

# Liaison Statement Management Tool Enhancements

## Development Statement of Work

### 1. Introduction

The initial version of the IETF Liaison Statement Management Tool (LSMT) was deployed to the IETF Liaison Managers on July 21, 2005. This version of the tool was designed to satisfy the \*basic\* requirements of RFC 4053 (BCP 103), “Procedures for Handling Liaison Statements to and from the IETF,” with the exception of one feature: automatic copying of the appropriate parties. The intent was to implement that feature in future versions of the tool.

This document presents a proposal for enhancing the LSMT to (a) address the requirement that was omitted from the original version, (b) broaden the use of the tool within the IETF community, and (c) reduce the need for Secretariat intervention in the submission and posting of liaison statements to and from the IETF. It consists of a description of the enhancements to the tool to be implemented and related tasks and an Appendix that summarizes the procedures for handling liaison statements that form the basis for the proposed enhancements.

### 2. Enhancements to be Implemented and Related Work

#### 2.1 Creating accounts on the LSMT for authorized IETF participants

DEVELOPER will create accounts on the tool for all IETF participants who are authorized to submit liaison statements on behalf of the various IETF entities as follows:

- For the IETF/IESG Chair, the IAB Chair, the IAB Executive Director, and the IETF Area Directors: when seated
- For an IETF Liaison Manager: when named
- For an IETF WG Chair and an IETF WG Secretary: upon request

The accounts will be customized and will include \*only\* the entities that an individual represents in the “drop-down” list in the “From:” field. For example, if an individual is the chair of multiple working groups, then his or her drop-down list will include each of those working groups. If the individual is an Area Director, then his or her drop-down list will include \*only\* the Area (unless that Area Director also happens to be the chair of one or more working groups). If an individual is an IETF Liaison Manager, then his or her drop-down list will include \*all\* IETF entities plus the relevant Standards Development Organization(s) (SDO(s)).

As part of this effort, DEVELOPER will ensure that all accounts are up-to-date as of the date that the enhanced version of the LSMT is deployed.

#### 2.2 Obtaining approval to send a liaison statement on behalf of the various IETF entities

### 2.2.1 On behalf of an IETF WG.

DEVELOPER will create a check box where the WG Chair, WG Secretary, or Liaison Manager can indicate that he or she has obtained prior approval from the appropriate AD(s) to send the liaison statement. DEVELOPER will ensure that the appropriate ADs are copied on the liaison statement when it is sent.

### 2.2.2 On behalf of an IETF Area, the IETF as a whole, the IESG, or the IAB.

DEVELOPER will create a check box where a Liaison Manager can indicate that he or she has obtained prior approval from the AD(s), from the IETF/IESG Chair, or from the IAB Chair, as appropriate, to send the liaison statement. DEVELOPER will ensure that the appropriate party (ies) are copied on the liaison statement when it is sent.

### 2.3 Obtaining a list of SDO representatives who are authorized to send liaison statements on behalf of their respective SDOs.

DEVELOPER will request the Liaison Manager for each SDO to provide the Secretariat with a list of individuals who are authorized to send liaison statements on behalf of that SDO. These individuals will receive accounts on the tool. The initial request will be sent at the time that the enhanced version of the LSMT is deployed. Automated reminders to update the list (i.e., to add and delete individuals, as appropriate) will be sent quarterly thereafter.

### 2.4 Implementing a “Post Only” option

Currently, the LSMT sends and posts liaison statements simultaneously. DEVELOPER will implement a “Post Only” option, which will allow a user to post a liaison statement that was originally sent via e-mail to the “Liaison Statements” Web page via the tool. When using the “Post Only” option, the user will be instructed to cut and paste the entire e-mail submission, including all headers, into the “Body:” field of the Web form.

The “Post Only” option will be available to all individuals with accounts on the tool. That is, the user will have two options: “Send and Post” or “Post Only.” The one exception is for an IETF Liaison Manager who wishes to post a liaison statement to the “Liaison Statements” Web page that was originally submitted via e-mail by a representative of the Liaison Manager’s SDO. Although the SDO will be listed on the Liaison Manager’s “drop down” list in the “From:” field of the Web form, if the Liaison Manager selects the SDO, then he or she will have only one option: “Post Only.”

### 2.5 Implementing a Universal “From” address

DEVELOPER will implement a universal “From” address, e.g., “lsmt@ietf.org,” and all outgoing and incoming liaison statements that are sent by the tool will be sent from this address.

The Secretariat will suggest that the list administrators for all WG discussion lists accept messages from this address without moderation. The universal “From” address will not be visible to the public as it should not receive messages.

## 2.6 Additional features

DEVELOPER will implement some additional features to assist the submitters of outgoing and incoming liaison statements in completing the “From:,” “To:,” and “Cc:” fields of the template. The features described in the following subsections will be implemented in the enhanced LSMT.

### 2.6.1 For outgoing liaison statements:

- The “From:” field: The leadership of all recognized IETF entities will have accounts on the tool. (Please see Section A.1 in the Appendix.) When the submitter logs on to the tool, if the submitter represents a single IETF entity (e.g., a WG), then the “From:” field will include the name of the entity that the submitter represents, followed by the submitter’s name in parenthesis, e.g.,

IETF CCAMP WG ([Adrian Farrel](#))

If the submitter represents multiple entities (e.g., is a chair of two or more WGs), then the “From:” field will provide a drop-down list of these entities, and the submitter can select the appropriate one for the current liaison statement.

The submitter’s name will be a link to a “mail-to” form that will be pre-populated with whatever address is inserted into the “Reply-To:” field of the form. Initially, the “Reply-To:” field will be pre-populated with the submitter’s e-mail address. However, the field will be editable, so that he or she can replace that address with another address in cases where it is appropriate for responses to go to another individual.

- The “To” field: The “Organization:” sub-field of the “To:” field will consist of a drop-down list of all SDOs with which the IETF has a formal liaison relationship, and the category “Other.” The submitter can select an organization or select “Other.” If the submitter selects “Other,” then he or she will manually insert the name of the organization in the field. (The “Other” category would be used to send or respond to liaison statements to or from SDOs with which the IETF does *\*not\** have a formal liaison relationship.) In either case, the submitter will be required to complete the “POC:” sub-field of the “To:” field manually. (Note: At some point, it might be useful to create an address book for POCs for the various SDOs.)
- The “Cc:” field: If the submitter selects one of the organizations on the drop-down list of the “Organization:” sub-field of the “To:” field, then the “Cc:” field will be pre-populated with the e-mail address of the associated Liaison Manager. For example, if the submitter

is sending a liaison statement to an ITU-T entity, then the “Cc:” field will be pre-populated with Scott Bradner's e-mail address or an appropriate alias, e.g., [itu-t-liaison-manager@ietf.org](mailto:itu-t-liaison-manager@ietf.org) (TBD). Additional recipients will be automatically added to the “Cc:” list depending on the submitting entity, as specified in Section A.5.1 in the Appendix.

Finally, any addresses included in the “Response Contact:” and “Technical Contact:” fields of the liaison statement will also receive copies of the liaison statement. (Note: a blind copy will be sent to “[statements@ietf.org](mailto:statements@ietf.org)” to generate a ticket in the Secretariat's RT ticket system.)

#### 2.6.2 For incoming liaison statements:

- The “From:” field: The authorized representatives of the SDOs with which the IETF has a formal liaison relationship will have accounts on the tool. (Please see Section A.3 in the Appendix.) When an authorized representative logs on to the tool, the “From:” field will include the name of the SDO followed by the submitter’s name in parenthesis, e.g.,

ITU-T SG 15 ([Greg Jones](#))

The submitter’s name will be a link to a “mail-to” form that will be pre-populated with whatever address is inserted into the “Reply-To:” field of the form. Initially, the “Reply-To:” field will be pre-populated with the submitter’s e-mail address. However, the field will be editable, so that he or she can replace that address with another address in cases where it is appropriate for responses to go to another individual.

- The “To:” field: The “Organization:” sub-field of the “To:” field will consist of a drop-down list of all recognized IETF entities: IETF, IAB, IESG, all IETF Areas, and all IETF Working Groups. The list will be organized so as to facilitate locating the desired entity (TBD). When the submitter selects an entity, the “POC:” sub-field will be filled in automatically based on the guidelines contained in Section A.4 in the Appendix.
- The “Cc:” field: The “Cc:” field will be pre-populated with the e-mail address of the IETF Liaison Manager for the SDO whose authorized representative is sending the liaison statement. For example, if the submitter represents an ITU-T entity, then the “Cc:” field will be pre-populated with Scott Bradner's e-mail address or an appropriate alias, e.g., [itu-t-liaison-manager@ietf.org](mailto:itu-t-liaison-manager@ietf.org) (TBD). Additional recipients will be automatically added to the “Cc:” list depending on the entity selected in the “Organization:” sub-field of the “To:” field as specified in Section A.5.2 in the Appendix.

Finally, any addresses included in the “Response Contact” and “Technical Contact” fields of the liaison statement will also receive copies of the liaison statement. (Note: a blind copy will be sent to “[statements@ietf.org](mailto:statements@ietf.org)” to generate a ticket in the Secretariat's RT ticket system.)



## Appendix: IETF Procedures for Handling Liaison Statements

This Appendix addresses the procedural issues that affect the enhancements that will be made to the tool.

A.1 Who has the authority to send liaison statements on behalf of the various IETF entities (i.e., who are the IETF participants who will receive accounts on the tool)?

DEVELOPER understands that the ability to transmit and post liaison statements will be limited to the following individuals:

- IETF Liaison Managers: on behalf of any IETF entity
- WG Chairs and WG Secretaries: on behalf their working groups
- Area Directors: on behalf of their Areas
- The IESG Chair: on behalf of the IESG
- The IETF Chair: on behalf of the IETF as a whole
- The IAB Chair: on behalf of the IAB
- The IAB Executive Director: on behalf of the IAB

A.2 Who must approve the transmission of a liaison statement sent on behalf of the various IETF entities?

A.2.1 A liaison statement sent on behalf of an IETF WG

DEVELOPER understands that a WG chair, WG secretary, or Liaison Manager should obtain approval from the appropriate AD prior to sending a liaison statement, and Cc the AD on the message.

A.2.2 A liaison statement sent on behalf of an IETF Area, the IETF as a whole, the IESG, or the IAB

DEVELOPER understands that if a liaison statement is sent by an IETF Area Director, the IETF/ IESG Chair, or the IAB Chair or the IAB Executive Director on behalf of his or her respective entity, then no additional approval or notification is required. However, if the liaison statement is sent by an IETF Liaison Manager, then the Liaison Manager must obtain prior approval from the appropriate party and Cc the appropriate party(ies) on the message.

A.3 Who has the authority to transmit liaison statements on behalf of the Standards Development Organizations (SDOs) with which the IETF has formal liaison relationships (i.e., who are the SDO representatives who will receive accounts on the tool)?

The IETF Liaison Manager for each SDO will provide the Secretariat with a list of individuals who are authorized to send liaison statements on behalf of that SDO. The Liaison Manager will update the list on a quarterly basis.

A.4 Who is the appropriate point-of-contact (POC) for an incoming liaison statement? (i.e., who is the recipient of a liaison statement sent to one of the various IETF entities)?

DEVELOPER understands that the recipients of incoming liaison statements are as follows:

IETF Entity	POC
The IETF or the IESG	<ul style="list-style-type: none"><li>• The IESG/IETF Chair</li></ul>
The IAB	<ul style="list-style-type: none"><li>• The IAB Chair, IAB Executive Director</li></ul>
An IETF Area	<ul style="list-style-type: none"><li>• The Area Directors</li></ul>
An IETF WG	<ul style="list-style-type: none"><li>• The WG Chairs</li></ul>

A.5 Who must be copied on liaison statements?

DEVELOPER understands that the following individuals/entities must be copied on *\*all\** outgoing and incoming liaison statements:

- The IETF Liaison Manager for the SDO (where applicable)
- The IETF Secretariat ([statements@ietf.org](mailto:statements@ietf.org))
- Any addresses included in the “Response Contact:” and “Technical Contact:” fields of the liaison statement form.

Additional individuals, entities, and mailing lists must be copied on “outgoing” and “incoming” liaison statements depending on the submitting entity or the receiving POC, respectively.

#### A.5.1 Outgoing liaison statements

DEVELOPER understands that the following individuals, entities, and mailing lists must be copied on outgoing liaison statements:

Submitting Entity	Cc: Field
The IETF or the IESG	<ul style="list-style-type: none"><li>• The IETF Chair (if not the submitter) <a href="mailto:chair@ietf.org">chair@ietf.org</a></li><li>• The IESG <a href="mailto:iesg@ietf.org">iesg@ietf.org</a></li></ul>
The IAB	<ul style="list-style-type: none"><li>• The IAB Chair (if not the submitter) <a href="mailto:iab-chair@iab.org">iab-chair@iab.org</a></li><li>• The IAB <a href="mailto:iab@iab.org">iab@iab.org</a></li><li>• The IAB Executive Director <a href="mailto:execd@iab.org">execd@iab.org</a></li></ul>

Submitting Entity	Cc: Field
An IETF Area	<ul style="list-style-type: none"> <li>• The IETF Area Directors (or one, if the other is the submitter)</li> <li>• The IETF Chair <a href="mailto:chair@ietf.org">chair@ietf.org</a></li> <li>• The IETF Area Directorate mailing list (where applicable)</li> </ul>
An IETF WG	<ul style="list-style-type: none"> <li>• The IETF WG Chairs (or one, if the other is the submitter)</li> <li>• The IETF Area Directors</li> <li>• The IETF WG Discussion List</li> </ul>

### A.5.2 Incoming liaison statements

DEVELOPER understands that the following individuals, entities, and mailing lists must be copied on incoming liaison statements:

Receiving Entity	Cc: Field
The IETF or the IESG	<ul style="list-style-type: none"> <li>• The IESG <a href="mailto:iesg@ietf.org">iesg@ietf.org</a></li> </ul>
The IAB	<ul style="list-style-type: none"> <li>• The IAB <a href="mailto:iab@iab.org">iab@iab.org</a></li> <li>• The IAB Executive Director <a href="mailto:execd@iab.org">execd@iab.org</a></li> </ul>
An IETF Area	<ul style="list-style-type: none"> <li>• The IETF Chair <a href="mailto:chair@ietf.org">chair@ietf.org</a></li> <li>• The other IETF Area Director (where applicable)</li> <li>• The IETF Area Directorate mailing list (where applicable)</li> </ul>
An IETF WG	<ul style="list-style-type: none"> <li>• The IETF Area Directors</li> <li>• The other IETF WG Chair (where applicable)</li> <li>• The IETF WG Discussion List</li> </ul>

### A.6 Can a liaison statement be sent via e-mail and posted via the LSMT?

With one exception, all individuals with accounts on the tool should be able to simultaneously send and post liaison statements, or send them by e-mail and post them via the tool. The one exception is a Liaison Manager. DEVELOPER understands that IETF liaison managers are not permitted to send liaison statements on behalf of their respective SDOs. However, they should be able to post a liaison statement, which was originally sent by a representative of an SDO via e-mail, to the IETF Liaison Statements Web page via the tool.