Kitware's Software Sustainability Matrix

Building Vital Computing Infrastructure

Best Practices for HPC Software Developers
August 2024

Bill Hoffman, CTO
Will Schroeder, Opportunity Catalyst

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Introduction

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Bill Hoffman, CTO Kitware Inc.

Bill Hoffman

- **CTO, Kitware**
- **One of five founders of Kitware**
- **Short boring list of jobs**
  - GE CRD 1990-1999
  - Kitware 1999-2023
- **Personas**
  - CMake guy
  - Kitware guy
  - Sandal runner guy

Will Schroeder

- **Opportunity Catalyst, Kitware**
- **One of five founders of Kitware**
- **Former CEO (18 yrs)**
- **Short boring list of jobs**
  - GE Power Systems
  - GE Research
- **Sidelines**
  - VTK Developer / VTK Book author
  - Open Source / Science Advocate
  - Sea kayaking

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Center for Open-Source Research Software Stewardship and Advancement (CORSA)

https://corsa.center/

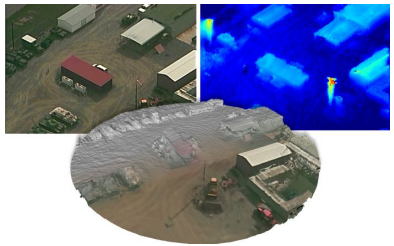
- Kitware is part of the CORSA team working on Metrics and Sustainability Scorecards

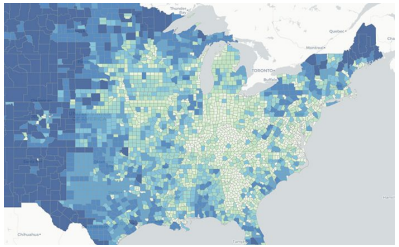
Consortium for the Advancement of Scientific Software

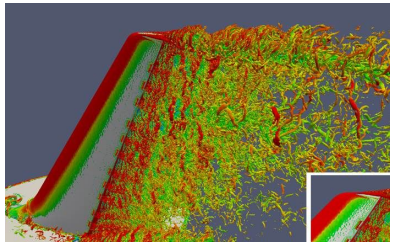
Fostering collaboration across a diverse collection of Software Stewardship Organizations (SSOs)

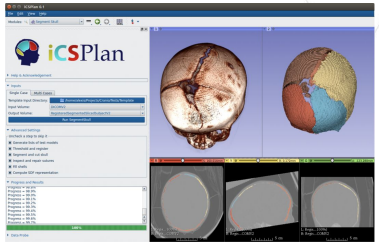
https://cass.community/

Kitware Areas of expertise / Built on open source









Computer Vision

Data and Analytics

Scientific Computing

Medical Computing

Software Solutions

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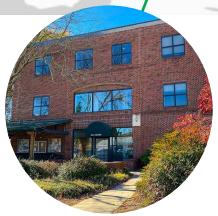
Clifton Park Headquarters / Global Presence

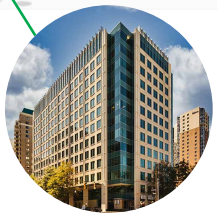
2023
Minneapolis, MN

1998
Clifton Park, NY

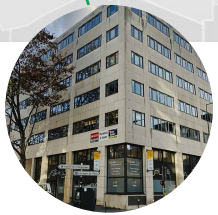
2012
Santa Fe, NM



2006
Carrboro, NC

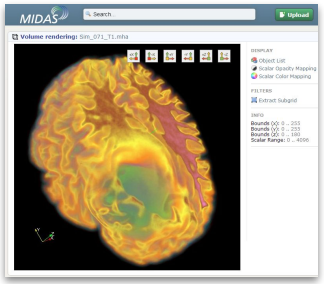


2018
Arlington, VA

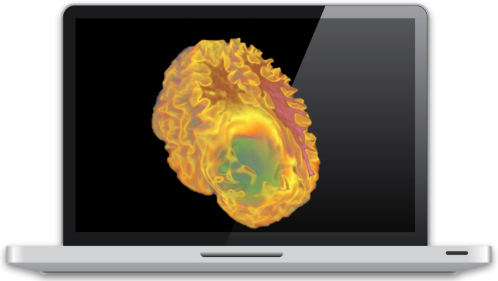


2010
Lyon, France

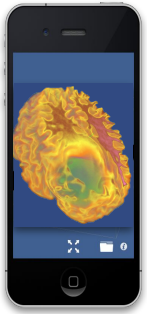
Applications / Universal Platforms



Web



Desktop



Mobile

Cloud /HPC

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Platforms

3D Slicer
ParaView
KWIVER
mstk
VTK
Pulse Physiology Engine
CMake
Resonant
tomviz
ITK

What Is Sustainability?

"...the expectation that the software used today will be available into the future."

Corollary (Open Science): Published computational results can be reproduced

Related: Data is available into the future

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Sustainability: It's not that simple…….

What does it mean to be available in the future? In the face of:

- Platform (hardware / software) changes
- Compiler / interpreter changes
- New / obsoleted programming languages
- API changes
- Build / test process
- Technical innovation

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Alternate Meaning of Sustainability

Reduce the cost of developing and using software

- Energy efficient computing infrastructures
- Energy efficient software / algorithms
- Virtualization / containerization - reduce server loads
- Efficient testing processes

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Why Sustainability?

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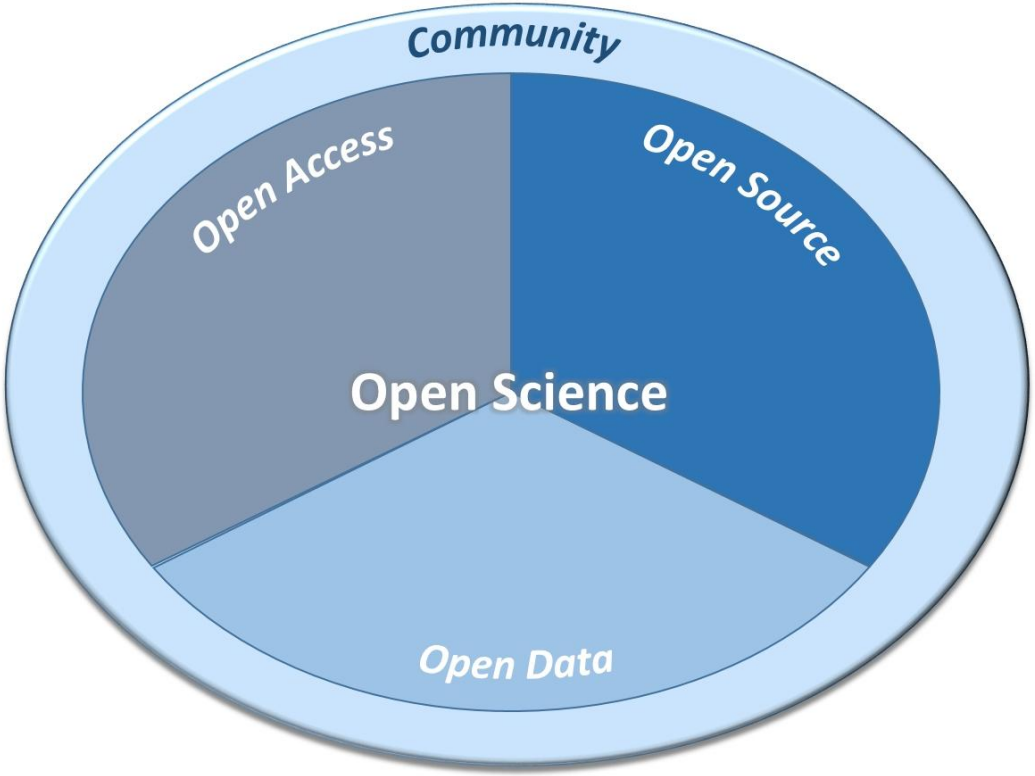
The Importance of Software

- The scientific method / innovation is increasingly dependent on software (and data)
- Modern societies increasingly rely on software
- A throw-away mentality is no longer viable for large, complex software systems

Bill's running watch

Sustainability for Open Science - Reproducibility



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If it's not reproducible, it's not Science

Nullius in Verba

"take nobody's word for it"
Royal Society 1660

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Failure of Reproducibility (350 years later)

- ***Nature* (March 2012)**
  - Glenn Begley, former head of cancer research at pharma giant Amgen
  - Lee M. Ellis, cancer researcher at the University of Texas

Found that more than 90% of papers published in science journals describing "landmark" breakthroughs in preclinical cancer research, are not reproducible, and are thus just plain wrong.

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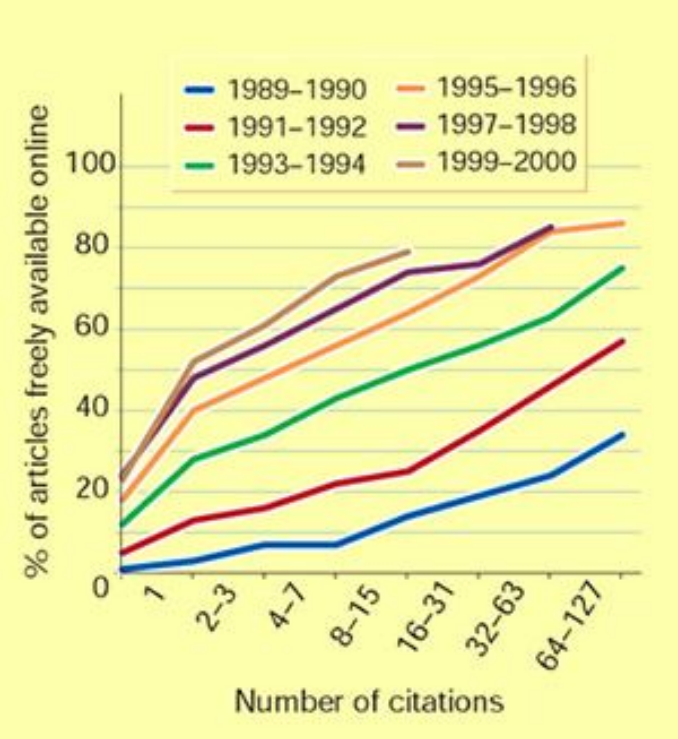
Be Selfish and Share, increase your impact



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Sustainability for Innovation

- Open infrastructure as a springboard
- Avoid reinventing the wheel
- Reduce technical debt / bankruptcy

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Takeaways so far

- Scientific research depends on software, lots of complex software
- Research and Software needs to be reproducible
- Agile innovation relies on reliable, computational foundations

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Measuring Software Sustainability

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Ins & Outs of Measuring Software

- **Improve software quality**
- **Build healthy communities**
- **Monitor and increase impact**

} ***Identify areas for improvement***

- **Balancing *Objective* measures vs. *Subjective* measures**
- **Claim: Software Quality ≠ Software Sustainability**
  - Claim: Sustainability requires ongoing interest in, and support from, a community
  - Community depends on squishy characteristics like:
    - Usefulness
    - Technological artistry
    - Market forces
    - Cultural influences

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Early Approaches

- **GE Six Sigma (1995) - Measure and improve quality**
- **CMake / CTest / CDash - conceived at GE Research: a direct response to Six Sigma applied to software**
- **Measuring software quality**
  - Identify areas for improvement
  - Software quality: necessary but not sufficient for sustainability

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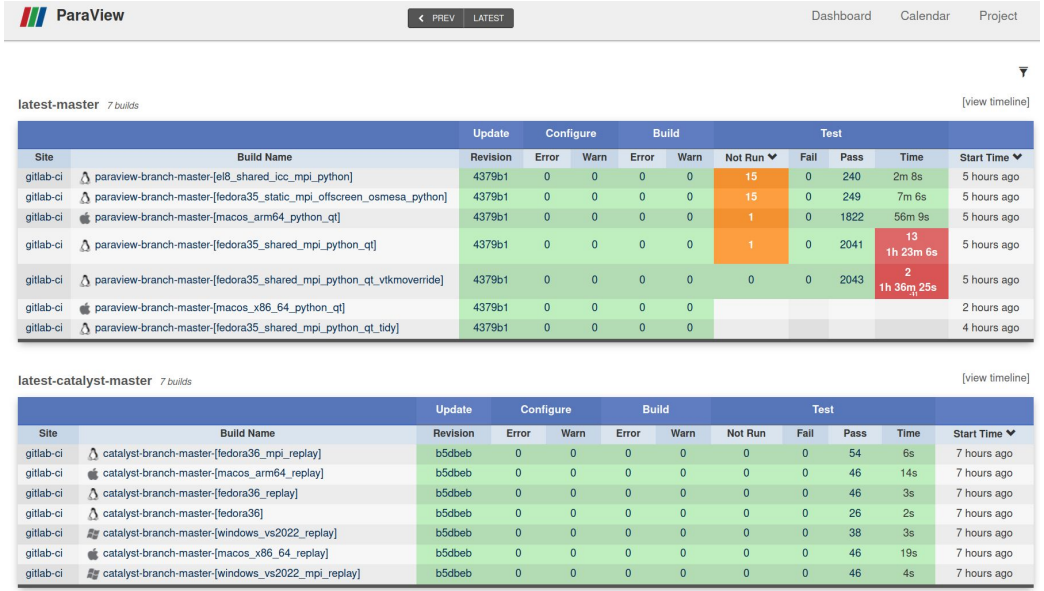
CMake / CTest / CDash

Computing metrics since 1995!

- # Warnings
- # Errors
- # Failed tests
- Static analysis
- Dynamic analysis
- Code coverage
- etc.



ParaView

PREV LATEST

Dashboard Calendar Project

latest-master *7 builds* [view timeline]

		Update	Configure		Build		Test				
Site	Build Name	Revision	Error	Warn	Error	Warn	Not Run	Fail	Pass	Time	Start Time
gitlab-ci	paraview-branch-master-[el8_shared_icc_mpi_python]	4379b1	0	0	0	0	15	0	240	2m 8s	5 hours ago
gitlab-ci	paraview-branch-master-[fedora35_static_mpi_offscreen_osmesa_python]	4379b1	0	0	0	0	15	0	249	7m 6s	5 hours ago
gitlab-ci	paraview-branch-master-[macos_arm64_python_qt]	4379b1	0	0	0	0	1	0	1822	56m 9s	5 hours ago
gitlab-ci	paraview-branch-master-[fedora35_shared_mpi_python_qt]	4379b1	0	0	0	0	1	0	2041	13 1h 23m 6s	5 hours ago
gitlab-ci	paraview-branch-master-[fedora35_shared_mpi_python_qt_vtkmoverride]	4379b1	0	0	0	0	0	0	2043	2 1h 36m 25s	5 hours ago
gitlab-ci	paraview-branch-master-[macos_x86_64_python_qt]	4379b1	0	0	0	0					2 hours ago
gitlab-ci	paraview-branch-master-[fedora35_shared_mpi_python_qt_tidy]	4379b1	0	0	0	0					4 hours ago

latest-catalyst-master *7 builds* [view timeline]

		Update	Configure		Build		Test				
Site	Build Name	Revision	Error	Warn	Error	Warn	Not Run	Fail	Pass	Time	Start Time
gitlab-ci	catalyst-branch-master-[fedora36_mpi_replay]	b5dbeb	0	0	0	0	0	0	54	6s	7 hours ago
gitlab-ci	catalyst-branch-master-[macos_arm64_replay]	b5dbeb	0	0	0	0	0	0	46	14s	7 hours ago
gitlab-ci	catalyst-branch-master-[fedora36_replay]	b5dbeb	0	0	0	0	0	0	46	3s	7 hours ago
gitlab-ci	catalyst-branch-master-[fedora36]	b5dbeb	0	0	0	0	0	0	26	2s	7 hours ago
gitlab-ci	catalyst-branch-master-[windows_vs2022_replay]	b5dbeb	0	0	0	0	0	0	38	3s	7 hours ago
gitlab-ci	catalyst-branch-master-[macos_x86_64_replay]	b5dbeb	0	0	0	0	0	0	46	19s	7 hours ago
gitlab-ci	catalyst-branch-master-[windows_vs2022_mpi_replay]	b5dbeb	0	0	0	0	0	0	46	4s	7 hours ago

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CTest/CDash: Search for Relevant Results

Filters Help

Match all of the following rules:

Site	contains	microsoft	- +
Group	is	Nightly Expected	- +
Tests Failed	is greater than	0	- +

Apply Clear Create Hyperlink

Nightly Expected 6 builds

Site	Build Name	Update	Configure		Build		Test			
		Revision	Error	Warn	Error	Warn	Not Run	Fail	Pass	Start Time
gillesk.microsoft	VS2017 x86.rel	602d4c	0	0	0	0	0	4^{+4}_{-4}	471_{-4}	10 hours ago
gillesk.microsoft	VS2015 x64.rel	602d4c	0	0	0	0	0	4^{+3}	476_{-3}	10 hours ago
gillesk.microsoft	VS2012 x86.rel	602d4c	0	0	0	0	0	3^{+3}	412_{-3}	5 hours ago
gillesk.microsoft	VS2012 x64.rel	602d4c	0	0	0	0	0	3^{+3}	412_{-3}	5 hours ago
gillesk.microsoft	VS2017 x64.rel	602d4c	0	0	0	0	0	3^{+3}_{-4}	472_{-3}	10 hours ago
gillesk.microsoft	VS2015 x86.rel	602d4c	0	0	0	0	0	3^{+3}	477_{-3}	10 hours ago

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Examples of Measurement Metrics

- CMake / CTest / CDash
- OpenHub.net
- Repo-Review from Scientific Python
- Open Source Security Foundation (OpenSSF) Scorecard
- Linux Foundation's CHAOSS community analytics
- Oak Ridge National Lab Scientific Software Excellence Assessment
- Kitware's Sustainability Matrix

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OpenHub.net

Code

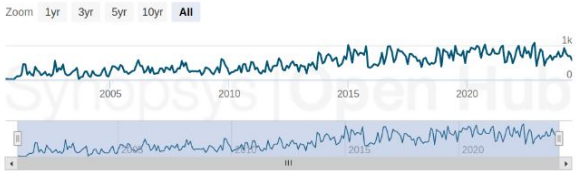
Lines of Code

Languages

C	44%	C++	32%
CMake	22%	33 Other	2%

Activity

Commits per Month



30 Day Summary

Jun 16 2024 — Jul 16 2024

376 Commits
24 Contributors
Including 6 new contributors

12 Month Summary

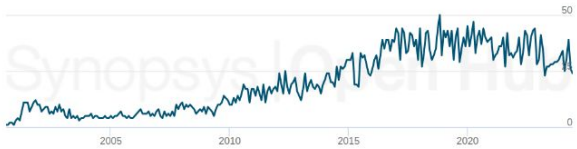
Jul 16 2023 — Jul 16 2024

8234 Commits
Down -222 (2%) from previous 12 months

206 Contributors
Down -35 (14%) from previous 12 months

Community

Contributors per Month



Most Recent Contributors

- Brad King
- Kitware Robot
- Kyle Edwards
- Pavel Liavonau
- moyo1997
- 橙少

Ratings

135 users rate this project: 4.4/5.0

Click to add your rating

Review this Project!

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Scientific Python Repo-Review

- A repository-style checker
- A framework for building checks to see if a repository follows guidelines
- https://github.com/scientific-python/repo-review

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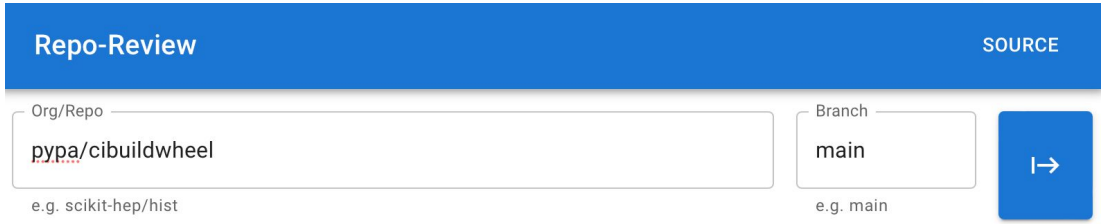

sp-repo-review on **cibuildwheel**
https://blog.scientific-python.org/-scientific-python/dev-summit-1-development-guide/

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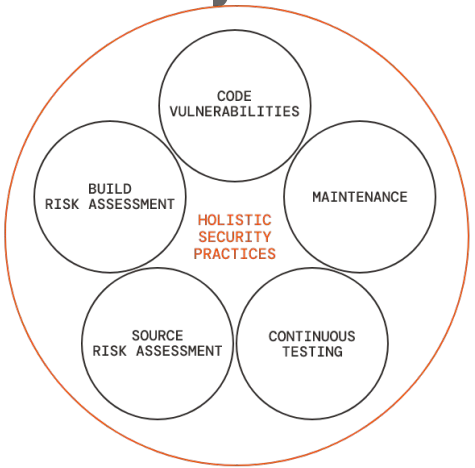
OpenSSF Scorecard

- Assess open source projects for security risks through a series of automated checks
- Automated evaluation covering five categories (20 tests)



- https://github.com/ossf/scorecard/tree/main

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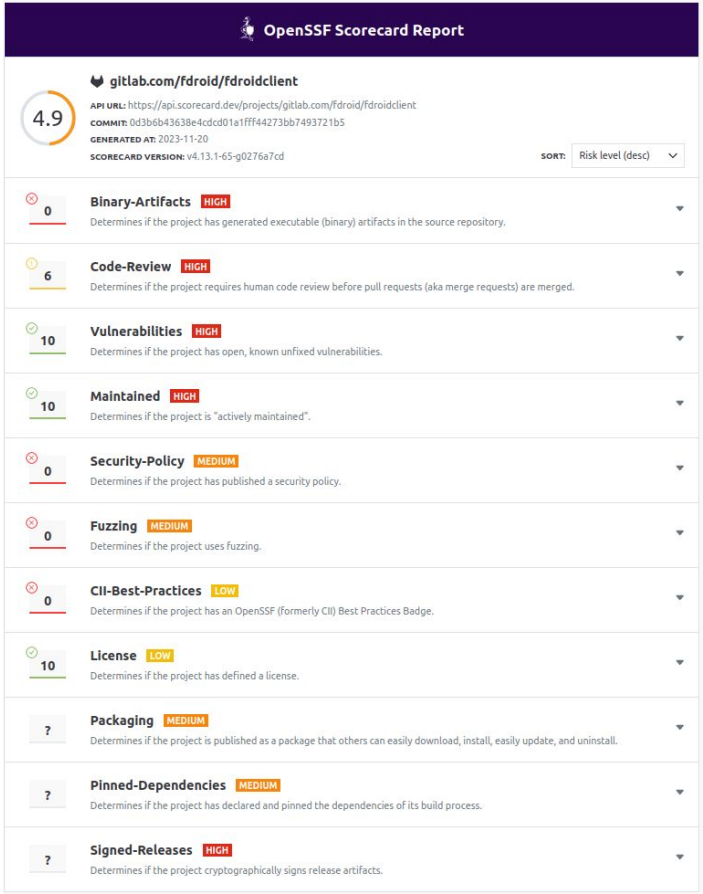
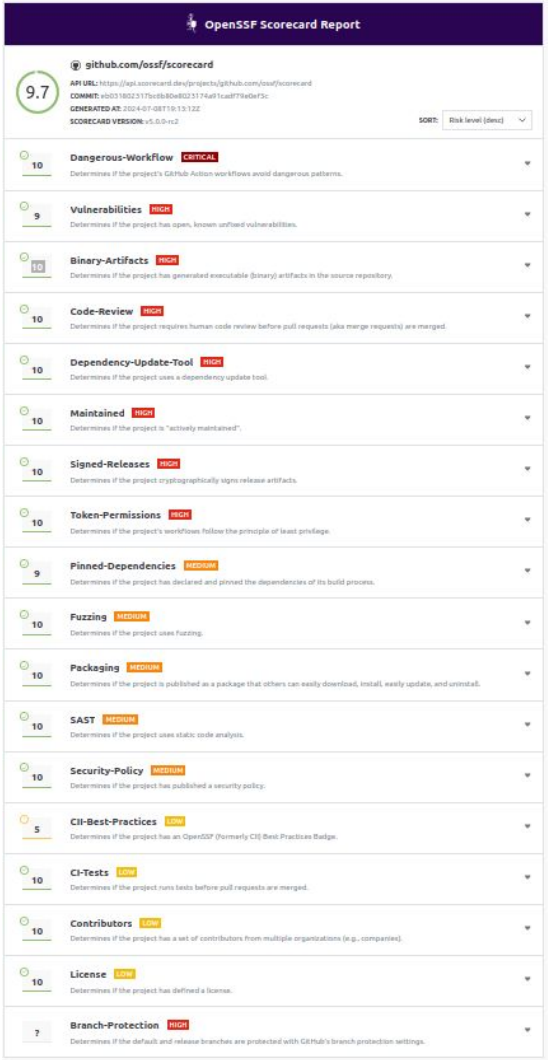
OpenSSF - Examples





Linux Foundation CHAOSS community analytics

- **Focused on creating metrics, metrics models, and software to better understand open source community health**
- **89 metrics covering:**
  - Organization
  - Platform
  - Software
  - Contribution
  - Event
  - Governance & Leadership
  - Lifecycle
  - Contributor
  - Community
  - Ecosystem

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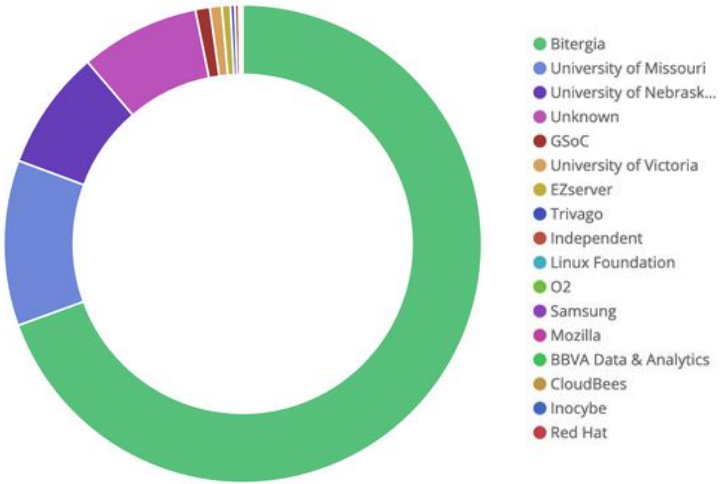
CHAOSS - Metric Examples

Elephant Factor: *The distribution of work in the community across organizations*

E.g., the number of organizations contributing >50% of the project commits



Burnout Self-Test

Instructions: For each question, place the corresponding number in the column that most applies.

Questions	Not At All (1)	Rarely (2)	Sometimes (3)	Often (4)	Very Often (5)
I feel run down and drained of physical or emotional energy.					
I have negative thoughts about my job.					
I am harder and less sympathetic with people than perhaps they deserve.					
I am easily irritated by small problems, or by my co-workers.					
I feel misunderstood or unappreciated by my co-workers.					
I feel that I have no one to talk to.					
I feel that I am achieving less than I should.					
I feel under an unpleasant level of pressure to succeed.					
I feel that I am not getting what I want out of my job.					
I feel that I am in the wrong organization or profession.					
I am frustrated with parts of my job.					
I feel that organizational politics or bureaucracy frustrate my ability to do a good job.					
I feel that there is more work to do than I practically have the ability to do.					
I feel that I do not have time to do many of the things that are important to doing a good quality job.					
I find that I do not have time to plan as much as I want to.					

ORNL Scientific Software Excellence Assessment

- *“ORNL has developed a software excellence assessment survey that can be used to guide staff towards activities that would lead to beneficial improvements to a software project”*

- **A. Malviya-Thakur, et al.,"Research Software Engineering at Oak Ridge National Laboratory" Computing in Science & Engineering**

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Kitware's Software Sustainability Matrix

- **Practices KISS principle - keep it simple**
  - Avoid excessive number of, or overly complex, metrics

- **Four core values, each value scored according to combining multiple, simple metrics**
  - Impact
  - Risks
  - Community
  - Technology

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Recipe for Sustainability Matrix

Impact (I)	Perceived value Business Model User Base	
Risks (R)	IP & License Bus Rule Security	Dependencies Competition
Community (C)	Culture Software Process	Governance Outreach
Technology (T)	Ubiquity Interoperability	Architecture Latest & Greatest

$$\text{Score} = \tfrac{1}{3} * I + \tfrac{1}{6} * R + \tfrac{1}{3} * C + \tfrac{1}{6} * T$$

$$0 \leq I,R,C,T \leq 1$$

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Issues

- **Based on empirical approaches**
- **Metric set incomplete (and evolving)**
  - Is there a “minimal spanning set” of metrics?
- **Measuring software quality is *not* the same as measuring for sustainability**

Problems with “Objective” Metrics & Assessment

Evaluating CMake *Impact* *(measured by customer base)***:**

- **# Downloads → ~100million/year Kitware servers**
  - Doesn’t count other distributions (e.g. Linux)
  - Cannot easily infer customer base
- **Alternative: CMake usage >50%** *(JetBrains study 2017-2021)*
  - C++ has 11.6million users *(SlashData)* →~6 million users?
- **Current impact vs. potential, future impact**
  - Maybe invest in innovative technologies?

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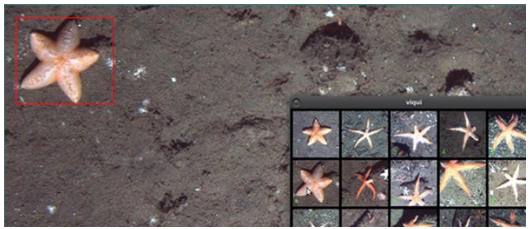
Measuring Impact: The Effects of Scale

Small:
VIAME
Video and Image Analytics for Marine Environments

100* downloads/month

<50K LOC



Medium:
VTK
The Visualization Toolkit

425,000* downloads/month

8M LOC**

Large:
CMake
Cross-Platform Make

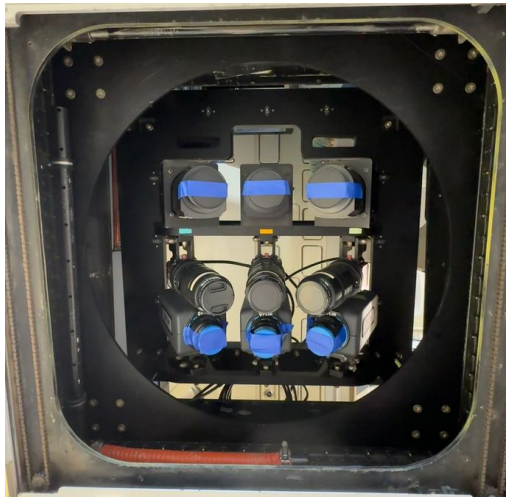
8,500,000* downloads /month

1.9M LOC**

** from Kitware servers*
*** openhub.net*

VIAME - NOAA Seal population census

(across three Arctic Seas: Bering, Beaufort, and Chukchi)



Adam Romlein (KW) is ready to go on NOAA's King Air

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Takeaways so far

- Scientific research depends on software, lots of complex software
- Research and Software needs to be reproducible
- Agile innovation relies on reliable, computational foundations
- **Use metrics to *improve* software, not *compare* software**
- ***Objective* metrics are quantifiable / reproducible**
- ***Subjective* metrics require human judgement**
- **Both objective and subjective metrics are prone to *biases***

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Case Studies

U Utah NIH R24

- **Utah SCI (Scientific Computing Institute)**
  - Aim: Improve sustainability of flagship software tools

- **Approaches**
  - Improve documentation ✅
  - Improved build process - support additional platforms ✅
  - Re-architected systems (extract reusable components) ✅
  - Replace OpenGL graphics engine with OS standard (VTK) ❎
  - Interoperability ✅✅

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U Utah NIH R24: *Improving Interoperability increased Impact*

Quality/System	Cleaver	FluoRender	ImageVis3D	SCIRun	Seg3D	ShapeWorks	*map3d*
Perceived Value	0.81	0.85	0.4	0.83	1.0	0.82	0.81
User Base	0.6	0.7	0.4	0.8	1.0	0.7	0.4
Business Model	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Impact	0.64	0.68	0.43	0.71	0.83	0.67	0.57
License	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Bus Rule	0.8	0.5	0.3	0.7	0.8	0.9	0.4
Competition	0.6	0.6	0.6	0.6	0.5	0.7	0.6
Dependencies	0.8	0.7	0.7	0.7	0.7	0.6	0.7
Risk	0.8	0.7	0.65	0.75	0.75	0.8	0.8
Culture	0.8	0.7	0.5	0.8	0.8	0.9	0.6
Software Process	0.5	0.3	0.4	0.8	0.5	0.8	0.3
Outreach	0.8	0.5	0.3	0.6	0.2	0.7	0.5
Governance	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Community	0.7	0.58	0.5	0.73	0.55	0.78	0.53
Latest and Greatest	0.8	0.5	0.6	0.6	0.5	0.9	0.3
Architecture	0.5	0.4	0.3	0.7	0.4	0.3	0.4
Interoperability	0.6	0.2	0.5	0.5	0.4	0.4	0.2
Technology	0.63	0.43	0.6	0.6	0.43	0.53	0.3
Total SSM	0.68	0.61	0.52	0.7	0.66	0.7	0.53

Major Focus on Interoperability → Cleaver Impact

- **Objective: Grow the community (i.e., increase impact)**
  - Users
  - Developers

- **Approach: *(improve Interoperability)***
  - Python integration via ***trame*** visual analytics platform
  - 3D Slicer extension
    (Cleaver downloads: 100/200 yr → 30,000 yr)

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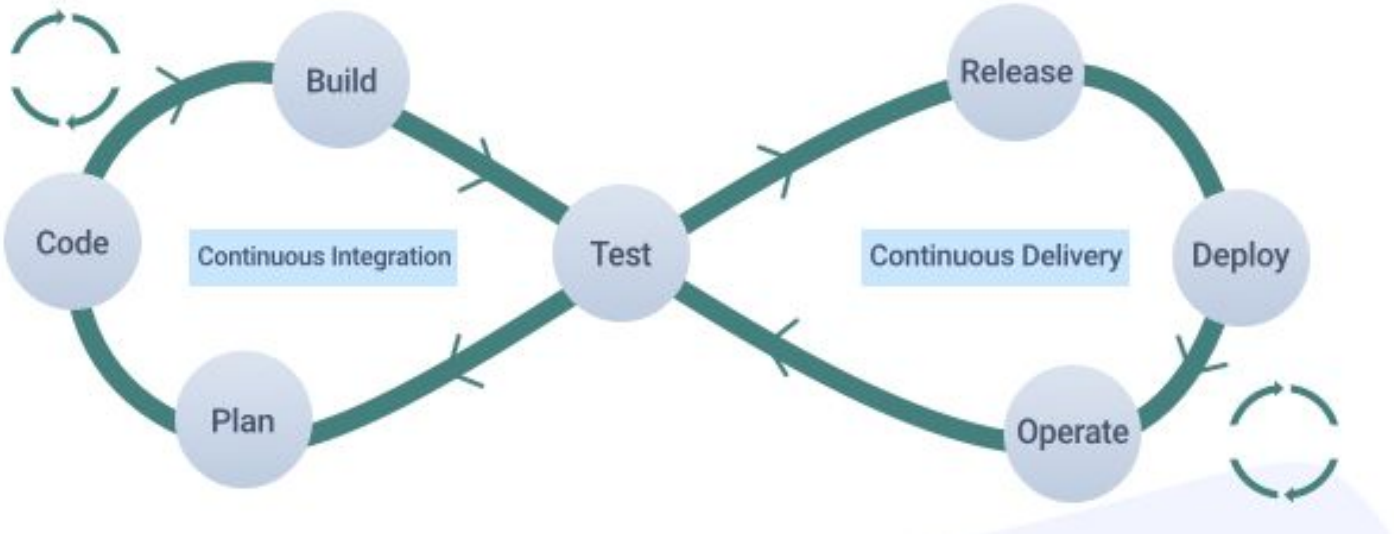
Path Forward



Identify spanning metrics

Integrate metrics into CI
(create a framework supporting plugin metrics)

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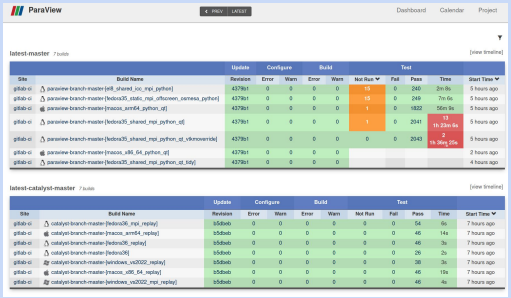
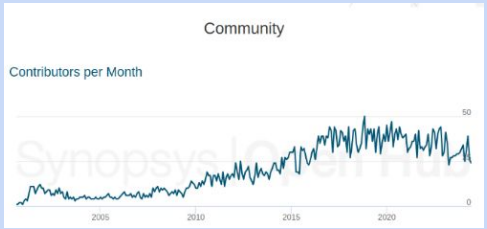
Concept: *Software Sustainability Dashboard*

Software Quality



Community Health



Impact

- # spack dependencies
- # downloads
- # references
- Community size

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Challenges

- **Identify a (spanning) set of metrics**
  - Further reading: “How Sustainable is Your Software?”
- **Automate metrics scoring**
- **Software Engineering Research**
  - What metrics are important to real-world software quality?
  - What metrics are important to long-term sustainability?
  - Support CORSA / CASS
- **Balance the increased cost of testing / evaluating metrics**

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