

caGrid Knowledge Center Incubator Policies and Procedures

Version History

Version		Date	Update
0.1	William Stephens	November 6, 2008	Initial Version
0.2	Justin Permar	November 10, 2008	Formatting and revisions
0.3	William Stephens	November 13, 2008	Update sections 2 and 5 to remove approval and rejection of projects.
0.4	William Stephens	December 4, 2008	Updated Incubator Categories (1.2) Corrected Committer and Contributor Roles. (1.3) Added "should" and "must" to Incubation Criteria (3.1.1) Added Table (4.1.2) Clarified Periodic Review (6.2)
0.5	Justin Permar	December 8, 2008	Revised Incubator Project Classification System (1.2). Removed Contributor Role and renamed Committer Role to Project Owner (1.3). Updated project proposal requirements in 3.1.1 and 3.1.2. Updated Compliance Table (4.1.2) criteria and renamed to Incubator Maturity Level. Updated the Periodic Review (6.2), adding detail on the Periodic Review document contents.
1.0	William Stephens	December 22, 2008	Updates from final KC review.

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1. Purpose

The caGrid Incubator, operated by the caGrid Knowledge Center, provides community members with the tools and processes for community-developed projects to become caGrid-compliant and, if applicable, migrate into caGrid core.

Adoption of Incubator projects into the caGrid Core distribution will be determined by the caGrid Knowledge Center in association with the caGrid Development Team and based on the candidate project's compliance with caGrid goals (from <http://www.cagrid.org>):

- To enable universal mechanisms for providing interoperable programmatic access to data and analytics to **caBIG™**.
- To create a self-described infrastructure wherein the structure and semantics of data can be programmatically determined.
- To provide a powerful means by which resources available in **caBIG™** can be programmatically discovered and leveraged.

1.1 caGrid Knowledge Center Incubator Responsibilities

- Establishment of requirements for entry of projects into the Incubator.
- Providing a Subversion repository to contain project source code.
- Supervising and mentoring the Incubator community.
- Establishing clear and concise requirements for projects that are eligible to be incorporated into the caGrid core distribution.
- Evaluating the maturity of the incubated project, either promoting it to official project status or by retiring it, in case of failure.
- Establishing the compliance of the incubated project against actively supported caGrid distributions and integration into the caGrid continuous integration system.

1.2 Incubator Categories

Incubated projects will be accepted under an existing caGrid classification category if one exists. The current classification system is as follows:

- Core cross-project utilities
 - Example Projects: Graphing, Core, Index utilities, Grape, Metadata utilities, Tools
- Grid Catalogs
 - Example Projects: GME, Index Service
- Authentication
 - Example Projects: SAML
- Authorization
 - Example Projects: Grid Grouper, CSM
- Data Sharing

- Example Projects: Transfer, CQL, DCQL, CQL translation (CQL -> HQL, etc), Data Services, Data federation, GridFTP integration
- Security
 - Example Projects: Web integration (webSSO), CDS, Grid management (GAARDS), Trust fabric (GTS, SyncGTS), Dorian
- Workflow
 - Example Projects: Taverna workflow, caOS (incubator)
- Semantics
 - Example Projects: caDSR, EVS
- Metadata
 - Example Projects: caBIG® metadata, Service metadata
- Introduce extensions
 - Example Projects: caBIG® extensions, Service web application, Data service extension (caCORE SDK Data Service generation, Enumeration, BDT)
- Service creation
 - Example Projects: Introduce
- Service patterns
 - Example Projects: Enumeration, BDT, Security configuration
- Installation
- Auditing
 - Example Projects: Service metrics, Data service metrics
- Testing

1.3 Incubator Roles

- Knowledge Center (KC) – caGrid Knowledge Center staff responsible for managing the Incubator and the incubation process.
- Project Point of Contact – Individual(s) dedicated to ongoing maintenance and support of an Incubated Project.
- Project Committer - These users have write access to the source repository.

2. Incubator Procedures

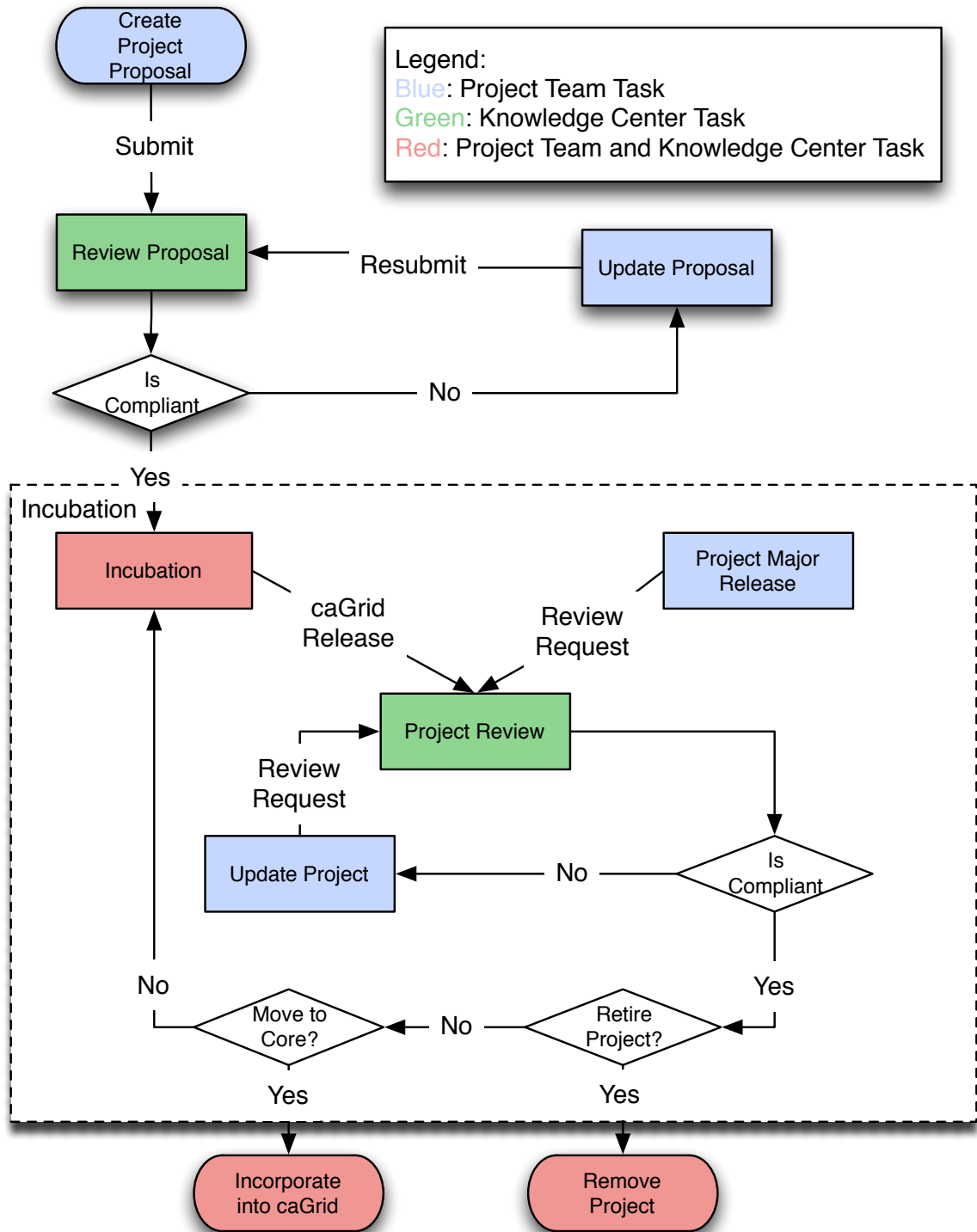
In order to establish a project within the caGrid Incubator, a Project Owner must propose their project as a candidate.

1. Project Proposal (Project Owner)
 - a. Verify that project meets “Requirements for Incubation Proposal”.
 - b. Create Proposal using provided template.
 - c. Submit Proposal to caGrid Knowledge Center via email.
2. Project Proposal Review (KC)
 - a. Archival of Proposal documents.
 - b. Work with Project Owner to update Proposal as needed.
 - c. Determine Incubator Compliance level.
3. Project Incubation Inception

- a. Create Knowledge Center Wiki account. (Project Owner)
 - b. Setup WIKI page for Project using template and Proposal details. (Project Owner)
 - c. Create GForge account. (Project Owner)
 - d. Commit of project code to Incubator repository (Project Owner)
 - e. Integrate project with caGrid continuous integration (Project Owner)
 - f. Update KC Incubator Project list. (KC)
 - g. Update caGrid.org Incubator Project list. (KC)
 - h. Announce new project to caGrid Users list. (KC)
 - i. Schedule contributing project on the next Incubator conference call. (KC)
4. Incubation
- a. Supports community by answering user questions and fixing reported bugs. (Project Owner)
 - b. KC periodic review of Project activities to determine the community development and usefulness of the Project in order to create an Assessment which shall contain one of three recommendations:
 - i. Project Retirement
 - ii. Continuation of Incubation
 - iii. Escalation into caGrid Core distribution.

KC will utilize the following measurements to determine the level of community and developer support for the project.

2.1 Process Diagram



3. Candidate Project Proposal

In order for a project to enter the caGrid Incubator the project must be proposed to the caGrid Knowledge Center. This proposal is intended to supply sufficient details about the project such that the Knowledge Center can determine acceptance of the project.

3.1 Process

3.1.1 Verify that project meets Criteria for Incubation Proposal

Criteria for Incubation Proposal:

- Codebase **must** use a caGrid-compatible open source license.
- Existing code **should** implement a core set of functionality as specified in the project description.
- Codebase **must** integrate with an existing caGrid distribution (and optionally the core caGrid development tree).
- The project **must** have a designated Project Owner that moves the project forward and provides community support.
- User documentation covering installation and use of the project software with an existing caGrid distribution **should** be provided.
- Project **must** provide developer documentation on setting up a development environment with the project source code.
- caGrid Knowledge Incubator repository **should** be used as the authoritative code repository.
- The project **should** provide automated testing to verify existing functionality works as intended.

3.1.2 Create Proposal

Utilizing the provided template, the Project Owner must provide all available details:

- Designated Project Owner, including contact information.
- A proposed name for the project.
- Abstract of the Project.
- Suggested Incubator category for the project (e.g., Security, Metadata, etc).
- Detailed Project description, specifying core functional and non-functional requirements.
- Background of the problem space that led to the project creation.
- Rationale for why this project should be adopted by caGrid (e.g., filling existing gaps in the caGrid infrastructure).
- Current Project Status. Examples of project status include: a) only used by project development team, b) small bug growing community of users, c) established user community.
- Committer list (optional)

- References to existing project website(s).
- Reference to the location of the source code for the project.
- Documentation of external dependencies for the project including specification of the supported version(s) of caGrid.

The contents of the Proposal will be used to populate the WIKI page for the project.

3.1.3 Submit Proposal to caGrid Knowledge Center

1. Email Proposal to knowledge@cagrid.org with the subject “Incubator Project Proposal: <Project Name>”

4. Candidate Proposal Review

Upon receiving a Candidate Project Proposal, the KC will discuss the appropriateness of the project for acceptance and work with the Project Owner to insure that the Proposal document contains all required information and that the project meets Incubator requirements.

The Incubator will accept all proposals that meet our requirements.

4.1 Review Process

4.1.1 Archive project proposal

The KC must archive a copy of the Candidate's proposal.

4.1.2 Determine initial Incubator Maturity Level

Criteria	Incubated		Publicized
	Bronze	Silver	Gold
Open Source Codebase	Yes	Yes	Yes
CaGrid Compatible License	Yes	Yes	Yes
Implements Minimum Functionality	Yes	Yes	Yes
caGrid Compatible	Yes	Yes	Yes
Project Owner provides community support	No	No	Yes
Developer Documentation	Yes	Yes	Yes
User Install Documentation	No	No	Yes
Automated Testing	No	Yes	Yes

Publicized projects will be incorporated into the Incubator continuous build process. Results of the build will be presented on the build Dashboard (<http://quality.bmi.ohio-state.edu/caGrid-Incubation/Dashboard/>). Project Points

of Contact are responsible for timely resolution in the event that the Incubator build is broken.

4.1.3 Work with Project Owner to revise Proposal

The KC must provide feedback to the Project Owner concerning any portion of the Proposal that requires additional detail or clarification.

5. Project Incubation Inception

Upon receipt of the Notice of Acceptance, the Project Owner and KC must perform the following actions to successfully activate the Incubated project.

5.1 Process

5.1.1 Create Knowledge Center Wiki account.

The Committer must create an account on the caGrid Knowledge Center WIKI. This account will be used to maintain WIKI information and access the Incubator Forum.

http://wikiutils.nci.nih.gov/KC_signup

5.1.2 Setup WIKI page for Project using template and Proposal details.

The Project Owner must create an initial WIKI page for the project using the information provided in the Candidate Proposal document and the provided Incubator Project Wiki Template.

5.1.3 Create account for Incubator repository.

The Project Owner must create an account to allow access to the Subversion repository.

<https://gforge.nci.nih.gov/account/register.php>

5.1.4 Commit of project code to Incubator repository.

The Project Owner must commit project source code into the provided SVN repository. The commit project must be identical to the reviewed project code.

5.1.5 Integration with Incubator continuous integration

The Project Owner must update the source project to integrate with the caGrid build process to insure that the project is built and tested by the caGrid continuous integration tools.

5.1.6 Update Knowledge Center Incubator Project list.

The KC must update the Knowledge Center Incubator project to link to the WIKI page of the Incubated Project.

5.1.7 Update caGrid.org Incubator Project list.

The KC must update the caGrid.org Incubator project list to contain the newly accepted project and link to the WIKI page of the Incubated Project.

5.1.8 Announce new project to caGrid Users list.

Upon completion of Inception activities the KC will announce the newly Incubated Project and Project Owner to the caGrid User list in order to promote the project.

- 5.1.9 Invite Project Owner to present on Monthly caGrid Users conference call.
The KC will schedule the Project Owner to present the Incubated Project to the caGrid community on an Incubator conference call.

6. Incubation

All Incubated Projects will undergo periodic review to

6.1 Community Support

6.1.1 Project Owner Responsibilities

The Project Owner will support community use of the project by performing the following activities:

1. Answering user questions posted to the caGrid Knowledge Center Incubator Forum.
2. Fixing project bugs reported via the Knowledge Center Bug Tracking tool. Wiki page should include links to Bug Tracking items.
3. Maintain repository access for project contributors (write access for committers).
4. Maintain the project wiki page with accurate technical and project status information.

6.1.2 KC Responsibilities

The Knowledge Center will support the Project Owner by providing technical guidance to incubator projects.

6.2 Periodic Review

The KC will review the project to determine the adoption and growth of the Incubated Project and assure continued compliance with Incubator policies. The KC will produce a Project Assessment document. This document will contain measurements of community involvement, based on:

- Continued development of project software
- Timely resolution of Bug Tracking entries.
- Downloads or other project metrics, including forum activity

Review initiators:

- Initial project submission.
- caGrid release.
- Project Major Release

In addition, the document will specify suggestions for project growth and note any areas where the project needs more work to continue to meet the current Incubator Maturity Level.

The Assessment Document will contain one of three recommendations:

1. Project Retirement
2. Continuation of Incubation.
3. Promotion to caGrid Core distribution.

The Project Periodic Assessment Document will be sent to the Project Owner and archived.