httpd restart

```

For SUSE-based or Debian-based systems:

```

[root]# service apache2 restart

```

## Accessing the GUI

**i** In order to use the Web GUI, users will have to generate passwords for themselves using the `gchpasswd` client command. Moab Accounting Manager may have to be restarted in order for role privileges to be reflected in the GUI.

```
[moab]$ gchpasswd
```

To access the web gui, open a browser with URL: <https://localhost/mam>.

## Initialization

You are now ready to define users, funds, charge rates, etc., as necessary for your site. The next chapter (Getting Started) provides a useful primer for this phase of the Moab Accounting Manager setup.

You can run one of the initialization scripts in the test directory to set up a sample initial environment (with some dummy users, funds, charge rates, etc.) for your desired accounting mode and context.

For HPC allocation enforcement:

```
[moab]$ test/hpc-allocation-enforcement.sh
```

For Cloud allocation enforcement:

```
[moab]$ test/cloud-allocation-enforcement.sh
```

# Chapter 3: Upgrading

This chapter assumes that you are updating Moab Accounting Manager to a new version where there have not been any database schema changes. Instructions for migrating to a new release where there have been database schema changes can be found in [Migrating on page 27](#).

Moab Accounting Manager uses the standard `configure`, `make` and `make install` steps for upgrades. This document provides a number of sample steps referenced to a particular installation on a Linux platform using the bash shell. These steps indicate the userid in brackets performing the step. The exact commands to be performed and the user that issues them will vary based on the platform, shell, installation preferences, etc.

## Preparation

To build and update Moab Accounting Manager, you first need to unpack the tar archive and change directory into the top directory of the distribution.

```
[moab]$ cd ~/src
[moab]$ tar -zxvf mam-7.2.tar.gz
[moab]$ cd mam-7.2
```

## Configuration

To configure Moab Accounting Manager, run the `configure` script provided with the distribution with the desired options.

```
[moab]$ ./configure
```

## Compilation

To compile the program, type `make`.

```
[moab]$ make
```

## Server Shutdown

Stop the server daemon.

```
[moab]$ goldd -k
```

## Installation

Use `make install` to install Moab Accounting Manager. You may need to do this as root if any of the installation or log directories do not already have write permission as the accounting admin user (moab).

```
[root]$ make install
```

## Server Startup

Start the server daemon back up.

```
[moab]$ goldd
```

# Chapter 4: Migrating

This procedure assumes that you are migrating Moab Accounting Manager to a new major or minor release where there are database schema changes. It contains instructions on migrating your database schema to version 7.2.6. You can determine your current database version by running `goldsh System Query`. By default, this version will unpack into a separate directory (`/opt/mam`) which, after modifying the database and port of the prior installation, will allow us to run or access both versions simultaneously. Instructions for upgrading to a new maintenance or fix release where there are no database schema changes can be found in [Chapter 3: Upgrading on page 25](#).

This chapter demonstrates installing the new version of Moab Accounting Manager into a separate directory and with a distinct database name and port, which will allow us to run or access both the new and the old versions simultaneously. The migration process Moab Accounting Manager uses the standard `configure`, `make`, and `make install` steps along with the running one or more migration scripts. This document provides a number of sample steps referenced to a particular installation on a Linux platform using the bash shell. These steps indicate the userid in brackets performing the step. The exact commands to be performed and the user that issues them will vary based on the platform, shell, installation preferences, etc.

**i** If you are migrating from a version of Gold Allocation manager prior to version 2.2, you will first need to perform a migration install to Gold Allocation Manager 2.2 using the Gold Allocation Manager tarball and the associated migration script and procedures.

**i** SQLite databases cannot yet be migrated in most circumstances since current versions do not support the `ALTER TABLE ADD COLUMN` syntax.

## Server shutdown

Quiesce the former server daemon.

```
[moab]$ <full_path_to_prior_version>/goldd -k
```

## Database copy

Dump the prior database to a file.

- For a PostgreSQL database:

```
[moab]$ pg_dump -U moab -W <old_database_name> > /tmp/old_database_name.sql
```

- For a MySQL database:

```
[moab]$ mysqldump -u moab -p <old_database_name> > /tmp/old_database_name.sql
```

Create a new database to preserve and reference the old data separately.

- For PostgreSQL database:

```
[postgres]$ psql
create database "mam-7.2";
```

- For MySQL database:

```
[root]# mysql
create database `mam-7.2`;
```

Import the old data into the new database.

- For PostgreSQL database:

```
[moab]$ psql -U moab -W mam-7.2 < /tmp/<old_db_name>.sql
```

- For MySQL database:

```
[moab]$ mysql -u moab -p mam-7.2 < /tmp/<old_db_name>.sql
```

## Preparation

To build and update Moab Accounting Manager, unpack the tar archive and change directory into the top directory of the distribution.

```
[moab]$ cd ~/src
[moab]$ tar -zxvf mam-7.2.6.tar.gz
[moab]$ cd mam-7.2.6
```

## Configuration

To configure Moab Accounting Manager, run the `configure` script provided with the distribution with the desired options. In this example we are installing the new version of Moab Accounting Manager with a new prefix, database name, and port. We are also specifying the prior symmetric key used between Moab Workload Manager and Moab Accounting Manager so that you do not have to change the key in Moab. This key can be found in the prior `auth_key` or `site.conf` file.

```
[moab]$ ./configure --prefix=/opt/mam-7.2 --localstatedir=/var/mam-7.2 --with-db-
name=mam-7.2 --with-port=7722 --with-key=<prior_secret_key>
```

## Compilation

To compile the program, type `make`:

```
[moab]$ make
```

## Perl module dependencies

You may need to rerun `make deps` if you are installing to a new directory and you chose to install the former perl libs in a local directory.

```
[root]# make deps
```

## Installation

Use `make install` to install Moab Accounting Manager. You will need to do this as root if any of the installation or log directories do not already have write permission as the accounting admin user (moab).

```
[root]# make install
```

## General setup

Edit the configuration files as necessary for your new installation. You will very likely want to merge your previous configuration settings into your new configuration files.

```
[moab]$ vi /var/mam-7.2/etc/goldd.conf
database.password = changeme
[moab]$ vi /var/mam-7.2/etc/gold.conf
```

Edit the new configuration files as necessary to configure the PATH. Then add the PATH in your current environment.

```
[root]# cp etc/profile.d/*sh /etc/profile.d
[moab]$ . /etc/profile.d/mam.sh
```

## Server startup

Start up the new server daemon.

```
[moab]$ goldd
```

## Run the migration scripts

Migrate your database to the new schema by running the migration scripts. You may need to run more than one of the migration scripts if you are skipping releases that have schema changes. These scripts are designed to be rerunnable, so if you encounter a failure, resolve the failure and rerun the migration script. If you are unable to resolve the failure and complete the migration, contact support.

### Migrating From Moab Accounting Manager 7.1

If you are migrating from Moab Accounting Manager version 7.1, you will just need to run a single migration script to migrate the database schema from 7.1 to 7.2.6.

```
[moab]$ sbin/migrate_7.1-7.2.pl
```

### Migrating From Moab Accounting Manager 7.0

If you are migrating from Moab Accounting Manager version 7.0, you will need to run two migration scripts: the first to migrate the database schema from 7.0 to 7.1 and the second to migrate the database schema from 7.1 to 7.2.6.

```
[moab]$ sbin/migrate_7.0-7.1.pl
[moab]$ sbin/migrate_7.1-7.2.pl
```

### Migrating From Gold Allocation Manager 2.2

If you are migrating from Gold Allocation Manager version 2.2, you will need to run three migration scripts: the first to migrate the database schema from 2.2 to 7.0, the second to migrate the database schema from 7.0 to 7.1 and the third to migrate the database schema from 7.1 to 7.2.6.

```
[moab]$ sbin/migrate_2.2-7.0.pl
[moab]$ sbin/migrate_7.0-7.1.pl
[moab]$ sbin/migrate_7.1-7.2.pl
```

## Verify migration

Verify that the resulting database schema version is 7.2.6.

```
[moab]$ goldsh System Query
```


Name	Version	Description
Moab Accounting Manager	7.2.6	Commercial Release



# Chapter 5: Getting started

Moab Accounting Manager can be configured in a myriad of use cases. It can be used in different contexts such as cloud or High Performance Computing (HPC). It can be used in different accounting modes such as for usage tracking, charge accounting or allocation enforcement. This chapter will outline a few basic examples of setting up Moab Accounting Manager for use in a High Performance Computing environment to track and charge accounts for job resource usage.

If you want to use Moab Accounting Manager solely for recording resource usage but not for charging, then review the section on [HPC usage tracking on page 31](#). If you want to calculate and record charges, but not restrict any workload from being serviced, then review the section on [HPC charge accounting on page 32](#). If you want charge and establish limits on the use of system resources, then review the section on [HPC allocation enforcement on page 35](#).

 You will need to be an Moab Accounting Manager System Administrator to perform the tasks in this chapter. It is assumed that you have already installed and bootstrapped Moab Accounting Manager and started the server before performing the steps suggested in this chapter.

## HPC usage tracking

When used solely for usage tracking, Moab Accounting Manager logs resource usage in usage records. This usage can be queried to report what resources were used when and by whom. In this case, there is no need for charge rates, funds, allocations, liens, or quotes. There is no need to define account membership. The only real consideration is whether you want to customize the usage record to display usage properties unique to your site.

### Usage Record Customization (Optional)

As an example, we will add a usage record property to track GPU usage. See the section on [Customizing the usage record object on page 88](#) for additional examples.

*Example 5-1: Adding a GPU Field to the Usage Record*

```
$ goldsh Attribute Create Object=UsageRecord Name=GPUs DataType=Integer  
Successfully created 1 attribute
```

*Example 5-2: Selecting the Usage Record fields we would like to see via glsusage*

We can select the usage records fields that show up in `glsusage` by editing the `usagerecord.show` attribute in the client configuration file (`gold.conf`). This is the same parameter that would have to be

edited for the new GPU attribute to show up in `glsusage`. The web GUI will automatically display the new attribute.

```
$ vi /var/gold/etc/gold.conf
usagerecord.show =
Id, Instance, User, Account, Machine, Stage, Processors, GPUs, Nodes, Duration, StartTime, EndTime
```

## Record The Usage

After a job completes, the usage is recorded (see [Creating a usage record on page 83](#)). This step is normally performed automatically by Moab Accounting Manager via the NAMI API but we can use the command line interface for the purpose of illustration.

*Example 5-3: Record resource usage for our job*

```
$ gmkusage -J job1 -u amy -p chemistry -m colony -P 16 -X GPUs=8 -N 4 -t 720
Successfully created 1 usage record with id 1
```

## List usage records

Let's examine the usage record that was created (see [Querying usage records on page 84](#)).

*Example 5-4: List Usage Records*

```
$ glsusage
Id Type Instance User Account Machine Processors GPUs Nodes Duration EndTime
--- ---
1 Job job1 amy chemistry colony 16 8 4 720
```

# HPC charge accounting

Some sites may want to use Moab Accounting Manager to calculate and record charges, but not to restrict or prevent any workload from being serviced. In this case, we need only define a single fund with inexhaustible credits. Moab Accounting Manager will ascribe a charge for resource utilization and attribute it to the entities using it. Liens, balance queries, and quotes are not needed. The main task is to define charge rates.

## Usage record customization (optional)

It may be desirable to customize the usage record to display usage properties unique to your site. See the section on [Customizing the usage record object on page 88](#) for examples.

## Decide on a currency and set the currency precision

Since we will be calculating charges, we will need to decide on a currency unit and set the currency precision. For this example we will define a currency in which one credit represents the value of using one processor core for one second. We will assume for simplicity that one processor second on one machine will have the same value as a processor second on another machine. Charges for other resource types will be given an appropriate value relative to this currency unit. All allocations and charges will be specified in terms of this currency. The only action to take here would be to set the currency precision to be the number of decimal places you want Moab Accounting Manager to display when reporting currency amounts. Since processor seconds can easily be represented as an integer with no decimal places and the default currency precision is zero, there is no action to take here. If instead we were to have chosen dollars as the currency base, we would want to set the **currency.precision** value in `golddd.conf`, `gold.conf` and `goldg.conf` to 2.

## Define charge rates

Since we are charging for usage, we must establish the charge rates for the usage. In our example, we will establish a charging scheme that charges 1 credit for each processor second utilized by the job as well as 1 credit for every GigaByte of memory utilized by the job per second.

We will add Processors and Memory as consumable resource charge rates (with a Type of Value Based Resource) so their values will be multiplied by the amount of time they are used. We will define a processor charge rate of 1 currency unit that will charge one credit per processor second used and we will set the memory charge rate to be .001 since we will assume that the memory will be reported in MegaBytes and we want to charge 1 currency unit for every GigaByte second of memory used. See the chapter on [Managing charge rates on page 97](#) for more detailed information on setting up charge rates.

### Example 5-5: Define Charge Rates for Processors and Memory

```

$ gmkrate -n Processors -T VBR -z 1
Successfully created 1 charge rate

$ gmkrate -T VBR -n Memory -z .001
Successfully created 1 charge rate

$ glsrate
Name      Value  Type  Rate  Description
-----  -
Memory    VBR    0.001
Processors VBR    1

```

## Create a single non-limiting fund

Since we do not want to limit usage in any way, it is probably not necessary to create individual funds. It may be sufficient to create a single unconstrained fund with unlimited credits. This section will demonstrate this approach. Usage charges associated with various accounts, users, machines, etc., can be extracted with usage record queries by applying appropriate filters. If you do wish to track usage via separate distinct funds (which will additionally allow you to produce separate fund statements), you may want to follow the steps outlined in the [HPC allocation enforcement on page 35](#) section with the

exception that you will make very large or infinite deposits into the funds. See the chapter on [Managing funds on page 59](#) for more detailed information on setting up funds.

*Example 5-6: Create a single unconstrained fund*

```
$ gmkgfund -n "Common Fund"
Successfully created 1 fund with id 1

$ glsfund
Id Name          Amount Constraints Description
-----
1  Common Fund 0
```

## Create an unlimited allocation

Since we do not wish to limit usage, we need to create a large or an unlimited allocation. We can do this by depositing infinite credits or by establishing an infinite credit limit (which will allow the fund to have an unlimited negative balance). See the section on [Making deposits on page 62](#) for additional information.

**i** The use of infinite allocations requires the use of a database that supports the IEEE Standard 754 for Floating-Point Arithmetic (e.g. PostgreSQL). If you are not using a supporting database type, you can deposit a very large amount (e.g. 1000000000) instead.

*Example 5-7: Creating a single unlimited allocation via an infinite deposit*

```
$ gdedeposit -z Infinity
Successfully deposited inf credits into fund 1
```

Let's examine the allocated we just created.

```
$ glsalloc
Id Fund    Active StartTime EndTime    Amount    CreditLimit Deposited Description
-----
1  1        True  -Infinity Infinity    Infinity    0 Infinity

$ glsfund
Id Name          Amount Constraints Description
-----
1  Common Fund Infinity
```

Since the fund has infinite credits, it will not be necessary to check the balance regularly because it is not going to change, but let's look at it to see how we have it set up.

```
$ gbalance
Id Name          Available Allocated PercentUsed
-----
1  Common Fund Infinity    Infinity    0.00
```

## Issue a refund

Since this was an imaginary job, refund the fund (see [Issuing usage refunds on page 88](#)).

**Example 5-8: Issue a refund for our job**

```
$ grefund -J job1
Successfully refunded 12960 credits to usage record 1 instance job1
```

Notice that the usage charge is now zero because the job has been fully refunded.

```
$ glsusage -u amy --show
Instance,Charge,User,Account,Machine,Processors,Memory,Duration
-----
Instance Charge  User Account      Machine Processors Memory Duration
-----
job1           0  amy  chemistry  colony  16           2000  720
```

## Examine fund statement

Finally, you can examine the fund statement for our activities (see [Obtaining a fund statement on page 66](#)).

**i** If you want to be able to issue separate fund statements for different accounts, users, etc., then you will need to establish separate funds by following the initial steps outlined in the [HPC allocation enforcement on page 35](#) section with the exception that you will make very large or infinite deposits into the funds.

**Example 5-9: We can request an itemized fund statement to see the debits and credits for the common fund**

```
$ gstatement
++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++
++++++ +
+
+ Includes fund 1 (Common Fund)
+ Generated on Thu Dec 22 18:26:55 2011.
+ Reporting fund activity from -Infinity to Now.
++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++ ++++++
++++++ +

Beginning Balance: 0
-----
Total Credits:           Infinity
Total Debits:            -12960
-----
Ending Balance:         Infinity

++++++ ++++++ ++++++ ++++++ ++++++ Credit Detail ++ ++++++ ++++++ ++++++ ++++++ ++++++
+
Object      Action      Instance  Amount  Time
-----
Fund        Deposit    Infinity  Infinity 2011-12-22 17:50:24
UsageRecord Refund     job1      12960 2011-12-22 18:13:30
++++++ ++++++ ++++++ ++++++ ++++++ + Debit Detail +++ ++++++ ++++++ ++++++ ++++++
++++++ +
```

## HPC allocation enforcement

With Moab Accounting Manager, one can establish limits on the use of system resources. Rates are established for the use of resources and resource credits can be apportioned to different parties or

purposes. Some sites establish an allocation cycle where proposals for resource usage are periodically reviewed and suitable candidates are granted an allocation on the computing system. Other sites limit consumers to what they "pay" for. In either case, multiple funds are needed; with rosters, allocation limits, balance and usage feedback, liens, and possibly quotes.

## Usage record customization

It may be desirable to customize the usage record to display usage properties unique to your site. See the section on for examples.

## Decide on a currency and set the currency precision

Since we will be calculating charges, we will need to decide on a currency unit and set the currency precision. For this example we will define the currency to be in dollars (and cents). Deposits into funds will be made in this currency. Resource charges will be calculated from charge rates based on this currency. Since dollars and cents are represented as a floating point number with two decimal places we must specify a currency precision of two.

*Example 5-10: Setting the currency precision to two*

The currency precision value must be set in the server and client configuration files (`goldd.conf` and `gold.conf`). It must also be set in the GUI configuration file (`goldg.conf`) if you will be using the web GUI.

```
$ vi /var/gold/etc/goldd.conf
currency.precision = 2

$ vi /var/gold/etc/gold.conf
currency.precision = 2
```

## Define charge rates

Since we are charging, we must establish the charge rates for the usage. In our example, we will establish a charging scheme that charges 1 dollar for each processor hour utilized by the job.

Since we want to charge 1 dollar per hour of usage per processor and because time-based charge rates are multiplied by the duration in seconds, we need create a charge rate for processors that charges 1/3600th of a dollar per second. See the chapter on [Managing charge rates on page 97](#) for more detailed information on setting up charge rates.

*Example 5-11: Define a Charge Rate for Processors*

```
$ gchrate -n Processors -z .00027778 -T VBR -d "1 dollar per processor-hour
Successfully created 1 charge rate

$ glsrate
Name          Value Type Rate          Description
-----
Processors    VBR    0.00027778 1 dollar per processor-hour
```

## Define accountable entities

Next we must decide to which entities we want to entitle our allocations. In this example, we will distribute the funds among different accounts. Each account will be assigned a set of user members that can charge to that account. Moab Accounting Manager can be customized to associate funds with any number of arbitrary entities such as Users, Groups, Accounts, Organizations, Classes, Machines, etc. We will start by defining some accounts and the associated user members of the accounts. We will also associate each account with an organization so that usage reports can be generated for the organization level as well as the account and user level.

We will create accounts for biology, chemistry, and film and assign them some users. The biology and chemistry account will be associated with the sciences organization while the film account will be associated with the arts organization. See the chapter on [Managing accounts on page 49](#) for more information on setting up accounts.

*Example 5-12: Define the biology, chemistry and film accounts*

```
$ gmkaccount -a biology -o sciences -u amy, bob -d "Biology Department"
Successfully created 1 account

$ gmkaccount -a chemistry -o sciences -u amy, dave -d "Chemistry Department"
Successfully created 1 account

$ gmkaccount -a film -o arts -u bob, dave -d "Film Department"
Successfully created 1 account

$ glsaccount
Successfully created 1 account

$glsaccount
Name           Active Users      Organization Description
-----
biology        True   amy, bob   sciences   Biology Department
chemistry      True   amy, dave  sciences   Chemistry Department
film           True   bob, dave  arts       Film Department
```

## Create funds

The next task will be to create the funds which will hold the allocated credits. A fund is much like a numbered bank account, where credits can be deposited and are defined by constraints that distinguish who or what can use the contained credits and for what purposes. In this example, we will create a fund for each of the three accounts. Had we enabled fund auto-generation or used the `--create-fund=True` option with the `gmkaccount` command, a fund would have been created automatically with the creation of each account. See [Managing funds on page 59](#) for more detailed information on setting up funds.

Note that in most cases, referenced objects will be auto-generated, such as the users that were auto-generated as they were added to the accounts. Undefined accounts, would have likewise been auto-generated as they were newly associated with funds, but had we taken that ordering, we would still have needed to go back and associate the appropriate users, organization, etc. to these accounts. We could have also created the users explicitly and provided additional detail about each user, before adding them to the accounts. Of course, even though they were auto-generated, we can still go back and add detailed information to each user as desired. See [Managing users on page 45](#) for more detailed information on setting up users.

**Example 5-13: Create four account-based funds**

```

$ gmkgfund -a biology -n "biology"
Successfully created 1 fund with id 1 and 1 constraint

$ gmkgfund -a chemistry -n "chemistry"
Successfully created 1 fund with id 2 and 1 constraints

$ gmkgfund -a film -n "film"
Successfully created 1 fund with id 3 and 1 constraints

$ glsfund
ID   Name                Amount   Constraints           Description
--   -
1    biology              0        Account=biology
2    chemistry            0        Account=chemistry
3    film                 0        Account=film

```

## Make deposits

Now we need to allocate credits to these funds by making deposits to them. An allocation has a start and end time associated with it declaring the time frame in which it can be used (defaulting to negative and positive infinity). It can also have a credit limit which defines the extent to which the allocation is allowed to go negative. Multiple allocations (usually with different expenditure time frames) can be associated with a fund. Judicial use of allocation time frames can be helpful to establish an allocation cycle and set expectations for credit expenditure. See [Making deposits on page 62](#) for additional information.

In this example, we will allocate 5000 and 3000 dollars to the biology and chemistry accounts respectively. The film account will be given a credit limit of 2000 dollars which allows them to charge up to 2000 dollars before rectifying their fund. When making a deposit we must specify the fund we are depositing into unless the fund can be unambiguously determined by its constraint references (i.e. there is only a single fund associated with the account biology). We will create allocations that must be used within the current year.

**Example 5-14: Making Deposits**

```

$ gdeposit -s 2012-01-01 -e 2013-01-01 -z 5000 -a biology
Successfully deposited 5000.00 credits into fund 1

$ gdeposit -s 2012-01-01 -e 2013-01-01 -z 3000 -a chemistry
Successfully deposited 3000.00 credits into fund 2

$ gdeposit -s 2012-01-01 -e 2013-01-01 -L 2000 -a film
Successfully deposited 0.00 credits into fund 3

```

Let's examine the allocations we just created:



```

$ glsfund
Id Fund
Active StartTime      EndTime      Amount  CreditLimit  Deposited  Description
-----
1  1          True    2012-01-01  2013-01-01  5000.00      00.0    5000.00
2  2          True    2012-01-01  2013-01-01  3000.00      0.00   3000.00
3  3          True    2012-01-01  2013-01-01   0.00      2000.00   0.00

$ glsaccount
Id  Name          Amount  Constraints  Description
---
1  biology        5000.00  Account=biology
2  chemistry       3000.00  Account=chemistry
3  film            0.00    Account=film

```

## Check the balance

We can verify the resulting balance (see [Querying the balance on page 63](#)).

*Example 5-15: Let's look at amy's balance*

```

$ gbalance -u amy
Id Name          Available Allocated PercentUsed
---
1  biology        5000.00  5000.00  0.00
2  chemistry       3000.00  3000.00  0.00

```

## Integrate Moab Accounting Manager with Your Brokering System

Now we are ready to run some jobs. Before doing so you will need to integrate Moab Accounting Manager with your resource management system (see [Integration on page 143](#)).

In practice, the billing actions (quote, reserve and charge) will be invoked automatically by your brokering system (i.e. initiated by Moab or by the resource manager). However, we will demonstrate these steps manually to illustrate their effects.

Let's simulate the lifecycle of a job.

*Example 5-16: We'll assume our job has the following characteristics*

```

Job Id:          moab.1
Job Name:        heavywater
User Name:       amy
Account Name:    chemistry
Machine Name:    colony
Requested Processors: 16
Estimated WallClock: 3600 seconds
Actual WallClock: 1234 seconds

```

## Obtain a usage quote

When a job is submitted, it is useful to check that the user's fund has enough credits for the requested usage. This will be verified when the job starts, but by that point the job may have waited some time in the queue only to find out it never could have run in the first place. The usage quote step (see [Obtaining usage quotes on page 85](#)) can fill this function. Additionally, the quote can be used to determine the cheapest place to run, and to guarantee the current rates will be used when the usage is charged.

*Example 5-17: Let's see how much it will cost to use the resources.*

```
$ gquote -u amy -a chemistry -c batch -m colony -P 16 -t 3600
Successfully quoted 16.00 credits
```

## Make a usage lien

When a job starts or usage begins, the workload manager typically creates a lien (or hold) against the appropriate allocations based on the estimated duration of the job (see [Making a usage lien on page 86](#)).

*Example 5-18: Make a lien for the estimated usage of the job*

```
$ greserve -J moab.1 -a chemistry -u amy -m colony -P 16 -t 3600
Successfully reserved 16.00 credits with lien id 1 for instance moab.1 and created
usage record 1

$ glslien
Id Instance Amount StartTime EndTime Duration UsageRecord
Funds Description
-----
1 moab.1 16.00 2012-05-29 15:20:45 2012-05-29 16:20:45
3600 1 2
```

This lien will decrease our available balance by the amount reserved.

```
$ gbalance -u amy -a chemistry --total --quiet
2984.00
```

The actual allocation has not changed.

```
$ glsalloc -a chemistry
Id Fund Active StartTime EndTime Amount CreditLimit Deposited Description
-----
2 2 True 2012-01-01 2013-01-01 3000.00 0.00 3000.00
```

This is best illustrated by the detailed balance listing:

```
$ gbalance -u amy -a chemistry
--show=Id,Name,Amount,Reserved,Balance,CreditLimit,Available
Id Name Amount Reserved Balance CreditLimit Available
-----
2 chemistry 3000.00 16.00 2984.00 0.00 2984.00
```

Note that the lien resulted in the initial creation of a usage record for the job.

```

$ glsusage -u amy -a chemistry
Id Type Instance Charge Stage User Group Project Organization Class QualityOfService
ce Machine Nodes Processors Memory Desk Network Duration Starttime EndTime Description
-----
-
1 Job moab.1 0.00 Reserve amy chemistry sciences

```

## Charge for the usage

After a job completes, any associated liens are removed and a charge is issued against the appropriate allocations based on the resources and wallclock time actually used by the job (see [Charging for usage on page 87](#)).

*Example 5-19: Issue the charge for the job*

```

$ gcharge -J moab.1 -u amy -a chemistry -m colony -P 16 -t 1234
Successfully charged 5.48 credits for instance moab.1
1 lien was removed

```

Your allocation will now have gone down by the amount of the charge.

```

$ glsalloc -u amy -a chemistry
Id Fund Active StartTime EndTime Amount CreditLimit Deposited
Description
-----
2 2 True 2012-01-01 2013-01-01 2994.52 0.00 3000.00

```

However, your balance actually goes up (because the lien that was removed was larger than the actual charge).

```

$ gbalance -u amy -a chemistry
--show=ID,Name,Amount,Reserved,Balance,CreditLimit,Available

Id Name Amount Reserved Balance CreditLimit Available
-----
2 chemistry 2994.52 0.00 2994.52 0.00 2994.52

```

A usage record for the job was updated as a side-effect of the charge (see [Querying usage records on page 84](#)).

```

$ glsusage -u amy -a chemistry
Id Type Instance Charge Stage Quote User Group Account Organization Cl
ass QualityOfService Machine Nodes Processors Memory Desk Network Duration S
tarttime EndTime Description
-----
1 Job moab.1 5.48 Charge amy amy chemistry sciences

```

## Usage refund

Since this was an imaginary job, refund the user's account (see [Issuing usage refunds on page 88](#)).

*Example 5-20: Issue a refund for the job*

```
$ grefund -J moab.1
Successfully refunded 5.48 credits to usage record 1 for instance moab.1
```

The balance is back as it was before the job ran.

```
$ gbalance -u amy -a chemistry
--show=Id,Name,Amount,Reserved,Balalance,CreditLimit,Available
Id Name      Amount Reserved Balance CreditLimit Available
-----
2  chemistry 3000.00   0.00 3000.00      0.00  3000.00
```

The allocation, of course, is likewise restored.

```
$ gsalloc -u amy -a chemistry
Id Fund      Active  StartTime  EndTime      Amount  CreditLimit Deposited Description
-----
2  2           True    2012-01-01 2013-01-01 3000.00      0.00   3000.00
```

Notice that the usage charge is now zero because the job has been fully refunded.

```
$ glsusage
Id Type Instance Charge Stage Quote User Group Account Organization Class
s QualityOfService Machine Nodes Processors Memory Desk Network Duration Starttime EndTime Description
-----
1  Job moab.1 0.00 Reserve amy chemistry sciences
```

## Examine fund statement

Finally, you can examine the fund statement for the activities (see [Obtaining a fund statement on page 66](#)).

Example 5-21: You can request an itemized fund statement over all time for use *amy* and the *chemistry* account (fund 2)

```

$ gstatement -u amy -a chemistry
#####
#
# Includes fund 2 (chemistry for amy)
# Generated on Tue May 29 15:48:22 2012
#
# Reporting fund activity from -infinity to now.
#
#####
Beginning Balance:                0.00
-----
Total Credits:                    3005.48
Total Debits:                     -5.48
-----
Ending Balance:                   30000.00

##### Credit Detail #####
Object      Action      Instance  Amount      Time
-----
Fund        Deposit      moab.1    3000.00     2012-05-29 14:52:15
UsageRecord Refund       moab.1    5.48        2012-05-29 15:41:20

##### Debit Detail #####
Object      Action      Instance  Account     User  Machine  Amount  Time
-----
UsageRecord Charge     moab.1    chemistry  amy   colony   -5.48   2012-05-
29 15:37:02
##### End of Report #####

```



# Chapter 6: Managing users

A user is a person authorized to use a resource or service. Default user properties include the common name, phone number, email address, default account, and description for that person. A user can be created, queried, modified, and deleted. By default, a standard user may only query their own user record.

User queries allow the specification of filter options which narrow down the users that will be returned to those belonging to the specified account.

## Creating users

To create a new user, use the command `gmkuser`:

```
gmkuser [-A | -I] [-n common_name] [-F phone_number] [-E email_address] [-a
default_account] [-d description] [-X, --extension property_name=property_
value[,property_name=property_value...]] [--debug] [--site site_name] [--help]
[--man] [--quiet] [--verbose] [--version] {[-u] user_name}
```

**i** Additional detail for this command can be found in the man page by issuing `gmkuser --man` at the command line.

*Example 6-1: Creating a user*

```
$ gmkuser -n "Smith, Robert F." -E "bob@bank.com" -F "(509) 555-1234" bob
Successfully created 1 user
```

## Querying users

To display user information, use the command `glsuser`:

```
glsuser [-A | -I] [-a account_name] [-X, --extension property_name=property_
value [,property_name=property_value...]] [--full] [--show attribute_name
[,attribute_name...]] [--long] [--wide] [--raw] [--debug] [--site site_name]
[--help] [--man] [--quiet] [--version] [[-u] user_pattern]
```

**i** The fields which are displayed by default by this command can be customized by setting the `user.show` configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsuser --man` at the command line.

**Example 6-2: Listing standard info about active users**

```

$ glsuser -A
Name      Active      CommonName      Description      PhoneNumber      EmailAddress
-----
amy       True        Wilkes, Amy     (509) 555-8765  amy@bank.com
bob       True        Smith, Robert F. (509) 555-1234  bob@bank.com

```

**Example 6-3: Displaying bob's phone number**

```

$ glsuser --show PhoneNumber bob --quiet
(509) 555-1234

```

**Example 6-4: Listing amy's accounts**

```

$ glsuser --show Accounts amy -l -q
chemistry
biology

```

**Example 6-5: Listing all users belonging to the chemistry account**

```

$ glsuser --show Name -a chemistry -q
amy
dave

```

## Modifying users

To modify a user, use the command `gchuser`:

```

gchuser [-A | -I] [-n common_name] [-F phone_number] [-E email_address] [-a
default_account] [-d description] [-X, --extension property_name=property_
value [,property_name=property_value...]] [--debug] [--site site_name] [--
help] [--man] [--quiet] [--verbose] [--version] {[-u] user_name}

```

**i** Additional detail for this command can be found in the man page by issuing `gchuser --man` at the command line.

**Example 6-6: Activating a user**

```

$ gchuser -A bob
Successfully modified 1 user

```

**Example 6-7: Setting a user's default account**

```

$ gchuser -a chemistry amy
Successfully modified 1 user

```

**Example 6-8: Changing a user's email address**

```

$ gchuser -E "rsmith@cs.univ.edu" bob
Successfully modified 1 user

```



## Deleting users

To delete a user, use the command `grmuser`:

```
grmuser [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version] {[-u] user_name}
```

**i** Additional detail for this command can be found in the man page by issuing `grmuser --man` at the command line.

*Example 6-9: Deleting a user*

```
$ grmuser bob
Successfully deleted 1 user
```

## User auto-generation

By default, users will automatically be created when first added as a member to an account or role. It is also possible to have users be created automatically when first encountered in a usage function (charge, reserve or quote). In order for user auto-generation to occur, the **AutoGen** property for the User object must be set to `True`. This is the default. Additionally, for user auto-generation to occur when a user is added as a member of another object (such as Account) via an association table (e.g. AccountUser), the **Values** property for the user attribute of the **Association** (e.g. Name) must be set to `@User`, indicating that that value should be constrained to be a valid instance of the User object. For user auto-generation to occur when initially encountered in a usage function, the **Values** property of the user attribute of the UsageRecord object must be similarly set to `@User`. The auto-creation of users can be completely disabled by setting the **AutoGen** property for the User object to `False`.

*Example 6-10: Enable auto-generation of users when initially seen in a charge*

```
$ goldsh Attribute Modify Object==UsageRecord Name==User Values=@User
Successfully modified 1 attribute
```

*Example 6-11: Disable all auto-generation of users*

```
$ goldsh Object Modify Name==User AutoGen=False
Successfully modified 1 object
```

See [Object auto-generation on page 133](#) for more information about the auto-generation of objects.

## Default user

It is possible to set a global default user to which usage would be ascribed in quotes, liens, or charges where no user is specified. This can be accomplished by setting the **DefaultValue** property for the User object to the desired user.

It is also possible to set a custom user default or a specific object, which will result in usage being ascribed to the specified user when the object is attributed to the usage. This is done by creating a default usage override modifier. For example, to specify that `acmeuser` be the default user for usage associated with the acme organization, you might first create an attribute called **DefaultUser** for the **Organization** Object with the **Values** property of `@?=User`. Then you would populate the new **DefaultUser** property for the acme organization with the value of `acmeuser`. See [Customizing objects on page 131](#) for more information on default and other usage override modifiers.

*Example 6-12: Assign a global default user*

```
$ goldsh Object Modify Name==User DefaultValue=anonymous
Successfully modified 1 object
```

# Chapter 7: Managing accounts

An account represents a work entity requiring the use of resources or services for a common purpose. Users may be designated as members of an account and may be allowed to share its allocations. If the special 'ANY' user is added to an account, then any user may use funds allocated to the account. The user members may be designated as active or inactive, and as an administrator for the account. Default account properties include the description, the organization it is part of, and whether or not it is active. An account can be created, queried, modified and deleted. An account's user membership can also be adjusted. By default, a standard user may only query accounts they belong to.

Account queries allow the specification of filter options which narrow down the accounts that will be returned to those having the specified users in them.

## Creating accounts

To create a new account, use the command `gmkaccount`:

```
gmkaccount [-A | -I] [-o organization_name] [-d description] [-X, --extension
property_name=property_value [,property_name=property_value...]] [-u [^ | !]
[+ | -]user_name [, [^ | !] [+ | -]user_name...]] [-createFund=True|False] [--
debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
{[-a] account_name}
```

**i** Additional detail for this command can be found in the man page by issuing `gmkaccount --man` at the command line.

When defining users, the optional caret or exclamation symbol indicates whether the user should be created as an admin (^) or not (!) for the account. The optional plus or minus sign can precede each member to indicate whether the member should be created in the active (+) or inactive (-) state. By default, a user will be created in the active state but not an admin. Multiple users may be passed to the `-u` option in a comma-delimited list. Alternatively, multiple `-u` options may be specified.

**i** If the Fund object's AutoGen property is set to true (see [Fund auto-generation on page 67](#)), a fund will be automatically created for the account (unless overridden with the `--createFund` option). The auto-generated fund will be associated with the new account.

*Example 7-1: Creating an account*

```
$ gmkaccount -d "Chemistry Department" chemistry
Successfully created 1 account
```

*Example 7-2: Creating an account that can be used by any user*

```
$ gmkaccount -d "Common Account" -u ANY common
Successfully created 1 account.
```

*Example 7-3: Creating an account and specifying user members at the same time*

In this example, we make amy the account admin and associate the account with the sciences organization.

```
$ gmkaccount -d "Chemistry Department" -u ^amy,bob,dave chemistry -o sciences
Successfully created 1 account
```

## Querying accounts

To display account information, use the command `glsaccount`:

```
glsaccount [-A | -I] [-o organization_name] [-X, --extension property_
name=property_value [,property_name=property_value...]] [-u user_name] [--
full] [--show attribute_name [,attribute_name...]] [--long] [--wide] [--
raw] [--debug] [--site site_name] [--help] [--man] [--quiet] [---version] [[-
a] account_pattern]
```

**i** The fields which are displayed by default by this command can be customized by setting the **account.show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsaccount --man` at the command line.

*Example 7-4: Listing all info about all accounts*

```
$ glsaccount
Name           Active  Users           Organization    Description
-----
biology        True    amy,^bob        sciences        Biology Department
chemistry      True    ^amy,^dave      sciences        Chemistry Department
film           True    amy,^dave       arts            Film Department
```

*Example 7-5: Displaying the name and user members of an account in long format*

```
$ glsaccount --show Name,Users -long chemistry
Name           Users
-----
chemistry      ^amy
dave
```

*Example 7-6: Listing all account names*

```
$ glsaccount --show Name --quiet
biology
chemistry
film
```

*Example 7-7: Listing all accounts that have dave as a member*

```
$ glsaccount --show Name -u dave --quiet
chemistry
film
```

## Modifying accounts

To modify an account, use the command `gchaccount`:

```
gchaccount [-A | -I] [-o organization] [-d description] [-X, --extension
property_name=property_value [,property_name=property_value...]] [--addUser(s)
[^ | !] [+ | -]user_name [, [^ | !] [+ | -]user_name...] [--addUser(s) [^ |
!] [+ | -]user_name [, [^ | !] [+ | -]user_name...] [--delUser(s) user_name
[,user_name...]] [--modUser(s) [^ | !] [+ | -]user_name [,user_name...]] [--
debug] [--site site_man] [--help] [--man] [--quiet] [--verbose] [--version]
{[-a] account_name}
```

**i** Additional detail for this command can be found in the man page by issuing `gchaccount --man` at the command line.

User members may be added, removed or modified in an account. When adding user members to an account, the optional caret or exclamation symbol indicates whether the user should be created as an admin (^) or not (!) for the account. The optional plus or minus signs can precede each member to indicate whether the member should be created in the active (+) or inactive (-) state. When modifying user members of an account, the caret symbol or exclamation symbol indicates the user should be changed to become an admin (^) or not (!) for the account. The plus or minus signs indicate whether the user should be changed to become active (+) or inactive (-). If an active or admin modifier is not specified, that aspect of the user member will remain unchanged. If the `user.firstaccountdefault` server parameter is set to true, the first account that a user is added to will additionally become the default account for that user.

*Example 7-8: Deactivating an account*

```
$ gchaccount -I chemistry
Successfully modified 1 account
```

*Example 7-9: Adding users as members of an account*

```
$ gchaccount --add-users jsmith,barney chemistry
Successfully added 2 users
```

*Example 7-10: Deactivating a user in an account*

```
$ gchaccount --mod-user -dave chemistry
Successfully modified 1 user
```

## Deleting accounts

To delete an account, use the command `grmaccount`:

```
grmaccount [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose]
[--version] {[-a] account_name}
```

**i** Additional detail for this command can be found in the man page by issuing `grmaccount --man` at the command line.

*Example 7-11: Deleting an account*

```
$ grmaccount chemistry
Successfully deleted 1 account
```

## Account auto-generation

It is possible to have accounts be created automatically when first encountered in a usage function (charge, reserve or quote). It is also possible for accounts to be automatically created when initially added as a member of another object. In order for account auto-generation to occur, the **AutoGen** property for the Account object must be set to `True`. This is the default. For account auto-generation to occur when initially encountered in a usage function, the **Values** property of the account attribute of the UsageRecord object must be set to `@Account`. Additionally, for account auto-generation to occur when an account is added as a member of another object (such as the Organization object) via an association table (e.g. OrganizationAccount), the **Values** property for the account attribute of the Association (e.g. Name) must be set to `@Account`, indicating that that value should be constrained to be a valid instance of the Account object. The auto-creation of accounts can be completely disabled by setting the **AutoGen** property for the Account object to `False`.

*Example 7-12: Enable auto-generation of accounts when initially seen in a charge*

```
$ goldsh Attribute Modify Object==UsageRecord Name==Account Values=@Account
Successfully modified 1 attribute
```

*Example 7-13: Disable all auto-generation of accounts*

```
$ goldsh Object Modify Name==Account AutoGen=False
Successfully modified 1 object
```

See [Object auto-generation on page 133](#) for more information about the auto-generation of objects.

## Default account

It is possible to set a global default account to which usage would be ascribed in quotes, liens, or charges where no account is specified. This can be accomplished by setting the **DefaultValue** property for the **Account** object to the desired account name.

A per-user default account can be established by setting the **DefaultAccount** property for the user. If the **user.firstaccountdefault** server parameter is set to true, the first account that a user is added to will automatically become the default account for that user. Otherwise, one can use the `gchuser` command to set the default account for the user.

It is also possible to set a custom account default for a specific object, which will result in usage being ascribed to the specified account when the object is attributed to the usage. This is done by creating a default usage override modifier. For example, to specify a default account of testing for the beta organization, you might first create an attribute called **DefaultAccount** for the **Organization** Object with the **Values** property of `@?=Account`. Then you would populate the new **DefaultAccount** property for the beta organization with the value of testing. See [Customizing objects on page 131](#) for more information on default and other usage override modifiers.

*Example 7-14: Assign a global default account*

```
$ goldsh Object Modify Name==Account DefaultValue=common  
Successfully modified 1 object
```





# Chapter 8: Managing organization

An organization is a virtual organization in which accounts are grouped. An account may only belong to a single organization while an organization may have multiple accounts. For example, an account may represent a project or cost-center while an organization may represent an institutional department or business division. The purpose of defining organizations is to support the ability to produce reporting for higher-order organizational entities beyond the individual account. Default organization properties include a name and a description. An organization can be created, queried, modified, and deleted.

## Creating organizations

To create a new organization, use the command `gmkorg`:

```
gmkorg [-d description] [-X, --extension property_name=property_value  
[,property_name=property_value...]] [--debug] [--site site_man] [--help] [--  
man] [--quiet] [--verbose] [--version] {[-o] organization_name}
```

**i** Additional detail for this command can be found in the man page by issuing `gmkorg --man` at the command line.

*Example 8-1: Creating an organization*

```
$ gmkorg -d "Sciences Department" sciences  
Successfully created 1 organization
```

## Querying organizations

To display organization information, use the command `glsorg`:

```
glsorg [-X, --extension property_name=property_value[,property_name=property_  
value...]] [--full] [--show attribute_name[,attribute_name...]] [--raw] [--  
debug] [--site site_man] [--help] [--man] [--quiet] [--version] [[-o]  
organization_pattern]
```

**i** The fields which are displayed by default by this command can be customized by setting the **organization.show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsorg --man` at the command line.

*Example 8-2: Listing all organization names*

```
$ glsorg --show Name -q
+ arts
+ sciences
```

## Modifying organizations

To modify an organization, use the command `gchorg`:

```
gchorg [-d description] [-X, --extension property_name=property_value
[,property_name=property_value...]] [--site site_man] [--debug] [--help] [--
man] [--quiet] [--verbose] [--version] {[-o] organization_name}
```

**i** Additional detail for this command can be found in the man page by issuing `gchorg --man` at the command line.

*Example 8-3: Changing an organization's description*

```
$ gchorg -d "Art College" art
Successfully modified 1 organization
```

## Deleting organizations

To delete an organization, use the command `grmorg`:

```
grmorg [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--
version] {[-o] organization_name}
```

**i** Additional detail for this command can be found in the man page by issuing `grmorg --man` at the command line.

*Example 8-4: Deleting an organization*

```
$ grmorg arts
Successfully deleted 1 organization
```

## Organization auto-generation

It is possible to have organizations be created automatically when initially added as a member of another object. In order for organization auto-generation to occur, the **AutoGen** property for the Organization object must be set to `True`. This is the default. For organization auto-generation to occur when initially encountered in a usage function, the `Values` property of the organization attribute of the UsageRecord object must be set to `@Organization`. Additionally, for organization auto-generation to occur when an organization is added as a member of another object (such as a hypothetical Site object)

via an association table (e.g. SiteOrganization), the **Values** property for the organization attribute of the Association (e.g. Name) must be set to @Organization, indicating that that value should be constrained to be a valid instance of the Organization object. The auto-creation of organizations can be completely disabled by setting the **AutoGen** property for the Organization object to False.

*Example 8-5: Enable auto-generation of organizations when initially seen in a charge*

```
$ goldsh Attribute Modify Object==UsageRecord Name==Organization Values=@Organization
Successfully modified 1 attribute
```

*Example 8-6: Disable all auto-generation of organizations*

```
$ goldsh Object Modify Name==Organization AutoGen=False
Successfully modified 1 object
```

See [Object auto-generation on page 133](#) for more information about the auto-generation of objects.

## Default organization

It is possible to set a global default organization to which usage would be ascribed in quotes, liens, or charges where no organization is specified. This can be accomplished by setting the **DefaultValue** property for the **Organization** object to the desired organization name.

It is also possible to set an organization default for a specific object, which will result in usage being ascribed to the specified organization when the object is attributed to the usage. This is done by creating a default usage override modifier. For example, to specify that retail be the default organization for usage associated with the user amy, you might first create an attribute called **DefaultOrganization** for the User Object with the **Values** property of @?=Organization. Then you would populate the new **DefaultOrganization** property for the amy user with the value of retail. See the chapter on [Customizing objects on page 131](#) for more information on default and other usage override modifiers.

*Example 8-7: Assign a global default organization*

```
$ goldsh Object Modify Name==Organization DefaultValue=whitecloud
Successfully modified 1 object
```



# Chapter 9: Managing funds

A fund is a container for a time-bounded reference currency called credits for which the usage is restricted by constraints that define how the credits must be used. Much like with a bank, a fund is a repository for these resource or service credits which are added through deposits and debited through withdrawals and charges. Each fund has a set of constraints designating which entities (such as Users, Accounts, Machines, Classes, Organizations, etc.) may access the encapsulated credits or for which aspects of usage the funds are intended (QualityOfService, GeographicalArea, Feature, etc.). Fund constraints may also be negated with an exclamation point leading the constraint value.

When credits are deposited into a fund, they are associated with a time period within which they are valid. These time-bounded pools of credits are known as allocations. (An allocation is a pool of billable units associated with a fund for use during a particular time period.) By using multiple allocations that expire in regular intervals it is possible to implement a use-it-or-lose-it policy and establish an allocation cycle. An allocation can have an infinite balance or an infinite credit limit. See the [Managing allocations on page 71](#) chapter for more information on credit limits and infinite allocations.

Funds may be nested. Hierarchically nested funds may be useful for the delegation of management roles and responsibilities. Deposit shares may be established that assist to automate a trickle-down effect for credits deposited at higher level funds. Additionally, an optional overflow feature allows charges against lower level funds to trickle up the hierarchy.

Funds may have a name which is not necessarily unique for the fund. Funds may also have a priority which will influence the order of fund selection when charging. Operations include creating, querying, modifying and deleting funds as well as making deposits, withdrawals, transfers, and balance queries. A fund (or all funds) may also be reset which means that all of the credits and deposited tallies in all active allocations associated with the fund are set to zero. By default, a standard user may only query and view the balance for funds which pertain to them.

Some fund operations (Query, Balance, Deposit, Withdraw, and Refund) allow the specification of filter options which narrow down the funds that will be acted on for that operation. There are two fund filter types that can be employed: Exclusive and NonExclusive. If an exclusive filter type is used, the query will return only the funds for which the specified filters meet all constraints for usage. Another way to think of an exclusive filter is to ask if usage were to be posted given only the specified filter options as ACLs, which funds would be eligible for charging? For example, `Fund Query FilterType:=Exclusive Filter:=User=scottmo` would not return a fund with the sole constraint `Machine=blue` because `Machine=blue` was not included in the filters. Not only must the filters be a non-conflicting superset of the fund constraints, but all constraint dependencies must also be satisfied (for example, an appropriate user may need to be specified with the account). If a non-exclusive filter type is used, the query will return all funds for which the filters do not specifically exclude the constraints. The query assumes that if constraints are not specified within the filters, they can be assumed as a wildcard and will return all funds that are not specifically excluded by the filter. For example, `Fund Query FilterType:=NonExclusive Filter:=User=scottmo` would return a fund whose only constraint was `Machine=blue` (because it does not conflict) but would not return a fund with the constraint `User=bob` (because it does conflict).

## Creating funds

`gmkgfund` is used to create a new fund. You can specify a fund name, a description, and any number of fund constraints. If a name is not specified and constraints are specified, a name will be automatically generated based on the constraints. A new unique id is automatically generated for the fund.

```
gmkgfund [-n fund_name] [-d description] [-X, --extension property_
name=property_value [,property_name=property_value...]] [-c class_name] [-g
group_name] [-m machine_name] [-o organization_name] [-a account_name] [-u
user_name] [, [-C, --constraint constraint_name=[!]constraint_value
[,constraint_name=[!] [constraint_value...]] [--parent parent_fund_id] [--
debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `gmkgfund --man` at the command line.

**i** It is possible to have funds be created automatically when accounts are created by setting the Fund object's `AutoGen` property to `true` (see [Fund auto-generation](#) on page 67). The auto-generated fund will be associated with the new account.

*Example 9-1: Creating a fund valid for the `chemistry` account*

```
$ gmkgfund -a chemistry -n "Chemistry"
Successfully created 1 fund with id 7 and 1 constraint
```

*Example 9-2: Creating a wide-open fund that can be used by anyone for anything*

```
$ gmkgfund -n "Windfall"
Successfully created 1 fund with id 8
```

*Example 9-3: Creating a fund valid toward all `biology` account members except for `dave` and just the machine colony*

```
$ gmkgfund -C Account=biology,User=!dave,Machine=colony -n "Biology on Colony not for
Dave"
Successfully created 1 fund with id 9 and 3 constraints
```

## Querying funds

To display fund information, use the command `glsfund`:

```
glsfund [-A | -I] [-n fund_name] [-X, --extension property_name=property_value
[,property_name=property_value...]] [-u user_name] [-g group_name] [-a
account_name] [-o organization_name] [-c class_name] [-m machine_name] [-f, --
filter filter_name=filter_value[,filter_name=filter_value...]] [-F, --filter-
type Exclusive|NonExclusive] [--full] [--show attribute_name [,attribute_
name...]]... [--long] [--wide] [--raw] [-h, --hours] [--debug] [--site site_
man] [--help] [--man] [--quiet] [--version] [[-f] fund_id]
```

**i** The fields which are displayed by default by this command can be customized by setting the **fund.show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsfund --man` at the command line.

*Example 9-4: Listing all info about all funds with multi-valued fields displayed in a multi-line format*

```
$ glsfund --long
Id  Name                Amount      Constraints      Description
-----
1   Biology             25000000    Account=biology
2   chemistry for amy   34802392    User=amy
                        Account=chemistry
3   chemistry not amy   5000000     User=!amy
                        Account=chemistry
4   film on colony      0           Account=film
                        Machine=colony
```

*Example 9-5: Wide listing all info about all funds useable by amy*

```
$ glsfund -u amy
Id  Name                Amount      Constraints      Description
-----
1   biology             25000000    Account=biology
2   chemistry for amy   24802392    Account=chemistry,User=amy
4   film on colony      0           Machine=colony,Account=dance
```

## Modifying funds

To modify a fund, use the command `gchfund`:

```
gchfund [-n fund_name] [--priority fund_priority] [-d description] [-X, --
extension property_name=property_value [,property_name=property_value...]] [-
add-constraint(s) constraint_name= [!]constraint_value[,constraint_name= [!]
constraint_value...]] [--del-constraint(s) constraint_name[,constraint_
name...]] [--parent parent_fund_id] | --reset [--all]} [-u user_name] [-g
group_name] [-a account_name] [-o organization_name] [-c class_name] [-m
machine_name] [--filter filter_name=filter_value[,filter_name=filter_
value...]] [--filter-type Exclusive|NonExclusive] [--debug] [--site site_
name] [--help] [--man] [--quiet] [--verbose] [--version] ([-f] fund_id)
```

**i** Additional detail for this command can be found in the man page by issuing `gchfund --man` at the command line.

*Example 9-6: Adding a constraint to a fund so that it can only be used by the acme organization*

```
$ gchfund --add-constraint Organization=acme 7
Successfully created 1 constraint
```

*Example 9-7: Resetting a fund*

```
$ gchfund --reset 1
Successfully reset 4512 credits from 1 allocation
```

## Making deposits

`gdeposit` is used to deposit time-bounded resource credits into a fund resulting in the creation or increase of an allocation. (See [Managing allocations on page 71](#) for information about managing allocations). The start time will default to `-infinity` and the end time will default to `infinity` if not specified. Filter options can be specified to help select a unique fund for the deposit. If multiple funds are matched by the filters, the matching funds will be listed and you will be prompted to respecify the deposit with one of the fund ids. If an allocation for the deposit fund is found having the start and end times for the deposit, the amount of the allocation will be increased by the deposit amount. Otherwise, a new allocation will be created for the fund with the amount of the deposit. If no funds match your criteria, if fund auto-generation is enabled, a fund will be created and the deposit made into it. Otherwise, the deposit will fail (the fund will need to be first created using `gmksfund`).

Deposits may be used to extend the debit ceiling by specifying an amount for the deposit (with the `-z` option) or extend the credit floor by specifying a credit limit for the deposit (with the `-L` option) or a combination of both options may be used. Additionally, `Infinity` may be used for either of these option values when Moab Accounting Manager is coupled with a database that supports IEEE Standard 754 for Floating-Point Arithmetic (e.g. PostgreSQL).

```
gdeposit [-L credit_limit] [-s start_time] [-e end_time] [-d description] [-f
fund_id] [-i allocation_id] [-u user_name] [-g group_name] [-a account_name]
[-o organization_name] [-c class_name] [-m machine_name] [--filter filter_
name=filter_value[,filter_name=filter_value...]] [--filterType Exclusive|
(NonExclusive)] [--create-fund True|False] [--reset] [-h, --hours] [--debug]
[--site site name] [--help] [--man] [--quiet] [--verbose] [--version] [[-z
amount]
```



Additional detail for this command can be found in the man page by issuing `gdeposit --man` at the command line.

### Example 9-8: Making a deposit into *fund 1*

```
$ gdeposit -z 360000000 -f 1
Successfully deposited 360000000 credits into fund 1
```

### Example 9-9: Making a deposit "into" an account

If an account has a single fund then a deposit can be made against the account.

```
$ gdeposit -z 360000000 -a chemistry
Successfully deposited 360000000 credits into fund 2
```

### Example 9-10: Creating a credit allocation

```
$ gdeposit -L 1000000000 -f 3
Successfully deposited 0 credits into fund 3
```

### Example 9-11: Making a reset deposit

Reset the active allocations in the fund before making the deposit.



```
$ gdeposit -f 4 -z 36000000 --reset
Successfully deposited 36000000 credits into fund 4
Successfully reset 12767021 credits from 1 allocation
```

#### Example 9-12: Creating an infinite allocation

```
$ gdeposit -z Infinity -f 5
Successfully deposited inf credits into fund 5
```

**i** The use of infinite allocations requires the use of a database that supports the IEEE Standard 754 for Floating-Point Arithmetic (e.g. PostgreSQL).

#### Example 9-13: Making a series of quarterly allocations

```
$ gdeposit -s 2012-01-01 -e 2012-04-01 -z 25000000 -a biology
Successfully deposited 25000000 credits into fund 6

$ gdeposit -s 2012-04-01 -e 2012-07-01 -z 25000000 -a biology
Successfully deposited 25000000 credits into fund 6

$ gdeposit -s 2012-07-01 -e 2012-10-01 -z 25000000 -a biology
Successfully deposited 25000000 credits into fund 6

$ gdeposit -s 2012-10-01 -e 2013-01-01 -z 25000000 -a biology
Successfully deposited 25000000 credits into fund 6
```

## Querying the balance

To display balance information, use the command `gbalance`:

```
gbalance [-u user_name] [-g group_name] [-a account_name] [-o organization_name] [-c class_name] [-m machine_name] [--filter filter_name=filter_value [,filter_name=filter_value...]] [--filterType Exclusive|NonExclusive] [--total] [--available] [--ignore-liens] [--ignore-ancestors] [--full] [--show attribute_name [,attribute_name...]] [--long] [--wide] [--raw] [-h, --hours] [--site site_name] [--debug] [--help] [--man] [--quiet] [--version]
```

**i** The fields which are displayed by default by the `gbalance` command can be customized by setting the `balance.show` configuration parameter in `gold.conf`.

**i** Additional detail for this command can be found in the man page by issuing `gbalance --man` at the command line.

#### Example 9-14: Querying amy's balance

```
$ gbalance -u amy
Id Name Available Allocated PercentUsed
13 biology 2785.87 5000.00 44.28
2 chemistry 1785.87 3000.00 40.47
```

**Example 9-15: Querying the total balance available to bob for the biology account on a colony cluster**

```
$ gbalance -u bob -m colony -a chemistry --total --available --quiet
2785.87
```

**Example 9-16: List the available balances that amy can charge against along with the constraints on those balances**

```
$ gbalance -u amy --show Balance,Constraints
Balance      Constraints
-----
25000000     Account=biology
34802392     Account=chemistry,User=amy
0            Machine=colony,Account=film
```

## Personal balance

The `mybalance` has been provided as a wrapper script to show users their personal balance. It provides a list of balances for the funds that they can charge to:

```
mybalance [-h, --hours] [--help] [--man]
```

**i** Additional detail for this command can be found in the man page by issuing `mybalance --man` at the command line.

**Example 9-17: List my fund balances**

```
$ mybalance
Balance      Name
-----
25000000     biology
34802302     chemistry for amy
```

**Example 9-18: List my balance in (Processor) hours**

```
$ mybalance -h
Balance      Name
-----
6944.44      biology
9667.33      chemistry for amy
```

## Making withdrawals

A withdrawal can be used to debit a fund without being associated with the usage charge from some item. To issue a withdrawal, use the command `gwithdraw`:

```
gwithdraw [-f fund_id] [-i allocation_id] [-u user-name] [-g group_name] [-a
account_name] [-o organization_name] [-c class_name] [-m machine_name] [--
filter filter_name=filter_value[,filter_name=filter_value...]] [--filter-type
Exclusive|(NonExclusive)] [-d description] [-h, --hours] [--debug] [--site
site_name] [--help] [--man] [--quiet] [--verbose] [--version {[-z] amount}]
```

**i** Additional detail for this command can be found in the man page by issuing `gwithdraw --man` at the command line.

#### Example 9-19: Making a withdrawal

```
$ gwithdraw -z 12800 -f 1 -d "Grid Tax"
Successfully withdrew 12800 credits from fund 1
```

#### Example 9-20: Making a withdrawal "from" an account

If an account has a single fund then a withdrawal can be made against the account.

```
$ gwithdraw -z 12800 -a biology
Successfully withdrew 12800 credits from fund 1
```

If more than one fund exists for the account or filter, you will be asked to be more specific:

```
$ gwithdraw -z 12800 -a chemistry
Multiple funds were matched for the withdrawal.
Please respecify using one of the following fund ids:
2 [chemistry for amy]
3 [chemistry not amy]
```

## Making transfers

To issue a transfer between funds, use the command `gtransfer`. If the allocation id is specified, then only credits associated with the specified allocation will be transferred, otherwise, only active credits will be transferred. Fund transfers preserve the allocation time periods associated with the resource or service credits from the source to the destination funds. Source and destination filters may be used if they result in a single source fund and single destination fund.

```
gtransfer [--from-fund source_fund_id | --from-filter source_filter_name=source_
filter_value[,source_filter_name=source_filter_value...]] -i allocation_id} {-
-to-fund destination_fund_id | --to-filter destination_filter_name=destination_
filter_value[,destination_filter_name=destination_filter_value...]} [-d
description] [-h, --hours] [--debug] [--site site_name] [-?, --help] [--man]
[--quiet] [--verbose] {[-z] amount}
```

**i** Additional detail for this command can be found in the man page by issuing `gtransfer --man` at the command line.

#### Example 9-21: Transferring credits between two funds

```
$ gtransfer --from-fund 1 --to-fund 2 10000
Successfully transferred 10000 credits from fund 1 to fund 2
```

#### Example 9-22: Transferring credits between two single-fund accounts

```
$ gtransfer --from-filter Account=biology --to-filter Account=chemistry 10000
Successfully transferred 10000 credits from fund 1 to fund 2
```

## Obtaining a fund statement

To generate a fund statement, use the command `gstatement`. For a specified time frame it displays the beginning and ending balances as well as the total credits and debits to the fund over that period. This is followed by an itemized report of the debits and credits. Summaries of the debits and credits will be displayed instead of the itemized report if the `--summarize` option is specified. If filter options are specified instead of a fund, then the statement will consist of information merged from all funds valid toward the specified entities.

```
gstatement [[-f] fund_id] [-n fund_name] [-u user_name] [-g group_name] [-a
account_name] [-o organization_name] [-c class_name] [-m machine_name] [--
filter filter_name=filter_value[,filter_name=filter_value...]] [--filter-type
Exclusive|(NonExclusive)] [-s start_time] [-e end_time] [--summarize] [-h, --
hours] [--debug] [--site site_man] [--help] [--man] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `gstatement --man` at the command line.

*Example 9-23: Generating a fund statement for all chemistry funds for the fourth quarter of 2011*

```
$ gstatement -a chemistry -s 2011-10-01 -e 2012-01-01
##### End of Report #####
$ gstatement -a chemistry -s 2011-10-01 -e 2012-01-01 --summarize
#####
#
# Includes fund 3 (chemistry not amy)
# Includes fund 2 (chemistry for amy)
# Generated on Mon Feb 7 18:44:23 2012.
# Reporting fund activity from 2011-10-01 to 2012-01-01.
#
#####
Beginning Balance:          0
-----
Total Credits:              90122212
Total Debits:              -5308668
-----
Ending Balance:            84813544
##### Credit Summary #####
Object      Action      Amount
-----
Fund        Deposit    90100000
UsageRecord Refund      22212
##### Debit Summary #####
Object      Action      Account  User   Machine  Amount  Count
-----
UsageRecord Charge    chemistry amy    colony   -19744  239
##### End of Report #####
```

**i** The fields which are used as default discriminators in the detail section of the `gstatement` command (which are by default Account, User, and Machine) can be customized by setting the `statement.show` configuration parameter in `gold.conf`.

## Deleting funds

To delete a fund, use the command `grmfund`:

```
grmfund [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version] {[-f] fund_id}
```

**i** Additional detail for this command can be found in the man page by issuing `grmfund --man` at the command line.

*Example 9-24: Deleting a fund*

```
$ grmfund 2
Successfully deleted 1 fund
```

## Fund auto-generation

It is possible to enable the auto-generation of funds by setting the **AutoGen** property of the Fund object to `True`. When creating a new account, if fund auto-generation is enabled, a fund will automatically be created for the account (unless overridden with the `--create-fund` option). The fund will be usable only by usage attributed to the new account. Additionally, if fund auto-generation is set, a deposit that does not match an existing fund will automatically generate a fund using the filters as constraint options. Objects associated with the constraint that have **AutoGen** set to `True` will be auto-generated as well (unless overridden with the `--create-fund` option).

*Example 9-25: Enable auto-generation of funds*

```
$ goldsh Object Modify Name==Fund AutoGen=True
Successfully modified 1 object
```

## Hierarchical funds

A hierarchy can be established between funds. When creating a fund or by modifying it later, one can specify a parent fund id via the `--parent` option to establish the object fund as a child of the specified parent fund. A fund may have multiple children funds but only a single parent fund.

*Example 9-26: Establishing a child relationship with another fund*

```
$ gchfund --parent 3 -f 6
Successfully added 1 parent
```

Deposit shares may be established between the parent fund and its children that assist to automate a trickle-down effect for funds deposited at higher level funds (**DepositShare** is an attribute of the FundFund association object). Deposit shares are integers and are treated as a percentage of each deposit and the sum of the deposit shares for an fund's children may not exceed 100. If the deposit shares for the children of a fund totals less than 100, the difference is taken to be the share of the deposit that

will be allocated to the parent. When a deposit is made into a parent fund, for each child fund that has a non-zero deposit share a recursive deposit amounting to the designated percentage of the parent deposit is issued to that child. After the share amounts have been deposited to each of the child funds, the remaining percentage of the deposit is allocated to the parent fund. This effect is recursive with each child. If a start time and/or end time are specified in the original deposit, these time frames will be recursively applied to all descendant deposits. You have to use the goldsh interactive control program to manage deposit shares. For the FundFund association object, the Fund is the parent and the Id is the child.

*Example 9-27: Establishing a 10% deposit share between a parent and a child fund*

```
$ goldsh FundFund Modify Fund==3 Id==6 DepositShare=10
Fund      Id      DepositShare  Overflow
-----
3         6      10           False
Successfully modified 1 funFund
```

An overflow policy may be established between the parent fund and its children to enable a trickle-up effect for charges, liens, and quotes from the lower level funds (Overflow is an attribute of the FundFund association object). The Overflow attribute is a boolean value (True or False). If the overflow value between a child and its parent is set to True, any charges, liens, or quotes issued against the child fund that cannot be satisfied by the balance in the child fund, will recursively issue the unsatisfied portion of the charge, lien, or quote against the parent fund. If the charge, lien, or quote cannot be satisfied by the ancestors, no charges, liens, or quotes will result against any of funds. The balance in the descendant funds will be depleted before ancestor funds. This effect is recursive with each parent. If a parent fund is linked with overflow to a child fund and a charge, lien, or quote overflows to the parent fund, the constraints of the parent fund will not be checked against the properties of the item. One must use the goldsh control program to manage the overflow policy. For the FundFund association object, the Fund is the parent and the Id is the child.

*Example 9-28: Enabling overflow between a parent and a child fund*

```
$ goldsh FundFund Modify Fund==3 Id==6 Overflow=True
Fund      Id      DepositShare  Overflow
-----
3         6      10           True
Successfully modified 1 fundFund
```

## Fund priority

By default, when an item can charge to multiple funds, funds with more constraints are chosen over funds with fewer constraints. For example, if the user amy is charging against the chemistry account for usage of an item and there are two viable funds, one with a single constraint (e.g. Account=chemistry) and another with two constraints (e.g. Account=chemistry and User=amy), credits will be taken from the more specific fund (with 2 constraints) before they are taken from the more general fund (with 1 constraint). To override this behavior, it is possible to give a priority to a fund. The priority factor of a fund has higher precedence than the specificity (constraint count) of the fund. Thus, all else being equal, if a fund with a lower number of constraints is given a higher priority than a fund with a higher number

of constraints, the higher priority fund will be depleted first. Other factors, such as the end time of the allocation or whether there is an existing lien for the item against a fund, have a higher precedence than the specificity of the fund. If you want the allocations in a particular fund to be chosen before allocations that expire sooner or that have a lien, you may need to specify fund priorities that are in the millions (see [Allocation precedence on page 74](#) for a discussion of the manner of sorting allocations for charging).

*Example 9-29: Setting a fund priority*

```
$ gchfund -f 3 --priority 1  
Successfully modified 1 fund
```





# Chapter 10: Managing allocations

An allocation is a time-bounded pool of resource or service credits associated with a fund. A fund may have multiple allocations, each for use during a different time period.

An allocation has a start time and an end time that defines the time period during which the allocation may be used. By default an allocation is created with an unbounded time period (`-Infinity` to `Infinity`). An active flag is automatically updated to `True` if the allocation is within its valid timeframe or `False` if it is not. An allocation that becomes active because the current time is greater than its start time undergoes an activation which normally registers as a credit to the fund. An allocation that becomes inactive because the current time is greater than its end time undergoes a deactivation which normally registers as a debit to the fund.

An allocation may have a credit limit representing the amount by which it can go negative. Thus, by having a positive balance in the **Amount** field, the fund is like a debit account, implementing a pay-first use-later model. By establishing a credit limit instead of depositing an initial balance, the fund will be like a credit account, implementing a use-first pay-later model. These strategies can be combined by depositing some amount of funds coupled with a credit limit, implementing a form of overdraft protection where the funds will be used down to the negative of the credit limit.

An allocation also has a **Deposited** attribute that is incremented with each crediting deposit. When a deposit is made, if a matching allocation already exists with the appropriate time period, the existing allocation is modified. Otherwise, a new allocation is created. If the deposit results in an increased balance for the fund, the **Deposited** field is incremented by the same amount. Thus, the **Deposited** field seeks to track the total amount deposited to the allocation over its lifetime. An allocation can be reset, which causes both the **Amount** and the **Deposited** fields to be reset to zero.

It is possible for the allocation **Amount** or **Cred**

Operations include querying, modifying, resetting and deleting allocations. Allocations can be created by a fund deposit, creating a fund with allocation auto-generation enabled, refunding a usage record, or a transfer between funds. Allocations may also be indirectly modified via charges, withdrawals, transfers, or refunds. By default, a standard user may only query allocations which pertain to them.

Allocation queries allow the specification of filter options which filter the allocations to those with funds meeting the specified fund constraints. There are two allocation filter types that can be employed: `Exclusive` and `NonExclusive`. If an exclusive filter type is used, the query will return only allocations relating to funds for which the specified filters meet all constraints. For example, `Allocation Query FilterType:=Exclusive Filter:=User=scottmo` would not return an allocation for a fund with the sole constraint `Machine=blue`. If a non-exclusive filter type is used, the query will return all allocations relating to funds for which the filters do not specifically exclude the constraints. The query assumes that if constraints are not specified within the filters, they can be assumed as a wildcard and will return all allocations involving funds that are not specifically excluded by the filter. For example, `Allocation Query FilterType:=NonExclusive Filter:=User=scottmo` would return an allocation with a fund whose only constraint was `Machine=blue` but would not return an allocation with a fund with the constraint `User=bob`.

## Creating allocations

Allocations are normally created by making fund deposits via the `gdeposit` command (See [Making deposits on page 62](#)).

## Querying allocations

To display allocation information, use the command `glsalloc`:

```
glsalloc [-A | -I] [-f fund_id] [-X, --extension property_name=property_value
[,property_name=property_value...]] [-u user_name] [-g group_name] [-a
account_name] [-o organization_name] [-c class_name] [-m machine_name] [--
filter filter_name=filter_value[,filter_name=filter_value...]] [--filter-type
Exclusive|(NonExclusive)] [--include-ancestors] [--full] [-show attribute_name
[,attribute_name...]] [--long] [--wide] [--raw] [-h, --hours] [--debug] [--
site site_man] [--help] [--man] [--quiet] [--version] [[-i] allocation_id]
```

**i** The fields which are displayed by default by this command can be customized by setting the `allocation.show` configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsalloc --man` at the command line.

*Example 10-1: Listing allocations for fund 1*

```
$ glsalloc -f 1
Id Fund Active StartTime EndTime Amount CreditLimit Deposited Des
cription
-----
2 1 False 2012-04-01 2012-07-01 25000000 0 250000
3 1 False 2012-07-01 2012-10-01 25000000 0 250000
4 1 False 2012-10-01 2013-01-01 25000000 0 250000
1 1 True 2012-01-01 2012-04-01 24974400 0 250000
```

## Modifying allocations

To modify an allocation, use the command `gchalloc`:

```
gchalloc [-s start_time] [-e end_time] [-L credit_limit] [-D deposited] [-d
description] [-X, --extension property_name=property_value[,property_
name=property_value...]] [-h, --hours] [--debug] [--site site_name] [--help]
[--man] [--quiet] [--verbose] {[ -i] allocation_id}
```

**i** Additional detail for this command can be found in the man page by issuing `gchalloc --man` at the command line.

*Example 10-2: Changing the end time for an allocation*

```
$ gchalloc -e "2013-01-01" 4
Successfully modified 1 allocation
```

*Example 10-3: Changing the credit limit for an allocation*

```
$ gchalloc -L 5000000000000 -i 2
Successfully modified 1 allocation
```

*Example 10-4: Resetting an allocation*

```
$ gchalloc -e --reset 2
Successfully reset 25000000 credits from 1 allocation
```

## Delete allocations

To delete an allocation, use the command `grmalloc`:

```
grmalloc [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version] {-I | [-i] allocation_id}
```



Additional detail for this command can be found in the man page by issuing `grmalloc --man` at the command line.

*Example 10-5: Deleting an allocation*

```
$ grmalloc 4
Successfully deleted 1 allocation
```

*Example 10-6: Purging inactive allocations*

```
$ grmalloc -I
Successfully deleted 2 allocations
```

## Allocation auto-generation

It is possible to enable the auto-generation of allocations by setting the **AutoGen** property of the Allocation object to `True`. When creating a new fund, if allocation auto-generation is enabled, an allocation will automatically be created for the fund via a deposit. The deposit will use the default amount and default credit limit (defined in the **DefaultValue** property of the Allocation Amount and Allocation CreditLimit attributes). The default action for allocation auto-generation is to create an allocation with an infinite credit limit.

*Example 10-7: Enable auto-generation of allocations*

```
$ goldsh Object Modify Name==Allocation AutoGen=True
Successfully modify 1 object
```

## Allocation precedence

When issuing a charge (or a lien or quote) for the usage of a resource or service, the feasible allocations are sorted according to a weight given to them for that transaction. The weight for each allocation is calculated as follows: If the instance has a current lien against one or more allocations, these allocations are given a value of  $10000000 + \text{int}((2147483647 - \text{<end\_epoch\_time>}) / 86400)$ . Thus, these reserved allocations will generally have the highest precedence (subject to large fund priorities), with those that expire sooner being used first. For the remaining non-nested funds, allocations will be given a value of  $100 * \text{int}((2147483647 - \text{<end\_epoch\_time>}) / 86400) + 10 * \text{<fund\_priority>} + \text{<constraint\_count>}$ . Thus, sooner expiring allocations will be used before later expiring allocations, fund priority will be the next highest factor (assuming small priority values of 1-10), followed by the number of constraints on the fund (more specific funds will be used before more general funds). Of course, since priority is configurable, a sufficiently large priority (in the millions) can be used to override the precedence of earlier expiring allocations or even allocations with liens. Lastly, nested funds that become feasible because of overflow to ancestor funds have a negative weighting and are used last, with the earliest expiring allocations being used before later expiring allocations and closer level ancestors being depleted before ancestor funds that are at more distant levels. These allocations are given a weight of  $\text{<distance * 100000>} - \text{<end\_epoch\_time>}$ . After all feasible allocations are sorted according to the above rules, the charge (or lien or quote) will be applied against the allocations one by one in sorted order (highest value first) until the request is fulfilled, or until it fails due to insufficient funds. If a transaction is not able to be satisfied in whole, the entire transaction will fail and no partial debits will be applied.

# Chapter 11: Managing liens

A lien is a hold placed against an allocation. Before usage of a resource or service begins, a lien is made against one or more allocations within the requesting user's applicable fund(s). Subsequent usage requests will also post liens while the available balance (active allocations minus liens) allows. When the usage ends, the lien is removed and the actual charge is made to the allocation(s). This procedure ensures that usage will only be permitted so long as the requestors have sufficient funds.

Associated with a lien is the instance name (name of the item being used such as the job id), the usage record (which contains the item details), a start time and end time for the lien and a description. The lien will automatically expire and no longer count against the user's balance after the end time passes. Each lien will be associated with held amounts from one or more allocations. Operations include creating, querying, modifying, and deleting liens. By default, a standard user may only query liens attributed to them.

Lien queries allow the specification of filter options which narrow down the liens that will be returned. There are two lien filter types that can be employed: **AttributedTo** and **ImpingesUpon**. If **ImpingesUpon** is used, the query will return all liens associated with funds satisfying the filters. For example, `Lien Query FilterType:=ImpingesUpon Filter:=User=scottmo` will return all liens impinging on Funds usable by scottmo. If **AttributedTo** is used, the query will return all liens associated with usage records satisfying the filters. For example, `Lien Query FilterType:=AttributedTo Filter:=User=scottmo` will return all liens for resources or services allocated to scottmo.

When a lien is created via the UsageRecord Reserve action (such as via `greserve`), if another lien exists with the same instance name, the default behavior is to leave the old lien in place (and create the new one along side it). This behavior assumes that the other lien is probably a separate lien created by a resource or service manager that reuses instance ids. However, alternate behaviors may be specified via the mutually exclusive **Modify** or **Replace** options. If the **Replace** option is specified, any pre-existing liens with matching instance names will first be deleted, thereby ensuring only one lien per instance name at a time. If the **Modify** option is specified, a pre-existing lien with matching instance name will be modified to have the new properties (but keeping the same lien id), and can be used to extend a lien. This might be used with incremental charging to dynamically stretch liens along a little at a time as needed. (See [Making a usage lien on page 86](#) for a description of the action using these options).

Liens may be granted a grace period (in seconds), which is defined as the difference between the validity period of the lien (end time minus start time) and the expected duration of the usage. The purpose of a grace period is to account for the fact that we may not know precisely when the usage will begin and the lien needs to be remain in force during the lifetime of the usage. One can apply a desired grace period for a lien by setting the end time longer than the specified duration. Alternatively, a grace duration option can be specified with the duration when creating a lien via `greserve` as a helper to computing a relatively adjusted end time.

## Creating liens

Liens are normally created by the resource management system with the `greserve` command (See [Making a usage lien on page 86](#)).

However, it is also possible to create a manual lien against specified allocations using the `gmklie`n command. A lien object and its allocation associations will be created. Unlike `greserve`, no calculated lien amount will be returned nor will a usage record be created or updated with the lien. Furthermore, `gmklie`n will not perform any checking to ensure that the specified allocations have a sufficient active balance to support the lien.

```
gmklie n [-J instance_name|job_id] [-s start_time] {-e end_time | -t lien_
duration} [-d description] [-X, --extension property_name=property_value
[,property_name=property_value...]] {-A allocation_id<-fund_id=sublien_amount
[,allocation_id<-account_id=sublien_amount...]} [--debug] [--site site_name]
[--help] [--man] [-quiet] [--verbose] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `gmklie n --man` at the command line.

### Example 11-1: Creating a manual lien

```
$ gmklie n -J weekend_run -t 84600 -A "5<-2=3600"
Successfully created 1 lien
```

**!** Use of the `gmklie`n command bypasses the normal mechanisms that prevent more liens from being placed against an allocation than it can support. Use `greserve` instead if you wish to avoid the possibility of oversubscribing the allocations.

## Querying liens

To display lien information, use the command `glslien`:

```
glslien [-A | -I] [-J instance_pattern | job_id_pattern] [-X, --extension
property_name=property_value [,property_name=property_value...]] [-u user_
name] [-g group_name] [-a account_name] [-o organization_name] [-c class_name]
[-m machine_name] [--filter filter_name=filter_value[,filter_name=filter_
value...]] [--filter-type (AttributedTo)|ImpingesUpon] [--full] [--show
attribute_name [,attribute_name...]] [--long] [--wide] [--raw] [-h, --
hours] [--debug] [--site site_name] [--help] [--man] [--quiet] [--version] [[-
l] lien_id]
```

**i** The fields which are displayed by default by this command can be customized by setting the `lien.show` configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glslien --man` at the command line.

*Example 11-2: Listing all info about all liens for amy*

```
$ glslien -u amy
Id Instance      Amount  StartTime                EndTime                UsageRecord  Funds
-----
3  PBS.1234.4     57600  2012-04-06 21:21:48  2012-04-06 22:31:48  7           2
```

*Example 11-3: Listing all info about all liens that impinge against dave's balance*

```
$ glsres -u dave --filter-type ImpingesUpon
Id Instance      Amount  StartTime                EndTime                UsageRecord  Funds
-----
4  batch.12       7600   2012-04-06 15:30:34  2012-04-06 15:41:50  244         3
```

## Modifying liens

To modify a lien, use the command `gchlien`:

```
gchlien [-s start_time] [-e end_time] [-t lien_duration] [-d description] [-X, -
-extension property_name=property_value [,property_name=property_value...]] [-
debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
{[-l] lien_id}
```

**i** Additional detail for this command can be found in the man page by issuing `gchlien --man` at the command line.

*Example 11-4: Changing the expiration time of a lien*

```
$ gchlien -e "2012-06-06 14:43:02" 1
Successfully modified 1 lien
```

## Deleting liens

To delete a lien, use the command `grmlien`:

```
grmlien [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--
version] {-I | -J instance_name | job_id | [-l] lien_id}
```

**i** Additional detail for this command can be found in the man page by issuing `grmlien --man` at the command line.

*Example 11-5: Deleting a lien by instance (or job id)*

```
$ grmlien -J PBS.1234.0
Successfully deleted 1 lien
```

*Example 11-6: Deleting a lien by Lien Id*

```
$ grmlien 1  
Successfully deleted 1 lien
```

*Example 11-7: Purging stale liens*

```
$ grmlien -I  
Successfully deleted 2 liens
```



# Chapter 12: Managing quotes

A quotation provides a way to determine beforehand how much would be charged for a job. When a guaranteed quote is requested, the charge rates applicable to the usage request are saved and a quote id is returned. Charge rates may be specified with the quote or the standard rates may be used in the quote calculation. When the lien and the final charge are issued, the quote id can be referenced to ensure that the saved quote charge rates are used instead of current standard values. A quotation has an expiration time after which it cannot be used. A quotation may also be used to verify that the given job has sufficient funds and meets the policies necessary for the charge to succeed.

Associated with a quote is the id, the instance name (name of the item being used such as the job id), the amount quoted (assuming full use of the quoted resources or services), the usage record (which contains the usage details), a start and end time for the quote, a duration (how long the item is expected to be used), a boolean indicating whether the quote is pinned or unpinned, and a description. Each guaranteed quote will be associated with one or more saved charge rates. Operations include creating, querying, modifying and deleting quotes. By default, a standard user may only query quotes attributed to them.

Quote queries allow the specification of filter options which narrow down the quotes that will be returned. The query will return all quotes associated with usage records satisfying the filters. For example, `Quote Query Filter:=User=scottmo` will return all quotes for resources or services allocated to `scottmo`.

A quote may be pinned (restricted to a particular instance) or unpinned (allowed to be used by any number of different instances). If a quote is pinned and has not been tied to a particular instance when initially created, it will be tied to the first instance that claims it. Once pinned to an instance, it can then be used repeatedly by that same instance until the quote expires, but not by any other instance. If a quote is not pinned, any instances may use the quoted rates while the quote is active.

A quote may be granted a grace period, which is defined as the difference between the validity period of the quote (end time minus start time) and the expected duration of the usage in seconds. The purpose of a grace period is to account for the fact that we may not know precisely when the usage will begin and the quote needs to be valid during the time of completion of the usage in order for the guaranteed charge rates to be applied. One can apply a desired grace period for a quote by setting the end time longer than the specified duration. Alternatively, a grace duration option can be specified with the duration when creating a quote via `gquote` as a helper to computing a relatively adjusted end time.

A distinction may be made between quotes and quote templates, both of which use the Quote object. A quote will always return a cost estimate and will be associated with a specific usage record. A quote template provides a way to bundle together a package of special charge rates that can be applied to quotes, liens, and charges. Quote templates use the same Quote object as regular quotes but they are not associated with a usage record and do not generate a quote amount.

In calculating a price, a quote will use (in order of lower to higher precedence) the standard charge rates, the charge rates from a specified quote template, the specified override charge rates, or an externally specified charge amount. In saving guaranteed charge rates, the standard charge rates

pertaining to the specified usage record properties will be used unless overridden by a specified quote template or specified charge rates.

There are several key purposes for using quotes and quote templates. First, a quote may be requested to discover the cost of using a resource or service. If this is your sole purpose, then you may want to use the `gquote` command with the `--costOnly` option. Second, a quote can be used to check whether the requestor has sufficient access and funds to use the requested resource. This may be accomplished by invoking the `gquote` command without the `--costOnly` option. Third, a quote or a quote template can be used to lock-in current or specified charge rates for use in future liens and charges. If the details of the usage are known and you would like to get a quote amount with a quote id that can be referenced to guarantee the quoted charge rates, you may use the `gquote` command with the `--guarantee` option. Override charge rates may be factored in to the cost estimate of the quote by using the `gquote` command with the `--rate` option. If specific override charge rates need to be saved or guaranteed for future use within a quote, lien, or charge without generating a cost estimate, create a pinned quote template by using the `gmkquote` command with the `--pin` and `-R` options. If it is necessary to create a quote template that can be used to override the standard charge rates for multiple instances, use the `gmkquote` command with the `--nopin` and `-R` options.

## Creating quotes

Quotes are normally generated by the resource management system with the `gquote` command before an instance uses requested resources or services (see [Obtaining usage quotes on page 85](#)).

## Creating quote templates

Quote templates may be created by using the `gmkquote` command. Quote templates provide a way to bundle together a package of special charge rates that can be applied to quotes, liens, and charges.

```
gmkquote [--pin] [-J instance_name|job_id | --nopin] [-s start_time] {-e end_time | -t quote_duration} [-d description] [-X, --extension property_name=property_value [,property_name=property_value...]] {-R charge_rate_type:charge_rate_name[{charge_rate_instance}]=charge_rate_amount[,charge_rate_type:charge_rate_name[{charge_rate_instance}]=charge_rate_amount...]} [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
```



Additional detail for this command can be found in the man page by issuing `gmkquote --man` at the command line.

### Example 12-1: Creating a pinned quote template

```
$ gmkquote --pin -J vpc.1 -t 86400 -R
VBR:Processors=1.5,NBM:QualityOfService{Premium}=1.7
Successfully created 1 quote template with id 17
```

*Example 12-2: Creating an unpinned quote template*

```
$ gmkquote --nopin -t 86400 -R VBR:Disk=2.5,NBR:License{Matlab}=4
Successfully created 1 quote template with id 18
```

**i** Use of the `gmkquote` command will not result in a cost estimate or the creation of a usage record. Use `gquote` instead if you wish to obtain a quote for usage.

## Querying quotes

To display quotation information, use the command `glsquote`:

```
glsquote [-A | -I] [-J instance_name|job_id [-X, --extension property_
name=property_value [,property_name=property_value...]] [-u user_name] [-g
group_name] [-a account_name] [-o organization_name] [-c class_name] [-m
machine_name] [--filter filter_name=filter_value[,filter_name=filter_
value...]] [--filter-type (AttributedTo|ImpingesUpon) [--full] [--show
attribute_name[,attribute_name...]] [--long] [--wide] [--raw] [-h, --hours] ]
[--debug] [--site site_name[--help] [--man] [--quiet] [--version] [{"-q} quote_
id]
```

**i** The fields which are displayed by default by this command can be customized by setting the `quote.show` configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsquote --man` at the command line.

*Example 12-3: Listing all quotes for user amy on machine colony*

```
$ glsquote -u amy -m colony
Id Amount Pinned Instance UsageRecord StartTime EndTime D
uration ChargeRates Description
-----
1 57600 True 242 2012-04-06 12:49:53 2012-04-
13 13:09:58 3600 VBR:Processors:1
```

## Modifying quotes

To modify a quote, use the command `gchquote`:

```
gchquote [-s start_time] [-e expiration_time] [-d description] [-X, --extension
property_name=property_value [,property_name=property_value...]] [-debug] [--
site site_name] [--help] [--man] [--quiet] [--verbose] [--version] [{"-q}
quote_id}
```

**i** Additional detail for this command can be found in the man page by issuing `gchquote --man` at the command line.

*Example 12-4: Changing the expiration time of a quote*

```
$ gchquote -e "2012-05-01" 1
Successfully modified 1 quote
```

## Deleting quotes

To delete a quote, use the command `grmquote`:

```
grmquote [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [-v]
[-version] {-I | [-q] quote_id}
```

**i** Additional detail for this command can be found in the man page by issuing `grmquote --man` at the command line.

*Example 12-5: Deleting a quote*

```
$ grmquote 1
Successfully deleted 1 quote
```

*Example 12-6: Purging stale quotes*

```
$ grmquote -I
Successfully deleted 2 quotes
```

# Chapter 13: Managing usage records

Moab Accounting Manager can track the usage of resources and services on your system, recording the charge and the details of the usage in a usage record. A usage record is created when a resource or service manager requests a guaranteed quote for usage, places a lien for usage, or charges for the usage of an item. Usage records can also be created directly via UsageRecord Create (`gmkusage`). A refund can be invoked to credit a charge amount back to the originating fund. Usage records can also be queried, modified, or deleted. By default, a standard user may only query usage records attributed to them.

In a typical use case, a quote might be used to discover how much it would cost to use an item (resource or service) and to verify the user had sufficient access to the item and funds to cover the requested usage. Just before the item is about to be used, a lien (or hold) might be placed against the user's allocated credits for the requested usage. After the usage is complete, a charge for the actual usage can be debited from their fund and the lien removed.

As is the case for other Moab Accounting Manager objects, usage records are highly customizable. One may remove most usage record properties and add new usage record properties. Refer to the section [Customizing the usage record object on page 88](#) for examples of customizing usage records.

## Creating a usage record

In most cases, usage records will be created by the resource management system via the API or with the `gquote`, the `greserve` or the `gcharge` command.

However, it is also possible to create usage records directly using the `gmkusage` command:

```
gmkusage [-T usage_record_type] [-u user_name] [-g group_name] [-a account_name] [-o organization] [-c class_name] [-Q quality_of_service] [-m machine_name] [-N nodes] [-P processors] [-M memory] [-D disk] [-n network] [-t usage_duration] [-s start_time] [-S service_id] [-e end_time] [-d description] [-X | --extension property=value[,property_name=property_value...]] [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version] {[-J] instance_name|job_id}
```

**i** Additional detail for this command can be found in the man page by issuing `gmkusage --man` at the command line.

### Example 13-1: Creating a usage record

```
$ gmkusage -u jsmith -a chem -m cluster -X Charge=2468 -P 2 -t 1234 -J PBS.1234.0
Successfully created 1 usage record with id 246
```

**i** The fields which are displayed by default by this command can be customized by setting the **usagerecord.show** configuration parameter in `gold.conf`.

**i** Use of the `gmkusage` command to record usage will not result in the debiting of a user's allocation. Use `gcharge` instead if you wish to charge for the usage.

## Querying usage records

To display usage record information, use the command `glsusage`:

```
glsusage [-T usage_record_type] [[-J] instance_name_pattern|job_id_pattern] [-u
user_name] [-g group_name] [-a account_name] [-o organization_name] [-c class_
name] [-m machine_name] [--stage stage] [-s start_time] [-S service_id] [-e
end_time] [-X, --extension property_name=property_value [,property_
name=property_value...]] [--full] [--show attribute_name [,attribute_name...]]
[--raw] [-h, --hours] [--debug] [--site site_name] [--help] [--man] [--quiet]
[--verbose] [[-j] usage_record_id]
```

**i** The fields which are displayed by default by this command can be customized by setting the **usagerecord.show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsusage --man` at the command line.

*Example 13-2: Show specific info about usage tallied by amy*

```
$ glsusage --show=Type,Instance,Account,Machine,Charge -u amy
Type Instance Account Machine Charge
-----
Job PBS.1234.0 chemistry colony 22212
```

## Modifying a usage record

It is possible to modify a usage record by using the command `gchusage`:

```
gchusage [-T usage_record_type] [-u user_name] [-g group_name] [-a account_
name] [-o organization] [-c class_name] [-Q quality_of_service] [-m machine_
name] [-N nodes] [-P processors] [-M memory] [-D disk] [-n network] [-t usage_
duration] [-s start_time] [-S service_id] [-e end_time] [-d description] [-X,
--extension property_name=property_value [,property_name=property_value...]] [-
debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
{[-j] usage_record_id | -J instance_name|job_id}
```

**i** Additional detail for this command can be found in the man page by issuing `gchusage --man` at the command line.

*Example 13-3: Changing a usage record*

```
$ gchusage -Q HalfPrice -X Charge=1234 -d "Benchmark" -J PBS.1234.0
Successfully modified 1 usage record
```

**i** Changing a recorded charge in this manner will not change the allocated balance (see [Issuing usage refunds on page 88](#) to refund a charge).

## Deleting a usage record

To delete a usage record, use the command `grmusage`:

```
grmusage [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [-version]
[[-j] usage_record_id|-J] instance_name|job_id
```

**i** Additional detail for this command can be found in the man page by issuing `grmusage --man` at the command line.

*Example 13-4: Deleting a usage record*

```
$ grmusage -J PBS.1234.0
Successfully deleted 1 usage record
```

## Obtaining usage quotes

Usage quotes can be used to determine how much it will cost to use a resource or service. Provided the cost-only option is not specified, this step will additionally verify that the submitter has sufficient funds and meets all the allocation policy requirements for the usage, and can be used at the submission of the usage request as an early filter to prevent the usage from getting blocked when it tries to obtain a lien to start later. If a guaranteed quote is requested, a quote id is returned and can be used in the subsequent charge to guarantee the rates that were used to form the original quote. A guaranteed quote has the side effect of creating a quote record and a permanent usage record. A quote id will be returned which can be used with the lien and charge to claim the quoted charge rates. A cost-only quote can be used to determine how much would be charged for usage without verifying sufficient funds or checking to see if the charge could succeed. A breakdown of the charges in the quote can be returned by specifying the `--itemize` option with the `--verbose` option.

To request a usage quote, use the command `gquote`:

```
gquote [-T usage_record_type] [-u user_name] [-g group_name] [-a account_name]
[-o organization] [-c class_name] [-Q quality_of_service] [-m machine_name] [-N nodes]
[-P processors] [-M memory] [-D disk] [-n network] [-X, --extension property name=property_value[,property_name=property_value...]]
[-t quote_duration] [-G grace_duration]] [-s quote_start_time] [-S service_id] [-e quote_end_time]
[-d quote_description] [-z quote_amount] [--cost-only | --guarantee] [-R charge_rate_type:charge_rate_name[{charge_rate_instance}]
```

```
=charge_rate_amount[,charge_rate_type:charge_rate_name[{charge_rate_instance}]
=charge_rate_amount...]] [--debug] [--site site_name] [--help] [--man] [--
quiet] [--verbose] [--version] [[-j] usage_record_id] [-q quote_template_id]
[-J] instance_name|job_id]
```

**i** Additional detail for this command can be found in the man page by issuing `gquote --man` at the command line.

#### Example 13-5: Requesting a quote

```
$ gquote -a chemistry -u amy -m colony -P 2 -t 3600
Successfully quoted 7200 credits
```

#### Example 13-6: Requesting a guaranteed quote

```
$ gquote -a chemistry -u amy -m colony -P 16 -t 3600 --guarantee
Successfully quoted 57600 credits with quote id 1 and usage record id 86

$ glsqoute
Id Amount UsageRecord StartTime EndTime Duration Used Cha
rgeRates Description
-----
1 57600 86 2012-04-06 10:09:58 2012-04-
06 11:09:58 3600 0 VBR:Processors:1
```

**i** It is possible to establish a system default machine, project or user to be used in job functions (charge, reserve or quote) when left unspecified (see [Server configuration on page 147](#)).

## Making a usage lien

A usage lien can be used to place a hold on the user's fund before usage starts to ensure that the credits will be there when it completes. The replace option may be specified if you want the new lien to replace existing liens of the same instance name (associated with the same usage record). The modify option may be specified to dynamically extend any existing lien with the same instance name with the specified characteristics instead of creating a new one. See [Managing liens on page 75](#) for more information about these options.

To create a usage lien use the command `greserve`:

```
greserve [-T usage_record_type] [-u user_name] [-g group_name] [-a account_name]
[-o organization] [-c class_name] [-Q quality_of_service] [-m machine_name] [-
N nodes] [-P processors] [-M memory] [-D disk] [-n network] [-X, --extension
property name=property_value[,property_name=property_value...]] [-t lien_
duration] [-G grace_duration]] [-s lien_start_time] [-S service_id] [-e lien_
end_time] [-d lien_description] [-z lien_amount] [--replace|--modify] [-R
charge_rate_type:charge_rate_name[{charge_rate_instance}]=charge_rate_amount
[,charge_rate_type:charge_rate_name[{charge_rate_instance}]=charge_rate_
amount...]] [--itemize] [--debug] [--site site_name] [--help] [--man] [--
```



```
quiet] [--verbose] [--version] [-q quote_id] [[-j] usage_record_id] {-J
instance_name|job_id}
```

**i** Additional detail for this command can be found in the man page by issuing `greserve --man` at the command line.

#### Example 13-7: Creating a lien

```
$ greserve -J PBS.1234.0 -a chemistry -u amy -m colony -P 2 -t 3600
Successfully reserved 7200 credits with lien id 37 for instance PBS.1234.0 and created
usage record id 87
```

## Charging for usage

A usage charge debits the appropriate allocations based on the attributes of the usage. The charge is calculated based on factors including the resources and services used, the usage time, and other quality-based factors (see [Managing charge rates on page 97](#)). By default, any liens associated with the charge will be removed. The incremental option may be specified if you want associated liens to be reduced instead of removed. If a usage record already exists for the instance being charged it will be updated with the data properties passed in with the charge request, otherwise a new usage record will be created.

A quote id can be specified to use a previously quoted set of charge rates. This will also ensure the charge will update the usage record instantiated with the quote. A lien id can be specified to help match up a charge with its lien (this may assist in deleting the correct lien if instance ids are not unique). This will also ensure the charge will update the usage record that may have been instantiated by the lien.

Although, by default, Moab Accounting Manager will calculate the charge for the usage using its default charge rates or using the charge rates saved by a referenced quote or quote template, it is possible to specify override charge rates via the rate option. Alternatively, it is possible to designate an externally calculated charge by specifying the charge amount with the Charge option (`-z` option to `gcharge`).

To charge for a usage use the command `gcharge`:

```
gcharge [-T usage_record_type] [-u user_name] [-g group_name] [-a account_name]
[-o organization] [-c class_name] [-Q quality_of_service] [-m machine_name] [-N
nodes] [-P processors] [-M memory] [-D disk] [-n network] [-x usage_state]
[-X, --extension property name=property_value[,property_name=property_
value...]] [-t charge_duration] [-s charge_start_time] [-S service_id] [-e
charge_end_time] [-d charge_description] [-z charge_amount] [--incremental] [-R
charge_rate_type:charge_rate_name[{charge_rate_instance}]=charge_rate_
amount[,charge_rate_type:charge_rate_name[{charge_rate_instance}]=charge_rate_
amount...]] [-h, --hours] [--itemize] [--debug] [--site site_name] [--help] [-
-man] [--quiet] [--verbose] [--version] [[-j] usage_record_id] [-q quote_id]
[-l lien_id] {-J instance_name|job_id}
```

**i** Additional detail for this command can be found in the man page by issuing `gcharge --man` at the command line.

*Example 13-8: Issuing a usage charge*

```
$ gcharge -J PBS.1234.0 -a chemistry -u amy -m colony -P 2 -t 1234
Successfully charged 2468 credits for instance PBS.1234.0
1 lien was removed
```

## Issuing usage refunds

A charged amount can be credited back in part or in whole by issuing a usage refund. This action attempts to lookup the referenced usage record to ensure that the refund does not exceed the original charge and so that the charge entry can be updated. If multiple matches are found (such as the case when instance names (such as job ids) are non-unique), this command will return the list of matched usage records with unique ids so that the correct usage record can be specified for the refund.

To issue a refund for a usage charge, use the command `grefund`:

```
grefund [-z amount] [-f fund_id] [-d description] [-A] [-h, --hours] [--debug]
[--site site_name] [--help] [--man] [--quiet] [--verbose] [--version] [-J]
instance_name|job_id | [-j] usage_record_id
```



Additional detail for this command can be found in the man page by issuing `grefund --man` at the command line.

*Example 13-9: Issuing a usage refund*

```
$ grefund -J PBS.1234.0
Successfully refunded 19744 credits for instance PBS.1234.0
```

## Customizing the usage record object

The usage record object as natively defined can be customized with the attributes you want to track in your use cases. The chapter on [Customizing objects on page 131](#) goes into some detail on the customization syntax. However, since this may be a common requirement, this section will provide a few examples on modifying, adding and deleting usage record attributes and getting them to be tracked and show up in queries.

Usage record discriminators are those properties which are considered primary differentiators between usage, lien, and quote records. Usage record discriminators are used in the dynamic web portal as filters for the listing, modification, and deletion of usage records, liens, and quotes. The default usage record discriminators are Type, User, Group, Account, Organization, Class, QualityOfService, and Machine. Any new attributes added to the usage record object will become usage record discriminators. Removing a discriminator attribute from the usage record object will necessarily remove it as a usage record discriminator as well. It will be necessary to log out and back in after adding or removing a discriminator in order for it to be reflected in the web GUI.

*Example 13-10: Setting VM as the default Usage Record Type*

As installed, the usage record type defaults to `Job`. The default value can be set to `NULL` if there should be no default value, or to any other default value. This example will demonstrate how to set the default usage record type to `VM`.

```
$ goldsh Attribute Modify Object=UsageRecord Name=Type DefaultValue=VM
Successfully modified 1 attribute
```

*Example 13-11: Adding a UsageRecord Application Field (and discriminator)*

Let's say you would like to track the application run by your usage scenarios. First, you would add **Application** as an Attribute of the UsageRecord Object.

```
$ goldsh Attribute Create Object=UsageRecord Name=Application DataType=String
Successfully created 1 attribute
```

If you want the new attribute to show up in `glsusage`, you must add it to the `usagerecord.show` string in `gold.conf`.

```
$ vi /opt/mam/etc/gold.conf
usagerecord.show =
Id, Instance, User, Group, Organization, Account, QualityOfService, Machine, Stage, Charge, Proc
essors, Nodes, Application, Duration, StartTime, EndTime, Description
```

If you want to filter the usage records by **Application**, (such as listing all usage records associated with the specified application), use the `-X` (or `--extension`) option in `glsusage`.

```
$ glsusage -X Application=foo --show=Type, Instance, Charge, User, Application
Type Instance Charge User Application
-----
Job PBS.1234.0 19744 amy foo
```

You could also use **Application** as the basis of a ChargeRate. See Name-Based Resources or Name-Based Multipliers in the [Managing charge rates on page 97](#) chapter for details on how to do this.

Although the initial step above allows the application value to be tracked in the usage record, it is also possible to add it as an attribute of the Transaction table so that it will be automatically populated from actions having assignments, conditions, options and data values referring to the **Application**.

```
$ goldsh Attribute Create Object=Transaction Name=Application DataType=String
Successfully created 1 attribute
```

Additionally, the `gstatement` client command can show `Application` as one of its discriminators (which are `Account`, `User`, and `Machine` by default) in its debit detail. These statement discriminators are specified by the `--show` argument to `gstatement` and can be configured with the `statement.show` configuration parameter in `gold.conf`.

*Example 13-12: Removing the UsageRecord Class Field*

Let's say you were not interested in tracking the class. First, you would delete **Class** as an Attribute of the UsageRecord Object.

```
$ goldsh Attribute Delete Object==UsageRecord Name==Class
Successfully deleted 1 attribute
```

Next, we need to make sure `glsusage` doesn't try to list the class.

```
$ vi /opt/mam/etc/gold.conf
usagerecord.show =
Id, Instance, User, Account, Machine, QualityOfService, Stage, Charge, Processors, Nodes, Application, Duration, StartTime, EndTime, Description
```

If the attribute you want to delete is also an attribute in the Transaction table, you could delete it from there as well.

## Usage record property verification

If a usage record property has an object associated with it, you may want to verify that when that usage record property is specified in a scheduling action (Charge, Reserve, Quote), it verifies that that property is a valid instance of its object type. You can apply a simple verification to a usage record property by setting the property's **Values** attribute to an @ sign followed by the name of the object.

*Example 13-13: Ensure that an organization specified in a charge actually exists*

```
$ goldsh Attribute Modify Object==UsageRecord Name==Organization Values=@Organization
Successfully modified 1 attribute
```

See [Managing attributes on page 134](#) for more information about setting the **Values** attribute.

## Usage record property defaults

It is possible to set defaults for usage record properties when they are not specified in the usage data for a charge, lien, or quote. There are two cases which must be considered — when the property has an object associated with it and when the property does not.

If a property does not have an object associated with it, simply set the **DefaultValue** attribute for the property's UsageRecord Attribute object to the desired value.

*Example 13-14: Setting a system-wide simple default class of batch for usage functions*

```
$ goldsh Attribute Modify Object==UsageRecord Name==Class DefaultValue=batch
Successfully modified 1 attribute
```

If a property does have an object associated with it, you will need to both set the **DefaultValue** attribute for the property's **UsageRecord** Attribute object to the desired value AND set the **DefaultValue** attribute for the corresponding object to the desired value.

*Example 13-15: Setting a system-wide simple default user of anonymous for usage functions*

```
$ goldsh Attribute Modify Object==UsageRecord Name==User DefaultValue=anonymous
Successfully modified 1 attribute
```

See [Global object-based defaults on page 134](#) for more information about setting default values for objects. See [Local attribute-based defaults on page 137](#) for more information about setting default values for attributes.

## Usage record property auto-generation

It is possible for usage record properties which have object definitions to automatically create the referenced objects the first time they are encountered in a usage function (charge, reserve or quote). To do this, the referenced object must be set to `AutoGen=True` and the **Values** attribute for the `UsageRecord` attribute corresponding to the object must be set to a string consisting of the `@` sign followed by the object name.

*Example 13-16: Setting the Usage Record Type to auto-generate Items for usage functions*

For example, let's assume there were many usage record types that could be charged for (Food, Book, Haircut) and that you had already created an `Item` object. It would be possible to automatically generate a new `Item` instance each time a new usage record type was referenced in a charge operation.

```
$ goldsh Object Modify Name==Item AutoGen=True
Successfully modified 1 object

$ goldsh Attribute Modify Object==UsageRecord Name==Type Values=@Item
Successfully modified 1 attribute
```

See [Object auto-generation on page 133](#) for more information about the auto-generation of objects.

## Usage record property instantiators

It is possible to establish a dynamic correlation between usage record properties in which one usage record property can instantiate another. For example, if a user is specified in a charge but no account is specified then the user's default account should be applied to the fund constraints and logged; or if an account is specified in a charge but not its organization then the organization corresponding to that account should be looked up and applied to the fund constraints and logged. Three usage record property instantiator types are currently supported and are configured by prefixing the property instance's `Values` foreign object reference with the appropriate characters: Assign if not defined (`@?=`), Assign if not different (`@!=`), Assign always (`@:=`). We shall look at each of these individually and in different terms.

*Applying a correlated default (@?=)* — If property `X` is specified with the value `x` in the usage record and property `Y` is not specified in the usage record and if the object instance referred to by `x` has a correlated default value of `y` for property `Y`, then `y` will be applied as the default value for property `Y` in the usage record. For example, we could establish the notion of a default account for a user.

*Example 13-17: Establishing a default account for a user*

First we add a `DefaultAccount` attribute (the name is arbitrary) to the `User` object and give it a **Values** property of `@?=Account`.

```
$ goldsh Attribute Create Object=User Name=DefaultAccount DataType=String
Values="\@?=Account\" Description="\Default Account\"
Successfully created 1 attribute
```

Then we can establish the default account for user `scottmo` to be `chemistry`.

```
User Modify Name==scottmo DefaultAccount=chemistry
Successfully modified 1 user
```

Subsequently, when a Charge, Lien, or Quote is issued that specifies the User `scottmo` but does not specify the Account, the `chemistry` Account will be applied to the charge as if originally specified in the usage record charge data.

*Applying a correlated verification (@!=)* — If property X is specified with the value `x` in the usage record and property Y is specified with the value `y` in the usage record and if the object instance referred to by `x` has a correlated verification value of `y'` for the property Y' and if `y'` does not equal `y`, then fail with an error message. Additionally, if property X is specified with the value `x` in the usage record and property Y is not specified in the usage record and if the object instance referred to by `x` has a correlated verification value of `y'` for property Y', then `y'` will be applied as the default value for property Y in the usage record. For example, we could establish a parent-child relationship between organizations and accounts in which explicitly specified incongruities result in a failure.

*Example 13-18: Establishing an override hierarchy with accounts and organizations*

First we add a `VerifyOrganization` attribute (the name is arbitrary) to the Account object and give it a **Values** property of `@!=Organization`.

```
$ goldsh Attribute Create Object=Account Name=VerifyOrganization DataType=String
Values="@!=Organization\" Description="\"Verify Organization\""
Successfully created 1 attribute
```

Then we can establish the verify organization for account `chemistry` to be `sciences`.

```
$ goldsh Account Modify Name==chemistry VerifyOrganization=sciences
Successfully modified 1 account
```

Subsequently, when a Charge, Lien, or Quote is issued that specifies the Account `chemistry` and specifies the wrong Organization (e.g. `arts`), the transaction will fail with an error message. Additionally, when a Charge, Lien, or Quote is issued that specifies the Account `chemistry` but does not specify the Organization, the Organization `sciences` will be applied to the charge as if originally specified in the usage record charge data.

*Applying a correlated override (@:=)* — If property X is specified with the value `x` in the usage record and if the object instance referred to by `x` has a correlated override value of `y'` for property Y', then `y'` will be applied as the override value for property Y in the usage record. For example, we could establish a parent-child relationship between organizations and accounts in which explicitly specified incongruities are silently overridden with the value from the child.

*Example 13-19: Establishing an override hierarchy with accounts and organizations*

First we add an `OverrideOrganization` attribute (the name is arbitrary) to the Account object and give it a **Values** property of `@:=Organization`.

```
$ goldsh Attribute Create Object=Account Name=OverrideOrganization DataType=String
Values="@:=Organization\" Description="\"Override Organization\""
Successfully created 1 attribute
```

Then we can establish the override organization for account `chemistry` to be `sciences`.

```
$ goldsh Account Modify Name==chemistry OverrideOrganization=sciences
Successfully modified 1 account
```

Subsequently, when a Charge, Reserve or Quote is issued that specifies the Account chemistry and specifies either the wrong Organization (e.g. arts) or no Organization, the Organization sciences will be silently applied to the charge as if originally specified in the usage record charge data.





# Chapter 14: Managing itemized topics

The itemized charge table provides an ability to display the components of a composite charge in a line item format. Each charge transaction will write the components of its charge into the charge record so that you can get a line-item breakdown of each charge for usage including the names, values, rates, scaling factors, charge amounts and details listed for each component of the charge. This capability is enabled by setting `charge.itemization = true` in the `goldd.conf` (it is false by default).

Itemized charges may only be queried. They are created automatically in charge transactions and there are no command line clients to change or remove them.

Additionally, an `itemize` option can be specified for quotes, liens, and charges to include an itemized charge breakdown in the response data instead of a single line with the amount.

## Querying itemized charges

To display itemized charge information, use the command `glscharge`:

```
glscharge [-j usage_record_id] [-J instance_name] [-n usage_property_name] [-s start_time] [-e end_time] [--full] [-- show attribute_name[,attribute_name...]] [-- raw] [-h, --hours] [-- debug] [--site site_name] [--help] [--man] [--quiet] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `glscharge --man` at the command line.

### Example 14-1: Listing all itemized charge information

```
$ glscharge
UsageRecord Instance Name      Value Duration Rate      ScalingFactor Amount Creatio
nTime      Description
-----
24         job.1      Storage    100  86400  1.157e-07 1          1 2012-
04-05 17:49:41
25         job.2      Processors 4     86400  5.787e-07 1          20 2012-
04-05 17:49:42
25         job.2      Memory    4096 86400  1.13e-08  1          4 2012-
04-05 17:49:42
26         job.3      Processors 1     86400  5.787e-05 1          5 2012-
04-05 17:49:43
26         job.3      Memory    1004 86400  1.13e-08  1          1 2012-
04-05 17:49:43
```

## Displaying itemized charges for a transaction

In addition to the itemized charge table, Moab Accounting Manager captures the itemized charges for usage record charges, liens, and guaranteed quotes in the details of the transaction. The itemized charges show the details for the formula used to calculate the charge for the transaction. To display the itemized charges for a scheduling transaction, parse the details from the command `glstxn --full -A Charge|Reserve|Quote`:

*Example 14-2: Extract the itemized charges for a job charge*

```
$ glstxn -A Charge -J PBS.1234.1 -q --show Details | perl -pe 's/.*(ItemizedCharges
[^,]*)*/\1/'
ItemizedCharges:= ( ( 16 [Processors] * 1 [ChargeRate{VBR}{Processors}] ) + ( 2000
[Memory] * 0.001 [ChargeRate{VBR}{Memory}] ) ) * 1234 [Duration] ) = 22212
```

# Chapter 15: Managing charge rates

Charge Rates establish how much to charge for usage. Charge rates are applied when usage properties matching the charge rate names are found in the usage data. In order for a charge rate of a given name to be applied, a usage record attribute of the same name must exist.

There are four major categories of charge rates: Resource, Usage, Multiplier, and Fee. These are distinguished by the way they are factored into the charge calculation. Resource charge rates are additive charges that are multiplied by the amount of time that they are used in seconds. Usage charge rates are additive charges that are not multiplied by time. Multiplier charge rates apply multipliers to the sum of the Resource and Usage charges. Fee charge rates are added after the multipliers have been applied.

Each of the major charge rate types has two sub-types: value-based and name-based.

- Name-based charge rates are used for usage properties that take strings for values (e.g. `QualityOfService=premium` or `Account=chemistry`). The charge rate that is applied will be determined by a lookup of the usage property value to see if there is a matching charge rate value. A default rate may be specified by creating a name-based charge rate with an empty charge rate value. Multiple values may be assigned to the same rate via separate charge rate definitions or by combining the values in a single charge rate value separated by commas.
- Value-based charge rates are used for usage properties that take numbers for values (e.g. `Processors=2` or `CpuTime=12.67`). The charge rate that is applied will be multiplied by the usage property value. The charge rate value is commonly left blank to be taken as the default rate for the full range of usage property values. A particular value may also be specified as the charge rate value which means that that rate will only be used if the usage property value exactly matches the charge rate value. A half-bounded expression may be used by specifying a less than or greater than sign with an optional equal sign, followed by the number. For example, the charge rate value `<=4` would match a usage property value of `x` if `x <= 4`. A charge rate value may also be specified as a range (of the form `<number>[-<number>]`). For example, the range `1-4` would be match a usage property value of `x` if `1 <= x <= 4`. If you need to be more specific about the boundedness of the ranges, you may replace the dash with a less than sign with an optional equal sign on either side of it to indicate whether the endpoints are included. For example, the range `1<4` would match if `1 < x < 4`, `1=<4` would match if `1 <= x < 4`, `1<=4` would match if `1 < x <=4` and `1=<=4` would match if `1 <= x <= 4`. So you might use ranges like `1=<2`, `2=<4`, `4=<8`, and `>=8`. Multiple values or value ranges having the same charge rate may be specified in a single expression separated by commas.

Thus there are eight composite types of charge rates referred to by their acronyms: VBR (Value-Based Resource), NBR (Name-Based Resource), VBU (Value-Based Usage), NBU (Name-Based Usage), VBM (Value-Based Multiplier), NBM (Name-Based Multiplier), VBF (Value-Based Fee) and NBF (Name-Based Fee).

Composite type	Description
<b>Value-Based Resource</b>	Value-Based Resource (or Consumable Resource) Charge Rates define how much it costs per unit of time to use a consumable resource like processors, memory, telescope time, generic resources that are charged per time used, etc. These resource metrics must first be multiplied by the usage duration in seconds before being added to the total charge. Value-Based Resource Charge Rates are of Type "VBR", with the Name being the resource name (such as Processors) and the given Rate (such as 1) being multiplied by the consumed resource value (such as 8).
<b>Name-Based Resource</b>	Name-Based Resource Charge Rates define how much it costs per unit of time to use a named resource like license, etc. The cost for the named resource must first be multiplied by the usage duration in seconds before being added to the total charge. Name-Based Resource Charge Rates are of Type "NBR", with the Name being the resource name (such as License), the Value being the resource value (such as matlab), and having the given Rate (such as 5).
<b>Value-Based Usage</b>	Value-Based Usage Charge Rates define how much to charge for metrics of total resource usage such as cputime, power consumed, generic resources or licenses that are charged flat fees per use, etc. These usage metrics are added to the total charge without being multiplied by the duration. Value-Based Usage Charge Rates are of Type "VBU", with the Name being the resource name (such as Power) and the given Rate (such as .001) being multiplied by the consumed resource value (such as 40000).
<b>Name-Based Usage</b>	Name-Based Usage Charge Rates define how much it costs to use a named attribute having a flat charge such as feature, etc. These usage metrics are added to the total charge without being multiplied by multiplied by the duration. Name-Based Usage Charge Rates are of Type "NBU", with the Name being the resource name (such as Feature), the Instance being the usage value (such as GPU), and having the given flat Rate (such as 200).
<b>Value-Based Multiplier</b>	Value-Based Multiplier Charge Rates are scaled multipliers which apply a multiplicative charge factor based on a numeric scaling factor. These incoming scaling factors are multiplied against the Value-Based Multiplier Rate and then are multiplied against the total of the resource and usage charges. Value Based Multiplier Charge Rates are of Type "VBM", with the Name being the multiplier name (such as Discount) and the given Rate (such as 1) being multiplied with the scaling factor (such as .5) before being multiplied to the total charge.
<b>Name-Based Multiplier</b>	Name-Based Multiplier Charge Rates are quality based multipliers which apply a multiplicative charge factor based on a quality of the usage such as quality of service, nodetype, class, user, time of day, etc. These charge multipliers are determined by a hash or lookup table based on the value of the usage attribute. These rates are multiplied against the total of the resource and usage charges. Name-Based Multiplier Charge Rates are of Type "NBM", with the Name being the multiplier name (such as QualityOfService), the Value being the quality instance (such as Premium), and having the given multiplier Rate (such as 2).

Composite type	Description
<b>Value-Based Fee</b>	Value-Based Fee Charge Rates define how much to charge for scaled or enumerated fees such as setup fees, shipping charges, etc. which should be added after the multipliers are applied. These fees are added to the total charge. Value-Based Fee Charge Rates are of Type "VBF", with the Name being the fee name (such as Shipping) and the given Rate (such as 25) being multiplied by the scaling or counted value (such as 4).
<b>Name-Based Fee</b>	Name-Based Fee Charge Rates define how much it costs to use a named attribute having a flat charge such as feature, etc. which should be added after the multipliers are applied. These fees are added to the total charge. Name-Based Fee Charge Rates are of Type "NBF", with the Name being the fee name (such as Zone), the Value being the fee value (such as Asia), and having the given flat Rate (such as 100).

By default, usage charges are calculated according to the following formula: For each value-based resource charge rate matching a usage property in the usage record data, a value-based resource charge is calculated by multiplying the usage property value by the charge rate and by the duration of time it was used. For each name-based resource charge rate matching a usage property name and value in the usage record data, a name-based resource charge is calculated by multiplying the charge rate by the duration of time it was used. For each value-based usage charge type matching a usage property in the usage record data, a value-based usage charge is calculated by multiplying the usage property value by the charge rate. For each name-based usage charge type matching a usage property name and value in the usage record data, a name-based usage charge is given by the charge rate. These value-based and name-based resource charges and the value-based and name-based usage charges are added together. Then, for each value-based multiplier charge rate matching a usage property in the usage record data, a value-based multiplier is calculated by multiplying the usage property value of the charge rate. For each name-based multiplier charge rate matching a usage property name and value in the usage record data, a name-based multiplier is given by the charge rate. The sum of the resource and usage charges is then multiplied by the product of the applicable value-based and name-based multipliers. Next, for each value-based fee charge type matching a usage property in the usage record data, a value-based fee charge is calculated by multiplying the usage property value by the charge rate. For each name-based fee charge type matching a usage property name and value in the usage record data, a name-based fee charge is given by the charge rate for that fee. Finally, these value-based and name-based fee charges are added to the multiplied usage charge subtotal.

In short, the formula can be represented by  $((((\sum(VBR \cdot value) + \sum(NBR) + \sum(MVBR \cdot value)) \cdot duration) + (\sum(VBU \cdot value) + \sum(NBU))) \cdot \prod(VBM \cdot value) \cdot \prod(NBM)) + (\sum(VBF \cdot value) + \sum(NBF)))$ .

## Creating charge rates

To create a new charge rate, use the command `gmkrate`:

```
gmkrate -n charge_rate_name [-x charge_rate_value] -T charge_rate_type [-d
description] [-- debug] [--site site_name] [--help] [--man] [--quiet] [--
verbose] [--version] {[-z] charge_rate_amount}
```

**i** Additional detail for this command can be found in the man page by issuing `gmkrate --man` at the command line.

**i** If a usage record attribute does not exist for the name of the charge rate you are creating, you must first create the corresponding usage record property. See [Customizing the usage record object](#) on page 88.

#### Example 15-1: Creating a value-based resource charge rate

```
$ gmkrate -T VBR -n Memory -z 0.001
Successfully created 1 charge rate
```

#### Example 15-2: Creating a name-based resource charge rate

```
$ gmkrate -T NBR -n License -x Matlab -z 5
Successfully created 1 charge rate
```

#### Example 15-3: Creating a value-based usage charge rate

```
$ gmkrate -T VBU -n CpuTime -z 1
Successfully created 1 charge rate
```

#### Example 15-4: Creating a name-based usage charge rate

```
$ gmkrate -T NBU -n Feature -x GPU -z 200
Successfully created 1 charge rate
```

#### Example 15-5: Creating a value-based multiplier charge rate

```
$ gmkrate -T VBM -n Discount -z 1
Successfully created 1 charge rate
```

#### Example 15-6: Creating a couple of name-based multiplier charge rates and a default rate

```
$ gmkrate -T NBM -n QualityOfService -x Premium -z 2
Successfully created 1 charge rate
```

```
$ gmkrate -T NBM -n QualityOfService -J BottomFeeder -z 0.5
Successfully created 1 charge rate
```

```
$ gmkrate -T NBM -n QualityOfService -z 1
Successfully created 1 charge rate
```

#### Example 15-7: Creating a value-based fee charge rate

```
$ gmkrate -T VBF -n Shipping -z 25
Successfully created 1 charge rate
```

#### Example 15-8: Creating a name-based fee charge rate

```
$ gmkrate -T NBF -n Zone -x Asia -z 200
Successfully created 1 charge rate
```

**Example 15-9: Creating a couple of conditional value-based resource charge rates**

```
$ gmkrate -T VBR -n Disk -x User=dave? -z 0.2
Successfully created 1 charge rate
```

```
$ gmkrate -T Disk -n User -x User=mike? -z 0.5
Successfully created 1 charge rate
```

**Example 15-10: Creating some value-based resource charge rate ranges and a default**

```
$ $ gmkrate -T VBR -n Processors -x 1-4 -z 2
Successfully created 1 charge rate
```

```
$ gmkrate -T VBR -n Processors -x 5-8 -z 1.5
Successfully created 1 charge rate
```

```
$ gmkrate -T VBR -n Processors -z 1
Successfully created 1 charge rate
```

**Example 15-11: Creating some value-based usage charge rate ranges for floating point values**

```
$ $ gmkrate -T VBU -n Power -x '<2' -z 0.005
Successfully created 1 charge rate
```

```
$ $ gmkrate -T VBU -n Power -x '2=<4' -z 0.004
Successfully created 1 charge rate
```

```
$ $ gmkrate -T VBU -n Power -x '>=4' -z 0.003
Successfully created 1 charge rate
```

**Example 15-12: Assigning multiple classes to run for free**

```
$ $ gmkrate -T NBM -n Class -x dev,test -z 0
Successfully created 1 charge rate
```

## Querying charge rates

To display charge rate information, use the command `glsrate`:

```
glsrate [-n charge_rate_name] [-x charge_rate_value] [-T charge_rate_type] [--full] [--show attribute_name][,attribute_name...] [--raw] [--debug] [--site site_name] [--help] [--man] [--quiet] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `glsrate --man` at the command line.

**Example 15-13: Listing all charge rates**

```
$ glstrate
```

Name	Value	Type	Rate	Description
CpuTime		VBU	1	
Discount		VBM	1	
Disk	User=dave?	VBR	0.2	
Disk	User=mike?	VBR	0.5	
Feature	GPU	NBU	200	
License	Matlab	NBR	5	
Memory		VBR	0.001	
Power		VBU	0.001	
Processors		VBR	1	
Processors	1-4	VBR	2	
Processors	5-8	VBR	1.5	
QualityOfService		NBM	1	
QualityOfService	BottomFeeder	NBM	0.5	
QualityOfService	Premium	NBM	2	
Shipping		VBF	25	
Zone	Asia	NBF	200	

## Modifying charge rates

To modify a charge rate, use the command `gchrates`:

```
gchrates [-n choice="plain" charge_rate_name [-x charge_rate_value] [-T charge_rate_type] [-z charge_rate_amount] [-d description] [-- debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `gchrates --man` at the command line.

**Example 15-14: Changing a charge rate**

```
$ gchrates -T VBR -n Memory -z 0.05
Successfully modified 1 charge rate
```

## Deleting charge rates

To delete a charge rate, use the command `grmrates`:

```
grmrates [-n choice="plain" charge_rate_name] [-x charge_rate_instance] [-- debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version]
```

**i** Additional detail for this command can be found in the man page by issuing `grmrates --man` at the command line.

**Example 15-15: Deleting a charge rate**

```
$ grmrates -T VBR -n Memory
Successfully deleted 1 charge rate
```



# Chapter 16: Managing transactions

Moab Accounting Manager logs all modifying transactions in a detailed transaction journal (queries are not recorded). Previous transactions can be queried but not modified or deleted. By default, a standard user may only query transactions performed by them.

## Querying transactions

To display transaction information, use the command `glstrans`:

```
glstrans [-O object] [-A action] [-k primary_key_value] [-U actor] [-f fund_id]
[-i allocation_id] [-u user_name] [-r account_name] [-m machine_name] [-j
usage_record_id] [-J instance_name|job_id] [-s start_time] [-e end_time] [-T
transaction_id] [-R request_id] [-X, --extension property_name=property_value
[,property_name=property_value...]] [--show attribute_name[,attribute_
name...]] [--raw] [-h, --hours] [--debug] [--site site_name] [--help] [--man]
[--quiet] [--version]
```

**i** The fields which are displayed by default by this command can be customized by setting the **transaction.show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glstrans --man` at the command line.

*Example 16-1: List all deposits made in 2012*

```
$ glstrans -A Deposit -s 2012-01-01 -e 2013-01-01
```

*Example 16-2: List everything done by amy since the beginning of 2012*

```
$ glstrans -U amy -s 2012-01-01
```

*Example 16-3: List all transactions related to job moab.1*

```
$ glstrans -J moab.1
```

*Example 16-4: List all transactions affecting charge rates*

```
$ glstrans -O ChargeRate
```

## Customizing the transaction object

The transaction record as natively defined can be customized with the attributes you want to track in your use cases. It is possible to add additional attributes to the Transaction table so that it will be automatically populated from actions having assignments, conditions, options and data values referring to the attribute.

Transaction discriminators are those properties which are considered primary differentiators between transaction records (besides the metadata differentiators of object, action, and instance). Transaction discriminators are used in the dynamic web portal as filters for the listing of transaction records. Any new attributes added to the Transaction object will become transaction discriminators. Removing a discriminator attribute from the transaction object will necessarily remove it as a transaction discriminator as well. It will be necessary to log out and back in after adding or removing a discriminator in order for it to be reflected in the web GUI.

*Example 16-5: Adding an Organization field to the Transaction record (which also makes it a discriminator)*

```
$ goldsh Attribute Create Object=Transaction Name=Organization DataType=String  
Successfully created 1 attribute
```

# Chapter 17: Managing events

Moab Accounting Manager has an internal event scheduler that can be configured to execute Moab Accounting Manager actions at a designated time in the future or on a periodic basis. Valid actions on an event include Create, Query, Fire, Modify, Refresh and Delete. Event attributes include Id, FireCommand, ArmTime, FireTime, RearmPeriod, EndTime, Notify, RearmOnFailure, FailureCommand, CatchUp and Description.

There are two server configuration parameters which affect event scheduling: **event.scheduler** which specifies whether the event scheduler is enabled or not (it is disabled by default) and **event.pollinterval** which is the period in minutes that the event scheduler uses to fire events. The poll interval must divide evenly into the number of minutes in a day (1440).

The command(s) to be fired by an event are expressed in a serialized form of the request identical to the syntax used in the interactive control program (goldsh). There are two commands that can be configured in an event: the **FireCommand** which is the command to be executed when the event is fired, and the **FailureCommand** which is the command to be executed if the fired command results in an unsuccessful response status. The **FireTime** is the target time for the event to be triggered by the event scheduler. The actual fire time may be dependent on the state of the server and will be recorded in the **CreationTime** property of the corresponding "Event Fire" Transaction. An event may also be fired manually with the Event Fire action.

The **RearmPeriod** is a time period expression specifying when the event will be rearmed. This period expression is of the form: "<period>[[@<instant>] [~|^]!]" where period may be something like 1 day, 2 hours, or 5 minutes. Instant locks the period to a specific instant within the time period such as 1 day @ hour 12 or 1 month @ day 3. The modifiers indicate whether the time period should be relative to now (!), or relative to the start of this (~|^) designator (month or minute, etc.), or relative to the start of the first (^) designator (month or minute, etc.). For example, assuming the FireTime was 7:15, if you specified 4 hours ! as the rearm period it would be rearmed at 11:15, if you specified 4 hours ~ as the rearm period it would be rearmed at 11:00, and if you specified 4 hours ^ as the rearm period it would be rearmed at 8:00.

The **ArmTime** is the time the event was last armed or fired. This field is used as a reference time to be able to derive how long the event has been waiting to happen. This field will be initially set to mark the moment the first FireTime is set and updated thereafter to indicate the last time the event was fired. In the case where an event does not have a FireTime set, this field may be set manually and used in a similar manner. If we consider the time between event firings as "laps", this could be thought of as the Lap Start Time. If the **RearmOnFailure** boolean is set to `False`, the event will not be rearmed if the command was unsuccessful. If set to `True`, the event will be evaluated for rearming even if the command response has a status of `Failure`. The standard default is `False`. If the **CatchUp** boolean is set to `True` and the server was down during the time this event should have fired, the event scheduler will attempt to make up for the past due events by progressively firing them (rearming based on previous arm time) until catching up to the present. The actions will still show as having occurred in the present rather than in the past. If set to `False`, and the server is brought back up after an outage, the event scheduler will

still fire immediately for a past due event, but it will only fire once and then rearm relative to the current time.

A Notification method can be specified via the **Notify** parameter and is of the form: `[+|=] [<delivery_method>:] [<recipient>] [, [+|=] [<delivery_method>:] [<recipient>]]*`. If the term is a `-`, the notification is sent only on failure. If the term is a `+`, the notification is sent only on success. Otherwise the notification is always sent. There can be multiple notify expressions separated by a comma. All applicable notifications will be sent. See the chapter on [Managing notifications on page 109](#) for more information about delivery method and recipient.

## Creating events

To create a new event, use the command `goldsh Event Create`:

```
goldsh Event Create FireCommand="<goldsh Command to Execute When Fired>"
[FireTime=YYYY-MM-DD[ hh:mm:ss]|Now] [RearmPeriod=<Repeat Frequency>]
[EndTime=YYYY-MM-DD[ hh:mm:ss]] [FailureCommand=<goldsh Command to Execute on
Failure>] [RearmOnFailure=True|(False)] [ArmTime=YYYY-MM-DD[ hh:mm:ss]|Now]
[CatchUp=(True)|False] [Notify=<Notification URL>] [Description=<Event
Description>] [ShowUsage:=True]
```

*Example 17-1: Creating an automatic allocation renewal event*

```
$ goldsh Event Create FireCommand="\`Fund Deposit Filter:=Account=chemistry
Amount:=10000 Reset:=True\`" FireTime="\`2013-01-01\`" RearmPeriod="\`3 months^\`"
Successfully created 1 event
```

## Querying events

To display event information, use the command `glsevent`:

```
glsevent [-s start_time] [-e end_time] [--full] [--show attribute_name
[,attribute_name...]] [--raw] [--debug] [--site site_name] [--help] [--man] [-
quiet] [--version] [[-E] event_id]
```

**i** The fields which are displayed by default by this command can be customized by setting the **event-show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsevent --man` at the command line.

*Example 17-2: Listing all events*

```

$ glsevent
Id FireCommand                               FireTime  ArmTime
  RearmPeriod EndTime Notify RearmOnFailure FailureCommand CatchUp CreationT
ime      Description
-----
1  Fund Deposit Filter:=Account=biology Amount:=10000 Reset:=True 2013-01-01 2012-1
1-07 13:34:22 3 months^                False      True      2012-1
1-07 13:34:22
2  Fund Deposit Filter:=Account=chemistry Amount:=10000 Reset:=True 2013-01-01 2012-1
1-07 13:34:47 3 months^                False      True      2012-1
1-07 13:34:47

```

## Deleting events

To delete an event, use the command `grmevent`:

```
grmevent [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [-
-version] {[-E] event_id}
```

**i** Additional detail for this command can be found in the man page by issuing `grmevent --man` at the command line.

*Example 17-3: Deleting an event*

```

$ grmevent 1
Successfully deleted 1 event

```



# Chapter 18: Managing notifications

When event commands are executed (asynchronously), the success or failure of the operation is communicated back to the initiator via a notification. When an event is created, you may specify the `Notify` option which will associate a notification method with the event. Currently there is only one **DeliveryMethod** implemented which is `Store`. With the `Store` delivery method, command response information is stored as instances of the `Notification` object. These messages can later be retrieved by the initiator via a `Notification Query`. Payments can also route a notification method down to their associated events via a `Notify` option.

The notification attributes include **Id** (autogenerated), **Type**, **Event**, **Status**, **Code**, **Message**, **Key**, **Recipient**, **EndTime** and **CreationTime**. Stored notifications can be queried on any of these conditions. The notification type distinguishes what type of command resulted in the notification (`Fire` or `Failure`). The notification key is the value of the primary key of the object instance that the command acted on (e.g. the `Payment Id`). The recipient could be a user name or any tag that identifies the intended reader for the notification. The `Notification Query` supports a **Delete** option, which if set to `True`, will delete the notifications after they have been queried. Additionally, stored notification have an `EndTime` after which they are automatically deleted by `Gold`. The `Notification` actions include `Send`, `Refresh`, `Create`, `Query`, `Delete` and `Modify`.

There are two server configuration parameters which affect notifications: **notification.deliverymethod** which dictates which `deliverymethod` is used by default if unspecified and **notification.duration** which defines how long notifications stick around if the `Store` delivery method is used.

## Querying notifications

To display event information, use the command `glsnot`:

```
glsnot [-E event_id] [-T notification_type] [-k primary_key_value] [-k primary_key_value] [-u recipient] [-x status] [-s start_time] [-e end_time] [--delete] [--full] [--show attribute_name[,attribute_name...]] [--raw] [--debug] [--site site_name] [--help] [--man] [--quiet] [--version] [[-N] notification_id]
```

**i** The fields which are displayed by default by this command can be customized by setting the **event-show** configuration parameter in `gold.conf`. Additional detail for this command can be found in the man page by issuing `glsnot --man` at the command line.

*Example 18-1: Listing all failure notifications*

```

$ glsnot -x Failure
Id Event Type Status Code Message
                                     Key Recipient EndTim
e          CreationTime
-----
-----
-----
4  20    Fire Failure 782  Payment Begin failed starting payment: Failed creating paym
ent starting lien: Insufficient balance to reserve usage (Instance Moab.1)
\nClearing the event fire time.\nThe controlling event has been deleted. 9 amy      2
012-04-23 13:35:01 2012-04-09 13:35:01

```

## Deleting notifications

To delete a notification, use the command `grmnot`:

```
grmnot [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--
version] {[-N] notification_id}
```

**i** Additional detail for this command can be found in the man page by issuing `grmnot --man` at the command line.

*Example 18-2: Deleting a notification*

```

$ grmnot 4
Successfully deleted 1 notification

```

*Example 18-3: Deleting all successful notifications*

To delete many notifications, query them with the `--delete` option:



```

$ glsnot -x Success --delete
Id Event Type Status Code Message

cipient EndTime CreationTime Key Re
-----
-----
-----
-----
4 20 Fire Failure 782 Payment Begin failed starting payment: Failed creating paym
ent starting lien: Insufficient balance to reserve usage (Instance Moab.1)
\ nClearing the event fire time.\ nThe controlling event has been deleted.
9
amy 2012-04-23 13:35:01 2012-04-
09 13:35:01se True 2012-04-
09 13:15:09 Use Payment
1 11 Fire Success 000 Payment Begin: Successfully charged 10 credits for instance
Moab.1\ nSuccessfully charged 20 credits for instance Moab.2\ nSuccessfully charged 2
0 credits for instance Moab.3\ nSuccessfully started payment (6)
and created 3 liens\ nClearing the event fire time.\ nThe controlling event has been
deleted. 6 scottmo 2012-04-23 13:28:02 2012-04-09 13:28:02
2 14 Fire Success 000 Payment Begin: Successfully charged 10 credits for instance
Moab.1\ nSuccessfully charged 20 credits for instance Moab.2\ nSuccessfully charged 2
0 credits for instance Moab.3\ nSuccessfully started payment (7)
and created 3 liens\ nClearing the event fire time.\ nThe controlling event has been
deleted. 7 amy 2012-04-23 13:31:02 2012-04-09 13:31:02
3 17 Fire Success 000 Payment Begin: Successfully charged 10 credits for instance
Moab.1\ nSuccessfully charged 20 credits for instance Moab.2\ nSuccessfully charged 2
0 credits for instance Moab.3\ nSuccessfully started payment (8)
and created 3 liens\ nClearing the event fire time.\ nThe controlling event has been
deleted. 8 amy 2012-04-23 13:32:02 2012-04-09 13:32:02
Successfully deleted 3 notifications

```



# Chapter 19: Managing roles

Moab Accounting Manager uses instance-level role-based access controls to determine what users can perform what functions. Named roles are created, actions are associated with the roles, and users are assigned to these roles.

The actions for a role consist of a set of tuples of object, action and instance permitted by the role. In other words, each role action defines an object (whether specific or `ANY`), the action that can be taken on that object (whether specific or `ANY`) and the instance of the object that action can be taken on (whether specific or `ANY`).

In the base configuration, there are three default roles: `SystemAdmin`, `Anonymous` and `OVERRIDE`. Other configurations, such as the bank configuration, add additional roles. Roles can be added as desired. The three base roles are required for proper function of Moab Accounting Manager and should not be deleted. By default, the `SystemAdmin` role can perform any action on any object. This role is usually assigned to the super user. The `Anonymous` role is intended to define the actions available to your standard unprivileged user. This may include the ability to set your password, query certain public objects and modify objects that belong to you (implemented via the `OVERRIDE` role). The `OVERRIDE` role is a special role type that defines those actions that should use special business logic intrinsic to the routine that handles that object and action. For example, in the bank configuration, the `OVERRIDE` logic for the Account Query routine will only allow the standard user to see information about accounts for which he or she is a member. A given user's privileges will be the superset of the actions of all roles that apply to that user.

The instance indicates which specific instances of the object the action can be performed on. There are several special instance types that can be used in certain situations. The `ANY` instance is supported by all objects and permits the specified action on all instances of the specified object. The `SELF` instance applies to the user's own instance if the object is `User`, or to objects that have a `User` attribute associated with the user. The `MEMBERS` instance applies to objects for which the user is a direct member. The `ADMIN` instance applies to objects for which the user is designated as an administrator. Unless otherwise specified, the instance will default to a value of `ANY`.

## Creating roles

To create a new role, use the command `gmkrole`. Users and actions may be associated with the role at creation time. When assigning actions to a role, the object, action and instance must be specified in the form shown. Multiple actions or users may be specified for the role.

```
gmkrole [-d description] [-u user_name[,user_name...]] [-A object_name->action_name[{{instance_name}} [,object_name->action_name[{{instance_name}}]...]] [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose] [--version] [--r] role_name}
```

**i** Additional detail for this command can be found in the man page by issuing `gmkrole --man` at the command line.

#### Example 19-1: Creating a Manager role

```
$ gmkrole -r Manager -d "Manages Roles and Responsibilities"
Successfully created 1 role
```

## Querying roles

To display the role information, use the command `glsrole`:

```
glsrole [--full] [--show attribute_name[,attribute_name...]] [--long] [--wide]
[--raw] [--debug] [--site site_name] [--help] [--man] [--quiet] [--version]
[[-r] role_name]
```

**i** Additional detail for this command can be found in the man page by issuing `glsrole --man` at the command line.

#### Example 19-2: Listing all roles along with users and descriptions

```
$ glsrole --show=Name,Users,Description
Name          Users          Description
-----
AccountAdmin          Can update or view an account they are admin for
Anonymous            ANY            Things that can be done by anybody
OVERRIDE             ANY            A custom authorization method will be invoked
Scheduler            root            Scheduler relevant Transactions
SystemAdmin          scottmo        Can update or view any object
UserServices          User Services
```

#### Example 19-3: Listing information about the scheduler role

```
$ glsrole --long Scheduler
Name          Users          Actions          Description
-----
Scheduler     root            UsageRecord->Create (ANY) Scheduler relevant Transactions
UsageRecord->Quote (ANY)
UsageRecord->Reserve (ANY)
UsageRecord->Charge (ANY)
Lien->Delete (ANY)
```

## Modifying roles

To modify a role, use the command `gchrole`:

```
gchrole [-d description] [--AddUser(s) user_name{,user_name...}] [--addAction(s)
object_name->action_name[{{instance_name}}][,object_name->action_name[{{instance_
```

```
name}}...]] [--delUser(s) user_name[,user_name...]] [--del-action(s) object_
name->action_name[{{instance_name}} [,object_name->action_name [{{instance_
name}}]...]] [--debug] [--site site_name] [-?, --help] [--man] [--quiet] [-v, -
-verbose] [-V, --version] [[-r] role_name]
```

**i** Additional detail for this command can be found in the man page by issuing `gchrole --man` at the command line.

Users may be added to a role or removed from a role. Actions also may be added to a role or removed from a role. When specifying actions, the instance will default to a value of `ANY`.

*Example 19-4: Adding a user to a role*

Let's add dave to our new Manager role:

```
$ gchrole --add-user dave -r Manager
Successfully added 1 user
```

*Example 19-5: Associating an action with a role*

Allow the Manager to change role responsibilities:

```
$ gchrole --add-action "RoleAction->ANY" Manager -v
Successfully added 1 action
```

## Deleting roles

To delete a role, use the command `grmrole`:

```
grmrole [--debug] [-S, --site site_name] [--help] [--man] [--quiet] [--verbose]
[--version] [[-r] role_name]
```

**i** Additional detail for this command can be found in the man page by issuing `grmrole --man` at the command line.

Users may be added to a role or removed from a role. Actions also may be added to a role or removed from a role. When specifying actions, the instance will default to a value of `ANY`.

*Example 19-6: Deleting the Manager role*


Let's add dave to our new Manager role:

```
$ grmrole Manager
Successfully deleted 1 role and 2 associations
```



# Chapter 20: Managing passwords


Passwords must be established for each user who wishes to use the web-based GUI. Passwords must be at least eight characters and are stored in encrypted form. A `gchpasswd` command line client exists to aid a user or administrator in setting or changing a password. Other operations (deleting or listing password entries) must be performed using the interactive control program (`goldsh`). By default, a standard user may only set or change their own password. A system administrator may set or change any user's password.

 Because Moab Accounting Manager caches password information for faster responsiveness, it will be necessary to restart the server after running `gchpasswd` for the GUI to accept that password change.

## Setting passwords

To set a new password, use the command `gchpasswd`. If the user name is not specified via an option or as the unique argument, then the invoking user will be taken as the user whose password will be set. The invoker will be prompted for the new password.

```
gchpasswd [--debug] [--site site_name] [--help] [--man] [--quiet] [--verbose]
[--version] {[-u] user_name}
```

 Additional detail for this command can be found in the man page by issuing `gchpasswd --man` at the command line.

### Example 20-1: Setting a password

```
$ gchpasswd amy
Enter your new password:
Successfully created 1 password
```

## Querying passwords

To display password information, use the command `goldsh Password Query`:

```
goldsh Password Query [Show:=<"Field1,Field2,...">] [User==<User Name>]
[ShowUsage:=True]
```

*Example 20-2: List the users who have set passwords*

```
$ goldsh Password Query Show:=User
User
-----
amy
gold
```

## Deleting passwords

To delete a password, use the command `goldsh Password Delete`:

```
goldsh Password Delete User==<User Name>]
```



The `goldsh` control program allows you to make powerful and sweeping modifications to Moab Accounting Manager objects. Misuse of this command could result in the inadvertent deletion of all passwords.

*Example 20-3: Deleting a password*

```
$ goldsh Password Delete User==amy
User Password
-----
amy HZYzwD20o1XIE/gxRYyFKP2sumkCluHm
Successfully deleted 1 password
```



# Chapter 21: Using the gold shell (goldsh)

`goldsh` is an interactive control program that can access all of the advanced functionality in Moab Accounting Manager.

**i** The `goldsh` control program allows you to make powerful and sweeping modifications to many objects with a single command. Inadvertant mistakes could result in modifications that are very difficult to reverse.

## Usage

Goldsh commands can be invoked directly from the command line as arguments, or read from stdin (interactively or redirected from a file).

```
goldsh [--debug] [--site site_name] [--help] [--man] [--raw]
[--quiet] [--verbose] [--version] [<Command>]
```

**i** Additional detail for this command can be found in the man page by issuing `goldsh --man` at the command line.

*Example 21-1: Specifying the command as direct arguments*

```
$ goldsh System Query
Name                Version  Description
-----
Moab Accounting Manager  7.0.0  Commercial Release
```

*Example 21-2: Using the interactive prompt*

```
$ goldsh
gold> System Query
Name                Version  Description
-----
Moab Accounting Manager  7.0.0  Commercial Release
gold> quit
```

*Example 21-3: Reading commands from a file*

```

$ cat >commands.gold <<EOF
System Query
quit
EOF
$ goldsh <commands.gold

Name                Version  Description
-----
Moab Accounting Manager  7.0.0  Commercial Release

```

## Command syntax

goldsh commands are of the form:

```

<Object> [=<Alias>] [,<Object> [=<Alias>]...] <Action> [ [<Con-
junction>] [<Open_Parenthesis>...] [<Object>.] <Name> <Oper-
ator> [<Subject>.] <Value> [<Close_Parenthesis>...] ...]

```

The basic form of a command is `<Object> <Action> [<Name><Operator><Value>]*`. When an action is performed on more than one object, such as in a multi-object query, the objects are specified in a comma-separated list. Commands may accept zero or more predicates which may function as fields to return, conditions, update values, processing options, etc. Predicates, in their simplest form, are expressed as Name, Operator, Value tuples. Predicates may be combined via conjunctions with grouping specified with parentheses. When performing multi-object queries, names and values may need to be associated with their respective objects.

Valid conjunctions include:

Conjunction	Meaning
&&	and
	or
&!	and not
!	or not

Open parentheses may be any number of literal open parentheses '('.

Name is the name of the condition, assignment, or option. When performing a multi-object query, a name may need to be prepended by its associated object separated by a period.

Valid operators include:

Operator	Meaning
==	equals
<	less than
>	greater than
<=	less than or equal to
>=	greater than or equal to
!=	not equal to
~	matches
=	is assigned
+=	is incremented by
-=	is decremented by
:=	option
:!	not option

Value is the value of the selection list, condition, assignment, or option. When performing a multi-object query, a value may need to be prepended by its associated object (called the subject) separated by a period.

Close parentheses may be any number of literal closing parentheses ')'.

## Valid objects

To list the objects available for use with commands in goldsh commands, use the goldsh command: `Object Query`

*Example 21-4: Listing all objects*

```
gold> Object Query Show:="Sort (Name) "  
Name  
-----  
Account  
AccountUser  
Action  
Allocation  
Attribute  
ChargeRate  
Constraint  
Fund  
FundFund  
Lien  
LienAllocation  
Object  
Organization  
Password  
Quote  
QuoteChargeRate  
Role  
RoleAction  
RoleUser  
System  
Transaction  
UsageRecord  
User
```

## Valid actions for an object

To list the actions that can be performed on an object, use the goldsh command: `Action Query`

*Example 21-5: Listing all actions associated with the Fund object*

```
gold> Action Query Object==Fund Show:="Sort (Name) "  
Name  
-----  
Balance  
Create  
Delete  
Deposit  
Modify  
Query  
Transfer  
Undelete  
Withdraw
```

## Valid predicates for an object and action

By appending the option `ShowUsage:=True` to a command, the syntax of the command is returned, expressed in SSSRMAP XML Message Format.

**Example 21-6: Show the usage for Allocation Query**

```

gold> Allocation Query ShowUsage:=True
<Request action="Query">
  <Object>Allocation<Object>
    [<Get name="Id" [op="Sort|Tros|Count|GroupBy|Max|Min"]></Get>]
    [<Get name="Fund" [op="Sort|Tros|Count|GroupBy|Max|Min"]></Get>]
    [<Get name="StartTime" [op="Sort|Tros|Count|GroupBy|Max|Min"]></Get>]
    [<Get name="EndTime" [op="Sort|Tros|Count|GroupBy|Max|Min"]></Get>]
    [<Get name="Amount" [op="Sort|Tros|Count|GroupBy|Max|Min|Sum|Average"]></Get>]
    [<Get name="CreditLimit" [op="Sort|Tros|Count|GroupBy|Max|Min|Sum|Average"]
  ></Get>]
    [<Get name="Deposited" [op="Sort|Tros|Count|GroupBy|Max|Min|Sum|Average"]></Get>]
    [<Get name="Active" [op="Sort|Tros|Count|GroupBy"]></Get>]
    [<Get name="Description" [op="Sort|Tros|Count|GroupBy|Max|Min"]></Get>]
    [<Where name="Id" [op="EQ|NE|GT|GE|LT|LE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>Integer Number}</Where>]
    [<Where name="Fund" [op="EQ|NE|GT|GE|LT|LE|Match|NotMatch (EQ)"] [conj="And|Or
  (And)"] [group="<Integer Number>Fund Name}</Where>]
    [<Where name="StartTime" [op="EQ|NE|GT|GE|LT|LE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>YYYY-MM-DD[ hh:mm:ss]|-infinity|infinity|now}</Where>]
    [<Where name="EndTime" [op="EQ|NE|GT|GE|LT|LE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>YYYY-MM-DD[ hh:mm:ss]|-infinity|infinity|now}</Where>]
    [<Where name="Amount" [op="EQ|NE|GT|GE|LT|LE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>Decimal Number}</Where>]
    [<Where name="CreditLimit" [op="EQ|NE|GT|GE|LT|LE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>Decimal Number}</Where>]
    [<Where name="Deposited" [op="EQ|NE|GT|GE|LT|LE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>Decimal Number}</Where>]
    [<Where name="Active" [op="EQ|NE (EQ)"] [conj="And|Or (And)"]
  [group="<Integer Number>True|False}</Where>]
    [<Where name="Description" [op="EQ|NE|GT|GE|LT|LE|Match|NotMatch (EQ)"]
  [conj="And|Or (And)"] [group="<Integer Number>Description}</Where>]
    [<Option name="Filter">True|False (False)</Option>]
    [<Option name="FilterType">Exclusive|NonExclusive (NonExclusive)</Option>]
    [<Option name="IncludeAncestors">True|False (False)</Option>]
    [<Option name="Time">YYYY-MM-DD[ hh:mm:ss]</Option>]
    [<Option name="Unique">True|False (False)</Option>]
    [<Option name="Limit">{Integer Number}</Option>]
    [<Option name="Offset">Integer Number}</Option>]
    [<Option name="ShowHidden">True|False (False)</Option>]
    [<Option name="ShowUsage">True|False (False)</Option>]
  </Request>

```

## Common options

There are a number of options that may be specified for all commands. These options include:  
ShowUsage

*ShowUsage* — This option may be included with any command to cause the command to return a usage message in SSSRMAP XML Message Format.

## Common actions available for most objects

There are a number of actions that are available for most objects. These actions include Query, Create, Modify, Delete, and Undelete. Commands involving these actions inherit some common structure unique

to the action type.

## Query action

The Query action is used to query objects. It accepts selections that describe the attributes (fields) to return (including aggregation operations on those attributes), conditions that select which objects to return the attributes for, and other options unique to queries.

### Selections

Selections use the `Show` option to specify a list of the attributes to return for the selected object. If selections are not specified, a default set of attributes (defaulting to those not marked as hidden) will be returned.

Name = `Show`

Op = `:=`

Value = `"attribute1,attribute2,attribute3,..."`

Aggregation operators may be applied to attributes by enclosing the target attribute in parenthesis and prepending the name of the desired operator. The aggregation operators that can be applied depend on the datatype of the attribute.

Valid selection operators include:

Sort — Ascending sort

Tros — Descending sort

Count — Count

Max — Maximum value

Min — Minimum value

Average — Average value

Sum — Sum

GroupBy — Group other aggregations by this attribute

Additionally, aliases can be applied to selections so that columns can be renamed as desired. Aliases are expressed by adding `=<Alias>` to the target attribute name (and after the trailing parenthesis of the aggregation, if specified).

For example: `Allocation Query Show:="GroupBy) Fund), Sum (Amount)=Total"`

<b>Conditions</b>	<p>Conditions are used to select which objects the action is to be performed on.</p> <p>Name = Name of the attribute to be tested</p> <p>Op = conditional operator</p> <p>Value = The object or value against which the attribute is tested</p> <p>Valid condition operators include:</p> <ul style="list-style-type: none"> <li>== Equal to</li> <li>!= Not equal to</li> <li>&lt; Less than</li> <li>&gt; Greater than</li> <li>&lt;= Less than or equal to</li> <li>&gt;= Greater than or equal to</li> <li>~ Matches</li> <li>!~ Does not match</li> </ul> <p>Matching uses the wildcards * and ? (equivalent to SQL % and _ respectively) in a manner similar to file globbing. * matches zero or more unspecified characters and ? matches exactly one unspecified character. For example <code>mscf*</code> matches objects having the specified attributes whose values start with the letters <code>mscf</code>, while <code>mscf?</code> matches objects having the specified attributes whose values start with <code>mscf</code> and have a total of exactly five characters.</p>
<b>Options</b>	<p>Options indicate processing options that affect the result.</p> <p>Name = Name of the option</p> <p>Op = :=</p> <p>Value = Value of the option</p> <p>Valid options for query actions include:</p> <ul style="list-style-type: none"> <li>ShowHidden:=True False (False) Includes hidden attributes in the result</li> <li>Time:=YYYY-MM-DD[ hh:mm:ss] Run the command as if it were the specified time</li> <li>Unique:=True False (False) Display only unique results (like DISTINCT in SQL)</li> <li>Limit:={Integer Number} Limit the results to the number of objects specified</li> </ul>

**Example 21-7: Return the number of inactive liens**

```
gold> Lien Query EndTime<now Show:="Count (Id) "
Id
---
8
```

## Create action

The Create action is used to create a new object. It accepts assignments that describe the values of the attributes to be set.

<b>Assignments</b>	<p>Assignments specify values to be assigned to attributes in the new object.</p> <p>Name = Name of the attribute being assigned a value</p> <p>Op = = (is assigned)</p> <p>Value = The new value being assigned to the attribute</p>
--------------------	---

*Example 21-8: Add a new account member*

```
gold> AccountUser Create Account=chemistry Name=scottmo
Account      Name      Active   Admin
-----
chemistry    scottmo   True     False
Successfully created 1 accountUser
```

## Modify action

The Modify action is used to modify existing objects. It accepts conditions that select which objects will be modified and predicates that describe the values of the attributes to be set.

Assignments	<p>Assignments specify values to be assigned to attributes in the selected objects.</p> <p>Name = Name of the attribute being assigned a value</p> <p>Op = assignment operators {=, +=, -=}</p> <p>Value = The value being assigned to the attribute</p> <p>Valid assignment operators include:</p> <ul style="list-style-type: none"> <li>= is assigned</li> <li>+= is incremented by</li> <li>-= is decremented by</li> </ul>
Conditions	<p>Conditions are used to select which objects the action is to be performed on.</p> <p>Name = Name of the attribute to be tested</p> <p>Op = conditional operator</p> <p>Value = The object or value against which the attribute is tested</p> <p>Valid condition operators include:</p> <ul style="list-style-type: none"> <li>== Equal to</li> <li>!= Not equal to</li> <li>&lt; Less than</li> <li>&gt; Greater than</li> <li>&lt;= Less than or equal to</li> <li>&gt;= Greater than or equal to</li> <li>~ Matches</li> <li>!~ Does not match</li> </ul> <p>Matching uses the wildcards * and ? (equivalent to SQL % and _ respectively) in a manner similar to file globbing. * matches zero or more unspecified characters and ? matches exactly one unspecified character. For example <code>mscf*</code> matches objects having the specified attributes whose values start with the letters <code>mscf</code>, while <code>mscf?</code> matches objects having the specified attributes whose values start with <code>mscf</code> and have a total of exactly five characters.</p>



**Example 21-9: Change/set *scottmo*'s phone number and email address**

```
gold> User Modify Name==scottmo PhoneNumber="(509) 376-2204"
EmailAddress="scottmo@adaptivecomputing.com"
Name      Active   CommonName      PhoneNumber      EmailAddress
-----
      DefaultAccount      Description
-----
scottmo   True     Jackson, Scott M.      (509) 376-
2204     scottmo@adaptivecomputing.com
Successfully modified 1 user
```

**Example 21-10: Extend all liens against account *chemistry* by 10 days**

```
gold> Lien Modify EndTime+=864000 Instance=="PBS.1234.0"
Id Fund      Amount      Instance      UsageRecord User      Project      Machine      EndTime
-----
      Description
-----
1  2          57600      PBS.1234.0  1          amy      chemistry  colony      2012-
04-06 10:47:30
Successfully modified 1 lien
```

## Delete action

The Delete action is used to delete objects. It accepts conditions that select which objects are to be deleted.

Conditions	<p>Conditions are used to select which objects the action is to be performed on.</p> <p>Name = Name of the attribute to be tested</p> <p>Op = conditional operator</p> <p>Value = The object or value against which the attribute is tested</p> <p>Valid condition operators include:</p> <ul style="list-style-type: none"> <li>== Equal to</li> <li>!= Not equal to</li> <li>&lt; Less than</li> <li>&gt; Greater than</li> <li>&lt;= Less than or equal to</li> <li>&gt;= Greater than or equal to</li> <li>~ Matches</li> <li>!~ Does not match</li> </ul> <p>Matching uses the wildcards * and ? (equivalent to SQL % and _ respectively) in a manner similar to file globbing. * matches zero or more unspecified characters and ? matches exactly one unspecified character. For example <code>m<sub>scf</sub>*</code> matches objects having the specified attributes whose values start with the letters <code>m<sub>scf</sub></code>, while <code>m<sub>scf</sub>?</code> matches objects having the specified attributes whose values start with <code>m<sub>scf</sub></code> and have a total of exactly five characters.</p>
------------	---

*Example 21-11: Get rid of the pesky Jacksons*

```

gold> User Delete CommonName~"Jackson*"
Name      Active  CommonName      PhoneNumber      EmailAddress
-----
          DefaultAccount  Description
-----
scottmo   True    Jackson, Scott M.  (509) 376-
2204     scottmo@adaptivecomputing.gov
Successfully deleted 1 user and 1 association

```

## Undelete action

The Undelete action is used to restore deleted objects. It accepts conditions that select which objects are to be undeleted.

Conditions	<p>Conditions are used to select which objects the action is to be performed on.</p> <p>Name = Name of the attribute to be tested</p> <p>Op = conditional operator</p> <p>Value = The object or value against which the attribute is tested</p> <p>Valid condition operators include:</p> <ul style="list-style-type: none"> <li>== Equal to</li> <li>!= Not equal to</li> <li>&lt; Less than</li> <li>&gt; Greater than</li> <li>&lt;= Less than or equal to</li> <li>&gt;= Greater than or equal to</li> <li>~ Matches</li> <li>!~ Does not match</li> </ul> <p>Matching uses the wildcards * and ? (equivalent to SQL % and _ respectively) in a manner similar to file globbing. * matches zero or more unspecified characters and ? matches exactly one unspecified character. For example <code>m*scf*</code> matches objects having the specified attributes whose values start with the letters <code>m*scf*</code>, while <code>m*scf?</code> matches objects having the specified attributes whose values start with <code>m*scf</code> and have a total of exactly five characters.</p>
------------	--

*Example 21-12: Resurrect the deleted users that were active*

```

gold> User Undelete Active==True
Name      Active  CommonName      PhoneNumber      EmailAddress
-----
          DefaultAccount  Description
-----
scottmo   True    Jackson, Scott M.  (509) 376-
2204     scottmo@adaptivecomputing.com
Successfully undeleted 1 user and 1 association

```

## Multi-object queries

Goldsh supports multi-object queries (table joins). Multiple objects are specified via a comma-separated list and attributes need to be prefixed by the associated object.

*Example 21-13: Print the sums for active balance and allocated amounts grouped by account*

```
gold> Allocation,Constraint Query
Show:="GroupBy(Constraint.Value)=Account,Sum(Allocation.Amount)=Balance,Sum
(Allocation.Deposited)=Allocation"
Constraint.Fund==Allocation.Fund Constraint.Name==Account
Allocation.Active==True
```

Account	Balance	Allocation
biology	193651124	360000000
chemistry	296167659	360000000

*Example 21-14: Show all active accounts for amy's privileges*

```
gold> RoleUser,RoleAction Query
Show:="RoleAction.Object,RoleAction.Name=Action"
RoleUser.Role==RoleAction.Role && ( RoleUser.Name==amy ||
RoleUser.Name==ANY ) Unique:=True
```

Object	Action
Account	Query
AccountUser	Query
Action	Query
Allocation	Query
Attribute	Query
ChargeRate	Query
Constraint	Query
Fund	Balance
Fund	Query
FundFund	Query
Lien	Query
LienAllocation	Query
Object	Query
Organization	Query
Password	ANY
Quote	Query
QuoteChargeRate	Query
Role	Query
RoleAction	Query
RoleUser	Query
System	Query
Transaction	Query
UsageRecord	Query
User	Query

**i** Although the forgoing was a good example of a join request, it should be understood that it is not a straightforward way to determine the full extent of a user's privileges. Some of the actions may be tied to specific object instances and many of them are associated with an override method which may not actually permit the user access to any instances of the object. Using `Show:="RoleUser.Role,RoleUser.Name=User,RoleAction.Object,RoleAction.Name=Action,RoleAction.Instance"` may be revealing in this regard. See the chapter on [Managing roles on page 113](#) for more information about managing roles.



# Chapter 22: Customizing objects

Moab Accounting Manager provides the ability to dynamically create new objects or customize or delete existing objects through the interactive control program (goldsh).

**i** The object customizations described in this chapter will be noticeable in subsequent goldsh queries (and in the web GUI after a fresh login). For installations with a database that supports multiple connections (e.g. PostgreSQL) these changes will be visible immediately while others (e.g. SQLite) will require the server to be restarted. Client commands may need to be modified to properly interact with changed objects or attributes.

**i** The goldsh control program allows you to make powerful and sweeping modifications to many objects with a single command. Inadvertent mistakes could result in modifications that are very difficult to reverse.

## Managing objects

In Moab Accounting Manager, Objects correspond to tables in the repository which have Attributes (such as Name and Color) and Actions (such as Query and Modify). A specific instance of an object is described as an Instance and has Properties (the specific values of the attributes for that object). The instance is uniquely referred to via its primary key(s) (such as its Name or Id).

An object must have a name and may have a description. An object may be set to auto-generate its instances when first seen (see [Object auto-generation on page 133](#)) and/or a default value may be designated for the object (see [Global object-based defaults on page 134](#)).

Objects may reference other objects. If a single instance of an object references only a single instance of another object (for example, a usage record may only have one user), then it is sufficient for the first object to have an attribute field for the second object (the UsageRecord object has an attribute called User). However, if there may be a many-to-many relationship between objects (for example, an account may have multiple users and a user may belong to multiple accounts), then it is necessary to maintain a separate object as an association table (e.g. AccountUser). When creating an association object, the object should be given an appropriate name (e.g. AccountUser), it should be marked as an association (Association=True), and an object needs to be designated for the parent (e.g. Account) and the child (e.g. User). The association object itself may have additional attributes that provide qualitative information about the association (e.g. a particular AccountUser association may be active or be an administrator).

## Creating a custom object

To create a new object, use the command `goldsh Object Create`. When an object is created, the 5 default actions are automatically created for the object: Create, Delete, Modify, Query and Undelete. A number of default metadata attributes are created as well: CreationTime, ModificationTime, Deleted, RequestId and TransactionId. These attributes are normally hidden in regular queries.

```
goldsh Object Create Name=<Object Name> [AutoGen=True|False]
[DefaultValue=<Default Value>] [Description=<Description>]
[Association=True|False] [Child=<Child Object>] [Parent=<Parent Object>]
[ShowUsage:=True]
```

### Example 22-1: Creating a Node Object

```
$ goldsh Object Create Name=Node Description=\"Node Information\"
Successfully created 1 object and 5 actions
```

### Example 22-2: Add a node name attribute

```
$ goldsh Attribute Create Object=Node Name=Name DataType=String PrimaryKey=True
Successfully created 1 attribute
```

### Example 22-3: Add a processor count attribute

```
$ goldsh Attribute Create Object=Node Name=Processors DataType=Integer
Successfully created 1 attribute
```

## Querying objects

To display object information, use the command `goldsh Object Query`.

```
goldsh Object Query [Name=<Object Name>]
[Show:=Name,AutoGen,DefaultValue,Description,Association,Parent,Child]
[ShowUsage:=True]
```

### Example 22-4: List Information for the Node Object

```
$ goldsh Object Query Name==Node
```

Name	Association	Parent	Child	DefaultValue	AutoGen	Description
Node	False				False	Node Information

## Modifying an object

It is possible to modify an object by using the command `goldsh Object Modify`.

```
goldsh Object Query [Name=<Object Name>] [AutoGen=True|False]
[DefaultValue=Default Value>] [Description=Description>] [Association=True|
(False)] [Child=Child Object>] [Parent=Parent Object>] [ShowUsage:=True]
```

*Example 22-5: Changing the Node object's description*

```
$ goldsh Object Modify Name==Node Description="\Host Information\"
Successfully modified 1 object
```

## Deleting an object

To delete an object, use the command `goldsh Object Delete`. When an object is deleted, all associated attributes, actions and other associations are automatically deleted as well.

```
goldsh Object Delete [Name=<Object Name>] [ShowUsage:=True]
```

*Example 22-6: Deleting the Node Object*

```
$ goldsh Object Delete Name==Node
Successfully deleted 1 object
```



This is a very dangerous operation and could result in the deletion of all object definitions requiring database repair. The `goldsh` control program allows you to make powerful and sweeping modifications to many objects with a single command. Be sure to specify conditions for the object you want to delete.

## Object auto-generation

It is possible to have object instances be automatically generated the first time they are referenced in designated contexts. For example, you might want a user be auto-generated when newly added to an account. You could have an organization auto-generated when specified as the default for a user. You could have a cost-center be auto-generated when referenced in a usage record. To do this, the referenced object must be set to `AutoGen=True` and the **Values** property for the attribute that you want to trigger the auto-generation must be set to a string consisting of the `@` sign followed by the object name.

*Example 22-7: Auto-generate an account's organization*

For example, let's assume that your accounts belong to specific organizations that you may want to run a report against but you don't want to define all of the organizations up front. It would be possible to automatically generate a new organization instance each time an undefined organization is specified for an account.

```
$ goldsh Object Modify Name==Organization AutoGen=True
Successfully modified 1 object
```

```
$ goldsh Attribute Modify Object==Account Name==Organization Values=@Organization
Successfully modified 1 attribute
```

See [Usage record property auto-generation on page 91](#) for a discussion of auto-generating objects referenced in usage records.

## Global object-based defaults

It is possible to set a global default for an object that will be applied to all attributes referencing this object. When a new instance of an object is being created which has an attribute referring to another object via its **Values** property, if that attribute has not been specified and you want it to default to the global default, you will need to set the **DefaultValue** attribute for the referenced object to the desired value.

*Example 22-8: Setting a system-wide simple default organization called general*

```
$ goldsh Object Modify Name==Organization DefaultValue=general
Successfully modified 1 object
```

Thereafter each (non-association) object which has an attribute with a **Values** property set to @Organization will default to general if that attribute is not specified. Perhaps we would want the default value to be taken for the organization when a new account is created.

```
$ goldsh Attribute Modify Object==Account Name==Organization Values=@Organization
Successfully modified 1 attribute
```

See [Local attribute-based defaults on page 137](#) for more information about setting default values for attributes. See [Usage record property defaults on page 90](#) for more information about setting default values for usage record properties.

## Managing attributes

Objects can have any number of fields called Attributes. When an object is first created, a number of attributes are created for the object by default. These are: **CreationTime** (time the object was first created), **ModificationTime** (time the object was last updated), **Deleted** (whether the object is deleted or not), **RequestId** (request id that resulted in the last modification of the object), **TransactionId** (transaction id that resulted in the last modification of the object).

An attribute must have a name and be associated with an object.

An attribute will have a data type which can be one of (**AutoGen**, **TimeStamp**, **Boolean**, **Float**, **Integer**, **Currency**, **String**) and defaults to String. A data type of AutoGen means the field will be a primary key of type integer which will assume the next auto-incremented value from the `g_key_generator` table. TimeStamps are epoch times stored in integer format. Booleans are strings constrained to the values of `True` or `False` (or `unset`). Float is used to store decimal or floating point values. Currency is like Float but may have special business logic for handling currency values.

An object may have zero or more attributes which are primary keys (`PrimaryKey==True`), the combination of which are used to uniquely identify an object instance. Moab Accounting Manager will try to ensure that there can only be one object instance with the exact same set of values of its primary keys.

A required attribute (`Required==True`), must be either specified or be derived via a default value or other dynamic mechanism when the object is created. It can also not be unset.

A fixed attribute (`Fixed==True`), may not be changed from its initial value.



An attribute may be constrained to certain values via the **Values** attribute. The values may be constrained to members of a list expressed as a parenthesized comma-delimited list of strings (i.e. `Values="(Brazil,China,France,Russia,USA)"`). Alternatively, the values may be constrained to be an instance of a particular object type (like a foreign key constraint) by assigning to the Values attribute the name of an object prefixed by the @ sign (e.g. `Values="@Account"` -- which would constrain the value of this attribute to be a valid account name). Stronger versions of the @-prefixed object-constrained values may be used in Quote, Reserve and Charge actions to enforce dynamic interactions between usage record properties such as to assign default values if not defined (e.g. `Values="@?=Account"`), verification values which evoke an error if they differ (e.g. `Values="@!=Account"`), or designated values which always overwrite the value (e.g. `Values="@:=Account"`). See [Usage record property instantiators on page 91](#) for more information.

A default value may be assigned to an attribute via the **DefaultValue** attribute. When a new instance of an object is created, if a property is not specified for the attribute, the default value will be used.

The **Sequence** attribute determines which order an object's attributes will be listed in for queries if no selection list is specified in the query. Attributes with smaller sequence numbers will appear before attributes with larger sequence numbers. The Sequence attribute is also used to enforce a proper attribute display ordering in the web GUI.

The **Hidden** attribute specifies whether an attribute should be shown in a query by default or not. Hidden attributes can be seen in queries by specifying the **ShowHidden** option with a value of `True`.

The **Description** field is a location to describe the meaning of the attribute and is used in the GUI for field descriptions.

## Adding an attribute to an object

To create a new attribute for an object, use the command `goldsh Attribute Create`:

```
goldsh Attribute Create Object=<Object Name> Name=<Attribute Name>
[DataType=AutoGen|TimeStamp|Boolean|Float|Integer|Currency|(String)]
[PrimaryKey=True|(False)] [Required=True|(False)] [Fixed=True|(False)]
[Values=<Foreign Key or List of Values>] [DefaultValue=<Default Value>]
[Sequence=<Integer Number>] [Hidden=<True|(False)>]
[Description=<Description>] [ShowUsage:=True]
```

*Example 22-9: Adding a Country Attribute to User*

```
$ goldsh Attribute Create Object=User Name=Country Values="\
(Brazil,China,France,Russia,USA)" DefaultValue=USA
Successfully created 1 attribute
```

*Example 22-10: Tracking Submission Time in Usage records*

```
$ goldsh Attribute Create Object=UsageRecord Name=SubmissionTime DataType=TimeStamp
Successfully created 1 attribute
```

## Querying attributes

To display attribute information, use the command `goldsh Attribute Query`:

```
goldsh Attribute Query Object=<Object Name> Name=<Attribute Name>
[Show:=Object,Name,DataType,PrimaryKey,Required,Fixed,Values,DefaultValue,Sequ
ence,Hidden,Description] [ShowHidden:=True] [ShowUsage:=True]
```

**Example 22-11: List the attributes of the Node object**

```
$ goldsh Attribute Query Object==Node
```

Object Name	DataType	PrimaryKey	Required	Fixed	Values	DefaultValue	Sequence	Hidden	Description
Node Processors	Integer	False	False	False			20	False	
Node Name	String	True	True	True			10	False	
Node TransactionId	Integer	False	False	True			990	True	Last Modifying Transaction Id
Node RequestId	Integer	False	False	True			980	True	Last Modifying Request Id
Node Deleted	Boolean	False	False	True			970	True	Is this object deleted?
Node ModificationTime	TimeStamp	False	False	True			960	True	Last Updated
Node CreationTime	TimeStamp	False	False	True			950	True	First Created

## Modifying an attribute

To modify an attribute, use the command `goldsh Attribute Modify`:

```
goldsh Attribute Modify Object==<Object Name> Name==<Attribute Name> [Required=True|
(False)] [Fixed=True|(False)] [Values=<Foreign Key or List of Values>]
[DefaultValue=<Default Value>] [Sequence=<Integer Number>] [Hidden=<True|
(False)>] [Description=<Description>] [ShowUsage:=True]
```

**i** The `goldsh` control program allows you to make powerful and sweeping modifications to many objects with a single command. A mistake made using this command could result in the inadvertent modification of all attributes.

**Example 22-12: Change User Organization values to not be restricted to the set of organization instances**

```
$ goldsh Attribute Modify Object==User Name==Organization Values=NULL
Successfully modified 1 attribute
```

## Removing an attribute from an object

To delete an attribute, use the command `goldsh Attribute Delete`:

```
goldsh Attribute Delete Object==<Object Name> Name==<Attribute Name> [ShowUsage:=True]
```

**i** The goldsh control program allows you to make powerful and sweeping modifications to many objects with a single command. A mistake made using this command could result in the inadvertent deletion of all attributes.

**i** When using Moab Accounting Manager as an Allocation Manager, certain objects and attributes are assumed to exist. For example, a call to UsageRecord Charge would fail if you had deleted the **Allocation Amount** attribute. The Attribute Undelete command might come in useful in such a case.

#### Example 22-13: Removing the Organization attribute from Account

```
$ goldsh Attribute Delete Object==Account Name==Organization
Successfully deleted 1 attribute
```

#### Example 22-14: Perhaps we don't care to track the QualityOfService attribute in a Usage record

```
$ goldsh Attribute Delete Object==UsageRecord Name==QualityOfService
Successfully deleted 1 attribute
```

## Local attribute-based defaults

It is possible to set a specific default for an object attribute that will be applied when an instance of that object is created but the attribute is not specified. This type of default is intended for attributes which do not refer to another object or which should vary from the object global default. This default value is assigned to an attribute via the **DefaultValue** attribute. When a new instance of the associated object is created, if a property is not specified for the attribute, the specified default value will be used. A local attribute default will have precedence over a global object default.

```
goldsh Attribute Delete Object==<Object Name> Name==<Attribute Name>
[ShowUsage:=True]
```

#### Example 22-15: Setting a default organization just for the account object

```
$ goldsh Attribute Modify Object==Account Name==Organization DefaultValue=university
Successfully modified 1 attribute
```

#### Example 22-16: Setting a default phone for the user object

```
$ goldsh Attribute Modify Object==User Name==Phone DefaultValue=""NoPhone\"""
Successfully modified 1 attribute
```

See [Global object-based defaults on page 134](#) for more information about setting default values for objects.

See [Usage record property defaults on page 90](#) for more information about setting default values for usage record properties.

## Managing actions

Moab Accounting Manager defines which actions can be performed by which objects. When an object is first created, five basic actions are created for the object by default. These are: Create, Modify, Query, Delete and Undelete. Specific code must exist in Moab Accounting Manager modules in order for objects to support additional actions.

An action is uniquely specified by its name and the object with which it is associated. An action also has a description and a boolean display attribute which governs whether this action should be displayed in the web GUI or not.

### Adding an action to an object

To specify that an action is allowed for an object, use the command `goldsh Action Create`:

```
goldsh Action Create Object=<Object Name> Name=<Action Name> [Display=True|False]
[Description=<Description>] [ShowUsage:=True]
```

*Example 22-17: Adding a Modify Action to Transaction*

```
$ goldsh Action Create Object=Transaction Name=Modify Description=Modify
Successfully created 1 action
```

### Querying actions

To display action information, use the command `goldsh Action Query`:

```
goldsh Action Query [Object==<Object Name>] [Name==<Attribute Name>]
[Show:=Object,Name,Display,Description] [ShowUsage:=True]
```

*Example 22-18: List the actions of the Node object*

```
$ goldsh Action Query Object==Node
Object Name      Display Description
-----
Node   Create   False   Create
Node   Delete   False   Delete
Node   Modify   False   Modify
Node   Query    False   Query
Node   Undelete False   Undelete
```

### Modifying an action

To modify an action, use the command `goldsh Action Modify`:

```
goldsh Action Modify [Object==<Object Name>] [Name==<Attribute Name>]
[Display=True|False] [Description=<Description>] [ShowUsage:=True]
```

**i** The goldsh control program allows you to make powerful and sweeping modifications to many objects with a single command. A mistake made using this command could result in the inadvertent modification of all actions.

*Example 22-19: Display all Node actions but Undelete in the web GUI*

```
$ goldsh Action Modify Object==Node Name!=Undelete Display=True
Successfully modified 4 actions
```

## Removing an action from an object

To delete an action from an object, use the command `goldsh Action Delete`:

```
goldsh Action Delete [Object==<Object Name>] [Name==<Attribute Name>]
[ShowUsage:=True]
```

**i** The goldsh control program allows you to make powerful and sweeping modifications to many objects with a single command. A mistake made using this command could result in the inadvertent modification of all actions.

**⚠** When using Moab Accounting Manager as an allocation manager, certain actions are assumed to exist. Be careful what you delete!

*Example 22-20: Do not allow accounts to be deleted*

```
$ goldsh Action Delete Object==Account Name==Delete
Successfully deleted 1 action
```

## Examples creating custom objects

Creating a custom object normally involves defining a new object and adding attributes to the object.

*Example 22-21: Creating a License object to track license usage and charges.*

Invoke the Moab Accounting Manager control program in interactive mode.

```
$ goldsh
```

Create the License Object.

```
gold> Object Create Name=License Description=License
Successfully created 1 object and 5 actions
```

Next, define its attributes. Give each record a unique id (so the record can be more easily modified), a license type that can be one of (Matlab,Mathematica,Compiler,AutoCAD,Oracle), the user who is using it, the start and end time, how many instances of the license were used, and how much was charged.

```

gold> Attribute Create Object=License Name=Id DataType=AutoGen PrimaryKey=True
Description="Record Id"
Successfully created 1 attribute
gold> Attribute Create Object=License Name=Type DataType=String Required=True Values="
(Matlab,Mathematica,Compiler,AutoCAD,Oracle)" Fixed=True Description="License Type"
Successfully created 1 attribute
gold> Attribute Create Object=License Name=User Required=True Values="@User"
Description="User Name"
Successfully created 1 attribute
gold> Attribute Create Object=License Name=StartTime DataType=TimeStamp
Description="Start Time"
Successfully created 1 attribute
gold> Attribute Create Object=License Name=EndTime DataType=TimeStamp Description="End
Time"
Successfully created 1 attribute
gold> Attribute Create Object=License Name=Count DataType=Integer Description="Number
of Licenses Used"
Successfully created 1 attribute
gold> Attribute Create Object=License Name=Charge DataType=Currency
Description="Amount Charged"
Successfully created 1 attribute

```

Finally, since we would like to manage licenses from the web GUI, set `Display=True`.

```

gold> Action Modify Object=License Name!=Undelete Display=True
Successfully modified 4 actions

```

When done, exit the `goldsh` prompt.

```

gold> quit

```

That's about it. Licenses should now be able to be managed via the GUI and `goldsh`. The data source will need to use one of the methods of interacting with Moab Accounting Manager (see [Methods of interacting with Moab Accounting Manager on page 144](#)) in order to push license record usage info to Moab Accounting Manager.

Apart from being used as an Allocation Manager, Moab Accounting Manager can be used as a generalized information service. It can be used to manage just about any object-oriented information over the web. For example, Moab Accounting Manager could be used to provide meta-schedulers with machine/user mappings, or node/resource information.

*Example 22-22: Using Moab Accounting Manager as a Grid Map File.*

Invoke the `goldsh` control program in interactive mode.

```

$ goldsh

```

Create the GridMap Object.

```

gold> Object Create Name=GridMap Description="Online Grid Map File"
Successfully created 1 object and 5 actions

```

Next, define its attributes. Each entry will consist of a `userid` (which will serve as the primary key) and a required public X.509 certificate.

```
gold> Attribute Create Object=GridMap Name=User PrimaryKey=True Values=@User
Description="User Name"
Successfully created 1 attribute
gold> Attribute Create Object=GridMap Name=Certificate DataType=String Required=True
Description="X.509 Public Key"
Successfully created 1 attribute
```

Exit the goldsh prompt.

```
gold> quit
```

From this point, a peer service will need to use one of the methods of interacting with Moab Accounting Manager (see Interaction Methods) in order to query the GridMap information.





# Chapter 23: Integration

## Integrating with Moab Accounting Manager

Moab Workload Manager can be configured to interact with Moab Accounting Manager to track and charge for resources utilized by jobs and reservations in either an HPC or Cloud accounting context. If you are operating in an HPC context, you will need to use Moab HPC Suite — Enterprise Edition in order to have support for Moab Accounting Manager. The Moab Cloud Suite includes support for Moab Accounting Manager in a cloud context.

There are two accounting manager interface types that Moab can use to interact with Moab Accounting Manager: MAM, which is the direct SSS wire protocol, and Native, in which customizable scripts are invoked to communicate with Moab Accounting Manager. For cloud accounting contexts, it is necessary to use the Native accounting manager interface because of support which is built into the accounting scripts and the customizability of that interface. For HPC accounting contexts, it is recommended to use the MAM accounting manager interface because it is faster and has the best support for HPC policies. The Native accounting manager interface can be used in an HPC context if higher customizability is needed, but some HPC policies are not yet implemented for this interface.

## Moab Accounting Manager interface

If you are installing Moab HPC Suite — Enterprise Edition from RPM, the suite RPM will synchronize the shared secret keys between Moab Workload Manager and Moab Accounting Manager automatically. The **AMCFG** lines in `/opt/moab/etc/moab.d/am.cfg` will need to be uncommented and edited as necessary.

*Example 23-1: Integrating with Moab HPC Suite — Enterprise Edition RPM*

Uncomment and edit the **AMCFG** lines as applicable.

```
$ vi /var/moab/etc/moab.d/am.cfg
AMCFG[mam] TYPE=MAM HOST=localhost PORT=7112
AMCFG[mam] STARTFAILUREACTION=IGNORE,IGNORE CHARGEPOLICY=DEBITALLWC
```

If you are installing Moab HPC Suite — Enterprise Edition from tarball, configure Moab Workload Manager using the `--with-am` option. After installing Moab Accounting Manager, copy the **token.value** in `/opt/mam/etc/site.conf` into the **KEY** in `/opt/moab/etc/moab-private.cfg`.

*Example 23-2: Integrating with Moab HPC Suite — Enterprise Edition tarball*

Configure Moab to use the accounting manager.

```
$ ./configure --with-am ...
```

Synchronize the **KEY** in `moab-private.cfg` with the **token.value** in `site.conf`.

```
$ vi /var/moab/etc/moab-private.cfg
CLIENTCFG[AM:mam] KEY=UiW7EihzKyUyVQg6dKirDhV3 AUTHTYPE=HMAC64
```

## Native Accounting Manager Interface

If you are installing Moab Cloud Suite from RPM, the suite RPM will synchronize the shared secret keys between Moab Workload Manager and Moab Accounting Manager automatically. The **AMCFG** lines in `/opt/moab/etc/moab.d/am.cfg` will need to be uncommented and edited as necessary.

*Example 23-3: Integrating with Moab Cloud Suite RPM*

Uncomment and edit the **AMCFG** lines as applicable.

```
$ .vi /var/moab/etc/moab.d/am.cfg
AMCFG[mam] TYPE=NATIVE
AMCFG[mam] QuoteURL=exec://$TOOLSDIR/mam/usage.quote.mam.pl
AMCFG[mam] CreateURL=exec://$TOOLSDIR/mam/usage.create.mam.pl
AMCFG[mam] StartURL=exec://$TOOLSDIR/mam/usage.start.mam.pl
AMCFG[mam] UpdateURL=exec://$TOOLSDIR/mam/usage.update.mam.pl
AMCFG[mam] PauseURL=exec://$TOOLSDIR/mam/usage.pause.mam.pl
AMCFG[mam] EndURL=exec://$TOOLSDIR/mam/usage.end.mam.pl
AMCFG[mam] DeleteURL=exec://$TOOLSDIR/mam/usage.delete.mam.pl
AMCFG[mam] FLUSHINTERVAL=DAY
AMCFG[mam] StartFailureAction=IGNORE
```

# Methods of interacting with Moab Accounting Manager

There are essentially five ways of interacting with Moab Accounting Manager. Let's consider a simple usage charge in each of the different ways.

*Example 23-4: Integrating with Moab HPC Suite — Enterprise Edition Tarball*

## Using the appropriate command-line client

From inside a script, or by invoking a system command, you can use a command-line client (one of the "g" commands in the bin directory).

*Example 23-5: To issue a charge at the completion of job usage, you could use gcharge:*

```
gcharge -J Moab.1234 -a chemistry -u amy -m colony -P 2 -t 3600 -X Duration=3600
```

## Using the interactive control program

The interactive control program, goldsh, will issue a charge for a job expressed in xml.

*Example 23-6: To issue a charge you must invoke the Charge action on the Job object:*

```
goldsh UsageRecord Charge
Data: "<UsageRecord><Instance>Moab.1234</Instance><Account>chemistry</Account><User>amy</User><Machine>colony</Machine><Processors>2</Processors><Duration>3600</Duration></UsageRecord>" Duration:=3600
```

## Use the Perl API

If your resource management system is written in Perl or if it can invoke a Perl script, you can access the full functionality via the Perl API.

*Example 23-7: To make a charge via this interface you might do something like:*

```
use Gold;

my $request = new Gold::Request(object => "UsageRecord", action => "Charge");
my $usageRecord = new Gold::Datum("UsageRecord");
$usageRecord->setValue("Instance", "Moab.1234");
$usageRecord->setValue("Account", "chemistry");
$usageRecord->setValue("User", "amy");
$usageRecord->setValue("Machine", "colony");
$usageRecord->setValue("Processors", "2");
$usageRecord->setValue("Duration", "3600");
$request->setDatum($usageRecord);
$request->setOption("Duration", "3600");
my $response = $request->getResponse();
print $response->getStatus(), ": ", $response->getMessage(), "\n";
```

## Use the Java API

Although deprecated, the Java API may still be usable to interact with Moab Accounting Manager. The javadoc command can be run on the contrib/java/gold directory to generate documentation for the gold java classes.

*Example 23-8: To make a charge via this interface you might do something like:*

```
import java.util.*;
import gold.*;

public class Test
{
    public static void main(String [] args) throws Exception
    {
        Gold.initialize();
        Request request = new Request("UsageRecord", "Charge");
        Datum usageRecord = new Datum("UsageRecord");
        usageRecord.setValue("Instance", "Moab.1234");
        usageRecord.setValue("Account", "chemistry");
        usageRecord.setValue("User", "amy");
        usageRecord.setValue("Machine", "colony");
        usageRecord.setValue("Processors", "2");
        usageRecord.setValue("Duration", "3600");
        request.setDatum(usageRecord);
        request.setOption("Duration", "3600");
        Response response = request.getResponse();
        System.out.println(response.getStatus() + ": " + response.getMessage() + "\n");
    }
}
```

## Communicating via the SSSRMAP Protocol

Finally, it is possible to interact with Moab Accounting Manager by directly using the SSSRMAP Wire Protocol and Message Format over the network (see [SSS Resource Management and Accounting documentation](#)). This will entail building the request body in XML, appending an XML digital signature, combining these in an XML envelope framed in an HTTP POST, sending it to the server, and parsing the similarly formed response. The Moab Workload Manager communicates with Moab Accounting Manager via this method.

*Example 23-9: The message might look something like:*

```

POST /SSSRMAP HTTP/1.1
Content-Type: text/xml; charset="utf-8"
Transfer-Encoding: chunked

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<?xml version="1.0" encoding="UTF-8"?>
<Envelope>
  <Body>
    <Request action="Charge" actor="scottmo">
      <Object>UsageRecord</Object>
      <Data>
        <UsageRecord>
          <Instance>Moab.1234</Instance>
          <Account>chemistry</Account>
          <User>amyh</User>
          <Machine>colony</Machine>
          <Processors>2</Processors>
          <Duration>3600</Duration>
        </UsageRecord>
      </Data>
      <Option name="Duration">3600</Option>
    </Request>
  </Body>
  <Signature>
    <DigestValue>azu4obZswzBt89OgATukBeLyt6Y=</DigestValue>
    <SignatureValue>YXE/C08XX3RX4PMU1bWju+5/E5M=</SignatureValue>
    <SecurityToken type="Symmetric"></SecurityToken>
  </Signature>
</Envelope>
0

```

# Chapter 24: Configuration files

Moab Accounting Manager uses four configuration files: one for the connection information (`site.conf`), one for the server (`goldd.conf`), one for the clients (`gold.conf`) and one for the graphical user interface (`goldg.conf`). For configuration parameters that have hard-coded defaults, the default value is specified within brackets.

## Site configuration

The site configuration file specifies the connection information for the current site such as the server host name, port, backup server, default security method and the symmetric key. Optionally, it may also have blocks that specify connection information for other sites. This file should be readable only by the accounting admin user.

*Example 24-1: The following is an example `site.conf` file*

```
server.host = red-head1
backup.host = red-head2
server.port = 7071
token.type = Symmetric
token.value = pBaIapJqbfLd8NiyzTJefFXW

[white]
server.host = white-head1
server.port = 7071
token.value = F17wOkioUpyjJqJ8ckvWK_ta

[blue]
server.host = blue-head1
server.port = 7071
token.valne = gVSeQ8Diz503pzj01y4inGWq
```

The following configuration parameters may be set in the site configuration file (`site.conf`).

**backup.host** — The hostname of the backup server. Each site can have both a primary server and a hot-standby backup server. They should either point to the same database or separate instances of replicated database. If `backup.host` is specified, clients will try communicating with the primary server first, and if the connection fails, they will try communicating with the backup server.

**server.host** — The hostname of the server

**server.port** [7112] — The port that the server listens on

**token-type** [Symmetric] — Indicates the default security token type to be used in both authentication and encryption. Valid token types include `Password` and `Symmetric`. The default is `Symmetric`.

**token.value** — When using the `Symmetric` token type, `token.value` is the secret key. It is a base64-encoded symmetric key used between clients and the server for authentication and encryption.

## Server configuration

The following configuration parameters may be set in the server configuration file (`goldd.conf`).

Parameter	Description
<b>currency.itemization [false]</b>	Enables ( <i>true</i> ) or disables ( <i>false</i> ) the storing of itemized charges to the Charge table for charge transactions.
<b>currency.precision [0]</b>	Indicates the number of decimal places in the resource credit currency. For example, if you are will be dealing with an integer billable unit like processor-seconds, use 0 (which is the default). If you will be charging dollars and cents, then use 2. This parameter should be the same in the <code>goldd.conf</code> and <code>gold.conf</code> files.
<b>database.datasource [DBI:Pg:dbname=mam;host=localhost]</b>	The Perl DBI data source name for the database you wish to connect to
<b>database.password</b>	The password to be used for the database connection (if any)
<b>database.user</b>	The username to be used for the database connection (if any)
<b>event.scheduler [false]</b>	Specifies whether the event scheduler is enabled ( <i>true</i> ) or not ( <i>false</i> )
<b>event.pollinterval [5]</b>	The period in minutes that the event scheduler uses to check and fire events. The poll interval must divide evenly into the number of minutes in a day (1440).
<b>log4perl.appender.Log.filename</b>	Used by <code>log4perl</code> to set the base name of the log file
<b>log4perl.appender.Log.max</b>	Used by <code>log4perl</code> to set the number of rolling backup logs
<b>log4perl.appender.Log.size</b>	Used by <code>log4perl</code> to set the size the log will grow to before it is rotated
<b>log4perl.appender.Log.Threshold</b>	Used by <code>log4perl</code> to set the debug level written to the log. The logging threshold can be one of TRACE, DEBUG, INFO, WARN, ERROR, and FATAL
<b>log4perl.appender.Screen.Threshold</b>	Used by <code>log4perl</code> to set the debug level written to the screen. The logging threshold can be one of TRACE, DEBUG, INFO, WARN, ERROR, and FATAL
<b>notification.deliverymethod [store]</b>	Specifies which delivery method is used by default if unspecified

Parameter	Description
<b>notification.duration [1209600]</b>	Defines how long in seconds that stored notifications persist before being automatically deleted. The default is two weeks.
<b>response.chunksize [0]</b>	Indicates the line length in the data response that will trigger message segmentation (or truncation). A value of 0 (zero) means unlimited, i.e. that the server will not truncate or segment large responses unless overridden by a chunksize specification in a client request. The response chunksize will be taken to be the smaller of the client and server chunksize settings.
<b>security.authentication [true]</b>	Indicates whether incoming message authentication is required
<b>security.encryption [false]</b>	Indicates whether incoming message encryption is required
<b>super.user [root]</b>	The primary Moab Accounting Manager system admin which by default can perform all actions on all objects. The super user is sometimes used as the actor in cases where an action is invoked from within another action.
<b>user.firstaccountdefault [false]</b>	If set to true, the first account that a user is added to will become the default account for that user.

## Client configuration

The following configuration parameters may be set in the client configuration file (`gold.conf`):

Parameter	Description
<b>accounting.context [hpc]</b>	By specifying the accounting context (either <code>hpc</code> or <code>cloud</code> ), the behavior of some client commands are adjusted to show the proper fields for that context. The default is <code>hpc</code> .
<b>account.show [Name,Active,Users,Organization,Description]</b>	The default fields shown by <code>glsaccount</code>
<b>allocation.show [Id,Fund,Active,StartTime,EndTime,Amount,CreditLimit,Deposited]</b>	The default fields shown by <code>glsalloc</code>

Parameter	Description
<b>balance.show [Id,Name,Amount,Reserved,Balance,CreditLimit,Available]</b>	The default fields shown by <code>gbalance</code>
<b>currency.precision [0]</b>	Indicates the number of decimal places in the credit currency. For example, if you will be dealing with integer billable units like processor-seconds, use 0 (which is the default). If you will be charging dollars and cents, then use 2. This parameter should be the same in the <code>gold.conf</code> and <code>gold.conf</code> files.
<b>event.show</b>	[Id,FireCommand,FireTime,ArmTime,RearmPeriod,EndTime,Notify,RearmOnFailure,FailureCommand,CatchUp,CreationTime,Description] -- The default fields shown by <code>gsevent</code>
<b>fund.show [Id,Name,Amount,Constraints,Description]</b>	The default fields shown by <code>glsfund</code>
<b>lien.show [Id,Instance,Amount,StartTime,EndTime,UsageRecord,Funds,Description]</b>	The default fields shown by <code>gslien</code>
<b>log4perl.appender.Log.filename</b>	Used by <code>log4perl</code> to set the base name of the log file
<b>log4perl.appender.Log.max</b>	Used by <code>log4perl</code> to set the number of rolling backup logs
<b>log4perl.appender.Log.size</b>	Used by <code>log4perl</code> to set the size the log will grow to before it is rotated
<b>log4perl.appender.Log.Threshold</b>	Used by <code>log4perl</code> to set the debug level written to the log. The logging threshold can be one of TRACE, DEBUG, INFO, WARN, ERROR, and FATAL.
<b>log4perl.appender.Screen.Threshold</b>	Used by <code>log4perl</code> to set the debug level written to the screen. The logging threshold can be one of TRACE, DEBUG, INFO, WARN, ERROR, and FATAL.



Parameter	Description
<b>notification.show</b>	[Id,Event,Type,Status,Code,Message,Key,Recipient,EndTime,CreationTime] --The default fields shown by <code>glsnot</code>
<b>organization.show</b> [Name,Description]	The default fields shown by <code>glsorg</code>
<b>quote.show</b> [Id,Amount,Pinned,Instance,UsageRecord,StartTime,EndTime,Duration,Cha	The default fields shown by <code>glsquote</code>
<b>response.chunking</b> [false]	Indicates whether large responses should be chunked (segmented). If set to false, large responses will be truncated
<b>response.chunksize</b> [1000]	Indicates the line length in the data response that will trigger message segmentation (or truncation). A value of 0 (zero) means unlimited, i.e., that the client will accept the chunksize set by the server. The response chunksize will be taken to be the smaller of the client and server chunksize settings.
<b>security.authentication</b> [true]	Indicates whether outgoing message are signed
<b>security.encryption</b> [false]	Indicates whether outgoing messages are encrypted

Parameter	Description
<b>server.promotion [suidperl]</b>	When using the symmetric key for security authentication or encryption, since the <code>site.conf</code> file is readable only by the accounting admin user, a method must be employed to temporarily elevate privileges in order to encrypt the communication with the symmetric key. One of two security promotion methods may be selected: <code>suidperl</code> or <code>gauth</code> . <code>Suiperl</code> allows a Perl script to temporarily elevate privileges to the owner of the script if the <code>setuid</code> bit is set on the file. This method is recommended when <code>suidperl</code> can be installed on the system. If you prefer not to use <code>suidperl</code> or if it is not available for your system (such as with Perl 5.12 and higher), you will need to use the <code>gauth</code> security promotion method. <code>Gauth</code> is a <code>setuid</code> binary that allows the request body to be passed in as standard input and returns the authenticated digest and signature. Currently, only <code>suidperl</code> can be used for encryption of client communication. The security promotion method should be configured at install time by specifying the <code>--with-promotion</code> configuration parameter and defaults to <code>suidperl</code> when it is available.
<b>statement.show [Account,User,Machine]</b>	The default discriminator fields in <code>gstatement</code>
<b>transaction.show [Id,Object,Action,Actor,Name,Child,Instance,Count,Amount,Delta,User,Account,Description]</b>	The default fields shown by <code>glstrans</code>
<b>usagerecord.show [Id,Type,Instance,Charge,Stage,Quote,User,Group,Account,Organization,Class,QualityOfService,Machine,Notification,StartTime,EndTime]</b>	The default fields shown by <code>glsusage</code>
<b>user.show [Name,Active,CommonName,PhoneNumber,EmailAddress,DefaultAccount,Description]</b>	The default fields shown by <code>glsuser</code>

## GUI configuration

The following configuration parameters may be set in the GUI configuration file (`goldg.conf`).

Parameter	Description
<b>currency.enablehours [false]</b>	If set to true, the graphical user interface will include a ShowHours radio button (defaulting to <code>True</code> ) for certain panels (e.g. Fund Balance, Deposit, Query, Statement, Transfer, Withdraw) that will allow the currency inputs or outputs to be divided by 3600.
<b>currency.precision [0]</b>	Indicates the number of decimal places in the credit currency. For example, if you will be dealing with integer billable units like processor-seconds, use 0 (which is the default). If you will be charging dollars and cents, then use 2. This parameter should be the same in the <code>golddd.conf</code> and <code>gold.conf</code> files.
<b>gui.style [viewpoint]</b>	Modifies the appearance and behavior of the web GUI to be consistent with use within viewpoint or for standalone use. Valid values are <code>legacy</code> or <code>viewpoint</code> . The default is <code>viewpoint</code> .
<b>log4perl.appender.Log.filename</b>	Used by log4perl to set the base name of the log file
<b>log4perl.appender.Log.max</b>	Used by log4perl to set the number of rolling backup logs
<b>log4perl.appender.Log.size</b>	Used by log4perl to set the size the log will grow to before it is rotated
<b>log4perl.appender.Log.Threshold</b>	Used by log4perl to set the debug level written to the log. The logging threshold can be one of <code>TRACE</code> , <code>DEBUG</code> , <code>INFO</code> , <code>WARN</code> , <code>ERROR</code> , and <code>FATAL</code> .
<b>response.chunking [false]</b>	Indicates whether large responses should be chunked (segmented). If set to false, large responses will be truncated.
<b>response.chunksize [1000]</b>	Indicates the line length in the data response that will trigger message segmentation (or truncation). A value of 0 (zero) means unlimited, i.e. that the client will accept the chunksize set by the server. The response chunksize will be taken to be the smaller of the client and server chunksize settings.
<b>security.authentication [true]</b>	Indicates whether outgoing message are signed
<b>security.encryption [false]</b>	Indicates whether outgoing messages are encrypted

Parameter	Description
<b>server.promotion [suidperl]</b>	<p>When using the symmetric key for security authentication or encryption, since the <code>site.conf</code> file is readable only by the accounting admin user, a method must be employed to temporarily elevate privileges in order to encrypt the communication with the symmetric key. One of two security promotion methods may be selected: <code>suidperl</code> or <code>gauth</code>. Suidperl allows a Perl script to temporarily elevate privileges to the owner of the script if the <code>setuid</code> bit is set on the file. This method is recommended when <code>suidperl</code> can be installed on the system. If you prefer not to use <code>suidperl</code>, or if it is not available for your system (such as with Perl 5.12 and higher), you will need to use the <code>gauth</code> security promotion method. <code>Gauth</code> is a <code>setuid</code> binary that allows the request body to be passed in as standard input and returns the authenticated digest and signature. Currently, only <code>suidperl</code> can be used for encryption of client communication. The security promotion method should be configured at install time by specifying the <code>--with-promotion</code> configuration parameter and defaults to <code>suidperl</code> when it is available.</p>
<b>statement.discriminators</b>	<p>The Fund Statement page will group summary entries in the debit detail by these transaction properties.</p>