BABAR Collaboration Services Policy

December 10, 1999

This Collaboration Services Policy was accepted by the Executive Board on December 10, 1999. It was drafted, in response to the charge listed below, by an ad hoc committee chaired by Michael Roney. The members of the committee were:

Committee Members:
Gerard Bonneaud, David Hitlin, Yannis Karyotakis, Livio Lanceri, Mauro Morandin, Michael Roney (chair), Terry Schalk, Walter Toki

Charge:
Recommend to the Executive Board a policy governing Collaboration Service. This recommendation should include details on how the policy should be managed and should specifically deal with the question of service required of new members of the Collaboration.

Introduction
With *BABAR* now solidly in its data-taking phase, it is vital that Collaboration members contribute in an equitable manner to the operation of the experiment. The privilege of analyzing data and producing interesting physics results carries with it the responsibility to shoulder a fair portion of the load presented by the operation of the experiment. This document deals primarily with that portion of this responsibility termed 'Central Positions' and '*BABAR* Shifts', which will be defined below. This area involves shift-taking, which is now done in accordance with a well-established procedure and the staffing of a number of Central Positions, which will be handled on a regional basis through the appropriate member of the Executive Board or country representative. The other portion of the responsibility involves ongoing operation and maintenance of the detector systems. Finding people to do these jobs, which is a pressing matter, with the people who built the systems moving on, will be dealt with in individual interactions between PI's and the Spokesperson and Deputy Spokesperson. This latter activity will not be dealt with in detail in this document, except to note that these discussions will be guided by the principle that new groups and new members of the Collaboration must contribute a meaningful amount of service work before they devote themselves to analysis. In summary, the major areas requiring significant personnel resources include:

- detector system and core software support
- Central Positions
- *BABAR* Shifts

The policies regarding Central Positions and *BABAR* Shifts are treated in detail here.

Scope of this Policy Statement:
It is expected that all institutions in the collaboration contribute to the ongoing operation of the experiment. These contributions include detector systems and core software operations and maintenance; coordination and management tasks; physics tools development and infrastructure support; Monte Carlo production; and a host of other jobs both in the operation of the detector and in computing. Policies regarding some of these are well established, such as the maintenance and operation of a detector system or a core online and offline software system being the ongoing responsibility of those institutions involved in its construction. This document outlines a policy for Central Positions and *BABAR* Shifts that complement detector and core software systems tasks

and services, physics analysis and senior coordination and management. It also addresses the issue of Monte Carlo production.

The Central Positions are term positions normally held by physicists that do not fall under the purview of a system manager because they cross the boundaries between areas that fall under currently held institutional responsibilities. Reconstruction Manager and Online Detector Controls Manager are examples of Central Positions. These Central Positions provide an excellent opportunity for physicists to make a significant impact on the successful operation of *BABAR*. Appendix A contains a list of Central Positions for the year 2000. *BABAR* Shifts include a variety of shift-type activities normally performed by physicists that are required for the ongoing operation of *BABAR*. All *BABAR* institutions are expected to contribute to *BABAR* Shifts and, at some period, contribute to the Central Positions of the experiment. This document describes a simple administrative framework for filling the Central Positions by drawing on the resources of all *BABAR* institutions in a fair and equitable manner. The administration of the policy and guidelines for how much each institution can expect to contribute to the Central Positions and *BABAR* Shifts are also outlined here.

Institutional Contributions to Central Positions and *BABAR* Shifts:
In order to provide guidance to Principle Investigators regarding the level of contribution to the operation of the experiment expected from each institution, the following principles are followed.

1. Regarding *BABAR* Shifts, each institution will provide personnel to fill these shifts in proportion to the number of authors from the institution as determined on January 1 of each year. The Run Coordinator administers these shifts and before each running period will communicate to the Principle Investigators the number of shifts per person expected for the running period. The currency of credit is one eight-hour IR2 shift. Currently the Central IR2 shifts include Shift Leader, DAQ, Data Quality Monitor, PEP liaison shifts and OPR shifts. See the notes on OPR, Reco-reprocessing and On-Call shifts below.
2. Institutions and individuals that have not had a history of providing service work to the collaboration, for example recently hired Research Associates and graduate students, should be considered priority candidates for appointment to Central Positions.
3. Central Positions are filled with a limited term appointment of between 6 and 24 months, depending on the task. Therefore, unless otherwise agreed, institutions are not responsible *in perpetuum* for a specific task.
4. Credit for Central Positions and *BABAR* Shifts will be accounted for each calendar year starting from Jan. 1, 1999. An institution will have a grace period of 3 months to fulfill its *BABAR* Shifts responsibilities of the previous 12 month period.

NOTES:

- On-call Shifts:

It is anticipated that in the future, some of the *BABAR* shifts will become on-call shifts. These shifts require residence at SLAC and are to continue to be administered through the Run Coordinator and accounted in the IR2 shift schedule. The credit for these on-call shifts is to be determined by the spokesperson in consultation with the Technical and Computing Coordinators.

- OPR, OPR QA and Reco-reprocessing Shifts:

These shifts are, or are expected to be, primarily performed at SLAC. They are to be administered and accounted via the IR2 shift schedule. The credit for these shifts is to be

determined by the spokesperson in consultation with the Technical and Computing Coordinators.

Framework for Filling Central Positions:
By March 1 of each year, the Technical Coordinator and Computing Coordinator, in consultation with the Physics Coordinator where appropriate, will establish the list of Central Positions that are to commence during the following calendar year. A list of the positions that require new personnel will be distributed to the Executive Board. The Executive Board members or *BABAR* country representative from each county in consultation with their country's Principle Investigators will identify individuals within their constituency who are qualified to take on the Central Position responsibilities and who are available to do so during the term of the task. The list of candidates is expected to be longer than the list of tasks. The Technical Coordinator and Computing Coordinator, in consultation with the Physics Coordinator, will match appropriately qualified individual candidates with specific tasks. This identification of an individual with a Central Position will be constrained so as to ensure that all countries contribute fairly to the Central Positions. Progress on filling the positions will be monitored by the Executive Board on a regular basis.

The proportion of the Central Positions a country provides is proportional to the number of authors from that country, as determined on January 1 of each year.

Once an individual has been proposed for a Central Position, the Technical Coordinator or Computing Coordinator will communicate with the Principle Investigator responsible for the individual to verify the appropriateness of the assignment and to work out logistical details related to the position. Included in this is the expectation that the individual begins overlapping with the previous holder of the Central Position one month prior to the commencement of the term of office.

When the roster of Central Positions has been filled, a web page specifying which individuals are holding which positions, is to be updated in order to communicate the list to the collaboration. The web page will also include a description of the job and indicate the supervisor of the work.

For the first year of implementation, the year 2000, the list appended here will be used by the Executive Board member or country representative as a basis for recruitment of the necessary personnel starting in December 1999. The goal is to fill vacant positions as soon as possible and to replace individuals currently holding Central Positions when their term is up.

Monte Carlo Production Tasks/Shifts:
It is anticipated that each country will contribute to the production of Monte Carlo events according to the resources available to *BABAR* within the country. As a guideline, each country should contribute Monte Carlo events in proportion to the number of authors from that country. The Computing Coordinator and Computing Coordination Group (CCG) will administer this policy. All countries are encouraged to produce as many Monte Carlo events as their resources allow, but the additional events will not be used to discount other Central Positions or *BABAR* shift responsibilities of that country.

Appendix A: List of Central Positions for the Year 2000

It is expected that the individual begin overlapping with the previous holder of the Central Position one month prior to the commencement of the term of office.

Position	Description	FTE	TERM	Location
		(%)	(mo.)	SLAC/Home
Reconstruction Manager	Responsible for overall coordination of the reconstruction code	100	12	Home OK, active communication required
Simulation Manager	Responsible for overall coordination of the fast and slow simulation code	100	12	Home OK, active communication required
Doc master	Responsible for assembling needed documentation for reco & sim and for interfaces to the *BABAR* computing systems	100	12	Home OK, active communication required
Deputy Offline Coordinator	Responsible for assisting the offline coordinator in all his responsibilities	100	12	Home OK, active communication required
Tracking Coordinator	Responsible for validity of charged particle tracking in reco and sim	100	12	Home OK, active communication required
Data distribution data aid	Responsible for the data distribution infrastructure and coordination of requests from non-SLAC sites for *BABAR* data	50	6-12	much of the work can be done offsite but some work needed at SLAC
Data Distribution	Responsible for the data distribution infrastructure and coordination of requests from non-SLAC sites for *BABAR* data	100	12	Home OK, active communication required
Production Manager	Responsible for coordination of reprocessing and simulation production processing and any related bookkeeping	100	12	Home OK, active communication required
DAQ Operation Manager	Responsible for the overall efficient operation of the *BABAR* DAQ system	100	6 *	SLAC
ODC Operation Manager	Responsible for the operation of the *BABAR* Detector Controls system	100	6-12 *	SLAC
OPR Operation Manager	Responsible for operation of OPR and for regular production tests	100	6-12 **	SLAC
DQM Operation Manager	Responsible for the efficient operation of the DQM monitoring at OEP and OPR levels	100	6	SLAC
Release Manager	Responsible for collecting tags, testing and building online	50	6	Home OK, active communication required
Run Coordinator	Coordinates operation of the detector	100	6	SLAC
Assistant or Co-Run Coordinator	Assists the Run Coordinator in the day to day operation of the detector.	100	6	SLAC
Run Quality Manager	Setup and administer infrastructure to determine analyzable runs and to maintain a 'good run' list and book keeping.	50	6	SLAC required

* Assuming some familiarity with online systems.

** Assuming some familiarity with *BABAR* offline environment.