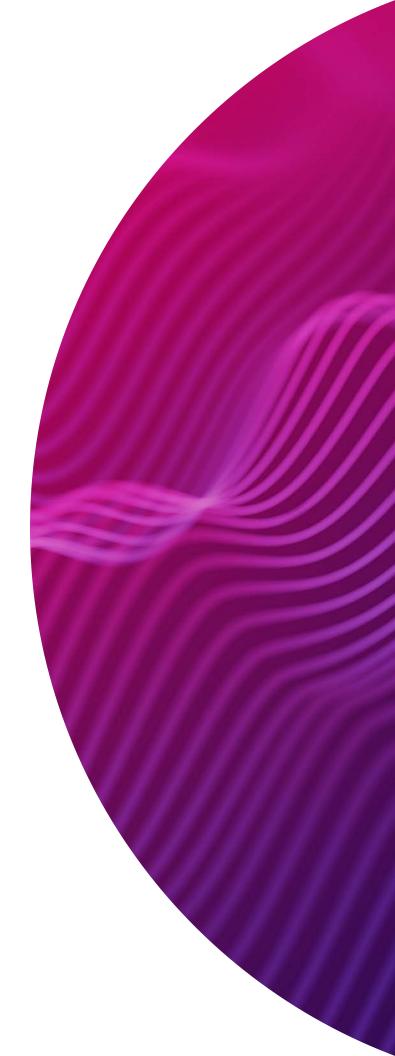
PacBi

SMRT® Link web services API use cases (v13.0)



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Introduction

The SMRT Link web services API, provided by PacBio[®], allows integration of SMRT Link with third-party software. It is also used for accessing features such as designing and performing quality control on instrument runs, querying new data from the instrument, and starting analyses on the sequence data.

This document describes common tasks performed using the SMRT Link web services API and provides "how to" recipes for accomplishing these tasks. To accomplish a task, you usually need to perform several API calls; the document describes the order of these calls.

As an example of a real-world workflow, most of the examples below roughly correspond to what happens when a Site Acceptance Test is run on Sequel® Ile systems using SMRT Link, starting from run design and finishing with the analysis pipeline.

Note: For clarity, all of the API examples in this document use the unauthenticated, insecure endpoints. In a default SMRT Link installation, these are available from localhost on port 9091. If you are connecting from a remote host and/or you require SSL or authentication, you will instead go through the API gateway layer, which uses port 8243 and adds the prefix /SMRTLink/1.0.0. For example, with default installer settings, these two URLs refer to the same endpoint (assuming that the SMRT Link server is running on localhost):

```
http://localhost:9091/smrt-link/datasets/subreads
https://servername.serverdomain:8243/SMRTLink/1.0.0/smrt-link/datasets/subreads
```

Later sections explain these connections and provide programmatic examples.

Viewing API information

For detailed information on the SMRT Link web services API calls, including definitions and examples, see Swagger-generated information here:

```
https://<server name>:8243/sl/docs/services/#/default
```

where <server name>: 8243 is the name and port number of your local SMRT Link server.

Connecting to the SMRT Link Services API securely

SMRT Link v13.0 restricts access to the services port (Default = 9091) to clients running on localhost or connecting via the secure (HTTPS) API gateway on port 8243, with authentication credentials. The default API gateway combines NGINX for HTTPS, KrakenD for API management, and Keycloak for authentication.

If you only connect from localhost, the existing clients will continue to work as long as you specify localhost or 127.0.0.1 and not the full host/domain name. If you are running any external database or automation programs that connect to the SMRT Link API, this section describes how to adapt your code to v13.0.

Use caution when embedding user credentials in shell scripts or source code, as this may expose them in log files or shell history. We recommend that automated clients such as LIMS systems use a special-purpose account with limited or no system login access. For example, the SMRT Link v13.0 installation process automatically creates a user in Keycloak for the Revio™, Sequel IIe and Sequel II systems to use when connecting. Since this user is only known to the SMRT Link API gateway, it cannot be used for any purpose other than connecting to the SMRT Link API.

How the authentication API works

Secure API access requires passing encoded authentication credentials in the HTTP header, with a slightly different endpoint URL. This is a two-step process: First the client requests an access token using the provided user name and password, then connects to the API endpoint using the access token. The token remains good for up to two hours (7200 seconds), but several caveats about token expiry are discussed below.

To connect to a secure API endpoint, follow this procedure, replacing <servername> with the fully-qualified domain name:

1. POST a request to https://<servername>:8243/token with these HTTP headers:

```
Content-Type: application/x-www-form-urlencoded
Authorization: Basic
S01MejVnN2ZibXg4UlZGS0tkdTBOT3JKaWM0YTo2TmpSWEJjRmZMWk93SGMwWGxpZGl6NHl3Y3Nh
```

and this content, replacing <user> and <password> with the actual credentials:

```
{
  "grant_type": "password",
  "username": "<user>",
  "password": "<password>",
  "scope": "welcome run-design run-qc openid analysis sample-setup data-management userinfo"
}
```

The "Basic" authorization identifies the client to the API gateway; for convenience we use hard-coded client registration credentials in SMRT Link and the pbservice clients, shown above. (The string passed here is a base-64 encoding of combined user and password strings.)

The client response will look something like below: (This is an example of the response data model, the actual token string may be hundreds of characters long.)

```
{
  'access_token': '<TOKEN STRING>',
  'id_token': '<id_token>',
  'expires_in': 6272,
  'token_type': 'Bearer',
  'scope': 'analysis data-management openid run-design run-qc userinfo',
  'refresh_token': '<TOKEN STRING>'
}
```

2. Perform the API client call. The URL must now include the prefix /SMRTLink/1.0.0, and use HTTPS port 8243. For example, these calls are equivalent:

```
GET http://localhost:9091/status
GET https://servername:8243/SMRTLink/1.0.0/status
```

Also note that all service endpoints that were originally prefixed with /secondary-analysis now need to use /smrt-link instead, for example:

```
GET http://localhost:9091/secondary-analysis/datasets/subreads
```

now becomes:

```
GET https://servername:8243/SMRTLink/1.0.0/smrt-link/datasets/subreads
```

These HTTP headers are required, replacing <access_token> with the field from the response in Step 1:

```
Content-type: application/json
Authorization: Bearer <access_token>
```

3. The access token remains valid for the duration specified by expires_in (in seconds). In practice we find it safest to refresh sooner than this to avoid clock skew issues. You can use the refresh token to request a new access token instead passing the user/password credentials:

```
{
  "grant_type": "refresh_token",
  "refresh_token": "<refresh_token>"
}
```

This is posted to the same /token endpoint as in Step 1, with the same headers. Note however that if you have multiple clients running simultaneously, the refresh mechanism will effectively lead to a race condition, therefore re-authenticating each time is recommended if the clients are running for longer than the expiry time.

4. You can revoke an access token by POSTing to /revoke:

```
POST https://servername:8243/revoke
```

Use the same headers as Step 1, and this body:

```
{
  "token": "<access_token>",
  "token_type_hint": "access_token"
}
```

This is what the **logout** button in SMRT Link does. (It is not, however, necessary for non-browser client applications.)

As a compact practical example, these Linux commands show how to use the secure API with the curl and jq utilities:

```
AUTH_TOKEN=$(curl -k -s --user KMLz5g7fbmx8RVFKKdu0NOrJic4a:6NjRXBcFfLZOwHc0Xlidiz4ywcsa -d "grant_type=password&username=$API_USER&password=$API_PASS&scope=sample-setup+run-design+run-qc+data-management+analysis+userinfo+openid" https://servername:8243/token | jq -r .access_token)

curl -k -s -H "Authorization: Bearer $AUTH_TOKEN" https://servername:8243/SMRTLink/1.0.0/status
```

Here the API_USER and API_PASS variables should contain the actual user credentials; again, use caution when passing sensitive authentication information. Note that curl internally converts the hard-coded —user credentials to the appropriate basic authorization header, and also sets the Content-Type header automatically.

SSL security features

The full SSL/HTTPS implementation includes several checks designed to prevent "man-in-the-middle" attacks by hackers, including the reliance on central certificating authorities to sign SSL keys, which are also tied to specific host names. The default SMRT Link installation uses a generic "self-signed" certificate that can optionally be replaced with a user-provided official certificate for that site. If this is **not** done, or if you encounter other problems with SSL security features, you may need to disable these features. This does not eliminate encryption or authentication, but it is generally discouraged by HTTP client libraries and tools. For example in the shell commands shown in the previous section, the -k flag tells curl to disable SSL certificate verification.

Python example

The following source code provides a complete working example of a simple authenticated client call using only the Python 3.7 standard library plus the request module, equivalent to the curl commands above:

```
class APIConstants(object):
    # These client registration credentials are valid for every SMRT Link
    # server (and are also used by the SL UI)
    SECRET = "KMLz5q7fbmx8RVFKKdu0NOrJic4a"
    CONSUMER KEY = "6NjRXBcFfLZOwHc0Xlidiz4ywcsa"
    SCOPES = ["welcome", "run-design", "run-qc", "openid", "analysis",
              "sample-setup", "data-management", "userinfo"]
def create auth(secret, consumer key):
    return base64.b64encode(":".join([secret, consumer key]).encode("utf-8"))
def get token(url, user, password, scopes, secret, consumer key):
   basic auth = create auth(secret, consumer key).decode("utf-8")
   headers = {
        "Authorization": "Basic {}".format(basic auth),
        "Content-Type": "application/x-www-form-urlencoded"
    }
    scope str = " ".join({s for s in scopes})
    payload = dict(grant type="password",
                   username=user,
                   password=password,
                   scope=scope str)
    # verify is false to disable the SSL cert verification
    return requests.post(url, payload, headers=headers, verify=False)
def get smrtlink auth token(user, password, url):
    r = get token(url, user, password, APIConstants.SCOPES, APIConstants.SECRET,
APIConstants.CONSUMER KEY)
    r.raise_for_status()
    j = r.json()
    access token = j['access token']
    refresh token = j['refresh token']
    scopes = j['scope'].split(" ")
    return access token, refresh token, scopes
```

```
def _to_headers(access_token):
   return {
        "Authorization": "Bearer {}".format(access_token),
        "Content-type": "application/json"
    }
def _get_endpoint(api_path, access_token):
    api\_url = "https://{h}:8243/SMRTLink/1.0.0{p}".format(h=host, p=api_path)
   headers = to headers(access token)
    # verify=False disables SSL verification
    response = requests.get(api_url, headers=headers, verify=False)
    response.raise_for_status()
   return response.json()
def get_status(hostname, user, password):
   token url = "https://{h}:8243/token".format(h=host)
   access_token, refresh_token, scopes = get_smrtlink_auth_token(user, password,
token_url)
    return _get_endpoint("/status", access_token)
```

How to set up a run design

To set up a run design, perform the following steps:

- Prepare the run design information in an CSV file, as documented in the SMRT Link help (https://<SERVERNAME>:8243/sl/docs/SL_DEF_Run_design_format.htm). The SMRT Link distribution also includes a ZIP file containing template CSV files.
- 2. Create the run design: Use the POST request with the following endpoint:

```
POST /smrt-link/import-run-design
```

The payload (request body) for this POST request is a JSON string with either one of these fields:

- path: The path to the CSV file on the local or NFS file system.
- content: The raw content of the CSV file, as a string

Example

```
POST /smrt-link/import-run-design
{
    "path"- : "/data/pacbio/run-csvs/my_run_20230201.csv"
}
```

This assumes that the server has read access to the specified path; if this is **not** possible, post the content directly.

The response will be the JSON object translated from CSV; the uuid field can be used to retrieve the run XML from this endpoint, which is also used by PacBio instruments:

```
GET /smrt-link/runs/<uuid>
```

For simple automation and testing, this endpoint is available on the Linux command line using the pbservice command:

```
pbservice import-run /data/pacbio/run-csvs/my_run_20230201.csv
```

Note: Posting the Run XML directly to the runs endpoint is technically possible, but the CSV import is PacBio's **officially supported API** for creating runs.

How to get recent runs

To get recent runs, perform the following steps:

1. Get the list of all runs by using the GET request with the following endpoint:

```
GET /smrt-link/runs
```

2. Filter the response based on the value of the createdAt field. For example:

```
"createdAt": "2016-12-13T19:11:54.086Z"
```

Note: You may also search runs based on specific criteria, such as reserved state, creator, or summary substring.

Example: Find all runs created on or after 01.01.2017

First, get the list of all runs:

```
GET /smrt-link/runs
```

The response is an array of run objects, as in the following example: (Some fields are removed for display purposes.)

```
[
    {
        "name" : "54001 SAT",
        "uniqueId": "a836efbc-fd58-40f6-b586-43c743730fe0",
        "createdAt": "2016-11-08T17:50:57.955Z",
        "summary" : "SAT run"
    } ,
        "name" : "54001 ecoli 15k",
        "uniqueId": "798ff161-23ee-433a-bfd9-be8361b40f15",
        "createdAt": "2017-01-20T16:08:41.610Z",
        "summary" : "E. coli assembly"
    },
        "name": "54001 hla amplicons",
        "uniqueId: "5026afad-fbfa-407a-924b-f89dd019ca9f",
        "createdAt" : "2017-01-21T00:21:52.534Z",
        "summary" : "Human HLA"
    }
1
```

Now, search the above response for all run objects whose createdAt field starts with the 2017-01 substring. In the above example, you will get two runs that fit your criteria (that is, created on or after 01.01.2017):

- Run with "name" equal to "54001_ecoli_15k",
- Run with "name" equal to "54001_hla_amplicons".

How to monitor the progress of a SMRT Link run

Run progress can be monitored by looking at the completion status of each collection associated with that run. Perform the following steps:

- 1. If you do not have the Run UUID, retrieve it as described in Step 1 of How to get recent runs.
- 2. Once you have the Run UUID, get all collections that belong to the run. Use the Run UUID in the GET request with the following endpoint:

```
GET /smrt-link/runs/{runUUID}/collections
```

The response contains the list of all collections of that run.

3. Monitor collection status to see when all collections are complete.

Until all collections of the run have the field status set to Complete, repeat the GET request with the following endpoint:

```
GET /smrt-link/runs/{runUUID}/collections
```

You may also monitor each collection individually.

Use the collection UUID in the GET request with the following endpoint:

```
GET /smrt-link/runs/{runUUID}/collections/{collectionUUID}
```

4. To monitor run progress using QC metrics as well, do this at the collection level, for each collection that belongs to this run. For instructions, see How to get QC reports for a specific collection.

The full set of QC metrics for a collection will be available **only** when the collection is **complete**. Monitor the completion status of each collection and, for each complete collection, check its QC metrics. QC metrics of all collections that belong to the run will let you evaluate the overall success of the run.

Example

To monitor the run with Name = 54001 DryRun 2Cells 20161219, use the following steps:

1. Get the list of all runs as described in the previous section.

```
GET /smrt-link/runs
```

The response is an array of run objects, as in the following example: (Some fields are removed for display purposes.)

2. Search the above response for the object with the name field equal to 54001 SAT.

From the above example, you will get the run object with the uniqueId field equal to a836efbc-fd58-40f6-b586-43c743730fe0.

3. With this Run UUID = a836efbc-fd58-40f6-b586-43c743730fe0, get all collections that belong to this run:

```
GET /smrt-link/runs/a836efbc-fd58-40f6-b586-43c743730fe0/collections
```

The response is an array of collection objects of this run, as in the following example:

```
[ {
    "name" : "54001 SAT 1stCell",
    "instrumentName" : "Sequel",
    "context": "m54001 161219 161247",
    "well" : "A01",
    "status" : "Complete",
    "instrumentId" : "54001",
    "startedAt" : "2016-12-19T16:12:47.014Z",
    "uniqueId": "7cf74b62-c6b8-431d-b8ae-7e28cfd8343b",
    "collectionPathUri" : "/data/sequel/r54001_20161219_160902/1_A01",
    "runId": "a836efbc-fd58-40f6-b586-43c743730fe0",
    "movieMinutes" : 120
   "name" : "54001 SAT 2ndCell",
    "instrumentName" : "Sequel",
    "context": "m54001 161219 184813",
    "well" : "B01",
    "status" : "Ready",
    "instrumentId" : "54001",
    "startedAt" : "2016-12-19T16:12:47.014Z",
    "uniqueId": "08af5ab4-7cf4-4d13-9bcb-ae977d493f04",
    "collectionPathUri": "/data/sequel/r54001 20161219 160902/2 B01",
    "runId": "a836efbc-fd58-40f6-b586-43c743730fe0",
    "movieMinutes" : 120
}
]
```

In the above example, the first collection has status of Complete.

You can take its UUID, i.e. uniqueId: 7cf74b62-c6b8-431d-b8ae-7e28cfd8343b, and get its QC metrics. For instructions, see How to get QC reports for a specific collection.

The second collection has a status of Ready.

You can take its UUID, i.e. uniqueId: 08af5ab4-7cf4-4d13-9bcb-ae977d493f04, and monitor its status until it becomes Complete. To do so, use the following API call:

```
GET /smrt-link/runs/a836efbc-fd58-40f6-b586-43c743730fe0/collections/08af5ab4-7cf4-4d13-9bcb-ae977d493f04
```

Once this collection becomes complete, you can get its QC metrics as well.

How to run jobs using services

SMRT Link runs several different types of "jobs" which consist of tasks that may take an arbitrarily long time to run and are therefore executed asynchronously. To view a list of supported job types, enter:

```
GET /smrt-link/job-manager/job-types

[
        "jobTypeId": "db-backup",
        "description": "Create a DB backup of the SMRT Link system",
        "isQuick": true,
        "isMultiJob": false
},
        {
        "jobTypeId": "delete-datasets",
        "description": "(Soft) delete of PacBio DataSet XML",
        "isQuick": true,
        "isMultiJob": false
},
        ...
]
```

Note: "Quick" jobs (generally taking less than a minute) have their own queue, separate from analysis jobs and other I/O intensive tasks.

Creating a job follows this pattern:

```
POST /smrt-link/job-manager/jobs/<jobTypeId>
```

The request body varies depending on job type, from a single path field to more complex data types, several examples of which are described below. The server should respond with 201: Created and the model for the new job:

```
"name": "import-dataset",
    "updatedAt": "2018-06-19T21:13:31.047Z",
    "workflow": "{}",
    "path": "/smrtlink/userdata/jobs root/000/000001",
    "state": "CREATED",
    "tags": "",
    "uuid": "7cf74b62-c6b8-431d-b8ae-7e28cfd8343b",
    "projectId": 1,
    "jobTypeId": "import-dataset",
    "id": 1,
    "smrtLinkVersion": "6.0.0.SNAPSHOT38748",
    "comment": "Description for job Import PacBio DataSet",
    "createdAt": "2018-06-19T21:13:31.047Z",
    "isActive": true,
    "createdBy": null,
    "isMultiJob": false,
    "jsonSettings":
"{\"path\":\"/data/sequel/r54001 20161219 160902/1 A01/m54001 20161219 170101.
subreadset.xml\",\"datasetType\":\"PacBio.DataSet.SubreadSet\",\"submit\":true}",
    "jobUpdatedAt": "2018-06-19T21:13:31.047Z",
```

Client code should now block until the job is complete, which should result in the state field changing to SUCCESSFUL if all goes well.

Note: Blocking mean that the client will poll for the server to complete a job. When the system is under minimal load, blocking can be used instead of manually polling for the job to complete. High-computational situations, such as a large FASTA file conversion, are **not** appropriate for blocking.

How to import a completed collection (Data Set)

Once a run is complete and the data have been transferred off the instrument, the resulting Data Set(s) can be imported into SMRT Link. This creates an imported ataset job that runs asynchronously and generates several reports used to assess run quality.

To import a Data Set, use this API call:

```
POST /smrt-link/job-manager/jobs/import-dataset
```

The request body in this case is very simple:

```
{
   "path":
   "/data/sequel/r54001_20161219_160902/1_A01/m54001_20161219_170101.subreadset.xml"
}
```

The server should respond with 201: Created and the model for the new job; it should only take several minutes at most for the import job to complete.

Note that the same import-dataset job type is also used to import other Data Set types such as the ReferenceSet XML used to run the SAT pipeline.

Searching for a Data Set

The Data Set retrieval endpoints support a number of search operators that may be included as CGI parameters:

```
GET /smrt-link/datasets/subreads?name=human
```

String fields use case-insensitive partial matching, so this will retrieve all Data Sets whose names include human in any combination of upper and lower case.

You can also retrieve a selection of Data Sets by posting a search query with a list of UUIDs:

```
POST /smrt-link/datasets/subreads
{
    "uuid": "in:7cf74b62-c6b8-431d-b8ae-7e28cfd8343b,a836efbc-fd58-40f6-b586-
43c743730fe0"
}
```

Note: The list needs to start with in: to tell the search API to find values from a list.

How to capture run-level summary metrics

Run-level summary metrics are captured in the QC reports. See the following sections:

- How to get QC reports for a specific SMRT Link run.
- How to get QC reports for a specific collection.

How to get SMRT Link Data Set reports by using the UUID

To get reports for a Data Set, given the Data Set UUID, perform the following steps:

1. Determine the Data Set type from the list of available types. Use the GET request with the following endpoint:

```
GET /smrt-link/dataset-types
```

- 2. Get the corresponding Data Set type string. The Data Set type is in the shortName field.
- 3. Get reports that correspond to the Data Set. Given the Data Set UUID and the Data Set type, use them in the GET request with the following endpoint:

```
GET /smrt-link/datasets/{datasetType}/{datasetUUID}/reports
```

Example

To get reports associated with a subreadset with UUID = 146338e0-7ec2-4d2d-b938-11bce71b7ed1, perform the following steps:

Use the GET request with the following endpoint:

```
GET /smrt-link/dataset-types
```

You see that the shortName of SubreadSets is subreads. The desired endpoint is:

```
/smrt-link/datasets/subreads/7cf74b62-c6b8-431d-b8ae-7e28cfd8343b/reports
```

Use the GET request with this endpoint to get reports that correspond to the SubreadSet with UUID = 7cf74b62-c6b8-431d-b8ae-7e28cfd8343b:

```
GET /smrt-link/datasets/subreads/7cf74b62-c6b8-431d-b8ae-7e28cfd8343b/reports
```

Once you have the UUID for an individual report, download it using the datastore files service with the uuid field:

GET /smrt-link/datastore-files/519817b6-4bfe-4402-a54e-c16b29eb06eb/download

How to get QC reports for a specific collection

For completed collections, the collection UUID is the same as the UUID of the SubreadSet for that collection. To retrieve the QC reports of a completed collection, given the collection UUID, perform the following steps:

1. Get the QC reports that correspond to this collection by using the GET request with the following endpoint:

```
GET /smrt-link/datasets/subreads/{collectionUUID}/reports
```

See <u>How to get SMRT Link reports for Data Sets by using the UUID</u> for more details.

Note: Obtaining Data Set reports based on the collection UUID as described above will only work if the collection is **complete**. If the collection is **not** complete, then the SubreadSet does not exist yet.

How to get QC reports for a specific SMRT Link run

To get QC reports for a specific run, given the run Name, perform the following steps:

1. Get the list of all runs by using the GET request with the following endpoint:

```
GET /smrt-link/runs
```

In the response, perform a text search for the run name: Find the object whose name field is equal to the run name, and get the Run UUID, which is found in the uniqueId field.

2. Get all collections that belong to this run by using the Run UUID found in the previous step in the GET request with the following endpoint:

```
GET /smrt-link/runs/{runUUID}/collections
```

3. Take a collection UUID of one of collection objects received in the previous response. The collection UUIDs are in the uniqueId fields.

For **complete** collections, the collection UUID is the same as the UUID of the SubreadSet for that collection.

Make sure that the collection whose uniqueId field you take has the field status set to Complete. This is because obtaining Data Set reports based on the collection UUID as described below will **only** work if the collection is **complete**. If the collection is **not** complete, the SubreadSet does not exist yet.

You can now retrieve the QC reports that correspond to this collection as described in <u>How to get SMRT Link reports for Data Sets by using the UUID</u>.

4. Repeat Step 3 to download QC reports for all complete collections of that run.

Example

You view the Run QC page in SMRT Link, and open the page of a run with a status of **Complete**. Take the run name and look for the Run UUID in the list of all runs, as described above.

Note: The Run ID also appears in the {runUUID} path parameter of the SMRT Link UI URL:

```
http://SMRTLinkServername.domain:9090/#/run-qc/{runUUID}
```

So the shorter way would be to take the Run UUID directly from the URL, such as

http://SMRTLinkServername.domain:9090/#/run-qc/a836efbc-fd58-40f6-b586-43c743730fe0

With this Run UUID = a836efbc-fd58-40f6-b586-43c743730fe0, get all collections that belong to this run:

```
GET /smrt-link/runs/a836efbc-fd58-40f6-b586-43c743730fe0/collections
```

Take a UUID of a completed collection, such as uniqueId: 59230aeb-a8e3-4b46-b1b1-24c782c158c1. With this collection UUID, retrieve QC reports of the corresponding SubreadSet:

```
GET /smrt-link/datasets/subreads/7cf74b62-c6b8-431d-b8ae-7e28cfd8343b/reports
```

Take a UUID of some report, such as uuid: 00c310ab-e989-4978-961e-c673b9a2b027. With this report UUID, download the corresponding report file:

```
GET /smrt-link/datastore-files/00c310ab-e989-4978-961e-c673b9a2b027/download
```

Repeat the last two API calls until you download all desired reports for all complete collections.

How to set up a SMRT Link analysis job for a specific workflow

Note to users of SMRT Link v7.0.0 or earlier: The analysis engine (pbsmrtpipe) was replaced in SMRT Link v8.0 with Cromwell, developed by the Broad Institute, and the names of workflows and options have changed significantly. The data model remains the same, as does most of the services API (aside from the change of job type ID). See SMRT Tools reference guide (v13.0) for details about Cromwell changes. Note that for backwards compatibility, the terms "pipeline" and "workflow" are used interchangeably when referring to specific applications.

To create an analysis job for a specific workflow, you need to create a job of type analysis with the payload based on the template of the desired pipeline. Perform the following steps:

1. Get the list of all pipeline templates used for creating analysis jobs:

```
GET /smrt-link/resolved-pipeline-templates
```

- 2. In the response, search for the name of the specific pipeline to set up. Once the desired template is found, note the values of the pipeline id and entryPoints elements of that template.
- 3. Identify the Data Set(s) you want to use to run the analysis, and make note of the UUID(s).
- 4. For each entry point, find the corresponding record in the dataset-types endpoint, and extract the shortName field:

```
GET /smrt-link/dataset-types
```

5. For each input Data Set, check whether a record already exists at the appropriate Data Set endpoint, and if one does not, it should be imported as described above. The Data Set endpoints take this form:

```
GET /smrt-link/datasets/<shortName>/UUID
```

6. Build the request body for creating a job of type analysis. The basic structure looks like this:

Use the pipeline id found in Step 2 as the value for the pipelineId element.

Use Data Set types of the <code>entryPoints</code> array found in Step 1 and corresponding Data Set IDs found in Step 2 as the values for elements of the <code>entryPoints</code> array.

The Data Set IDs may be provided **either** as UUIDs (which are specified by the XML file and are independent of the server used) or integer IDs (which are generated by the server when the Data Sets are imported). In most cases the UUIDs will be easier to work with as they are known in advance.

Note that the taskOptions array is **optional** and may be completely empty in the request body. (workflowOptions is not only optional but the contents are ignored by the server.)

7. Create a job of type analysis. Use the request body built in the previous step in the POST request with the following endpoint:

```
POST /smrt-link/job-manager/jobs/analysis
```

8. You may monitor the state of the job created in Step 6 with the following request:

```
GET /smrt-link/job-manager/jobs/analysis/{jobID}/events
```

where jobID is equal to the value received in the id element of the response in Step 6.

Example

Suppose you want to set up an analysis job for the SAT pipeline.

First, get the list of all pipeline templates used for creating analysis jobs:

```
GET /smrt-link/resolved-pipeline-templates
```

The response is an array of pipeline template objects. In this response, do the search for the entry with name : Site Acceptance Test (SAT). The entry may look as in the following example: (Task options were truncated for clarity.)

```
"name": "Entry Name: PacBio.DataSet.ReferenceSet"
    },
    {
        "entryId": "eid subread",
        "fileTypeId": "PacBio.DataSet.SubreadSet",
        "name": "Entry Name: PacBio.DataSet.SubreadSet"
],
"tags": [ "consensus", "mapping", "reports", "sat"],
"taskOptions" : [{
    {
        "default": "",
        "description": "Dataset filter string",
        "id": "dataset filters",
        "name": "Filters to add to the DataSet",
        "optionTypeId": "string"
        "default": 0,
        "description": "Downsampling Factor",
        "id": "downsample factor",
        "name": "Downsampling Factor",
        "optionTypeId": "integer"
    }
1
    }
```

In the above entry, take the value of the pipeline id :cromwell.workflows.

Also, take the Data Set types of entryPoints elements: fileTypeId:

PacBio.DataSet.SubreadSet and fileTypeId: PacBio.DataSet.ReferenceSet. In this

example we use the lambdaNEB reference and example PacBio data that are distributed with SMRT Link.

First check whether they have been imported already:

```
GET /smrt-link/datasets/subreads/5bd43ef4-6afe-dc62-4f49-03b75a051801
  {
    "name": "lambda/0007 tiny",
    "updatedAt": "2015-10-26T22:54:46.000Z",
    "path": "opt/smrtlink-release 6.0.0.40259/admin/bin/../../bundles/smrtinub
/current/private/pacbio/canneddata/lambdaTINY/m150404 101626 42267 c1008079208
00000001823174110291514 s1 p0.subreadset.xml",
    "instrumentControlVersion": "2.3.0.1.142990",
    "tags": "",
    "instrumentName": "42267",
    "uuid": "5bd43ef4-6afe-dc62-4f49-03b75a051801",
    "totalLength": 16865720,
    "projectId": 1,
    "numRecords": 19930,
    "wellSampleName": "Inst42267-040315-SAT-100pM-2kb-P6C4",
    "bioSampleName": "unknown",
    "version": "3.0.1",
    "cellId": "unknown",
    "id": 5,
    "md5": "288d3bdadf83bda41dd7fefc11cad128",
    "importedAt": "2018-07-06T00:45:10.753Z",
    "jobId": 3,
    "createdAt": "2015-10-26T22:54:46.000Z",
    "isActive": true,
```

```
"createdBy": "smrtlinktest",
    "wellName": "A01",
    "cellIndex": 4,
    "metadataContextId":
"m150404 101626 42267 c10080792080000001823174110291514 s1 p0",
    "numChildren": 0,
    "runName": "lambdaTINY",
    "datasetType": "PacBio.DataSet.SubreadSet",
    "comments": "Inst42267-SAT-100pM-2kbLambda-P6C4-Std120 CPS 040315"
GET /smrt-link/datasets/references/1a369917-507e-4f70-9f38-69614ff828b6
    "name": "lambdaNEB",
    "updatedAt": "2015-10-24T03:32:50.530Z",
    "path": "opt/smrtlink-release 6.0.0.40259/admin/bin/../../bundles/smrtinub
/current/private/pacbio/canneddata/referenceset/lambdaNEB/referenceset.xml",
    "ploidy": "haploid",
    "tags": "",
    "uuid": "la369917-507e-4f70-9f38-69614ff828b6",
    "totalLength": 48502,
    "projectId": 1,
    "numRecords": 1,
    "version": "3.0.1",
    "id": 4,
    "md5": "4861bca63e02aa26c92724febb3299c2",
    "importedAt": "2018-07-06T00:45:10.660Z",
    "jobId": 5,
    "createdAt": "2015-10-24T03:32:50.530Z",
    "isActive": true,
    "createdBy": "smrtlinktest",
    "organism": "lambdaNEB",
    "numChildren": 0,
    "datasetType": "PacBio.DataSet.ReferenceSet",
    "comments": "reference dataset comments"
  }
```

Build the request body for creating an analysis job for the SAT pipeline. Use the pipeline id obtained above as the value for the pipelineId element. Use the two Data Set UUIDs as values of the datasetId fields in the entryPoints array. For example:

```
"workflowOptions": [],
    "name": "My SAT Job"
}
```

Now create a job of type analysis. Use the request body built above in the following API call:

```
POST /smrt-link/job-manager/jobs/analysis
```

Verify that the job was created successfully. The return HTTP status should be 201 Created.

How to query job history

The Job Service endpoints provide a number of search criteria (plus paging support) that can be used to limit the return results. A full list of available search criteria is provided in the the JSON Swagger API definition for the jobs endpoint. The following search retrieves all **failed** Site Acceptance Test (SAT) pipeline jobs:

```
GET /smrt-link/job-manager/jobs/analysis?state=FAILED&subJobTypeId=cromwell
```

For most data types, additional operators besides equality are allowed. For example:

```
GET /smrt-link/job-manager/jobs/analysis?createdAt=lt%3A2019-03-01T00:00:00.000Z&createdBy=myusername
```

This retrieves all analysis jobs run before 2019-03-01 by a user with the login ID myusername.

Note: Certain searches, especially partial text searches using like:, may be significantly slower to execute and can overload the server if performed too frequently.

You can also perform bulk retrieval of jobs using the search endpoint:

```
POST /smrt-link/job-manager/jobs/analysis/search
{
    "id": "in:1,2,3,4"
}
```

The example above will retrieve jobs 1-4. You may also query on UUID or any other supported search field.

How to copy and rerun a SMRT Link analysis

The options endpoint for a specific job provides the POST content that ran it:

```
GET /smrt-link/job-manager/jobs/analysis/<jobId>/options
```

As is the case for Data Set IDs, **either** the UUID or the integer ID of the job can be provided. In this case, as both are generated automatically at job creation time, there is no preference for one or the other.

For example:

```
GET /smrt-link/job-manager/jobs/analysis/3/options
  {
    "name": "sat lambda",
    "entryPoints": [
        "entryId": "eid subread",
        "fileTypeId": "PacBio.DataSet.SubreadSet",
        "datasetId": 1
      },
        "entryId": "eid ref dataset",
        "fileTypeId": "PacBio.DataSet.ReferenceSet",
        "datasetId": 2
      }
    ],
    "workflowOptions": [],
    "taskOptions": [],
    "pipelineId": "cromwell.workflows.pb sat"
  }
```

This data model can be directly POSTed to the analysis job endpoint as described above. Note that in this case, the datasetId fields are the integer IDs generated by the SMRT Link database backend. You can retrieve the full Data Set records (including their UUIDs) by using the same Data Set endpoints described previously, only with the integer IDs instead of UUIDs:

```
GET /smrt-link/datasets/subreads/1
GET /smrt-link/datasets/references/2
```

How to run an analysis on all collections in a run

As explained earlier, each collection corresponds to a SubreadSet Data Set. To run an analysis on multiple SubreadSets combined, you can **either** first run a merge job to generate a single input, or let the analysis job perform the merge automatically.

For the two-step approach, perform the following steps:

- 1. As described previously, collect the UUIDs for the collections in the Run you want to analyse.
- 2. Check each collection UUID to make sure the SubreadSet XML has already been imported, and if not, import it as described above:

```
GET /smrt-link/datasets/subreads/<UUID>
```

3. Build a payload using the following model:

```
{
  "datasetType": "PacBio.DataSet.SubreadSet",
  "ids": ["<UUID1>", "<UUID2>", ...],
  "name": "Merge run <runId> collections"
}
```

4. Create a merge-datasets job with the request body from Step 3:

```
POST /smrt-link/job-manager/jobs/merge-datasets
```

5. Block until this job completes successfully, then retrieve the list of job datastore files. One of these should be the merged Data Set.

```
GET /smrt-link/job-manager/jobs/merge-datasets/<ID>/datastore
  [
      "modifiedAt": "2018-07-12T21:38:34.815Z",
      "name": "Auto-merged hdfsubreads @ 1531431514119",
      "fileTypeId": "PacBio.DataSet.SubreadSet",
      "path":
"/opt/smrtlink 5.1.0.14963/userdata/jobs root/008/008767/merged.dataset.xml",
      "description": "Merged PacBio DataSet from 4 files",
      "uuid": "f54694da-5985-42b9-9a9e-f2190bd3b4a4",
      "fileSize": 33495,
      "importedAt": "2018-07-12T21:38:35.085Z",
      "jobId": 4,
      "createdAt": "2018-07-12T21:38:34.815Z",
      "isActive": true,
      "jobUUID": "127619b4-f615-4c3f-b208-e1bf52bfe21b",
      "sourceId": "pbscala::merge dataset"
    },
      "modifiedAt": "2018-07-12T21:38:34.264Z",
      "name": "SMRT Link Job Log",
      "fileTypeId": "PacBio.FileTypes.log",
      "path":
"/opt/smrtlink 5.1.0.14963/userdata/jobs root/008/008767/pbscala-job.stdout",
      "description": "SMRT Link Job Log",
      "uuid": "b19fbfc6-0808-40fc-917b-092f369180cd",
      "fileSize": 388,
      "importedAt": "2018-07-12T21:38:34.266Z",
      "jobId": 8767,
      "createdAt": "2018-07-12T21:38:34.264Z",
      "isActive": true,
      "jobUUID": "127619b4-f615-4c3f-b208-e1bf52bfe21b",
      "sourceId": "analysis::master.log"
```

6. You may now follow the steps for running an analysis job, using the new merged SubreadSet as input.

To use the auto-merge capability, just submit the analysis job options with a separate eid_subread entry point for each input Data Set, for example:

```
GET /smrt-link/job-manager/jobs/analysis/3/options
  "name": "sat lambda",
  "entryPoints": [
    {
      "entryId": "eid subread",
      "fileTypeId": "PacBio.DataSet.SubreadSet",
      "datasetId": "<UUID1>"
    },
      "entryId": "eid subread",
      "fileTypeId": "PacBio.DataSet.SubreadSet",
      "datasetId": "<UUID2>"
    },
      "entryId": "eid ref dataset",
      "fileTypeId": "PacBio.DataSet.ReferenceSet",
      "datasetId": "<REF_UUID>"
    }
  ],
  "workflowOptions": [],
  "taskOptions": [],
  "pipelineId": "cromwell.workflows.pb sat"
}
```

Note that this process is opaque to Cromwell, which does **not** itself accept multiple inputs with the same identifier.

How to delete a SMRT Link job

To delete a job, you need to create another job of type delete-job, and pass the UUID of the job to delete in the payload (the request body).

Perform the following steps:

- 1. Build the payload for the POST request as a JSON with the following fields:
 - jobId: The UUID of the job to be deleted.
 - removeFiles: A boolean flag specifying whether to remove files associated with the job being deleted.
 - dryRun: A boolean flag to check whether it is safe to delete the job prior to actually deleting it.

Note: To make sure that it is safe to delete the job (that is, there is no other piece of data dependent on the job being deleted), then first set the <code>dryRun</code> field to <code>true</code> and perform the API call described in Step 2 below. If the call succeeds, meaning that the job can be safely deleted, set the <code>dryRun</code> field to <code>false</code> and repeat the same API call again, as described in Step 3 below.

2. Check whether the job can be deleted, without actually changing anything in the database or on disk. Create a job of type delete-job with the payload which has dryRun = true; use the POST request with the following endpoint:

```
POST /smrt-link/job-manager/jobs/delete-job
```

3. If the previous API call succeeded, that is, the job may be safely deleted, then proceed with actually deleting the job.

Create a job of type delete-job with the payload which has dryRun = false; use the POST request with the following endpoint:

```
POST /smrt-link/job-manager/jobs/delete-job
```

Suppose you want to delete the job with UUID = 13957a79-1bbb-44ea-83f3-6c0595bf0d42. Define the payload as in the following example, and set the dryRun field to true:

```
{
    "jobId" : "13957a79-1bbb-44ea-83f3-6c0595bf0d42",
    "removeFiles" :true,
    "dryRun" : true
}
```

Create a job of type delete-job, using the above payload in the following POST request:

```
POST /smrt-link/job-manager/jobs/delete-job
```

Verify that the response status is 201: Created.

Also notice that the response body contains JSON corresponding to the job to be deleted, as in the following example:

```
"name" : "Job merge-datasets",
"uuid" : "13957a79-1bbb-44ea-83f3-6c0595bf0d42",
"jobTypeId" : "merge-datasets",
"id" : 53,
"createdAt" : "2016-01-29T00:09:58.462Z",
```

```
"comment": "Merging Datasets

MergeDataSetOptions(PacBio.DataSet.SubreadSet, Auto-merged subreads
@1454026198403)"
}
```

Define the payload as in the following example, and this time set the <code>dryRun</code> field to <code>false</code>, to actually delete the job:

```
{
   "jobId" : "13957a79-1bbb-44ea-83f3-6c0595bf0d42",
   "removeFiles" : true,
   "dryRun" : false
}
```

Create a job of type delete-job, using the above payload in the following POST request:

```
POST /smrt-link/job-manager/jobs/delete-job
```

Verify that the response status is 201: Created. Notice that this time the response body contains JSON corresponding to the job of type delete-job, as in the following example:

```
"name" : "Job delete-job",
    "uuid" : "1f60c976-e426-43b5-8ced-f8139de6ceff",
    "jobTypeId" : "delete-job",
    "id" : 7666,
    "createdAt" : "2017-03-09T11:51:38.828-08:00",
    ...
    "comment" : "Deleting job 13957a79-1bbb-44ea-83f3-6c0595bf0d42"
}
```

Clients should then block until the job is complete.

How to create and manipulate a Project

By default, **all** Data Sets and analyses are part of a "General Project" with global permissions. Creating new projects lets you organize related Data Sets and jobs and optionally restrict access to specific users using the SMRT Link UI. (**Note**:This is **only** enforced in the UI itself; the REST services do **not** currently restrict users to specific projects.)

The Projects service requires user credentials, which typically means going through the API gateway as described in <u>How the authentication API works</u>. Following is an example of how to create a project that contains two Data Sets and includes three users with varying levels of access:

```
POST /SMRTLink/1.0.0/smrt-link/projects
{
    "name": "Human Structural Variation",
    "description": "Human SV datasets and analyses",
    "state": "CREATED",
    "datasets": [
        {"id": 34},
        {"id": 45}
],
    "members": [
        {"login": "user1", "role": "OWNER"},
        {"login": "user2", "role": "CAN_EDIT"},
        {"login": "collaborator1", "role": "CAN_VIEW"}
],
}
```

The server will return the newly-created project including the integer ID that should be used in subsequent requests:

```
{
    "id": 2,
    "name": "Human Structural Variation",
    "description": "Human SV datasets and analyses",
    "state": "CREATED",
    "createdAt": "2020-06-01T11:51:38.828-08:00",
    "updatedAt": "2020-06-01T11:51:38.828-08:00",
    "isActive": true,
    "grantRoleToAll": null,
    "datasets": [
        {"id": 34},
        {"id": 45}
    ],
    "members": [
        {"login": "user1", "role": "OWNER"},
        {"login": "user2", "role": "CAN EDIT"},
        {"login": "collaborator1", "role": "CAN VIEW"}
    ]
}
```

If you do not want to manage user permissions individually, the field grantRoleToAll grants global access to the project if non-null.

You can retrieve details for a specific project by appending the integer ID to the URL, thus:

```
GET /SMRTLink/1.0.0/smrt-link/projects/2
{
    "id": 2,
    "name": "Human Structural Variation",
    ...
}
```

To update project details, send a PUT request to this same URL with the modified version of the data model used to create the project. Use DELETE to soft-delete the project and reassign all of its Data Sets and jobs to the "General Project".

Once you have a project ready to work with, any new job can be added to that project by overriding the projectId field to the job data model (the default is 1, the "General Project"). You may also add a projectId query argument when retrieving lists of jobs or Data Sets to filter the list to members of the specified project.

How to retrieve mapping report metrics from an analysis job

The jobs API provides an endpoint to retrieve report files:

```
GET /smrt-link/job-manager/jobs/analysis/1001/reports
  [
      "dataStoreFile": {
        "modifiedAt": "2020-12-07T10:14:03.121Z",
        "name": "Report mapping stats ccs",
        "fileTypeId": "PacBio.FileTypes.JsonReport",
        "path": "/data/smrtlink/jobs-root/cromwell-
executions/pb align ccs/00eae20b-f029-4a64-b882-8d95038ee89e/call-
ccs mapping/mapping/fc30ff7d-de59-49d9-800d-dd25bf749704/call-
mapping stats/execution/mapping stats.report.json",
        "description": "PacBio Report mapping stats ccs (a7d394be-9a9a-457a-
b0ad-5d41a21a460b)",
        "uuid": "a7d394be-9a9a-457a-b0ad-5d41a21a460b",
        "fileSize": 7459,
        "importedAt": "2020-12-07T10:14:46.635Z",
        "createdAt": "2020-12-07T10:14:03.121Z",
        "isActive": true,
        "sourceId": "pb align ccs.report mapping stats"
      "reportTypeId": "pb align ccs.report mapping stats"
    },
      "dataStoreFile": {
        "modifiedAt": "2020-12-07T10:14:12.639Z",
        "name": "Report coverage",
        "fileTypeId": "PacBio.FileTypes.JsonReport",
        "path": "/data/smrtlink/jobs-root/cromwell-
executions/pb align ccs/00eae20b-f029-4a64-b882-8d95038ee89e/call-
ccs mapping/mapping/fc30ff7d-de59-49d9-800d-dd25bf749704/call-
coverage reports/coverage reports/408518ac-80e5-4f48-9185-ed1b51fe43c6/call-
pbreports coverage/execution/coverage.report.json",
        "description": "PacBio Report coverage (52adc5b2-b1b9-4e27-9ae4-
94de2a525b1e)",
        "uuid": "52adc5b2-b1b9-4e27-9ae4-94de2a525b1e",
```

```
"fileSize": 2596,
    "importedAt": "2020-12-07T10:14:46.635Z",
    "createdAt": "2020-12-07T10:14:12.639Z",
    "isActive": true,
    "sourceId": "pb_align_ccs.report_coverage"
    },
    "reportTypeId": "pb_align_ccs.report_coverage"
}
```

For workflows that produce a mapping report, it will typically have a reportTypeId of the form workflow_id.report_mapping_stats, in this case pb_align_ccs.report_mapping_stats. We can then retrieve the full report by adding the UUID to the URL:

In SMRT Link v13.0 and later blast_identity is the metric displayed as **Mean Concordance (mapped)** in the SMRT Link UI (after converting to a percentage value). This Python snippet shows an alternative approach to retrieving several metrics like this from the report JSON file, bypassing the final API call:

```
import os.path
from pbcommand.pb_io import load_report_from_json

def get_mapping_metrics(report_file):
    report = load_report_from_json(report_file)
    keys = {"blast_identity", "mapped_reads_n", "mapped_readlength_mean"}
    return {a.id:a.value for a in report.attributes if a.id in keys}
```

Changes from the v11.1 document

- Replaced text and code references to WSO2 with API gateway.
- Updated the "How to set up a run design" procedure.

Changes from the v12.0 document

Updated "Viewing API information" section on p1.