

# Shortened product evaluation

1. Identity provisioning
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to username assignment and generation, username changes, and support for linking to social IDs.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are username generation logic and persistent identifiers.
2. Identity matching
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to matching on a variety of attributes and matching after initial creation (such as when an SSN is later corrected, resulting in a duplicate).
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are support for levels of assurance when matching.
3. Identity lifecycle
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to state changes and deactivation.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are complex state changes for users with multiple affiliations (such as staff and student).
4. Credential provisioning
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to password policies (content, expiration, reuse), initial password assignment, password recovery, and support for credentials other than passwords (certificates, tokens).
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are synchronization among multiple password stores and support for different password policies for different populations.
5. Target directory provisioning
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to linking identities between the central person registry and the target, communicating changes to targets, reconciling targets, and support for a variety of provisioning protocols (LDAP, SOAP, SCIM, etc.).
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are the level of effort required to add a new target or modify what it receives.
6. Service provisioning
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to available connectors for common services, support for different provisioning models (just-in-time, just-in-case, on-demand), account reconciliation, and support for approval-based provisioning workflows.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are communicating state changes and fine-grained authorization data to services and support for repatriation . of a user's service account on separation.
7. Groups and roles
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to roles based on affiliation and function, dynamic groups, composite groups, and ad hoc groups.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are group member attestation and automatic group clean-up.
8. Auditing and reporting
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to flexible reporting, proactive auditing, and flexible deprovisioning workflows.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are identity attestation and automated as well as workflow oriented account deactivation.
9. API functionality
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to API performance, support for accessing all product features through API calls, and API ease of use.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are speed and multi-threading to execute large numbers of provisioning updates (such as at the beginning or end of the semester).
10. Customization and extensibility
  - a. How would you rate the completeness/maturity of the product in this area: low, medium, high, not applicable
  - b. Describe the high-level capabilities of the product in this area, with special attention to customizable user interfaces, custom attributes, custom workflows, and provisioning to new services.
  - c. Describe any ways in which this product fails to meet your needs out of the box and what customizations, workarounds or add-on products are required to meet those needs. Of special interest are localized branding.
11. Licensing and support
  - a. If this is a commercial product or commercial support has been purchased, how does the vendor price licensing? In particular, what are the units for licensing such as per-user, per-FTE, or per-processor? Is specific licensing available to the educational sector?
  - b. What support channels, free and paid, are available for this product? What are the response times expected for these channels? What channel is most commonly used?
  - c. How long has this product been in the market?
  - d. Are there regular updates and maintenance for this product?
12. Is there anything else you'd like to share about this product? Items might include additional product functionality, noteworthy product shortcomings, or challenges you have had with the product.

