As you begin to configure and use COmanage, it will be helpful to consider the factors that will impact how well COmanage can support your activities. This planning document is designed help you consider factors that will be most helpful in an effective model.

HOW TO USE THIS TOOL: Consider the following questions for the way that your collaborative organization (CO) manages and enables the actions of its participants. You may need to work with others in your CO to answer some of these questions.

A NOTE ABOUT TERMINOLOGY: For the purposes of COmanage and this document, we will use the term "Collaborative Organization" or CO to refer to any formal or informal group of individuals that work collaboratively in a digital setting. For example, they must use the same resources or tools to get work done, often using them at the same time. These COs may include individuals in a single organization, or individuals may be in multiple organizations, geographically different regions, or even work independently.

Environment Considerations

Internal IT

- What compute and data platforms (software) are currently in use?
- What collaboration platforms currently are in use, if any?
- Does your CO use Google Apps or other outsourced collaboration environments?
- What use, or expected use, do you have of platforms like XCEDE or OSG?

Existing Middleware Infrastructure

- What are your current identity management and authentication models? How do they differ from your ongoing plans or expectations?
- What is your current ability to produce credentials of different Levels of Assurance (LOS's?) How does this ability differ from your ongoing plans or expectations?
- Do you use directories and registries? In what way?
- Are there specific schema that are required by your CO?
- Is eduPerson in use or required?

Access & Use Considerations

Access control

- Which online resources need access controls? (for example, data set restrictions; domain application restrictions, etc.)
- Do you use user profiles to help match users to data sets, permissions, etc? If os, who defines these profiles, and who (users, admins, systems, etc.) populates them with attributes?

- Does any of your participating collaborations/ groups or institutions use profiles (for example, VIVO)?
- Who determines which resources neet to be protected?
- What type of education and outreach needs regarding access control issues does your organization or collaboration have?

Application requirements

- Does your CO use or expect to use web portals or other domain science gateways?
- How do individuals find out about new applications available to your CO?
- Is command line and/or SSH in use? In what way or 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? Who 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?
- What are other necessary domain science applications that are required for your CO?
- What are 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, what are the models you expect, and what are any other unique factors expressed or implied by having different models available?

Consideration For How Your Collaborations Work

Use cases

- What are some “typical” users and their expected activities and interactions within a collaboration managed environment?

Profiling your CO - culture and management

- What is the scope of your research and collaborations? (for example, broad with significant outreach? Narrow with a focus on a single instribute or dataset? Open community? Closed community?)
- How does the leadership of your CO make decisions (for example, ad hoc; steering committee; consensus; distributed based on topic)
- How are new services defined, developed and promoted to participants? (for example, by email list; newsletter; world of mouth)
- What level of authority does the CO leadership have to specify local group behaviors?

Make up of the CO community

- Where are the participants of your CO located? (for example, one location; different campuses; different countries)

- Does your CO work with any international participants or resources?
- Are any participants outside of the Research and Education (R&E) community? (for example, commercial entities; citizen scientists)
- What are the key funding agencies that are involved? For US COs, are there any key federal agencies involved?
- What are the Levels of Assurance (LoA) requirements needed for the collaborations? What is the importance of the resources being protected?
- What are the variations of size and character of the groups within your CO?

Users, guests, and contributors

- Who decides what services are given to whom, and when those services are provisioned/ deprovisioned?
- What roles to individuals play within your CO? How consistent are those roles across the CO? (for example, researcher; data administrator; assistant; guest) How distinct are these roles?
- Who needs to be able to add people to your CO or its groups? Who is responsible for disambiguation of individuals and the records that describe them?
- For each of the types of individuals joining your CO, what is the invitation model? How are they added, invited and enrolled?
- How do you handle changes in an individual's affiliation? (for example, a postdoc institution A becomes a faculty member at institution B, but remains involved in your CO)
- What are your reporting requirements about the users in the CO? (for example, real-time or batch reports for new users; FTE efforts toward research for the CO)
- Do you manage or provide a CO-associated identifier (for example, forwarding-only email address; kerberos principle; username/password)