

SMT Meeting - March 26, 2020

Attendees:

NAME	PRESENT  
John Towns	
Ron Payne	
Tim Boerner	
Leslie Froeschl	
Kelly Gaither	
Robert Sinkovits	
Emre Brookes	
Ruth Marinshaw	
Scott Wells	
David Lifka	
Gregory Peterson	
Victor Hazlewood	
Sergiu Sanielevici	
Philip Blood	
David Hart	
Craig Stewart	
JP Navarro	
Lizanne DeStefano	
Richard Knepper	
Maytal Dahan	
Ken Hackworth	
Linda Akli	
Boswell Hutson	
Nathan Tolbert	
Bob Chadduck	
Alejandro Suarez	
Kerk Kee	

Canonical Meeting Template (as a reminder):

1. Review of meeting agenda
2. Addressing issues

- Description/Status of issue
- Review of action items from previous meetings if any
- Recommended actions and discussion of same
- Close issue or identify next action items

3. Status updates from SMT members

- Status update on significant activities
- Review of prior open issues if any (and not addressed earlier in agenda)
- Identification of new issues if any (and not addressed earlier in agenda)

Agenda/Notes

1. Review of Meeting Agenda: Any comments/additions?

2. Welcome to Bob Chadduck

Discussion

- Have sought interest of UIUC to continue XSEDE project through 2022 (12 month period). If UIUC is interested, NSF will welcome and proceed accordingly. Opportunity to continue to go forward and build on all of the good work done so far.
 - This has been shared with senior leadership and we have begun to pull together a
 - Some mission as exists for XSEDE2?
 - To be worked out, but essentially yes. Will be operating under current operating agreement/scope for an additional 12 mos.
 - Budgeting: discussing spending out all funds by end of project. Flexibility to have carryover into additional year of XSEDE2?
 - To be worked out, but likely yes.

3. Presentation from Kerk Kee

Discussion

- Organizational Capacity for Cyberinfrastructure Adoption and Diffusion
- Project motivated by questions of If you build it, will they come and will they stay?
- Diffusion of innovation: how new tech, behavior, etc spreads through communication channels over time in social system
 - Innovation attributes (advantage, ease of use), Adopter categories (innovators, early adopters, early majority, late majority, laggards), Social Networks (opinion leaders, network positions), Organizational Capacity severely lacking
- What makes up the capacity for adoption by users?
 - 192 interviews with CI roles (administrator, technologies, users, developer, educator, etc.)
 - Relationships to projects (build org of capacity of projects)
- Organizational capacity
 - 12 levels that can help accelerate CI adoption
- Reflections
 - User support is critical to successful adoption and implementation
 - Adoption decision hampered by researchers' lack of time and incentives
 - Many researchers do not understand what CI is and how CI can help their research
- Next steps
 - Survey questionnaire to statistically validate the model
 - If you are interested in participating please reach out to Kerk.
 - Generate an organizational capacity index like a Fico score.
 - Index would provide assessment of org's potential for driving adoption—not necessarily its success in driving adoption? Will help user figure out what they need to get in place to increase adoption. Existing user—will help inform where they're doing well and how they can increase capacity.
 - Develop capacity building strategies for CI projects
- Layman marketing: CI not just for elite?
 - Could argue that not everyone needs to use CI—for a particular type of researcher. For innovation to reach maximum capacity, best to promote wide and systemic adoption of CI. Adopters got on CI because they're savvy and understand complexity of CI. Large sector of community that may not fully understand what CI is and can be relevant to them. Messaging may intimidate some potential users or out of their league.
 - Potential users who could benefit but they believe it's not for them but for others. Misconceptions.
 - Difficult not to share successes of early adopters, but doing so can reinforce this misconception that CI is for the elite—not for me.
- Inter-Organization Collaboration: many stories, testaments about XSEDE and good work being done.

4. XSEDE2 Reporting (Leslie Froeschl)

Previously:

- Previous discussion archived: [SMT Meeting - December 19, 2019](#)
- (1/16) IPR11 compilation will begin on February 1. Email with instructions will be sent out in the next few days, and L2 PMs will be communicating with people in their area about pulling your section's part of the report together. Please be responsive and get your text in by the due date, and make sure staff in your area do the same.
 - Risk review email was sent out earlier this week. Please be sure to review all risks assigned to you before the end of January.
- (1/30) IPR11 starts 2/1! PY10 plan info will come out late next week.
- (2/13) Thank you for efforts thus far on IPR11. We are in good shape to submit report on time next week.
 - PY10 Planning begins next week on 2/17! See [Annual Planning Process](#) for the schedule/dates for the various tasks and link to planning spreadsheets.
- (2/27) PY10 Planning is underway. Teams should be reviewing activities and determining what can be accomplished within budget, populating PY10 KPI targets, and completing the +/- 5% activity.
 - Note that the Google slides template to use for PY10 planning presentations at the Quarterly is linked on the March Quarterly wiki page ([Google Slides template for L2 PY10 Planning presentations](#) -make a copy for your presentation and remove the unnecessary slides with other L2 KPI info).
 - Note that John would like one slide included on transition planning efforts in your area (this is included in the slide template).
 - All KPI target changes for PY10 should be called out in your slides. Any target changes requested after the Quarterly meeting will require a PCR.

Discussion:

- L3 PY10 planning text is due to your PM by tomorrow (Friday 3/27). L2s then have until next Thursday to finalize planning text for your area. Please help keep our planning process on-track and get this done on time!

- Next step will be building slides for XAB April meeting
- Supplement: Once we've extracted PY10 plan info—update for following year.
 - Will need parallel discussion re. budget. Reluctant to make across the board cuts. Prefer conversation with this team about where cuts should be made. BusOps working on preliminary budget. Current intent is to ask all subs to give a plan to spend to net zero by end of PY10. If more beneficial to put projected carryover into PY11 can do that. John open to thoughts on this. Like to see what subawardee plans are. May have to look at plans and make decisions from there.
 - If we have sufficient carryover for PY11 and request under \$20M, can imagine NSF might misunderstand and assume the project can be funded at a lower level.
 - If we come in with budget close to \$22M (close to PY10), do you see danger in that? John doesn't have a good feel for that at this point. Will be part of discussions coming up to determine what the threshold is. Better job we can do to figure out what it will really take to do this the better.
 - Staying within confines of current award—we are to deliver final transition plan in PY10. Won't transition until PY11. Bob would like us to try to deliver in PY10 and then deliver updated /final plan in PY11. Solid transition plan depends on knowing who the awardee is. Matching will have to happen between their plan and what we've been doing. Not off the hook for delivering transition plan next year, but won't be the final one.
 - Travel restrictions in place now makes spending down budget difficult. Anticipate all subs will have this issue.
 - Salary freeze likely next year. Could say freeze salaries across the board.
 - Will there be an additional annual review? Extension request will be part of this year's annual review together with RY4 & PY10 plan. If reviewed & approved then no need to review again the following year. Potential review of RY5 could be requested. If following expectations, RY5 would be part of final report and no review required. Bob is now considering this and will get back to us.
 - What is happening with new solicitation?
 - This was being discussed up to the COVID-19 outbreak. Blueprint doc is clearly their draft of a solicitation. John speculates that thoughtful response they received to that caused them some pause as we pointed out gaping holes in their plan. They're working on something, but unclear when it will come out.

Decisions:

5. New NSF Service Provider Resources (Victor Hazlewood)

Previously:

- (12/19) Added to agenda.
 - Need to get status/have discussion about how things are going on this call.
 - Open Storage Network: initial kickoff meeting was Oct 31, meeting minutes sent out to all the affected XSEDE group for integration. Victor following up with those XSEDE groups. Entry put in RDR for Open Storage Network
 - Stony Brook: had one initial call at the summer quarterly meeting. Victor following up with Robert to do an SP kickoff in Jan
 - U Del: Scheduling kickoff meeting in January. Doodle poll already sent to them.
 - Will drop off Bridges-2 and Expanse for detailed status since PSC and SDSC are plugged in so well to XSEDE. (Ken at PSC and Bob at SDSC, for example)
- (1/16) Darwin gave timeline of later summer for fall allocations.
 - Dave H. hadn't heard of DISCO before. Related to Open Storage Network?
 - Victor talked with them yesterday. MRI award that has already been awarded w/ stipulation that states they will be joining XSEDE. They still need to do XSEDE Federation application.
 - Planning to pull team together for call after XSEDE Federation application letter is submitted
 - Cancer computer is not on the list.
 - They still need to go through application process. Will be added once the XSEDE Federation application comes through. John will ping them re. status of their application letter.
 - Kickoff meeting with OSN was held.
 - Need to get connected with allocations, XCI (Victor sent email to JP & Shava)
 - Kickoff meeting with U Delaware was held. Working to get that connected to allocations process by Oct. 2020 allocations cycle.
 - Stony Brook has not been responsive to Victor so still working on that.
- (1/30): sent 3 emails to Robert Harrison/Stony Brook that haven't been returned. If he doesn't respond soon will be looking for suggestions. John can reach out if they don't respond.
 - Open Storage Network: They haven't connected with RAS so asked them to do that. Would be helpful to talk to Jim Glasgow (NCSA) about this to prod him to respond.
 - U Del: Kickoff meeting was held & minutes sent out. They want to say they've made significant progress getting connected to allocations by summer time for late Aug/early Sept XRAC meeting.
 - Johns Hopkins: waiting for Gayme to submit XSEDE Federation membership.
- (2/13) Victor has been working to get in touch with all of these providers with mixed results. Reminder that John is willing to ping people if needed.
- (2/27)
 - Johns Hopkins waiting on RFP for hardware result so he knows exactly what resource he'll have
 - Got in touch with Robert Harrison about getting started. He is planning a meeting with his team. They want to connect and be tied into XSEDE with user names (AMIE), etc. Victor to circle back with him to keep pushing progress.
 - Ruth asked Robert (Ookami) to choose a date in March or April to come to SPF but haven't heard back.
 - OSN: Kenton sent a note with a status last week. He needs more meetings with folks. Victor pressed people on XSEDE side to get the conversations going.
 - Trying to get something done by summer for fall allocation cycle, so things need to be getting done. Have made some progress
 - DARWIN has moved along well. Victor had kickoff meeting & making connections with XSEDE group.
 - DE & OSN needs to be connected to XSEDE & AMIE.
- Status of new SP resources:

SP Resource	Org	Link	PI	NSF Award	Target Date
Bridges-2	PSC	Bridges-2 press release	Nick Nystrom	1928147	Summer 2020
Expanse	SDSC	Expanse press release	Mike Norman	1928224	Summer 2020
DARWIN	U Delaware		Rudi Eigenmann	1919839	Summer 2020

Open Storage Network	Collaboration (5)	openstoragenetwork.org	Collaboration (5)	1747507	Summer 2020
Ookami	SUNY at Stony Brook	Ookami press release	Robert Harrison	1927880	Startups: ~Fall 2020 Full Allocations: likely 2022
DISCO	Johns Hopkins Univ	DISCO news item	Dennice Gayme Contact: Jaime Combariza	1920103	TBD

Discussion:

- Good start with DE but they've dropped off.
- Steady progress with OSN.
- Stony Brook would like to do startups only by Fall & full allocations at a later time (year 4)
 - They proposed 4 year project. First 2 pilot mode & last 2 production with assumption they'll go to production earlier if things go well. (John's recollection-could be wrong).
- Haven't heard from Johns Hopkins since about a month ago. Still need XSEDE Federation letter from them.

Decisions:

6. XDCDB and production server access policy (David Hart)

Previously:

- (12/19) Added to agenda: [SMT Meeting - December 19, 2019](#).
Following the recent XDCDB security incident, we closed/inactivated a number of XDCDB roles, and we are now fielding requests from users to turn some of them back on. We want to clarify the XSEDE approach (if not formal policy) for responding to such requests consistently.
Ops & RAS will:
 - Assess all accounts (Victor will help)
 - Notify people & collect info & put into buckets of staff, SPs, etc.
 - Suggest policy for governing these things
- (1/16) Working through roles on XDCDB that have access to database & closing out some. Don't know where some came from so may shut those off and see if anyone complains. Not terminating any accounts that have been used in last month.
 - Victor still working on drafting a policy.
 - Some people only access to get data for IPR. Should they email to get access? In those cases those people have not been removed. Susan still has access.
- (1/30) Went through all XDCDB roles. Inactivated a bunch & no one has complained. Done with cleanup. Victor working on drafting a policy.
 - Identified a couple odd SP cases & need to clarify policy on SPs having access to the database. Security is looking at this and updating the enterprise services standard doc. Adding how to request & be granted roles in the database.
 - Main question is do we have official ways for SPs to get access to the database? Do we allow them to have access to all/part of database? They have home-grown capabilities that are questionable.
 - Concern about people making mistakes that have impact on operation of XSEDE. Mostly locked down to read access.
 - One SP pinging database for user info. They should already have this info.
 - Baseline security standard in doc to specify how you request & approve roles. Maybe need to go back and look at roles and people have to specify why they're requesting it.
 - Have to support things that we didn't build /design system for. Don't want to unintentionally break things for SPs if we change something. Don't want to be stuck supporting legacy feature for SP. These are unofficial side things the SPs do. Are we required to support unofficial integration mechanisms? At what level can we say change this because we're no longer supporting? Creates dependency that we need to support for others. Prefer formal mechanism that we can support. Not clear if those making use of info should have access to that info. Are they XSEDE staff? Who are they sharing the info with? Nice to have someone document the use cases & see if it violates any issues. If they're not doing anything wrong, determine obligation to support going forward.
 - TACC script was doing 72K logins/month to look up info about a user that he should already have. Figure out what he needs and how we can get him the info. Shouldn't let anyone do any craziness. Another issue with Jetstream.
 - Rather document use cases and we evaluate as we normally would. Can come up with specs re. roles & how to access. Final approval by Dave & Greg. If they go beyond our privacy policy then that would need to be evaluated
 - They could pull info from XDMoD
- (2/13) Dave collecting details about shadow sites some have set up to use XDCDB.
- (2/27) Put session on QM agenda to discuss use cases & how to deal with them. If you're interested, join that session.
 - Alex put together policy for identity/access. Identity & Authentication Mgmt. Will add QM session request for this.

Discussion:

- Moving forward looking into who has access, what can be turned off, etc.

Decisions:

Around the call up

Follow this basic outline:

- Status update on significant activities
- Review of prior open issues if any (and not addressed earlier in agenda)
- Identification of new issues if any (and not addressed earlier in agenda)

- Identification of recent improvements implemented

Updates from SMT members:

- PI (John/Ron) -
 - Working over the last week on COVID HPC. Huge extension by offering XSEDE resources to COVID-19 researchers. They didn't have an allocations mechanism so asked for XSEDE to do that. Expectation was that would go live Monday morning, and our allocations process would be live then as well. By Friday it was mostly in place & ready. Thanks to many on the team who worked into the weekend on this. Sunday: was told president would include info on this in press conference at 4pm ET. Released both main page (managed by IBM) and our pages and have begun process that has been running all week. Lightweight review process of proposals from prior day. 30 reviewers on team. Make recommendations to steering committee who makes decision in afternoon and matches to resources. Handed off to provider to bring team onto their resource. Reviewed 5 proposals yesterday, 2 today. Has consumed a lot of time. No overarching policy/process. A lot of work by XTRAS team & Maytal's team. Working very well. Anticipating more NSF resources coming onboard. Will bring into mix ASAP. People recognize key role XSEDE is playing in this. Receiving a lot of thanks and kudos for what we're doing, level of support, attentiveness being provided. Link to XSEDE submission page was included in White House press release. Creating a lot of recognition & good will for XSEDE.
- Tim
 - XSEDE COVID-19 response/continuity
 - Got responses re. status from all subaward institutions (all working remotely and no expected impacts to XSEDE)
 - Status of SPs being collected now.
 - L3s were sent a form to fill out with contingency plans for their area. Please encourage your L3s to get this task complete ASAP.
- CEE (Kelly) -
 - Consumed with TACC COVID-19 response.
 - Linda: WD & BP working to get word out to faculty who need support with moving classes to online format that XSEDE has resources. Adding resources into events that were planned related to this as well. Pulled in additional people to support presenters. Doing test runs to ensure assignments, materials, recordings being pushed out are accessible & understandable & targeted to intro learner. Diverted most effort to this. Making no new decisions for at least 2-3 weeks.
 - Ull: Continue working on account creation process.
- ECSS (Bob S/Phil/Sergiu) -
 - Planning for 1 year extension. Glad to hear budget cuts won't be across the board.
 - COVID-19 impact: Think ECSS projects and NIP engagements will be largely unaffected. ESTEO activities will have greater impact (training). Remote events going on as planned, but work underway to convert in-person events to online. This may require some significant effort.
 - Some COVID consortium projects may require ECSS support. Emailed all ECSS staff to let them know they may be asked to put current projects on hold to have time for COVID work
- XCI (Dave L/Craig) -
 - Gearing up to provide extra services for people who have campus CI resources in light of COVID—help install software needed for this work, etc. Deprioritizing non-COVID work.
- Ops (Greg/Victor) -
 - Everything continuing to operate normally.
 - Someone wants to be dropped from XSEDE in Europe—need to formalize that. Alex talked with UIUC counsel about this. Need consistent policy about this.
 - Talking about extension planning in regards to licenses, travel, people time.
- RAS (Dave H/Ken/Nathan) -
 - COVID consortium—ensuring everything runs correctly, pulling together reporting. Portal team has been great to work with.
- Program Office (Ron/Leslie) -
 - Reminder: Enter Publications in XUP and documents in IDEALS
 - Reminder: Reference collaborations in tracking worksheet: <https://docs.google.com/spreadsheets/d/19YRAPeAF0rh519Xvhj8nKjROe3-JN7a1caLYbNamPaw>
 - Reminder: Address recommendations (Jira)
 - NSF Review: Dry run Monday, June 8. Review June 9-11.
 - April XAB meeting in Rosemont: April 21 (to be held remotely via Zoom).
 - BusOps working to come up with NetZero plan for PY10 & forecasted budget for PY11
- SP Forum (Ruth) -
 - No update
- UAC (Emre) -
 - Emre sent COVID-19 HPC link to UAC Committee members.
- NSF (Bob C) - see above

Next Meeting: SMT - April 9, 2020