UA EAI WG Meeting
22 November 2022

Attendees

Mark Svancarek	Olivier Kouami
Jim DeLaHunt – Canada	Amina
Arnt Gulbrandsen	Prince Andrew L. Zutah
Carina Malor	Yin May Oo
Eunice Perez	Seda Akbulut

Agenda

1. Welcome and roll call

2. Continue on flowchart for the self-certification guide
   a. Developing a roadmap for implementing the EAI self-certification guide

   b. Statement of Work (SOW) for E1.1 and E1.2
      i. E1.1 Building a self-certification tool to generate EAI readiness score.

      ii. E1.2 Helping early EAI providers perform self-certification using the guide.
   c. User acceptance tests

   d. A quick guide for IT and procurement managers.
3. Other action items in the FY23 Action Plan to be included in the flowchart
   a. E2 Make it easier to experiment with a self-hosted working EAI system
   b. E3.1 and E3.2 that can be done in parallel

E3.1 Identify reference customers to showcase adoption of globally inclusive email, and document the experience (customer studies)
*E3.2 Identify reference mail service providers to showcase for adoption of globally inclusive email, and document the experience (provider stories)*

Meeting recording: Passcode: v0RyVd3kd^

Meeting Notes

Mark recapped about the last meeting and action items that were agreed upon. Most of the testing steps are going to be manual at the beginning. The score generator spreadsheet is a good approach that enables us to do it offline without a vendor. However, if we needed any vendor to help us with some manual work, we should factor that into our statement of work. Also, there is a need to replace the existing architectural diagram with a new version based on the discussions in the last meeting.

The below part of the diagram, the testing part, should have a better explanation and its drawing should be updated accordingly. There would be testing procedures, test samples and libraries or scripts for tech purposes. We need to determine how much of those would need to be created by the vendor. These were the thoughts suggested by Mark for discussion.
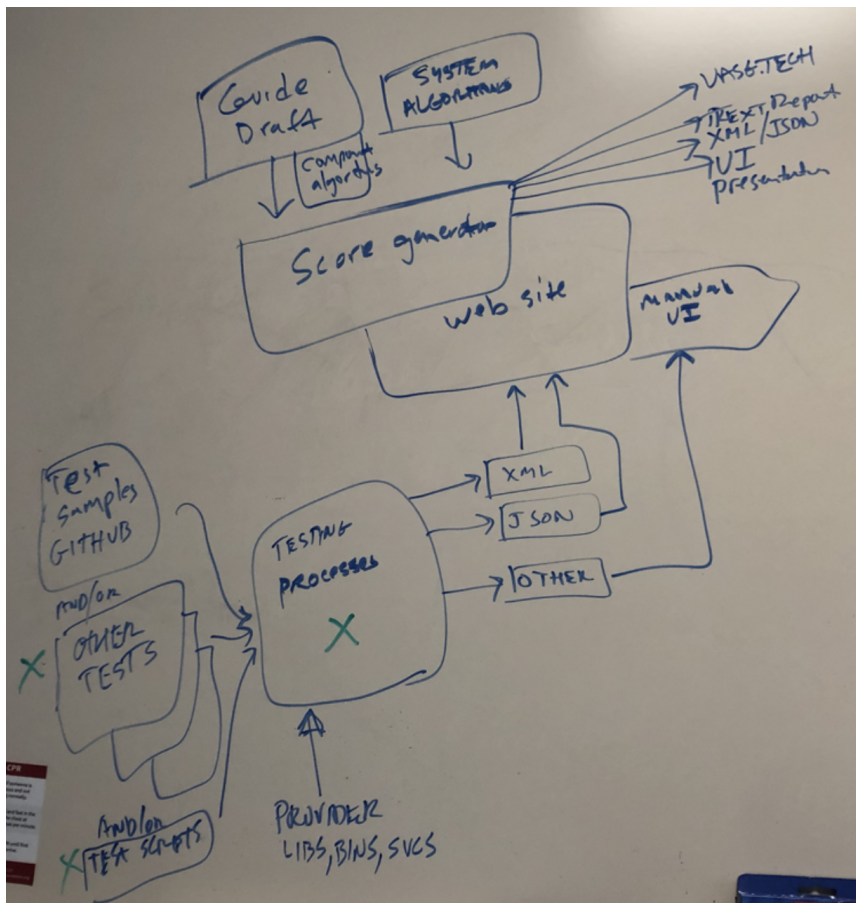
Then we talked about the SOW.

Mark raised a question to Arnt as he has been looking at the guide and testing recently. He discussed how to assign testing tasks to the vendor and what would be the experience of organizations.

Arnt mentioned that John Levine's script is valuable for the things that can be automated. When we make a tool with states, we should keep in mind that there would be bugs to fix as well. Arnt asked about the need of **hiring vendors to perform manual testing**. Mark clarified that the testing vendor is different from the vendor that was discussed in previous meetings to build the certification tool based on test results. And the system building vendor also should assist the early EAI adaptors to certify successfully. It would be valuable to make sure the testing guide is clear on testing procedures.

Referring to the SOW document, Arnt questioned the initial plan - which is to build the test-result-calculating tool first and then help the early adaptors using the self-certification guide. Mark answered that now we can change it to **help the early adaptors to self-certify and then document the process**. Mark said this would probably be a good approach. Jim agreed with this discussion.

Jim said, the initial idea of having a vendor to develop an online self-certification tool to generate scores based on the self-certification guide for EAI; additionally to educate them about the requirements of Universal Acceptance and to learn from each other about the concept and how to improve this process in future.

To apply tests based on the guide, the vendor needs to have a good understanding of the guide. Arnt agreed to Jim. **Arnt mentioned that he is the final key person to decide on the tool.** Jim suggested instead of the vendor, perhaps Arnt can go through the work. However, this means Arnt's shifting away from his main goal. However, Arnt said that he is preparing the training materials which will use the EAI self certification guide. From that sense, **Arnt can provide the how-to-guide**, but cannot shoot a video for this at least for the next 6 months.

There was another idea that instead of hiring a vendor to help people through the process, the working group members could do it directly, although this would take some time. It would help us to get more information. **Arnt said that it would also be useful to prepare training materials along with the guideline preparations.**

Arnt's role in this process was further discussed and suggested that he will be the person responsible for **keeping all the findings and documentation to observe**

how aligned the aims and impacts are. Jim suggested that what can be delegated can be included in the SOW for the vendor. Arnt agreed.

Jim suggested a scenario that **Arnt would be the primary contact person for two self-certificants and a vendor to delegate,** that would be a good input for the SOW. Arnt also suggested **that a video-guide for testing might be a good supplement** if there are resources to create one, but Arnt finds it better to keep it to written documentation.

Mark said what we have right now is the draft **self-certification guide to be completed, fully actionable or accurate, and then a small collection of scripts, the spreadsheet and some budget, and our new resource is Arnt.** To reconsider how we want the process to go through and what to get out of it, Mark suggested drafting down some notes during the meeting.

Arnt said John's scripts are quite comprehensive and passing his tests would give the self-certificants some level of confidence. Mark asked if John's way of testing scenarios coincide with the idea of the spreadsheet template created by Mark. Arnt could not confirm this yet. Mark said we need to figure out how much of the coverage these testing scripts have, if there's any manual work required.

Jim followed up with some comments on adding John's scripts to the self-certification guide; it would better be in a separate document rather than adding everything together. Jim suggested **going through the manual test run first, and see which parts are scriptable or automatable, and determine the amount of work, and calculate which tasks require manual work time.** Mark agreed to it.

Jim continued on automating some tasks, some would not be possibly automated because manual tasks are required to check the UI and so on. At the same time, some tasks would be difficult to do manually because there are interactions with the server at the protocol level. The current spreadsheet template would be commentary on this self-certification guide. It would be the first step of work for either the support person or the production team itself to perform the tasks.

Jim expressed his thoughts that the testing works could be done by a vendor since it does not require a great deal of knowledge about what we are or what our intentions are. On the other hand, it might be done within this working group. Mark said that he did not list the WG as a resource because for the members, there could be other things that came up and it could be hard to count on

volunteers concretely. So Mark and Arnt confirmed that our SOW is to help people with the process of self-certification and document it.

Mark asked if we want the **vendor to help with additional test cases, testing scripts or documentation**. Arnt commented that simply documenting would not create any technical problem or obstacles for the vendor.

Jim said there are two things the vendor could do**. One is the testing management job of going through the certification guide, and the second thing is to participate in meetings and document keeping**. Arnt said he would be able to respond after internal team discussion. Seda said some topics could be done in parallel while Arnt is justifying **what task could be delegated to the vendor**. Mark was keen to involve the vendor.

Arnt said **documentation of the first two self-certificating early EAI adapters** progressing through the process could be done. Mark asks what kind of vendor to hire to help the process. Arnt said the vendor should not be blocking any process and documentation on self-certification case study projects. Mark said the UASG budget could be allocated to assign a vendor and start to factor the skill sets. Jim said it would be ideal to find a vendor who could match a technical project manager who could read the self-certification guide and write commentary on required working steps.

Arnt asked who wrote the document UASG043 and it would be interesting to find someone who already knew these technical related components. It would be very important to find the very first two participants to do the **UA-readiness self-certification case study.**

Jim clarified that when he proposed a vendor that should do project management, he did not mean to hire a manager, what he meant was the skill set of managing an engineering related project. The job is more on estimating the required testing steps and documenting the progress, also includes internal and external team communication and presentation skills.

Mark noted that initially the WG thought of a vendor who could be technically strong and build an automated testing and self-certification system. Now we have shifted to hiring vendors for project management and communication, reporting roles.

Jim asked **Arnt on what roles he would take,** and Arnt answered that he is to provide support to those who are being certified for UA-readiness. Discussion continued on the term "certificants" for those who have the products to be tested. Mark said that it could be called the "certificating service providers", in short "providers".

Carine mentioned in the chat that she could help out in the project management part.

The WG agreed that the part "**to determine and summarize what actions are required for each self-certification item** " should be done within the WG themselves, and not by the vendor. It will be further discussed in the next meeting.

Following are the notes taken during this meeting. Yellow highlighted parts will be further discussed in the next meeting.

NOTES:

- Complete the self certification guide (5% left)
- Small collection of scripts (what pct of it will be scripted)
  - nr of tests
  - amount of time needed for manual testing
  - What it takes to perform the test (outsource?)
    (e.g., Think of a test engineer – evaluation of item from the guide – what would it take to do the automation? some tests are done manually, some cannot be done manually as the interactions may be on the server at the protocol level)
- Budget
- Resource (Arnt)

SOW
Step1: to help early adopters
Step2: to document the results

? Vendor or WG?
- determines and summarizes what test actions are required for each self certification item -TBD

Vendor: (what parts of the vendor's tasks can be done by EAI WG?)

- Support activity
    - Arnt participates support
    - Vendor documents support activity
- Vendor reports their progress on a regular basis
- Vendor documents the results
- Vendor records a video etc to describe how it worked out, develop a self-certification study

Vendor's skill sets
- technical writing
- project management
- software testing

provider = self-certificant

Next Meeting: Tuesday 29th Nov 2022 at 15:30 UTC

Action items

No.	Action Item	Owner
1	Prepare training materials, how-to guider for Self-certification testings	Arnt