esgcet Release 5.1.0b7

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Esgcet is a package of publisher commands for publishing to the ESGF search database.

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CHAPTER 1

TL;DR

if you have conda you can install the publisher wih the following into a fresh environment:

```
conda create -n esgf-pub -c conda-forge -c esgf-forge esgcet
conda activate esgf-pub
esgpublish # will print the usage information.
```

You may also look at the inital ~/.esg/esg.ini and fill in the missing information based on the provided examples.

1.1 Publisher Introduction

The **esg-publisher** or esgcet Python package contains a collection of command-line utilities to scan, manipulate and push dataset metadata to an *ESGF index node*. The basic publication process includes several basic steps and sometimes *optional* steps. Publisher functionality is available via several submodles/classes in the package.

The publisher software has undergone a significant change starting with v5.* of the software. Prior versions involved storage of dataset metadata in the legacy ESGF data node PostgreSQL database and generation of *THREDDS* catalogs. The actual publication to the ESGF index occured via catalog harvesting. Instead, the more recent publisher simplifies the process with the following phases:

- 1. Local scan of datasets (featuring the autocurator package by default)
- 2. Record generation using scan, mapfile and auxiliary (json) information/files as input
- 3. Update check of existing dataset, previous version manipulation.
- 4. Push/publish of record(s) to ESGF index

And several optional project-specific phases:

- Automatic metadata checking with PrePARE (CMIP6-only as of today)
- PID registration and citiation URL generation (CMIP6 and input4MIPs)

For those familiar with the previous publisher, please be aware of the following distinctions between earlier versions and v5.*

- A Python3 conda environment is required (most prior versions have run Python2)
- the configuration (.ini) file format is new and have been vastly simplified. Note that the old format for project-specific .ini files are still used by the esgf-prepare tools (eg. esgmapfile). The v5. publisher has the ability to migrate the needed settings from the previous ini files.
- Prior invocation of esgpublish required use of --thredds and --publish stages. Those arguments are eliminated. In the general case, you can run esgpublish in a single command. Advanced users may chose to run the individual publishing steps separately to create workflows, for instance, in the use of an external workflow manager.

1.1.1 Prerequisites

- conda eg. Miniconda installation.
- Mountpoint to located data on the same host as publisher software installation, so the publisher scan utility (eg. autocurator) has access.
- Basic dataset information provided via the esg mapfile format. The most popular approach is using the esgfprepare/esgmapfile utility.

1.2 Release Notes

1.2.1 b5.1.0-b10

• CRTICAL: esgunpublish checks dataset id argument for publication prior to unpublication to prevent serverside erroneus deletions.

1.2.2 v5.1.0-b9

- Improved Controlled-vocabulary agreement checks and upgraded rules (for CMIP6)
- Bug fix for input4MIPs (omit CMOR tables load)

1.2.3 v5.1.0-b8

- Change set-replica semantics with respect to PrePARE and add force_prepare option.
 - 1. Default behavior is to run PrePARE for non-replica but not for replica.
 - 2. With force_prepare=True, PrePARE is always run.
- esgunpublish now unpublishes PID from handle database.
- Allow for custom gridftp ports (specify with <hostname>:<port>).
- Correct file instance_id and master_id.

1.2.4 v5.1.0-b7

- Bug fix and refactoring: improved data root handling for paths that contain multiple instances of the project name in the path
- Bug fix for the skip_prepare argument (applies to CMIP6 replica publishing to bypass PrePARE)
- Feature to ensure that file tracking_ids are never duplicated within a dataset

1.2.5 v5.1.0-b6

- CRITICAL: corrected File record ID format to include | data_node to conform to prior specification
- Support for data root specifications that include the project string in the root
- Bug fixes: citiaton case for command line project path, support tilde for homedir in cmor path property in config
 file

1.2.6 v5.1.0-b5

- Update to support input4MIPs project
- Added --version argument
- · Additional arguments for esgunpublish
- Halt publishing if a file listed in the mapfile isn't found by autocurator

1.3 Installation

1.3.1 Conda & Required Packages

We recommend creating a conda env before installing esgcet

```
conda create -n esgf-pub -c conda-forge -c esgf-forge pip libnetcdf cmor autocurator \rightarrow esgconfigparser
```

NOTE: if you install esgeet using conda below, the cmor package (different from tables) should be installed at the time you install esgeet automatically, and having cmor in your env may cause conflicts (but not always).

You will also need to install esgfpid using pip:

```
pip install esgfpid
```

NOTE: you will need a functioning version of autocurator in order to run the publisher, in addition to downloading the CMOR tables. See those pages for more info.

1.3.2 Installing esgcet

You can install esgcet one of two ways: conda, or git.

To install esgeet using conda, activate the environment you created above and run:

```
conda install -c esgf-forge -c conda-forge esgcet
```

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To install esgeet by cloning our github repository (useful if you want to modiy the software): first, you should ensure you have a suitable python in your environment (see below for information on conda, etc.), and then run:

```
git clone http://github.com/lisi-w/esg-publisher.git -b refactor
cd esg-publisher
cd pkg
python3 setup.py install
```

Now you will be able to call all commands in this package from any directory. A default config file, esg.ini will populate in \$HOME/.esg where \$HOME is your home directory.

NOTE: if you are intending to publish CMIP6 data, the publisher will run the PrePARE module to check all file metadata. To enable this procedure, it is necessry to download CMOR tables before the publisher will successfully run. See those pages for more info.

1.3.3 Config

The config file will contain the following settings:

version

- This will be predefined in the [DEFAULT] section, it is used by setup to determine at time of install if your config file has all the latest settings.

· data_node

Required. This is the ESGF node at which the data is stored that you are publishing. It will be concatenated with the dataset_id to form the full id for your dataset.

index_node

- Required. This is the ESGF node where your dataset will be published and indexed. You can then retrieve it or see related metadata by using the ESGF Search API at that index node.

· cmor_path

Required for CMIP6. This is a full absolute path to a directory containing CMOR tables, used by the
publisher to run PrePARE to verify the structure of CMIP6 data. Example: /usr/local/cmip6-cmortables/Tables

· autoc path

Optional. This is the path for the autocurator executable. The default assumes that you have installed
it via conda. If you have not installed it via conda, please replace with a file path to your installed
binary.

· data_roots

- Required. Must be in a json string loadable by python. Maps file roots to names that appears in urls.

mountpoint_map

 Optional. Must be in a json string loadable by python. Changes specified sym link file roots in mapfile to actual file roots like so: {"/symlink/dir": "/actual/path"}

• cert

- Required, unless running in --no-auth mode. This is the full path to the certificate file used for publishing. Default assumes a file "cert.pem" in your current directory. Replace to override.

• test

Optional. This can be set to True or False, and it will run the esgfpid service in test mode. Default
assumes False. Override if you are not doing production publishing.

project

- Optional. ESGF project to which your data belongs. Default will be parsed from the mapfile name.

· non netcdf

- Optional. Enable or disable publication settings for non NetCDF data, default assumes False.

• set_replica

Optional. Enable or disable replica publication settings. Default assumes False, or replica publication off.

· globus uuid

Optional. Specify the UUID for your site Globus endpoint as configured in the Globus webapp.
 Default leaves out Globus URL from dataset metadata.

• data_transfer_node

- Optional. If you run the GridFTP service, set the hostname of that node, whether it the same as your data node or a sepearte Data Transfer Node for gsiftp urls in file records. Default of "none" will omit.

• pid_creds

- Settings and credentials for RabbitMQ server access for the PID service, required for some projects (CMIP6, input4MIPs). Input esgfpid credentials in a json loadable string.

user_project_config

 Optional. If using a self-defined project compatible with our generic publisher, put DRS and CONST_ATTR into a json loadable dictionary.

silent

 Optional. Enable or disable silent mode, which suppresses all INFO logging messages. Errors and messages from sub-modules are not suppressed. Default is False, silent mode disabled.

verbose

Optional. Enable or disable verbose mode, which outputs additional DEBUG logging messages.
 Default is False, verbose mode disabled.

Fill out the necessary variables, and either leave or override the optional configurations. Note that the section the publisher reads is the user section, not the default nor example. Example config settings can be found in the default esg.ini config file which will be created at \$HOME/.esg/esg.ini when you install esgcet. Note that while the cmor_path variable points to a directory, other filepaths must be complete, such as autoc_path and cert. This applies to the command line arguments for these as well. Additionally, a *required* setting if omitted can be satisfied via inclusion as ccommand line arguments.

If you have an old config file from the previous iteration of the publisher, you can use esgmigrate to migrate over those settings to a new config file which can be read by the current publisher. See that page for more info.

1.3.4 Run Time Args

If you prefer to set certain things at runtime, the esgpublish command has several optional command line arguments which will override options set in the config file. For instance, if you use the --cmor-tables command line argument to set the path to the cmor tables directory, that will override anything written in the config file under cmor_path. If you used the old version of the publisher, you should note that the command line argument -ini

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which points to your config file must be a complete path, not the directory as it was in the previous version. More details can be found in the esqpublish section.

1.4 Autocurator

1.4.1 Install

If you do not wish to install autocurator via conda, the option also exists to clone and install it from git:

```
git clone http://github.com/sashakames/autocurator.git
cd autocurator
make
```

After running this, there should be an autocurator executable saved as .../autocurator/bin/autocurator. You will need to update the config if you choose to do this with the correct path to the autocurator folder, as the default is just the autocurator command.

1.4.2 Running Autocurator

Before running autocurator (if you are not using the conda installed version) you must first run the following command:

```
export LD_LIBRARY_PATH=$CONDA_PREFIX/lib
```

This command helps autocurator locate and open shared libraries within the current conda environment. It will not work if this is not run. This also goes for running the esqpublish command if, in your config, you have listed a direct path instead of simply the autocurator command.

If you want to run autocurator as a stand alone, use the following format:

```
bash autocurator.sh <path to autocurator executable> <full mapfile path> <scan file →name (output file)>
```

The executable itself can also be run like so:

```
bin/autocurator --out_pretty --out_json <scan file name> --files <dataset directory>
```

However, this mode is sometimes difficult as specifying multiple files requires using a dir/*.nc format which sometimes causes issues. Overall, we recommend using the script above as it cleans up a few things. You can also use the conda install as above, but the path/command will just be "autocurator". Once you have your scan file, you can use that to run esgmkpubrec (see that page for more info).

1.5 CMOR

Before running the publisher, you will also need to obtain a directory of CMOR tables, used by PrePARE to check the metadata of your files. You can get this directory either using esgprep or by cloning the git repository.

1.5.1 esgprep

You can install esgprep using pip:

```
pip install esgprep
```

You can also clone their git repository and run setup.py:

```
git clone git://github.com/ESGF/esgf-prepare.git
cd esgf-prepare
python setup.py install
```

NOTE: esgprep uses python 2.6 or greater, but less than python 3.0. Configure your virtual environment as needed.

Following install, simply run:

```
esgfetchtables
```

You can specify project using --project and the output directory using --table-dir like so:

```
esgfetchtables --project CMIP6 --table-dir <path>
```

Once you have fetched the tables, you can update the <code>cmor_path</code> variable in your config file, or specify it at run time in the command line.

1.5.2 Clone Git Repository

Clone the repository:

```
git clone https://github.com/PCMDI/cmip6-cmor-tables.git
```

Your tables will be in the folder <code>cmip6-cmor-tables/Tables</code> (unless you specify a different target directory name for the clone). You can now update the <code>cmor_path</code> variable in your config file, or specify it at run time in the command line.

1.6 esgmigrate

The esgmigrate command migrates old config settings from the old publisher into a new config file formatted for the current new publisher. The output will be found in \$HOME/.esg/esg.ini which is the default config file path the publisher will read from.

1.6.1 Usage

esgmigrate is used with the following syntax:

```
esgmigrate
```

By default, esgmigrate will attempt to read the old config file at /esg/config/esgcet and will write the new config file to \$HOME/.esg/esg.ini. To override these defaults, use the optional command line arguments below.

Additional command line options are as follows:

(continues on next page)

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```
optional arguments:

-h, --help show this help message and exit

--old-config CFG Full path to old config file to migrate.

--silent Enable silent mode.

--verbose Enable verbose mode.

--project PROJECT Name of a particular legacy project to migrate.

--destination DEST Destination for new config file.
```

Note that --old-config should point to a directory, not the file itself; however, --destination should be a complete file path including the file name.

1.7 esgpublish

The esgpublish command publishes a record from start to finish using the mapfile(s) passed to it. On success, it will display a success message in the output of the last two steps. If an error occurs, a helpful statement will be printed explaining which step went wrong and why.

1.7.1 **Usage**

esgpublish is used with the following syntax:

```
esgpublish --map <mapfile>
```

The mapfile (--map) is the only truly *required* argumement, as other are typically supplied through the config file. You can also use --help to see:

```
$ esgpublish --help
usage: esgpublish [-h] [--test] [--set-replica] [--no-replica] [--esgmigrate]
                  [--json JSON] [--data-node DATA_NODE]
                  [--index-node INDEX_NODE] [--certificate CERT]
                  [--project PROJ] [--cmor-tables CMOR_PATH]
                  [--autocurator AUTOCURATOR_PATH] --map MAP [MAP ...]
                  [--ini CFG] [--silent] [--verbose] [--no-auth] [--verify]
Publish data sets to ESGF databases.
optional arguments:
 -h, --help
                      show this help message and exit
                      PID registration will run in 'test' mode. Use this mode_
 --test
\rightarrowunless you are performing 'production' publications.
 --set-replica Enable replica publication.
                      Disable replica publication.
 --no-replica
 --json JSON
                       Load attributes from a JSON file in .json form. The
\rightarrowattributes will override any found in the DRS structure or global attributes.
 --data-node DATA_NODE
                        Specify data node.
 --index-node INDEX_NODE
                        Specify index node.
 --certificate CERT, -c CERT
                       Use the following certificate file in .pem form for,
→publishing (use a myproxy login to generate).
 --project PROJ
                  Set/overide the project for the given mapfile, for use with,
→selecting the DRS or specific features, e.g. PrePARE, PID.
                                                                        (continues on next page)
```

```
--cmor-tables CMOR_PATH
              Path to CMIP6 CMOR tables for PrePARE. Required for CMIP6 only.
 --autocurator AUTOCURATOR_PATH
                      Path to autocurator repository folder.
 --map MAP
                      Required. mapfile or file containing a list of mapfiles.
 --ini CFG, -i CFG Path to config file.
                      Enable silent mode.
 --silent
 --verbose
                       Enable verbose mode.
                      Run publisher without certificate, only works on certain_
 --no-auth
⇒index nodes.
                       Toggle verification for publishing, default is off.
 --verify
```

This command can handle a singular mapfile passed to it, a file containing a list of mapfiles (with full paths), a directory of mapfiles, or a directory of lists of mapfiles. You do not need to specify how you are passing mapfiles, but all of them must be for the same project in order for them to be published with the correct metadata. If optional command line arguments are used, they will override anything set in the config file. NOTE: If, in your config file, you have specified a directory for autocurator rather than the default command, ie you are using a different autocurator than the one installed using conda, you must run the following command prior to running esgpublish:

```
export LD_LIBRARY_PATH=$CONDA_PREFIX/lib
```

If you do not run this and are not using the conda installed autocurator, the program will not work.

Warning: Please do not attempt to run *esg-publisher* commands with a legacy esg.ini file using the -i argumement. You will need to migrate the config using *esgmigrate*.

1.8 esgmapconv

The esgmapconv command executes the first step of the publishing protocol by converting metadata from a mapfile into json data. That data is the input to the esgmkpubrec command.

1.8.1 **Usage**

esgmapconv is used with the following syntax:

```
esgmapconv --map <mapfile>
```

where <mapfile> is the absolute path to a single mapfile. The output will be printed to stdout, but can be easily redirected to a chosen file using the --out-file option.

You can also use the other command line options for additional configuration:

1.8. esgmapconv 11

```
--out-file OUT_FILE Output file for map data in JSON format. Default is printed_

→to standard out.

--ini CFG, -i CFG Path to config file.
```

Using the command line option -h will display the above message. The above options (excluding --map) can be defined in the config file instead of the command line if you choose.

1.9 esgmkpubrec

The esgmkpubrec command uses the output data from esgmapconv to populate metadata for the dataset and file records. This command also requires the output of the autocurator command, which populates additional metadata using the mapfile and puts it into a separate json file. This output is the input to the esgpidcitepub command.

1.9.1 **Usage**

esgmkpubrec is used with the following syntax:

```
esgmkpubrec --scan-file <scan file> --map-data <JSON file>
```

where <JSON file> is the aforementioned output from esgmapconv and <scan file> is the output of autocurator<https://github.com/lisi-w/autocurator>`_. The output is again defaulted to stdout, but can easily be redirected using the ``--out-file option.

The other command line options are as follows:

```
usage: esgmkpubrec [-h] [--set-replica] [--no-replica] [--json JSON]
                   --scan-file SCAN_FILE --map-data MAP_DATA
                   [--out-file OUT_FILE] [--data-node DATA_NODE]
                   [--index-node INDEX_NODE] [--project PROJ]
                   [--ini CFG] [--silent] [--verbose]
Publish data sets to ESGF databases.
optional arguments:
                          show this help message and exit
   -h, --help
    --set-replica
                         Enable replica publication.
    --no-replica
                         Disable replica publication.
    --json JSON
                         Load attributes from a JSON file in .json form. The
→attributes will override any found in the DRS structure or global attributes.
   --scan-file SCAN_FILE
                          JSON output file from autocurator.
   --map-data MAP_DATA
                          Mapfile json data converted using esgmapconv.
   --out-file OUT_FILE
                          Optional output file destination. Default is stdout.
   --data-node DATA_NODE
                          Specify data node.
   --index-node INDEX_NODE
                          Specify index node.
    --project PROJ
                         Set/overide the project for the given mapfile, for use with_
→selecting the DRS or specific features, e.g. PrePARE, PID.
    --ini CFG, -i CFG
                         Path to config file.
    --silent
                          Enable silent mode.
    --verbose
                          Enable verbose mode.
```

NOTE: esgmkpubrec has customized settings and features depending on the project. If the project is undefined, it will use default settings which may not work for your project and could result in errors. It is highly recommended to specify your project, and also use the config file to specify if it is non-netcdf data.

1.10 esgpidcitepub

The esgpidcitepub command connects to a PID server using credentials defined in the config file. It then assigns a PID to the dataset. This step is necessary for all CMIP6 data records. The output of this command is the input to both the esgupdate command as well as the esgindexpub command.

1.10.1 Usage

esgpidcitepub is used with the following syntax:

```
esgpidcitepub --pub-rec <JSON file>
```

where <JSON file> is the output of the esgmkpubrec command. The output of this command is by default printed to stdout, but can easily be redirected using the --out-file option.

The other command line options are as follows:

You can also define the above options (aside from --pub-rec) in the config file if you choose.

1.11 esgupdate

The esgupdate command checks to see if the dataset being published is already in our database. If it is, it uses the metadata produced by the other commands to update the record. The output is the published data along with a success message upon success.

1.11.1 Usage

esgupdate is used with the follwing syntax:

```
esgupdate --pub-rec <JSON file>
```

where <JSON file> is the output of the esgpidcitepub command.

Additional command line options are as follows:

```
usage: esqupdate [-h] [--index-node INDEX_NODE] [--certificate CERT]
               --pub-rec JSON_DATA [--ini CFG] [--silent]
               [--verbose] [--no-auth] [--verify]
Publish data sets to ESGF databases.
optional arguments:
   -h, --help
                       show this help message and exit
   --index-node INDEX_NODE
                       Specify index node.
   --certificate CERT, -c CERT
                       Use the following certificate file in .pem form for_
→publishing (use a myproxy login to generate).
   --ini CFG, -i CFG
                       Path to config file.
   --silent
                       Enable silent mode.
   --verbose
                       Enable verbose mode.
                       Run publisher without certificate, only works on certain,
   --no-auth
→index nodes.
   --verify
                       Toggle verification for publishing, default is off.
```

You can also define most of these options in the config file if you choose.

1.12 esgindexpub

The esgindexpub command publishes the data record using the metadata produced by the other commands to the index_node defined in the config file. The output of this command will display published data along with a success message upon success.

1.12.1 Usage

esgindexpub is used with the following syntax:

```
esgindexpub --pub-rec <JSON file>
```

where <JSON file> is the output of the esgpidcitepub command.

You can also use the other command line options to configure some variables outside of the config file (or to define where to find the config file):

(continues on next page)

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```
--ini CFG, -i CFG Path to config file.
--silent Enable silent mode.
--verbose Enable verbose mode.
--no-auth Run publisher without certificate, only works on certain_

--ini CFG, -i CFG Path to config file.
Enable silent mode.

--verbose Enable verbose mode.

--uerify Toggle verification for publishing, default is off.
```

Use the command line option -h to see the message above.

1.13 esgunpublish

The esgunpublish command retracts, or, upon specification, deletes a specified dataset. The output of this command is either a success or failure message accompanied with the id of the dataset that was retracted. Exercise caution when deleting datasets as, if replicas have been made or if you will be republishing, you should retract rather than delete outright.

1.13.1 Usage

esgunpublish is used with the following syntax:

```
esgunpublish --dset-id <dataset_id>
```

The <dataset_id> can be either the instance_id or the full dataset_id corresponding to the dataset. If instance_id is used, the program will use the data-node option, from CLI or config file, to create the full dataset_id. You can also specify certain command line options rather than defining them in a config file:

```
usage: esgunpublish [-h] [--index-node INDEX_NODE] [--data-node DATA_NODE]
                [--certificate CERT] [--delete] --dset-id DSET_ID
                [--ini CFG]
Unpublish data sets from ESGF databases.
optional arguments:
   -h, --help
                          show this help message and exit
    --index-node INDEX_NODE
                          Specify index node.
   --data-node DATA_NODE
                          Specify data node.
    --certificate CERT, -c CERT
                          Use the following certificate file in .pem form for
                          unpublishing (use a myproxy login to generate).
    --delete
                          Specify deletion of dataset (default is retraction).
    --dset-id DSET_ID
                          Dataset ID for dataset to be retracted or deleted.
    --ini CFG, -i CFG
                          Path to config file.
```

You can see this message above by running esgunpublish -h. For the --ini, -i option, the path may be relative but it must point to the file, not to the directory in which the config file is.

1.14 Troubleshooting & Tips

If you encounter issues running any of the esgcet commands, try looking for common issues:

1.13. esgunpublish

- If you encounter issues processing arguments (variables are undefined but you included them either in the command line or ini file), try checking your ini file for syntax issues. The error messages should be clear for the most part, but for variable issues the config file is a good place to start.
- If the program fails to create the dataset, check to see if autocurator exited without error.
- If you are using a custom project and encounter errors, try using the individual commands one at a time instead of esgpublish. If your project requires customization, feel free to open a github issue and request that support for your project is added.
- For example commands and test scripts, see our test suite repository.
- For unexpected behavior, output, or errors, please open a github issue.

1.15 Contributing

Please document your pull requests so we can understand how to test your changes. We don't want changes to affect publishing of ongoing projects.

1.15.1 Updates to this document

Please install the Sphinx package. Also you will need to pip install sphinx-glpi-theme in your environment.