**IAM Ohio Federation Worksheet**

Institution\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IT Contact Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Library Contact \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Institution Characteristics**

⃝ Public ⃝ Independent ⃝4-year ⃝2-year ⃝ Residential ⃝ Research institution ⃝ Do you support a hospital?

**Population Characteristics**

# physical sites (campuses)\_\_\_\_\_\_\_\_\_\_\_total # identities managed\_\_\_\_\_\_\_\_\_\_\_\_ total # library patrons\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Students\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Faculty/Staff\_\_\_\_\_\_\_\_\_\_\_\_ Alumni\_\_\_\_\_\_\_\_\_\_\_\_ Applicants\_\_\_\_\_\_\_\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_

**Environment Characteristics**

Key IT Vendors for integration\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Key Library Technology Vendors for integration\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Key Content Providers to support\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Collaboration Characteristics**

Other institutions/consortia you collaborate with\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Authentication Models**

* Support for social identities (Google, OpenID, LinkedIn, Facebook, Twitter, other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)
* Support for two-factor/multi-factor authentication (\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)
* Support for non-web-based applications (\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

**Solution Preferences**

**Key gaps a solution must fill (select top 3)**

* Cost ⃝ Schedule ⃝ Staff Resources ⃝ Training/Expertise ⃝ Software platform ⃝ Software operations
* Hardware/Server platform ⃝ Data Center ⃝ Must support multiple services ⃝ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Delivery Models (select all that you might consider)**

* Self-supported, self-operated open-source (Shib, SimpleSAMLphp, etc.)
* Self-supported, self-operated commercial off-the-shelf (Microsoft, Novell, Oracle, etc.)
* Locally installed appliance (Federation-in-a-Box)
* Outsourced off-premises solution (Federation-in-the-Cloud, e.g. Fischer Ignite, Cirrus Bridge)
* Hub-and-Spoke (Shared trusted IdP of last resort, consortially operated)
* Identity-as-a-Service (outsource all IDM activities; e.g. Google, Fischer Suite, Salesforce, Stormpath)
* Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Business Models (select all that you might consider):**

* Capital software purchase + ongoing maintenance ⃝ Annual subscription
* Bundle into OARnet fees ⃝Bundle into OhioLINK fees ⃝ Bundle into Federation fees (InCommon/IAMOhio)
* Base fees on student FTE ⃝ Base fees on something else
* Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**What role should OH-TECH play specifically with respect to Identity and Authentication (select all that apply)?**

* Provide Funding ⃝ Provide Staff Augmentation ⃝ Provide training ⃝ Operate Servers/Data Center
* Drive national standards ⃝ Set regional federation policy ⃝ Drive vendor adoption
* Operate Identity Providers as a service ⃝ Negotiate favorable business relations with IDM vendors
* Act as an interface/agent for InCommon ⃝ Create standard terms for RFPs and Contracts
* Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Other Comments:**

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