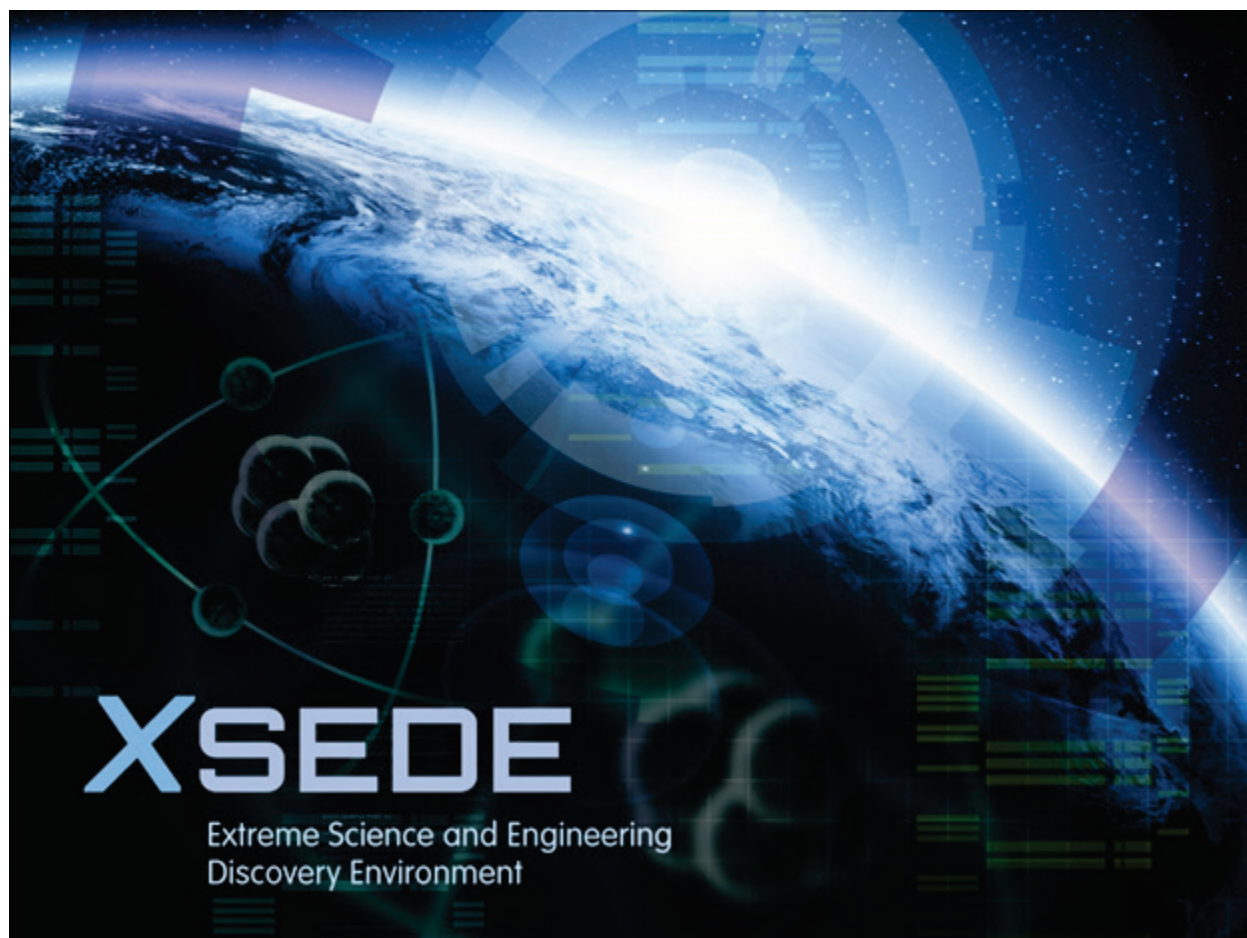


# XSEDE Service Provider Checklist

20 October 2020

Version 4.3



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## A. Document History

Relevant Sections	Version	Date	Changes	Author
Entire document	1.00	5/11/2012	Initial version	VGH,TB
Checklist on page 2 Checklist on page 3	1.1	2/19/2013	Removed mention of nagios, reference to contacts no longer with XSEDE and INCA contact. Contacts updated on page 3	VGH
Checklist on page 2, 3	1.2	2/25/2013	After meeting with SPs I came across some items to update and be more clear about	VGH
Checklist tables	1.3	10/8/2013	Updated contact information in checklist tables	VGH
Checklist page 2 under ECSS	1.4	12/10/2013	Added detailed ECSS information needed	VGH,NWD
Added exit checklist sections	1.5	1/21/2014	Added exit checklist information which came from SP Forum discussions	VGH editor, RLM, GDP, B.Sinkovits, B. Stock, SP Forum
	1.6	9/25/2015	Updated sections	V.Hazlewood
Updated doc for XSEDE2	2.0	7/12/2016	Review/update all sections	V. Hazlewood
Updated based on feedback	2.0	8/8/2016	XRAS section	A. Schuele
Update section C, D, E	3.0	1/4/2018	Review document and update any contacts to be titles and not names, updated Rich Knepper email, updated training contact	V. Hazlewood
Update section D	4.0	9/16/2020	Updated mailing lists	V. Hazlewood
Update section E	4.0	9/16/2020	Updated SP coordinator name and email	T. Samuel
Update section C, D	4.1	9/17/20	Updated XDCDB url. Updated allocations information.	D. Hart

<b>Update section D</b>	4.1	9/24/20	Removed dts mailing list placeholder	T. Samuel
<b>Update section D</b>	4.2	10/8/20	Updated Develop Education and Training section	T. Samuel
<b>Update section D, E</b>	4.3	10/20/20	Updated security related sections	D. Simmel, T. Samuel

## **B. Document Scope**

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The following describes the XSEDE Service Providers' (SPs) checklist to be used for integration and/or deployment of a new resource in XSEDE, verify an existing resource at an SP site, to coordinate a campus cyberinfrastructure project, or for the exit of a resource from XSEDE.

## C. Service Provider Checklist Descriptions

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The following describes the XSEDE Service Providers' (SPs) checklist and contact titles to be used for entry, annual review and/or exit of a new resource in XSEDE, to verify an existing resource at an SP site, or to coordinate a campus cyberinfrastructure project. These checklists are maintained by the XSEDE Community Infrastructure (XCI) XSEDE Capability and Resource Integration (XCRI) group. The SP checklist includes installation of some or all of the XSEDE Software and Services as appropriate for the resource. The separately maintained XSEDE Software and Services Table document provides a summary of the XSEDE Software and Services Baseline document and provides a concise high-level overview with links to further descriptions and links to the software and installation instructions.

Coordination, notification, and starting discussions should begin between the XSEDE SP Coordinator and the new SP representatives prior to the start of the SP resource allocation. Starting an SP deployment or coordinating a campus cyberinfrastructure projects starts with contacting the SP coordinator in the XCRI group as the first step. Information needs to be published in the XSEDE allocations system, website, and/or portal prior to any allocation award; therefore, discussions should begin **at least** one quarter prior to start of allocations awards on the new system. The checklists list titles of specific XSEDE contacts who are maintained at <https://software.xsede.org/sp-resource-integration-status>.

For any questions regarding this checklist, please contact the XCRI Manager, Richard Knepper, or the XSEDE SP Coordinator, Tabitha Samuel. Contact Rich at [rich.knepper@cornell.edu](mailto:rich.knepper@cornell.edu) or Tabitha at [tsamuel@utk.edu](mailto:tsamuel@utk.edu).

Locations where SP resource information is viewable and, in some cases, modifiable by the SP includes the following:

Item	URL
RDR	<a href="https://rdr.xsede.org/">https://rdr.xsede.org/</a>
Portal	<a href="https://portal.xsede.org/">https://portal.xsede.org/</a>
Information Services	<a href="http://info.xsede.org/">http://info.xsede.org/</a>
Allocation and usage resource for staff	<a href="https://xdcdb-admin.xsede.org/staff_allocation_queries/">https://xdcdb-admin.xsede.org/staff_allocation_queries/</a>
Research Software Portal	<a href="https://software.xsede.org/community/xsede">https://software.xsede.org/community/xsede</a>

## D. Service Provider Entry/Annual Checklists

<b>SP Level 1 and Level 2 Entry/Annual Checklist — all resource types</b>		
<b>Integration Item</b>	<b>XSEDE Division-Group</b>	<b>Contact</b>
<b>Start</b>		
Contact SP Coordinator to initiate SP integration project (coordinator to notify all appropriate XSEDE contacts for a new SP)	XCI-XCRI	SP Coordinator
<b>Step 0</b>		
Update RDR information ( <a href="https://rdr.xsede.org/">https://rdr.xsede.org/</a> )	XCI-XCRI	SP Coordinator
<b>Allocations</b>		
Allocations Process & XRAS Integration <ul style="list-style-type: none"> <li>Identify allocations liaison</li> </ul>	RAS-APP (Allocations)	RAS Allocations Coordinator
Request SP/Site Staff Allocation (if necessary)	RAS-APP (Allocations)	RAS Allocations Coordinator
<b>Systems Integration</b>		
Identify security contact for resource	Operations Cybersecurity	XSEDE Cybersecurity co-leads
XSEDEnet integration (SP L1 and SP L2)	Operations-Data Transfer Services	Operations Data Transfer Services (DTS) Manager
XSEDE ticket system integration coordination	Operations-XOC	XOC Manager
Accounting/AMIE implementation <ul style="list-style-type: none"> <li>Identify accounting point of contact</li> <li>Project/account create/modify</li> <li>Job accounting</li> <li>Gateway end-user accounting</li> <li>Storage allocation accounting</li> </ul>	RAS-A3M (Accounting)	RAS A3M Manager
Software and Services installation (See Software and Services Summary Table)	XCI-XCRI	SP Coordinator
Information Services integration (See Software and Services Summary Table)	XCI-XCRI	SP Coordinator
Portal Integration <ul style="list-style-type: none"> <li>job and load services, RDR and info services</li> </ul> (See Software and Services Summary Table)	XCI-XCRI, CEE-UIOI	SP Coordinator, CEE User Interfaces and Online Information (UII) Manager
XSEDE automated production testing (Inca)	XCI-RACD	XCI Requirements Analysis and Capability Delivery (RACD) Manager
<b>Other Coordination or Integration</b>		
ECSS coordination <ul style="list-style-type: none"> <li>Advanced notice, as possible</li> </ul>	ECSS	ECSS Director

<ul style="list-style-type: none"> <li>Identify ECSS that need staff accounts in first allocation quarter (prior to general staff account access)</li> <li>Description of specialty expertise that is expected for the new resource</li> <li>Discussion of how ECSS support can be handled</li> </ul>		
Identify liaison to Campus Champions	CEE-CE	Campus Champions Coordinator
How can SPs feedback into XSEDE <ul style="list-style-type: none"> <li>Discuss novel and innovative software and online capabilities (RACD)</li> <li>Feedback on current Software and Services</li> </ul>	XCI-RACD, XCI-XCRI	help@xsede.org, SP Coordinator XCI Requirements Analysis and Capability Delivery (RACD) Manager
Identify XRAC representative	RAS-APP	RAS Allocations Coordinator
<b>Communications</b>		
User Guide development for website/portal	CEE-UIOI	CEE UII Manager
Media communications coordination	External Relations	External Relations (ER) Manager
Research Software Portal news <a href="https://software.xsede.org/news/">https://software.xsede.org/news/</a>	RACD	RACD Manager
SP-related mailing list participation <ul style="list-style-type: none"> <li>ras-allocations@xsede.org (APP)</li> <li>ras-accounting@xsede.org (A3M)</li> <li>sp-software@xsede.org (XCRI)</li> </ul>	Operations, RAS, XCRI	SP Coordinator or <a href="mailto:help@xsede.org">help@xsede.org</a>
Develop education and training <ul style="list-style-type: none"> <li>Develop Training for Staff (ECSS)</li> <li>Develop User Training (CEE)</li> <li>Designate Course Calendar posting contact (CEE)</li> </ul>	CEE & ECSS	XSEDE ESTEO lead XSEDE CEE training lead
Security <ul style="list-style-type: none"> <li>security agreement</li> <li>participation in Trust Group</li> <li>mailing list incident-discuss@xsede.org</li> <li>awareness of incident process</li> <li>XSEDE security slack channel</li> </ul>	Operations Cybersecurity	XSEDE Cybersecurity co-leads
SP Forum participation	SP Forum	SP Forum Chair
<b>Final Checkout prior to production</b>		
SP integration testing	RAS-A3M, XCI-XCRI	SP Coordinator, RAS A3M Manager
SP early access period	RAS-APP	SP Coordinator, RAS Allocations Coordinator
Ticket routing testing	Operations XOC	XOC Manager or Operations Deputy Director
Add resource for access by XSEDE staff (as necessary for Level 1 and Level 2 SP)	RAS-APP	RAS Allocations Coordinator



<b>SP Level 3 Entry/Annual Checklist — all resource types</b>		
<b>Integration Item</b>	<b>XSEDE Division-Group</b>	<b>Contact</b>
<b><i>Start</i></b>		
Contact SP Coordinator to initiate SP Level 3 or campus bridging integration project	XCI-XCRI	SP Coordinator
<b><i>Allocations</i></b>		
SSO Hub integration for user access (optional)	RAS-APP, RAS-A3M	RAS Allocations Coordinator, RAS A3M Manager
<b><i>Systems Integration</i></b>		
XSEDE ticket system integration coordination (for SP L3), if requested	Operations XOC	XOC Manager or Operations Deputy Director
Software and Services installation (See Software and Services Summary Table)	XCI-XCRI	SP Coordinator
Information Services integration	XCI-XCRI	SP Coordinator
<b><i>Other Coordination or Integration</i></b>		
Identify liaison to Campus Champions	CEE-CE	Campus Champions Coordinator
Discuss novel and innovative software and online capabilities that might want to share with XSEDE (RACD)	XCI-RACD	XCI RACD Manager or XCI Project Manager
Develop and describe SP requirements	XCI-RACD	XCI RACD Manager or XCI Project Manager
Feedback on Software and Services	XSEDE ticket system	help@xsede.org
Participate in XSEDE Security Trust and Incident response (optional)	Operations Cybersecurity	XSEDE Cybersecurity co-leads
<b><i>Communications</i></b>		
Media communications coordination	External Relations	External Relations (ER) Manager
SP related mailing list participation <ul style="list-style-type: none"> <li>sp-forum@xsede.org</li> </ul>	Operations, RAS, XCRI	SP Coordinator or <a href="mailto:help@xsede.org">help@xsede.org</a>

## E. Service Provider Exit Checklist

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The following describes the XSEDE Service Providers' (SPs) exit checklist to be used for coordinating the exit of an allocated SP resource from XSEDE. This checklist is maintained by the XSEDE SP Coordinator in the XCRI group.

Note that the exit of an SP resource starts with the SP staff specifying the expected exit date of the resource in the XSEDE RDR system (called the "Decommission date" in RDR). The end dates of various statuses should be entered as soon as they are known. Please note that the end date of a particular status will usually match the start date of the next status. The SP Coordinator will monitor this information periodically to check for upcoming resource exits. This information will be reviewed during the annual SP coordination review conducted by the XSEDE SP Coordinator.

Communication to users, XSEDE staff, Campus Champions, and XSEDE NSF Program Officer are important aspects of any XSEDE SP exit.

For any questions regarding this checklist please contact the XCRI Manager, Richard Knepper, or the XSEDE SP Coordinator, Tabitha Samuel. Contact Rich at [rich.knepper@cornell.edu](mailto:rich.knepper@cornell.edu) or Tabitha at [tsamuel@utk.edu](mailto:tsamuel@utk.edu).

<b>SP Level 1 and SP Level 2 Allocated Resource Exit Checklist</b>		
<b>Integration Item</b>	<b>XSEDE Group</b>	<b>Coordinator</b>
<b><i>Start</i></b>		
SP Coordinator will periodically review SP resource end dates (exit date) in the XSEDE RDR system and coordinate with SP and XSEDE staff. This will be inspected at least at the annual SP checklist review (See Note 1)	XCI-XCRI	SP Coordinator
<b><i>User and XSEDE Notifications</i></b>		
At 12 months prior to the decommission date XSEDE will send communication through the XSEDE allocations notification news item to all XSEDE users regarding the exit date and effects on allocation requests; this is to inform the users of the exit date and inform them that the next round of allocation requests would have shortened periods for the resource (see Note 2)	SP and XCI-XCRI RAS-APP	SP Coordinator
SP will communicate to active PIs 6, 3, and 1 month prior to the exit date explaining disposition of the resource and instructions to users concerning access to their data	SP and XCI-XCRI RAS	SP Coordinator
At 1 month prior to exit date XSEDE Operations will send an email to XSEDE staff, Campus Champions, and SP Forum Chair announcing the exit of a resource and any related information/instructions	XCI-XCRI	SP Coordinator
<b><i>Allocations</i></b>		
Coordinate with SP for amount of resource to allocate to XRAC process, especially for the XRAC allocations meetings at 9, 6 and 3 months prior to the exit date	SP and XCI-XCRI RAS	RAS Allocations Coordinator
Coordinate with the SP for the removal of the resource from requests in XRAS	RAS-APP	RAS Allocations Coordinator
In coordination with the SP and after the exit date, retire XSEDE staff allocations related to this resource	RAS-APP	RAS Allocations Coordinator
Coordinate transfer of remaining balances of unexpired allocations on the decommissioned resource to other ongoing resources (allocation minimum can be specified)	SP mgmt. RAS-APP RAS-A3M	RAS Allocations Coordinator, RAS A3M Manager
<b><i>Operations</i></b>		
Discuss the disposition of participation in XSEDEnet after the exit date, if necessary	XCI-XCRI Operations-DTS	SP Coordinator, Operations DTS Manager
Set date to retire ticket system category for the exiting SP. Provide final ticket report for the quarter and the annual period	SP Operations-XOC	XOC Manager

Set date to end AMIE requests to/from SP	RAS-A3M	RAS A3M Manager
Retire SP in XSEDE Information Services <ul style="list-style-type: none"> <li>• Make sure RDR retirement date is set</li> <li>• Shut down any information services that serves job and load information</li> <li>• Coordinate with XCI RACD to set the SP info in information services to “retired”</li> </ul>	SP XCI-XCRI XCI-RACD RAS-APP RAS-A3M	SP Coordinator, XCI RACD Manager, RAS Allocations Coordinator, RAS A3M Manager
Remove resource from any staff resource list	RAS-A3M	RAS A3M Manager
Coordinate retirement of INCA and Nagios monitoring	XCI-XCRI XCI-RACD	XCI RACD Manager, SP Coordinator
Coordinate removal from XSEDE IPF reporting	XCI-XCRI XCI-RACD	XCI RACD Manager, SP Coordinator
Remove SP staff as appropriate from Operations mailing list participation <ul style="list-style-type: none"> <li>• ops-accting@xsede.org (AAAM)</li> <li>• ops-sp-software@xsede.org (XCRI)</li> <li>• incident-discuss@xsede.org (Security)</li> <li>• ops-network@xsede.org (Data xfer)</li> </ul>	XCI-XCRI	SP Coordinator or help@xsede.org
Remove from slack channels as appropriate	XCI/ Operations	SP Coordinator, Cybersecurity leads
<b><i>Portal and Website</i></b>		
Remove resource information from Portal and Website (resource listing, user guide, job/load info, etc.)	CEE-UIOI	CEE UII Manager
<b><i>Other Coordination</i></b>		
Final SPs feedback to XSEDE <ul style="list-style-type: none"> <li>• SP entry, maintenance, exit processes</li> <li>• Feedback on Software and Services</li> </ul>	XCI-XCRI	SP Coordinator or help@xsede.org

Notes:

1. To establish an understanding of a resource end date as determined by XSEDE, please review the following:
  - For "Track 2"-style resources (Level 1 SPs), this can be tied to the known award end date in the NSF awards database
  - For systems supported by other funds the end date should be set by the SP and reviewed at the annual checklist review

- For Level 2/3 resources that are not allocated it is important for XSEDE to have accurate information on the XSEDE website, portal, RDR and other systems. Participation in XSEDE will be confirmed at least annually and determined if the service will exit within the next 12 months.
2. Communications to users should outline their options for allocations on the resource (e.g., will there be 9-, 6-, and/or 3-month allocation made as the resource nears end of availability). Communications to user should relate options for alternate resources to target for their work. No allocations made on the resource should have an end date past the known end date of the system within XSEDE; availability will need to be pro-rated on time left in the last few allocation rounds if made available. Communications to users may advise them that they should request as much time as they think they need because amounts that were cut from requested allocations may be reinstated if the end date of the requested resource is extended.