

Introduction to Globus: SaaS for Research Data Management

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Slides and useful links: globusworld.org/tutorials



Globus delivers...

Big data transfer, sharing, publication, and discovery...

...directly from your own storage systems...

...via software-as-a-service



Bridge to campus HPC

Move datasets to campus research computing center





Move results to laptop, department, lab, ...



Bridge to national cyberinfrastructure

Move datasets to supercomputer, national facility





Move results to campus (...)



Bridge to instruments



Pre-processed Data



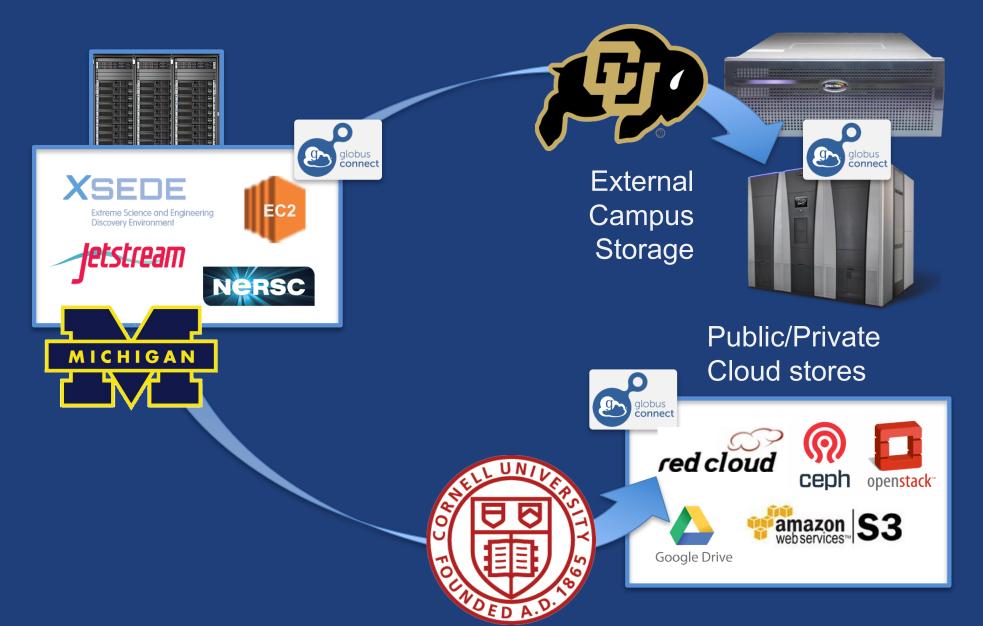
Analysis store

Raw Source Data High durability, low cost store





Bridge to collaborators





Bridge to community/public





Globus and the research data lifecycle

Instrument



Globus transfers files reliably, securely

Transfer

Researcher initiates transfer request; or requested automatically by script, science gateway



Researcher

3

selects files to share, selects user or group, and sets access permissions

Collaborator logs in to Globus and accesses shared files; no local account required: download via Globus specific)

Personal Computer

Publish

search and discover datasets; transfer and share using Globus

Discover





Share

Globus controls access to shared files on existing storage; no need to move files to cloud storage!



Curator reviews and approves; data set published on campus or other system

Researcher assembles data set: describes it using metadata (Dublin core and domain-

Publication Repository

Access via Web browser

- Use any storage system
- Use existing identity

Peers, collaborators

Why use Globus?

Simplicity

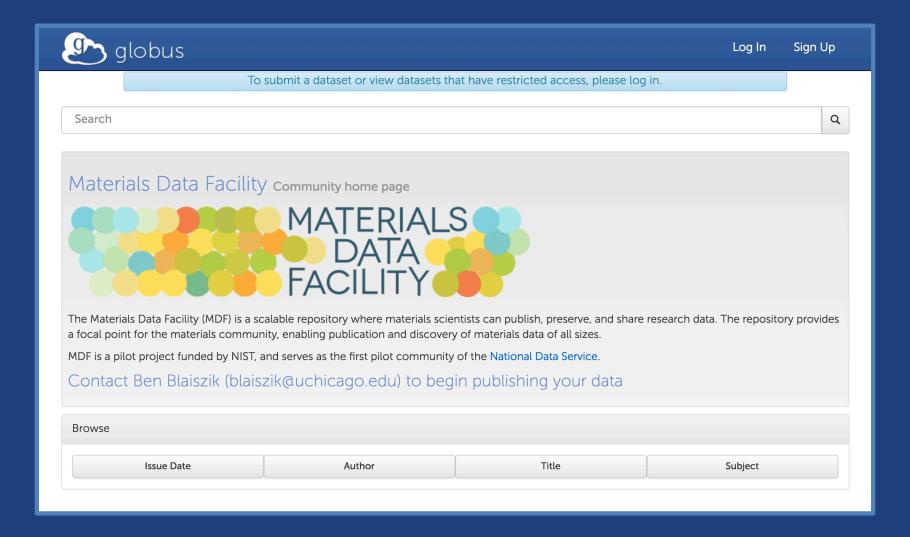
- Consistent UI across systems
- Easy access to collaborators
- Reliability and performance
 - "Fire-and-forget" file transfer
 - Maximized WAN throughput
- Operational efficiency
 - Low overhead SaaS model
 - Highly automatable: CLI, RESTful API
- Access to a large and growing community



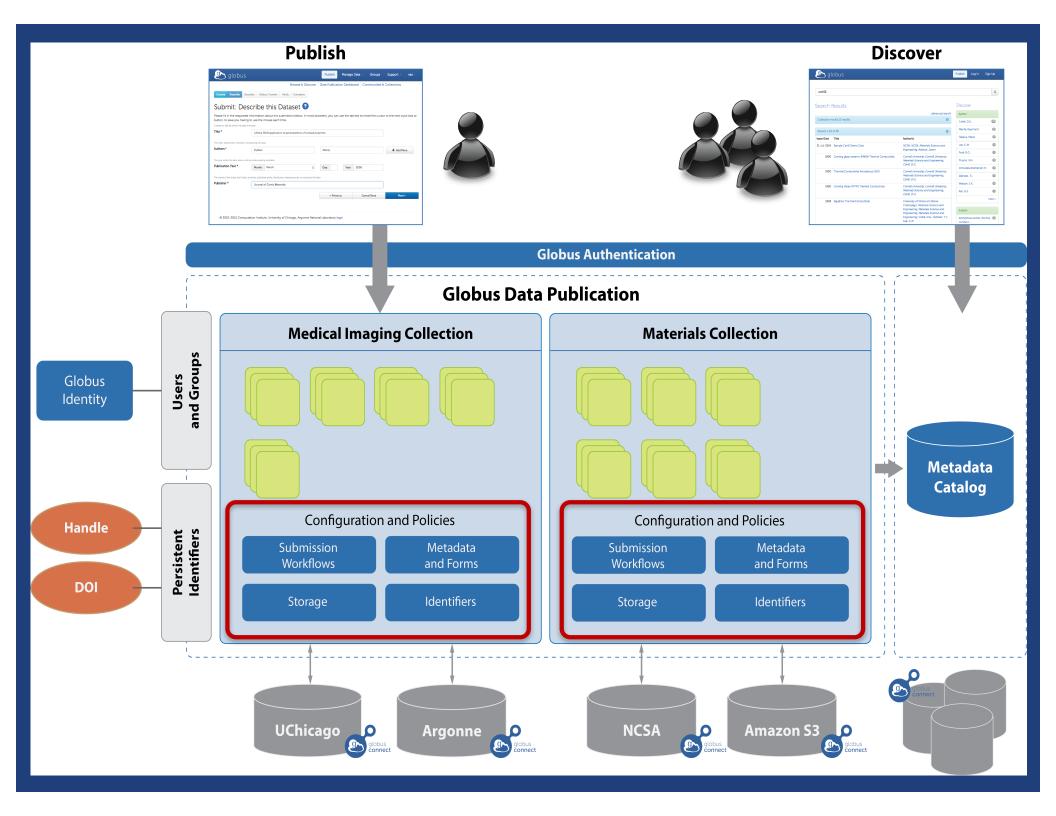
File Transfer and Sharing Demonstration



Data Publication and Discovery

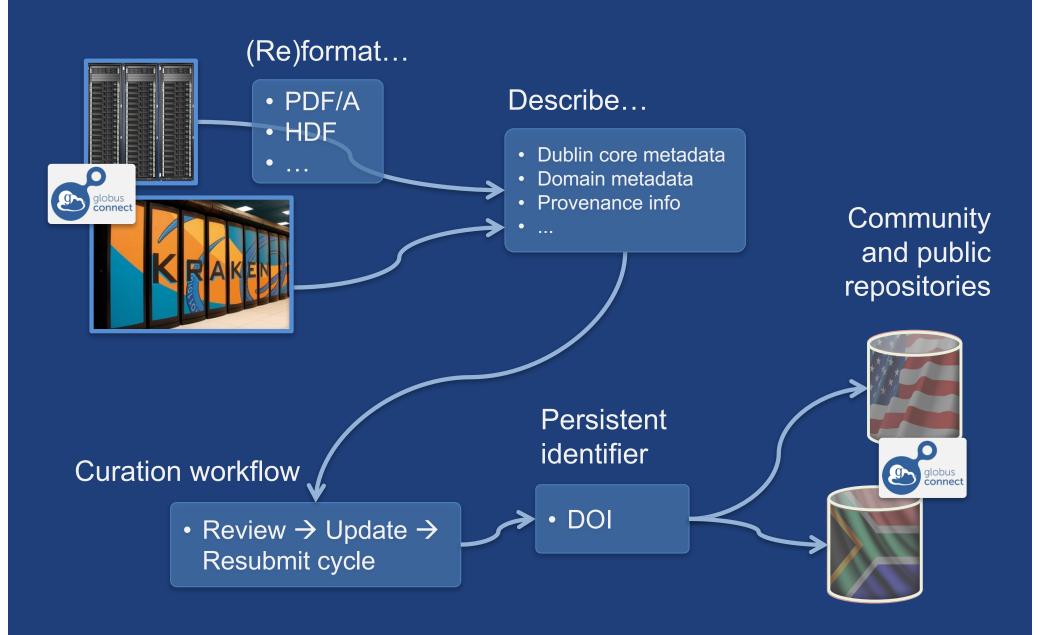


https://publish.globus.org





Peer reviewed paper data





Data Publication Demonstration



How can I use Globus on my system?



Globus Connect...

Makes your storage system a Globus endpoint



Globus Connect Personal



- Installers do not require admin access
- Zero configuration; auto updating
- Handles NATs



Moving data between your laptop and another system



Exercise: Log in & transfer files

- Go to: www.globus.org/login 1.
- Select your institution from the list 2. and click "Continue"
- Authenticate with your institution's **3**. identity system
- **Install Globus Connect Personal** 4.
- **5**. Move file(s) between an ESnet test endpoint and your laptop



Sharing Data



- 1. Join the "Tutorial Users" groups
 - Go to "Groups", search for "tutorial"
 - Select group from list, click "Join Group"
- 2. Create a shared endpoint on your laptop
- 3. Grant your neighbor permissions on your shared endpoint
- 4. Access your neighbor's shared endpoint



How can I integrate Globus into my research workflows?



Globus serves as...

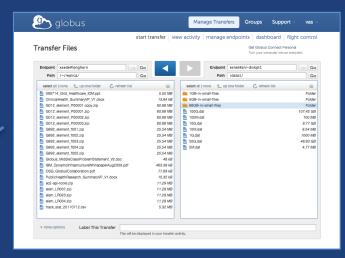
A platform for building science gateways, portals and other web applications in support of research and education



Use(r)-appropriate interfaces



Globus service



Web

```
(globus-cli) jupiter:~ vas$ globus
Usage: globus [OPTIONS] COMMAND [ARGS]...
Options:
  -v, --verbose
                            Control level of output
  -h, --help
                            Show this message and exit.
  -F, --format [json|text] Output format for stdout. Defaults to text
  --map-http-status TEXT
                           Map HTTP statuses to any of these exit codes:
                            0,1,50-99. e.g. "404=50,403=51"
Commands:
 bookmark
                  Manage Endpoint Bookmarks
                  Modify, view, and manage your Globus CLI config.
  config
```

CLI

GET /endpoint/go%23ep1 PUT /endpoint/vas#my endpt 200 OK X-Transfer-API-Version: 0.10 Content-Type: application/json

Rest API



Globus as PaaS







Globus REST





Data Publication & Discovery

File Sharing

File Transfer & Replication

Identity/Authentication, Group Management



Globus Toolkit

Integrate file transfer and sharing capabilities into scientific web apps, portals, gateways, etc.









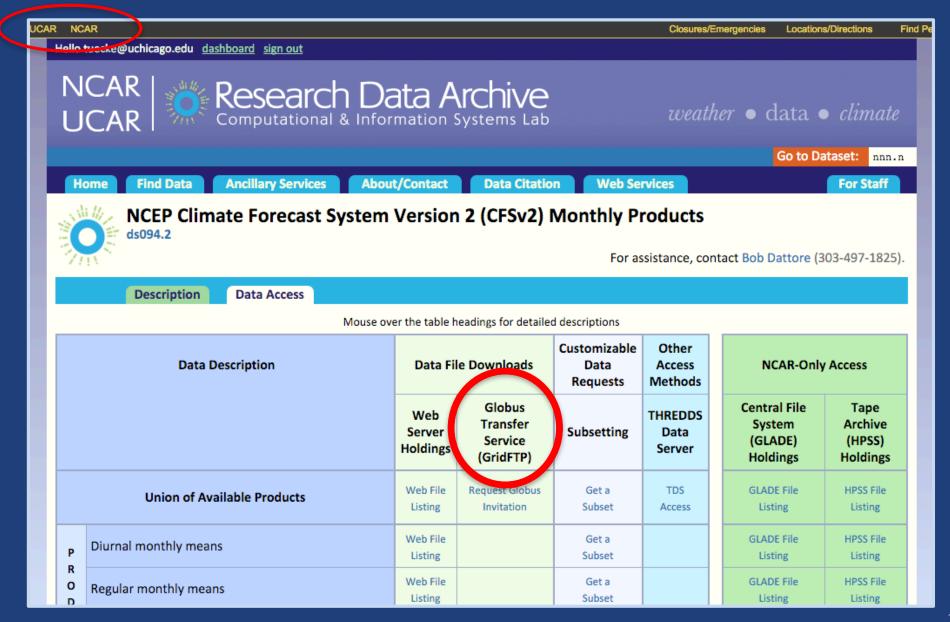


Enable existing institutional ID systems to be used in external web applications

Globus Connect



Data App: NCAR RDA



Analysis App: Wellcome Sanger

Sanger Imputation Service Beta

Home

About

Instructions -

Resources

Status

Sanger Imputation Service

This is a free genotype **imputation** and **phasing** service provided by the Wellcome Trust Sanger Institute. You can upload GWAS data in VCF or 23andMe format and receive imputed and phased genomes back. Click here to learn more and follow us on Twitter.

Before you start

Be sure to read through the instructions.

You will need to set up a free account with Globus and have Globus Connect running at your institute or on your computer to transfer files to and from the service.

Ready to start?

If you are ready to upload your data, please fill in the details below to register an imputation and/or phasing job. If you need more information, see the about page.

=11	name	
	паппе	

Organisation

Email address

What is this 2

Globus user identity



News

y @sangerimpute

11/05/2016

Thanks to EAGLE, we can now return phased data. The HRC panel has been updated to r1.1 to fix a known issue. See ChangeLog for more details.

15/02/2016

Globus API changed, please see updated instructions.

17/12/2015

New status page and reworked internals. See ChangeLog.

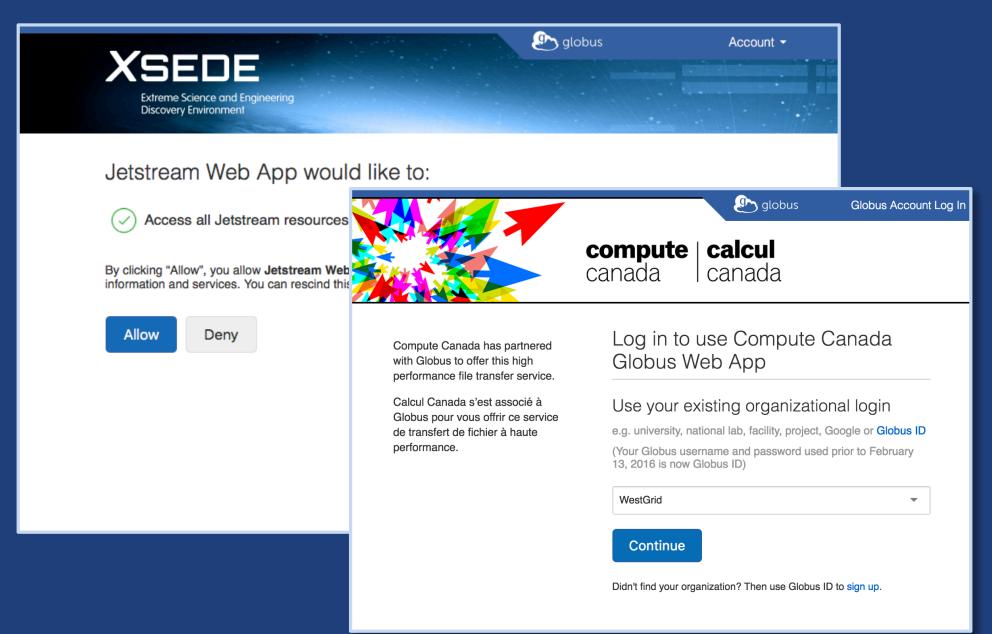
09/11/2015

Pipeline updated to add some features requested by users. See ChangeLog.

See older news...

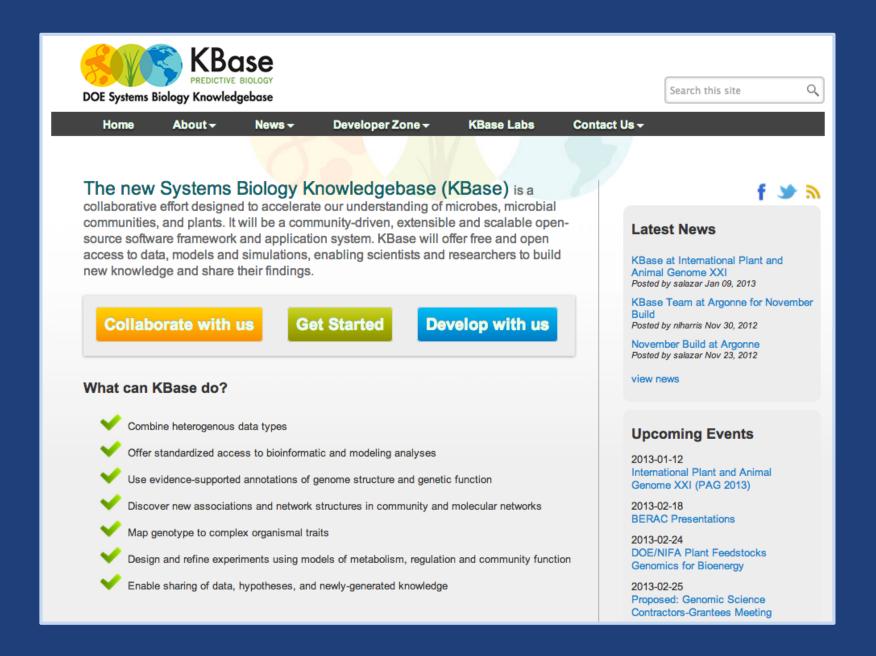


Globus PaaS: National Resource Access



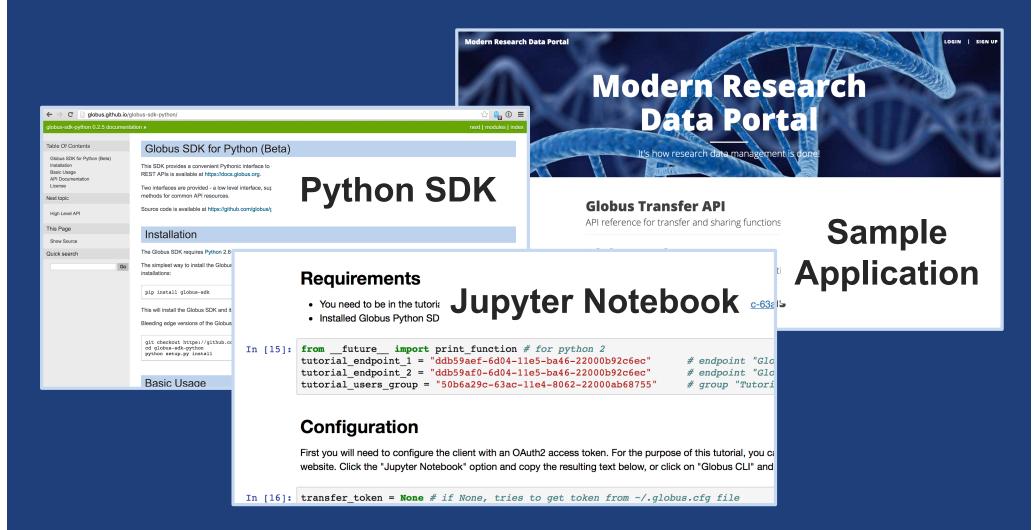


Globus PaaS: Identity Management





Globus PaaS developer resources



docs.globus.org/api

github.com/globus



HTTPS support (coming soon)

- Synchronous alternative to GridFTP
- Same fine-grained access control model
- Greatly simplified sharing/transfer of "small" datasets
- Standard browser behaviors
- Integration with clients and web apps to further leverage existing research storage systems

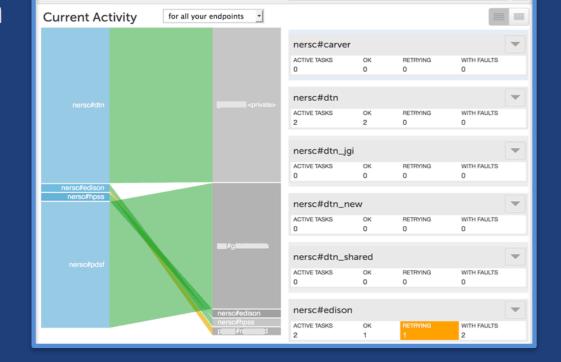


Globus sustainability model

endpoint overview active tasks

Standard Subscription

- Shared endpoints
- Data publication
- HTTPS support*
- Management console
- Usage reporting
- Priority support
- Application integration
- Branded Web Site



search tasks by Globus username, endpoint or taskID

- Premium Storage Connectors
 - Amazon S3, Ceph, HPSS, Spectra, Google Drive, Box*, HDFS*
- Alternate Identity Provider (InCommon is standard)



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ENERGY



THE UNIVERSITY OF CHICAGO





National Institute of Standards and Technology U.S. Department of Commerce











Thank you to our users...

major services

270 PB transferred

45 Bn files processed 58,000 registered users

13 national labs use Globus

10,000 active endpoints 10,000 active users/year 99.5% uptime

65+ institutional subscribers

1 PB

largest single transfer to date 3 months

longest continuously managed transfer 300+

federated campus identities



...and thank YOU, our subscribers!











































Join the Globus community

- Access the service: globus.org/login
- Create a personal endpoint: globus.org/app/endpoints/create-gcp
- Documentation: docs.globus.org
- Engage: globus.org/mailing-lists
- Subscribe: globus.org/subscriptions
- Need help? support@globus.org
- Follow us: @globusonline



Globus for System Administrators

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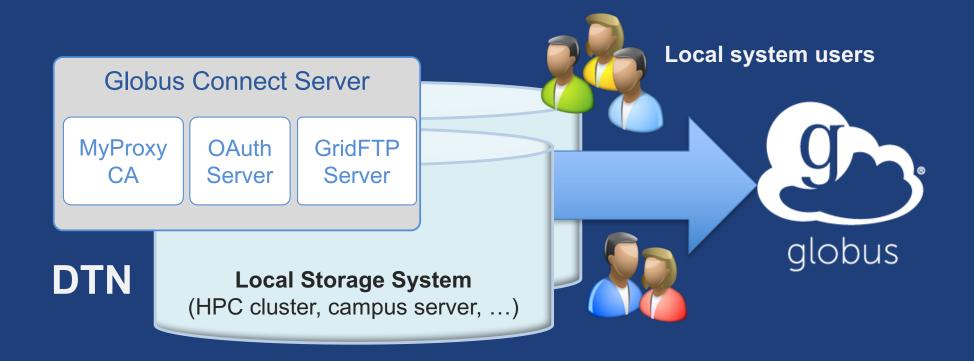
All passwords: globus2017



Enabling your storage system: Globus Connect Server



Globus Connect Server



- Create endpoint on practically any filesystem
- Enable access for all users with local accounts
- Native packages: RPMs and DEBs

Storage connectors

- Standard storage connectors (POSIX)
 - Linux, Windows, MacOS
 - Lustre, GPFS, OrangeFS, etc.
- Premium storage connectors
 - Amazon S3
 - Google Drive
 - Spectra Logic BlackPearl
 - HPSS
 - Ceph RadosGW (S3 API)
 - iRODS
 - HDFS
- Planned: Box, Azure, et al



- Creating a Globus endpoint on your storage system
- In this example, storage system = Amazon EC2 server



Step 0: Create a Globus ID

- Installation and configuration of Globus Connect Server requires a Globus ID
- Go to globusid.org
- Click "create a Globus ID"

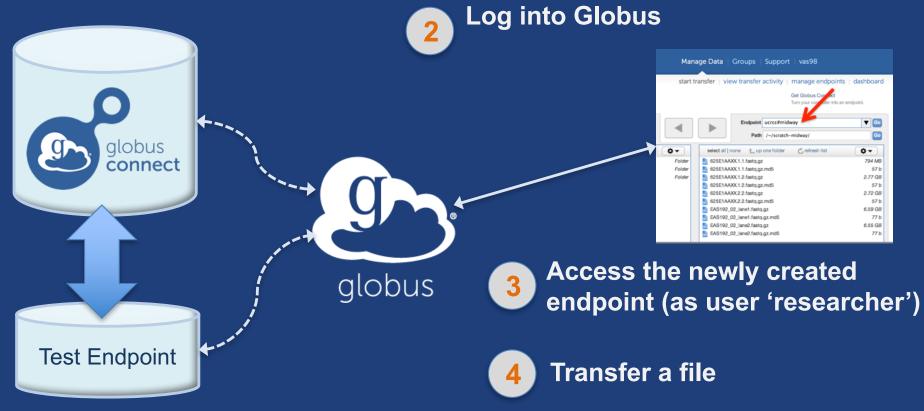


What we are going to do:



Install Globus Connect Server

- Access server as user "campusadmin"
- Update repo
- Install package
- Setup Globus Connect Server



Access your host

- Create a Globus ID
 - Optional: associate it with your Globus account
- Get the DNS for your EC2 server
- Log in as user 'campusadmin':

```
ssh campusadmin@<EC2_instance_IP_address>
(password: globus2017)
```

- NB: Please sudo su before continuing
 - User 'campusadmin' has sudo privileges



Step 3: Install Globus Connect Server

Cheatsheet: globusworld.org/tutorial

```
$ sudo su
$ curl -LOs http://toolkit.globus.org/ftppub/globus-
connect-server/globus-connect-server-
repo_latest_all.deb
$ dpkg -i globus-connect-server-repo_latest_all.deb
$ apt-get update
$ apt-get -y install globus-connect-server
$ globus-connect-server-setup
  L Use your Globus ID username/password when prompted
```

You have a working Globus endpoint!



Access the Globus endpoint

- Go to Manage Data

 Transfer Files
- Access the endpoint you just created
 - Search for your EC2 DNS name in the Endpoint field
 - Log in as user "researcher" (pwd: globus2017);
 you should see the user's home directory
- Transfer files to/from a test endpoint (e.g. Globus Tutorial, ESnet) and your endpoint



Ports needed for Globus

- Inbound: 2811 (control channel)
- Inbound: 7512 (MyProxy), 443 (OAuth)
- Inbound: 50000-51000 (data channel)
- If restricting outbound connections, allow connections on:
 - -80, 2223 (used during install/config)
 - 50000-51000 (GridFTP data channel)
- Futures: single-port GridFTP



Configuring Globus Connect Server

- Globus Connect Server configuration: /etc/globus-connect-server.conf
- To enable changes you must run: globus-connect-server-setup
- "Rinse and repeat"
- Globus service configuration
 - Temporary: two configs for some options



Configuration file walkthrough

Structure based on .ini format

```
[Section]
Option
```

Commonly configured options:

```
Name
Public
RestrictedPaths
Sharing
SharingRestrictedPaths
IdentityMethod (CILogon, Oauth)
```



Exercise: Make your endpoint visible

- Set Public = true
- Edit endpoint attributes
 - Change the name to something useful, e.g. <your name> EC2 Endpoint
- Find your neighbor's endpoint
 - You can access it too ☺



Enabling sharing on an endpoint

- Set Sharing = True
- Run globus-connect-server-setup
- Go to the Transfer Files page
- Select the endpoint
- Create shared endpoints and grant access to other Globus users*

* Note: Creation of shared endpoints requires a Globus subscription for the managed endpoint

Constitution of the second

Path Restriction

- Default configuration:
 - All paths allowed, access control handled by the OS
- Use RestrictPaths to customize
 - Specifies a comma separated list of full paths that clients may access
 - Each path may be prefixed by R (read) and/or W (write), or
 N (none) to explicitly deny access to a path
 - '~' for authenticated user's home directory, and * may be used for simple wildcard matching.
- e.g. Full access to home directory, read access to /data:
 - RestrictPaths = RW~,R/data
- e.g. Full access to home directory, deny hidden files:
 - RestrictPaths = RW~,N~/.*



Exercise: Restrict access

- **Set** RestrictPaths=RW~, N~/archive
- Run globus-connect-server-setup
- Access your endpoint as 'researcher'
- What's changed?



Limit sharing to specific accounts

- SharingUsersAllow =
- SharingGroupsAllow =
- SharingUsersDeny =
- SharingGroupsDeny =

Sharing Path Restriction

- Restrict paths where users can create shared endpoints
- Use SharingRestrictPaths to customize
 - Same syntax as RestrictPaths
- e.g. Full access to home directory, deny hidden files:
 - SharingRestrictPaths = RW~,N~/.*
- e.g. Full access to public folder under home directory:
 - SharingRestrictPaths = RW~/public
- e.g. Full access to /proj, read access to /scratch:
 - SharingRestrictPaths = RW/proj,R/scratch



Advanced Configuration



Using MyProxy OAuth server

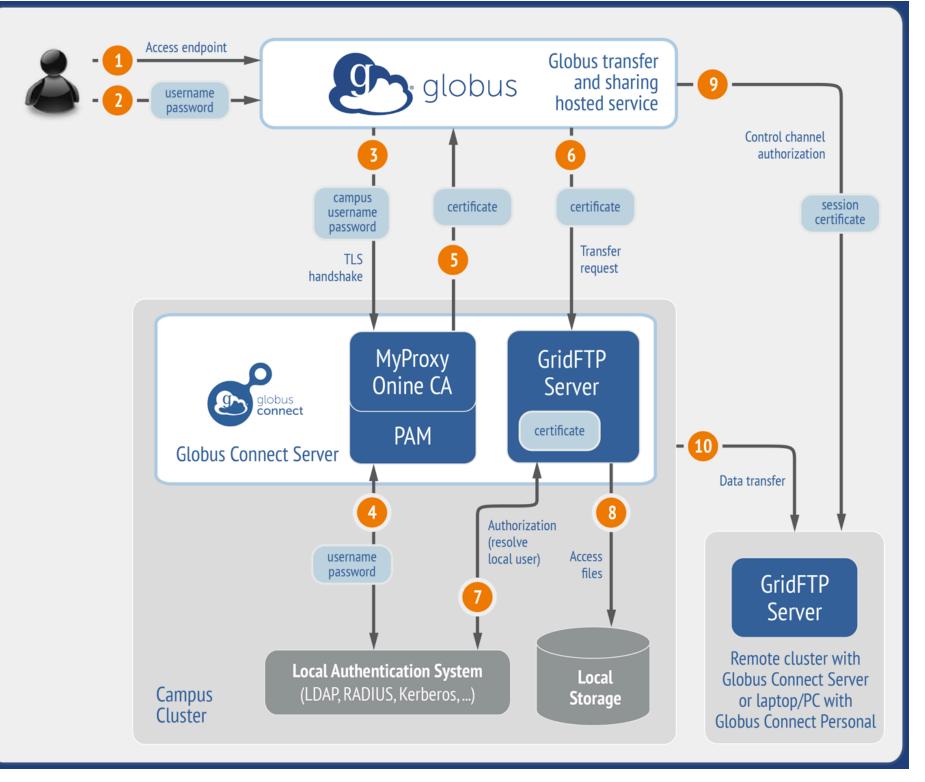
MyProxy without OAuth

- Passwords flow via Globus to MyProxy server
- Globus does not store passwords
- Still a security concern for many campuses

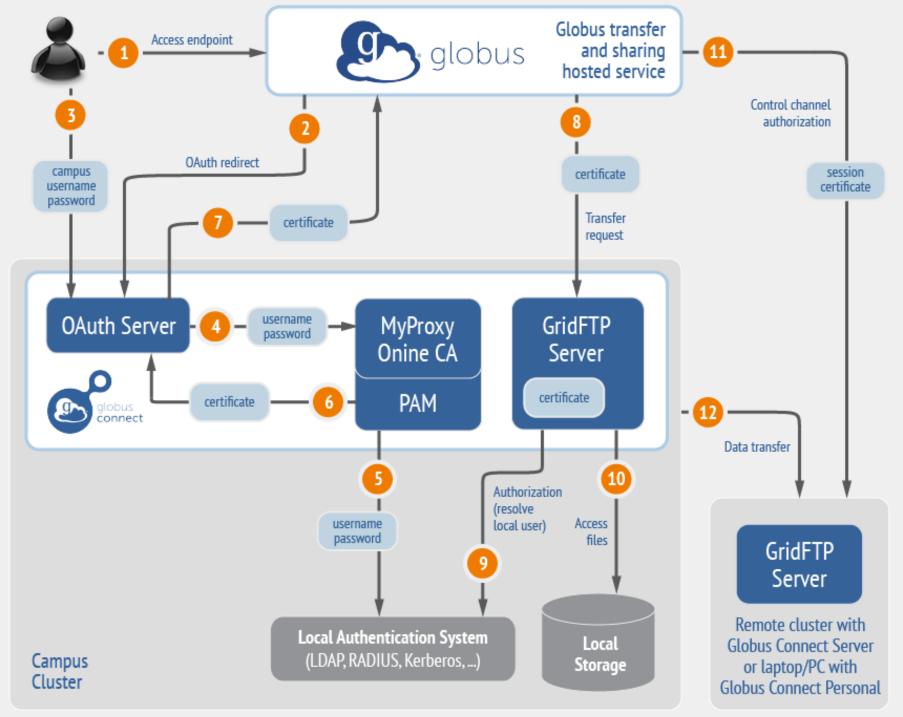
Web-based endpoint activation

- Sites run MyProxy OAuth server or use CI Logon
- Globus gets short-term X.509 credential via MyProxy OAuth protocol











Single Sign-On with InCommon/CILogon

- Your Shibboleth server must release the ePPN attribute to CILogon
- Local resource account names must match institutional ID (InCommon ID)
- AuthorizationMethod = CILogon

Integrating your IdP

InCommon members

- Must release R&S attributes to CILogon
- Mapping uses ePPN; can use GridMap
 AuthorizationMethod = CILogon
 CILogonIdentityProvider =
 <institution_name_in_CILogon_IdP_list>

Non-members

- IdP must support OpenID Connect
- Requires Alternate IdP subscription
- Using an existing MyProxy server



Managed endpoints and subscriptions



Subscription configuration

Subscription manager

- Create/upgrade managed endpoints
- Requires Globus ID linked to Globus account

Management console permissions

- Independent of subscription manager
- Map managed endpoint to Globus ID

Globus Plus group

- Subscription Manager is admin
- Can grant admin rights to other members



Creating managed endpoints

- Required for sharing, management console, reporting, etc.
- Convert existing endpoint to managed:

endpoint-modify --managed-endpoint <endpoint_name>

- Must be run by subscription manager, using the Globus CLI
- Important: Re-run endpoint-modify after deleting/re-creating endpoint
- Note: The above command requires the hosted (legacy) CLI

https://docs.globus.org/cli/#hosted_command_line_interface_legacy



Demonstration: Command Line Interface (CLI)



Managed endpoint activity accessible via management console

- Monitor all transfers
- Pause/resume specific transfers
- Add pause conditions with various options
- Resume specific tasks overriding pause conditions
- Cancel tasks
- View sharing ACLs



Demonstration: Management console

Endpoint Roles

- Administrator: define endpoint and roles
- Access Manager: manage permissions
- Activity Manager: perform control tasks
- Activity Monitor: view activity



Other Deployment Options



- Requiring encryption on an endpoint
 - User cannot override
 - Useful for "sensitive" data
- Globus uses OpenSSL cipher stack as currently configured on your DTN
- FIPS-140-2 compliance
 - Limit number of ciphers used by OpenSSL
 - https://access.redhat.com/solutions/137833



Distributing Globus Connect Server components

- Globus Connect Server components
 - globus-connect-server-io, -id, -web
- Default: -io, -id and -web on single server
- Common options
 - Multiple –io servers for load balancing, failover, and performance
 - No -id server, e.g. third-party IdP such as CILogon
 - id on separate server, e.g. non-DTN nodes
 - web on either –id server or separate server for OAuth interface



Setting up multiple –io servers

- Guidelines
 - Use the same .conf file on all servers
 - First install on the server running the –id component, then all others
- **Install Globus Connect Server on all servers** 1.
- 2. Edit .conf file on one of the servers and set [MyProxy] Server to the hostname of the server you want the -id component installed on
- Copy the configuration file to all servers **3.**
 - /etc/globus-connect-server.conf
- Run globus-connect-server-setup on the server running 4. the -id component
- Run globus-connect-server-setup on all other servers **5**.
- 6. Repeat steps 2-5 as necessary to update configurations



Example: Two-node DTN

```
/etc/globus-connect-server.conf
[Endpoint] Name = globus_dtn
[MyProxy] Server = ec2-34-20-29-57.compute-1.amazonaws.com
```



```
/etc/globus-connect-server.conf
[Endpoint] Name = globus_dtn
[MyProxy] Server = ec2-34-20-29-57.compute-1.amazonaws.com
```



Optimizing transfer performance



Balance: performance - reliability

- In-flight tuning based on transfer profile (#files, sizes)
- Request-specific overrides
 - Concurrency
 - Parallelism
- Endpoint-specific overrides; especially useful for multi-DTN deployments
- Service limits, e.g. concurrent requests



Network Use Parameters

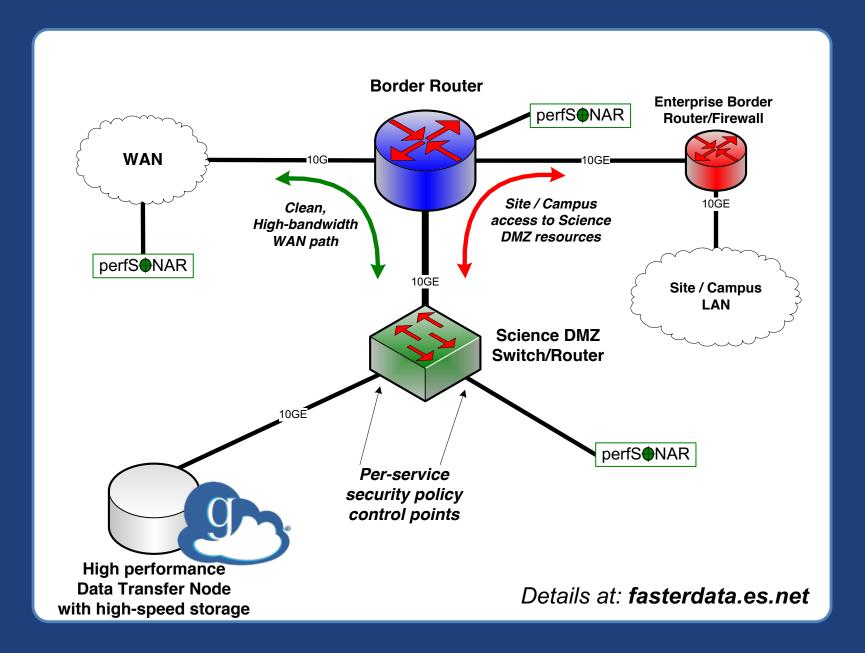
- Concurrency and parallelism configuration to tune transfers
- Maximum and Preferred
- Use values set for source and destination to determine parameters for a given transfer
- min (max (preferred src, preferred dest), max src, max dest)



- Separate control and data interfaces
- "DataInterface =" option in globusconnect-server-conf
- Common scenario: route data flows over Science DMZ link

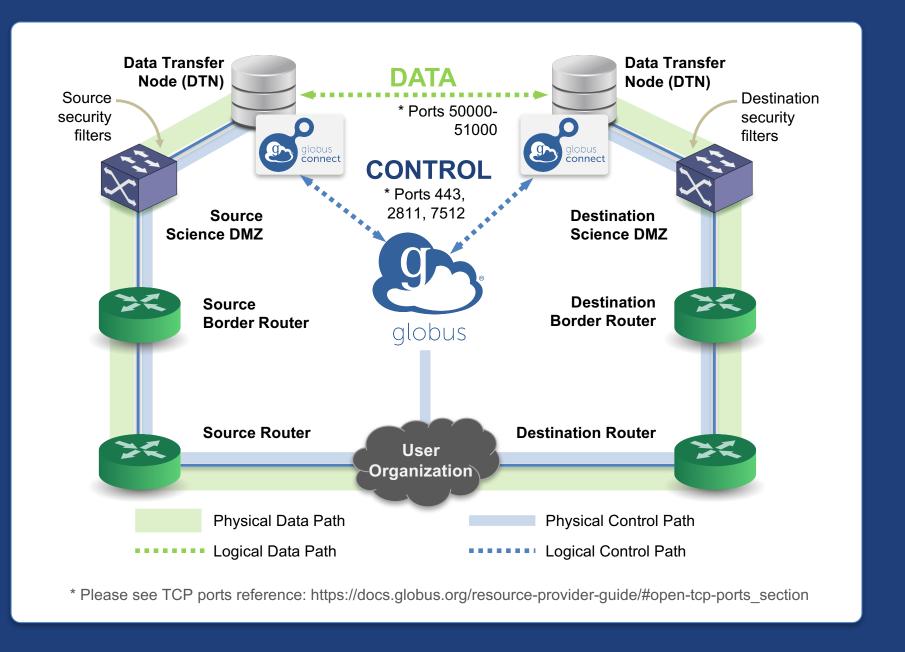


Best-practice deployment





Network Paths - Illustrative



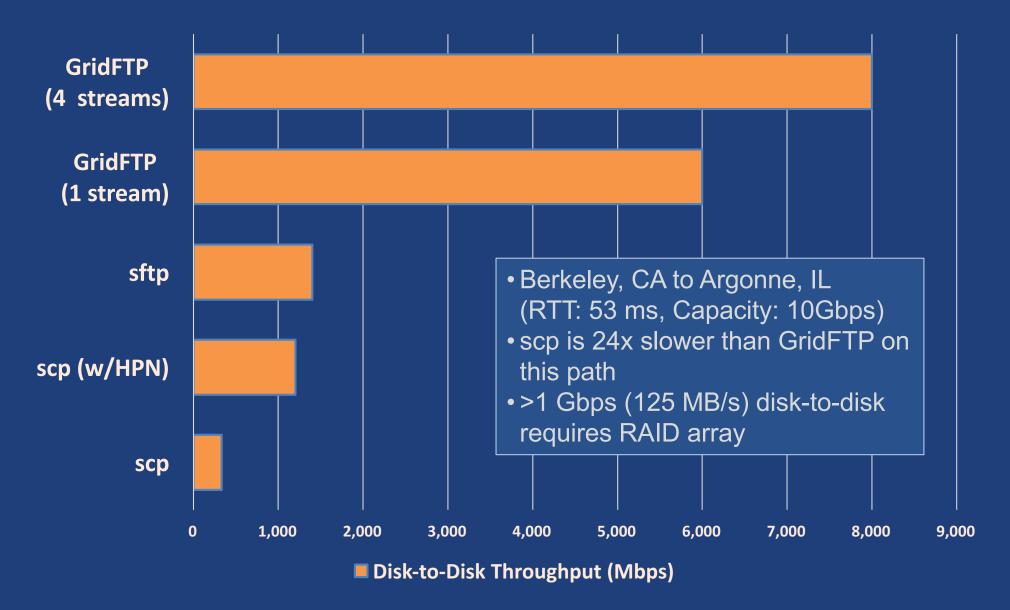


Illustrative performance

- 20x scp throughput (typical)
 - ->100x demonstrated
- On par/faster than UDP based tools (NASA JPL study and anecdotal)
- Capable of saturating "any" WAN link
 - Demonstrated 85Gbps sustained disk-to-disk
 - Typically require throttling for QoS



Disk-to-Disk Throughput



Source: ESnet (2016)



For the very brave...



Globus Network Manager

- Information from GridFTP to facilitate dynamic network changes
- Callbacks during GridFTP execution on **local DTN**
- Supplements information available via Globus transfer API



Globus Network Manager Callbacks

- Pre-listen (binding of socket)
- Post-listen
- Pre-accept/Pre-connect (no Data yet)
- Post-accept/Post-connect (data in flight)
- Pre-close
- Post-close



Network manager use cases

- Science DMZ Traffic Engineering
 - Use SDN to dynamically route data path
 - Control path uses traditional route
- Automated WAN bandwidth reservation
 - OSCARS, AL2S
- Note: All this requires custom code



Discussion



Enable your storage system

- Everything you wanted to know: docs.globus.org
- Need help? support.globus.org
- Mailing Lists: globus.org/mailing-lists
- Subscribe to help us make Globus self-sustaining: globus.org/provider-plans
- Follow us: @globusonline