CO Requirements Assessment

Collaborative Organization (CO) Requirements Assessment

Companion doc to Roles

See also the COmanage Glossary

Profiling your CO - culture and management	*For PI/Researcher /Collaboration Coordinator*
Describe the scope of your research and collaborations. (e.g. broad with significant outreach; narrow with a focus on a single instrument or data set; open community; closed community)	
Describe how the leadership of your CO make decisions.(e.g. ad hoc; steering committee; general consensus; distributed based on topic)	
How are new services defined, developed, and promoted to the participants?(e.g. email list; newsletter; word of mouth)	
What level of authority does the CO leadership have to specify local group behaviors?	
CO Community	*For PI/Researcher /Collaboration Coordinator*
Key campuses in the US?	
Any international participants or resources?	
Any other participants outside of the R&E community (e.g. commercial entities, citizen scientists)	
Key funding agencies involved? For U.S. CO - key federal agencies involved?	
Levels of assurance (LoA) requirements around the research? What is the importance of the resources being protected?	
Describe the variations of size and character of groups within the CO.	
Users, guests, and contributors	*For Collaboration Coordinator /Site Administrators*
Who decides what services are given to whom, and when are those services provisioned/de-provisioned?	
What roles do people play within your CO? How consistent are the roles (e.g. researcher, data administrator, assistant, guest) across the CO, or do roles often blend?	
Who needs to be able to add people? Who is responsible for disambiguation within the registry?	
For each of the different types of people joining your CO, what is the invitation model? How are they added/invited/enrolled?(See CMP Identity Intake and CO Enrollment for some common examples)	
How do you handle changes in affiliation? (i.e. a postdoc at institution A becomes a faculty member at institution B, but expects to remain involved in the CO)	
What are your reporting requirements around the users in the CO? (e.g. real-time or batch reports for new users, FTE effort towards research for the CO)	
Do you manage or provide a CO-associated identifier (e.g. forwarding-only email address, kerberos principle, username/password)?	
Application requirements	*For Collaboration Coordinator /Site Administrators*
Does your CO use or expect to use web portals or other domain science gateways?	
How do people find out about new applications available to your CO?	
Is command line and/or ssh in use? In what way/For what purpose?	
Is single sign-on (SSO) required through the applications in use? If so, are you using a certificate or key based service? How are the certificates or keys managed?	
Will data sets be stored or shared within the collaboration infrastructure?	
How are applications currently provisioned? Do you use a distributed model or rely on centralized services for provisioning?	
Are applications currently deprovisioned? If so, how?	
List other necessary domain science applications that are required for your CO.	
List other necessary collaboration tools that are required for your CO.	
Is there a preferred console for the authentication/authorization management interface?	
Do you have a need for multiple authentication models? If so, describe the models you expect and any other unique factors expressed or implied by having different models available.	
Access control	*For Collaboration Coordinator /Site Administrators*
Which online resources need access controls? (e.g. data set restrictions; domain app restrictions)	

Do you use user profiles to help match users to data sets, permissions, etc.? If so, who defines these profiles, and who (users, admins, systems, etc.) populates them with attributes ?	
Do any of your participating groups or institutions use profiles (e.g. VIVO)?	
Who determines which resources need protecting?	
What type of education and outreach needs regarding access control issues does your CO have?	
Existing Middleware Infrastructure	*For Site Administrators*
Describe your current identity management and authentication models. How does this differ from your ongoing plans or expectations?	
Describe your current ability to produce credentials of different LOA's. How does this differ from your ongoing plans or expectations?	
Do you use directories and registries? Describe.	
Are there specific schema that are required by your CO?	
Is eduPerson in use or required?	
Internal IT	*For Site Administrators*
List the compute and data platforms (software) currently in use.	
List the collaboration platforms, if any, currently in use.	
Describe if/how your CO uses Google Apps or other outsourced collaboration environments.	
Describe any use, or expected use, of platforms like XSEDE or OSG.	
Use Case	*For PI/Researcher /Collaboration Coordinator*
Describe one or two "typical" users and their expected activities and interactions with a collaboration managed environment.	