

When you are ready to proceed with SAML authentication, please contact Firsthand Customer Support at support@firsthand.co. They will provide you with the URL needed in step 3 below if your Customer Success Manager did not already provide URL details. Once you have completed all the steps and required information listed, please return this form to support@firsthand.co.

1. Is your Firsthand platform in active use? Yes ☐ No ☐
2. URL for SAML2 IdP metadata: _____
3. Ingest the metadata records for your platform based on the below and check once complete ☐
 - {yourplatform}.firsthand.co/account/sso/metadata
4. Please provide more information about mapping for your data. The Firsthand platform can prepopulate the following user data during SSO. Please let us know what attribute name to expect for the below attributes:
 - First Name _____
 - Last Name _____
 - Email Address _____
 - Unique ID (username, SAML ID, email) _____
 - A single degree name ("PhD") OPTIONAL _____
 - A single field of study ("Computer Science") OPTIONAL _____
 - Graduation Year OPTIONAL _____
5. Provide test credentials if possible.

Username: _____ Password: _____

If your platform includes mentoring, please proceed to page 2.

Please see additional information below *for customers with mentoring platforms* and respond if applicable for your account.

- Please confirm who will be using SSO: Just advisees? Just advisors? Both advisees and advisors? Any other users? _____
- Should SSO provisioning be enabled for advisees, advisors, or both? That is, if a user successfully authenticates via SSO, should the system automatically allow them to act as an advisee, as an advisor, or as either? Or do you need to have your staff manually create accounts for users before they go through the registration process?
 - It is also possible to handle more specific scenarios (e.g., your system will send along an “AFFILIATION” attribute; if that attribute is “ALUMNI” then allow self-provisioning to advisor OR advisee registration; if the attribute is “STUDENT” then allow self-provisioning only for advisee registration.)

- Should email/password self-registration still be allowed for advisees, advisors (if applicable), or both (if applicable)?

- Should email/password login remain active for advisees, advisors, or neither?
