

# Process and Tools (PROTO) Team

General Area Meeting

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# Process and Tools (PROTO) Team

- \* Introduction -- Margaret Wasserman
- \* Proposed Pilots:
  - WG Chair Document Writeups -- Aaron Falk
  - Shepherding AD Review Comments -- Henrik Levkowitz
  - Shepherding Discuss Comments -- David Meyer

# What is the PROTO Team?

- \* An IESG-driven activity focused on improving the speed, scalability, openness and overall effectiveness of our document procedures and tools
- \* <http://psg.com/~mrw/PROTO-Team/>

# PROTO Team Members

- \* Aaron Falk
- \* Bill Fenner
- \* Barbara Fuller
- \* Henrik Levkowetz
- \* Allison Mankin (Team Leader)
- \* David Meyer
- \* Margaret Wasserman (Team Leader)

# Initial PROTO Team Objective

- \* Consider what procedures and tools will allow WG Chairs to shepherd documents through the later stages of the document handling process
  - WGs could have increased visibility and control of their documents in the later stages
  - Documents could make it through the approval process faster

# Definition of Shepherding

- \* “Responsible AD” currently has three major roles in document processing
  - Review, Approval and Shepherding
- \* Goal is to tease apart AD roles, to allow WG chairs to take responsibility for shepherding
  - Providing initial submission and ballot write-ups
  - Following up on AD and IESG review comments with editors and WG
  - IANA and RFC Editor follow-up

# IESG Document Process Steps

- \* Request Publication (Handoff)
- \* AD Evaluation (Review)
- \* Resolution of AD Comments (Shepherding)
- \* Last Call Requested (Approval)
- \* Resolution of Last Call Comments (Shepherding)
- \* Place on the IESG Teleconference Agenda (Approval)
- \* IESG Evaluation (Review)
- \* Resolution of Discuss Comments (Shepherding)
- \* Approve for Publication (Approval)
- \* IANA and RFC-Editor interactions (Shepherding)

# How do we progress?

- \* Define shepherding in detail
- \* Conduct pilots to determine if it is reasonable and feasible for WG Chairs to perform specific shepherding tasks
- \* Initial pilots chosen to minimize impact on secretariat procedures and the I-D Tracker
  - WG Chair Document Write-ups
  - Shepherding AD Evaluation Comments
  - Shepherding IESG Discuss Comments
- \* Expect results from our initial pilots by IETF60



# Proposed Pilot: WG Chair Document Write-Ups



# WG Chair Document Write-Ups

- ★ This pilot extends an experiment already underway in the Internet Area to have WG chairs complete a document submission form when submitting documents for publication.

# Contents of Document Write-Up

- \* A mechanism for flagging issues to AD
  - (In current process, AD obtains this info via reviewing the wg mailing list)
- \* Emphasis is on document maturity & process issues:
  - Is it baked?
  - Was there adequate review?
  - In need of additional, specific technology review?
  - How solid is WG consensus? Appeals threatened?
  - ID nits checked? References split?

# Contents of Document Write-Up (cont.)

- ★ A synopsis of document for IESG review & Document Action announcements
- ★ Three components:
  - Technical Summary
    - Similar to document abstract
  - Working Group Summary
    - Noteworthy elements of process (e.g., was consensus rough)
  - Protocol Quality
    - Comments on implementations, vendors, reviews of note

# Proposed Pilot: Shepherding AD Review Comments



# Shepherding AD Review Comments

- \* The idea is to have WG chairs shepherd the handling of AD Review comments, in order to offload some of the AD workload (and hopefully increase process transparency, to boot)

# AD Review Shepherding Steps

- \* The AD reads, evaluates and writes comments
- \* The AD returns the full review to the chairs for handling
- \* The chairs decide on which one should be responsible
- \* The chair responsible makes certain that all comments are well understood, and resolves any ambiguity with the AD
- \* The chair responsible sends the comments to the author and to the workgroup mailing list...(next slide)

# AD Review Shepherding Steps

- \* The revising editor does the needed fixes, and keeps a summary list of issue/new text to forward with the revised document
- \* The chair responsible follows-up, nudges and iterates until the authors and workgroup has fixed the issues and submitted an updated draft
- \* The AD is notified of the revised draft, and provided with the summary list of issues and resulting text changes
- \* The Area Director verifies that the issues he found during AD Evaluation are resolved by the new version of the draft



# Proposed Pilot: Shepherding Discuss Comments



# Shepherding Discuss Comments

- \* This pilot is designed to allow a WG chair to follow up on and resolve the DISCUSS comments for a given Internet-Draft, and by doing so increase the efficiency of the IETF document process flow.

# Basic Process Overview

- \* AD and WG Chair agree on a draft
- \* WG Chair collects and analyzes DISCUSS comments from the ID Tracker–Iterative process with the responsible AD
- \* The WG Chair communicates this digested information to the authors/WG
- \* After the author(s) resolve the issues raised in the DISCUSS comments, the WG chair reviews the ID and summarizes the changes for the AD–Again, iterative process with the responsible AD
- \* WG Chair notifies the responsible AD that the document is ready for review by the IESG

# Open Issues

- \* Who–Which WG Chair(s), which AD(s)
- \* Which drafts
- \* Duration
- \* Tool Issues
  - ID Tracker notification of state change (where there are DISCUSS comments)
  - Does the shepherding WG chair need write access to the tracker?
  - Other...

# Questions?

