

UA EAI Working Group Meeting

18 July 2023

Attendees

Mark Svancarek

Abdalmonem Galila

Nitin Walia

Anna B

Athanase Bahizire

Harsha Wijayawardhana

Jim DeLaHunt

John Levine

Lavish Mawuena Mensah

Olivier Kouami

Temwani Sungubele

Yin May Oo

Meeting Agenda:

1. Welcome and roll call
2. Draft an [SOW for FY24 Action Item E2.1](#) (Make it easier to experiment with a self-hosted working EAI systems)
3. Clean up the EAI Self Certification [Guide](#)
4. AOB

Meeting recording: [Link](#); password aQJ&7kjbZs

Meeting Notes

Discussion of SOW for FY24 Action Item E2.1

Mark led the meeting by revisiting some of the points marked in the last meeting.

In the section 'Description of Work', the item 9 in the previous version was -
"The vendor shall create a brief FAQ page derived from results of testing and linked from the web-based form (if applicable) or UASG site"

In the section 'Deliverables', the item 4 in the previous version was -
"Presentation (for use as training material) (using UASG PowerPoint template provided) covering the contents of the work and the report. In developing the training material consider the following"

Mark proposed continuing the conversation on whether the vendor should do technical support or providing training materials or both.

Mark briefed through the list in the section 'Description of Work' - (As it was before the changes through the meeting on 18 July)

- 1) The expectation was for the vendor to receive information from UASG, also from Harsha and Abdalmonem's experience on building EAI ready systems or environments.
- 2) The vendor is expected to work with UASG on the outreach to the email service providers and collect the submissions results of EAI self-certification testing.
- 3) The vendor is expected to come up with a solution based on information provided by UASG and WG members, and this may need help from LIs.
- 4) work with the result submitters, help them check their submissions to level completeness, and provide the feedback to the submitters.
- 5) .. placeholder
- 6) .. placeholder
- 7) The vendor is expected to create an FAQ page, derived from the result of testing, and linked from the web-based form, which could be maintained by the ICANN staff
- 8) Vendor to provide reports and training materials
- 9) Vendor to provide visual training step by step

Mark opened the suggestion on who would create or who would host it.

Mark briefed through the list in the section 'Deliverables' - (As it was before the changes through the meeting on 18 July)

- 1) Expected a draft report for all instructions including the FAQ, with enough details for the mail service providers to reproduce the results.
- 2) The detailed content list of the draft report
- 3) Integrated report of community input and content for web-based FAQ
- 4) Presentation covering all the work and developing training materials, considering these three factors: purpose, target audience and length.

John expressed his concerns on spending time with discussion of expectations. John shared his idea of EAI which includes a virtual machine and cloud-based tools, with packages of well-known freeware and that have EAI support. And then, set up a few mailboxes and start running emails through it. If someone asked who does EAI, we already had an answer to that and support or guide them.

Mark answered that the idea was to demonstrate how we use existing solutions to achieve EAI goals. The original title was 'Make it easier to experiment with self-hosted working EAI systems', which sounds more like John's suggestion, which is a system in a box.

John said when he experimented with freeware and open-sourced tools, it did not take a lot of fine tuning to achieve EAI goals. It could be straightforward to package these virtual machines and libraries up like a docker package.

John said he did not mean to stop the process of SOW, however, when people came up and asked how to try EAI, the resources could be given and let them figure it out by themselves. Mark noted John's suggestion.

Mark asked for comments on John's input. Jim said what John was proposing sounds agreeable, and like what Abdalmonem did propose as well. The high-level goal is to encourage people to achieve these EAI-goals welcomingly. The purpose is to clear away unknown obstacles and missing steps. A docker container or so which has free software components. Jim said this might be a bit more work but this is for more visibility in the contract. It would be better than just following somebody else's free trial service.

Mark noted that Abdalmonem and Nitin put comments in the SOW document. Nitin commented suggesting making it into two parts, hosted tools and service tools.

Discussion on Deliverables

Mark said the turnkey solutions should be the first deliverable, before the reports. Mark added items such as virtual machine, binaries, and configs, according to John and Abdalmonem suggestions. John added a complete mail server in a box

that can send/receive and handle user accounts which are non-Latin email addresses. Mark took suggestions to the item 1 of Deliverables.

John suggested examples - Postfix, Dovecot, Courier and Roundcube. John said it should include enough configuration for a user to set up an email domain independently. John said also could be using any major cloud-based server as well.

Mark said he still likes the idea of making the tools and configuration that people have worked on. There are commercial solutions and custom solutions. Mark noted that some of them might seem commercial or so, people should be aware of what they are doing. Jim asked if there would be 15 solutions, must the vendor go through every one of them? Jim asked if the list could be finished before issuing the SOW? Jim said it is possible for vendors to finish up 3 different trials and solutions, although more work is more compelling, it's rather steering towards clearing out fewer numbers of paths rather than more paths. The vendor may provide their own tools or environment. The vendor's proposed solutions must have been tested against the EAI self-certification guide. This would motivate vendors to avoid the tools that have not been certified, and to choose the ones which have been certified.

Nitin said if we would like to specifically name them and list them down, we should be clear of the status of these tools or services. Otherwise, mentioning tools and services seems like promoting them. Nitin said if the EAI self-certification guide is promoted, the mentioning of tools and services would be motivating them to try to self-certify as well. Nitin added that the requirement of using the self-certification on their tools to check their status and level, would increase the use of the guide and indirectly help us by getting the attention of many more service providers.

Jim said cross-promotion is helpful, however, in this SOW, the vendor should be using only the tools which have completed the self-certification, which means it is approximately zero right now. Nitin said there are a few tools and services, for example Coremail from China. We have a few tools ready, so we can encourage them to test their obligations. There is no harm in having a handful of tools which are self-validated applications. We already have a list of applications based on

UASG 030 and UASG 030A. There is no harm using the self-certification guide to prove their claim.

Jim said nobody has completed the self-certification guide and completed the final certification. A few people went through the beta version of self-certification and came up with reports, however, we have not done the work on our part to accept their test results. Nitin said EAI WG has agreed to rely on their claims based on their test results. Mark pointed out that there was an idea to publish their self-certification test results in some way, which we have never gotten around to. Mark believed that the UA-EAI-WG has enough people who have gone through the self-certification guide and generated their own scores and asked for feedback on their test results. So, Mark concluded that it is not required to do the self-certification test. The tool may not be tested but the part of the deliverables will be tested, assuming it must be Silver at least.

Jim discussed that for each solution, the vendor should come up with solutions to improve for example from Silver to Gold or Platinum. Mark asked to clarify if we planned to pay them for this separately. Mark's question "If the vendor bids to provide more solutions at the level of Gold or Platinum, do we have the budget to take it". Jim answered that the structure of the contract looks like we are presumably offering a fixed price. We can ask how many responses or solutions they can provide for the fixed price, and we can accept their bids based on that. Mark agreed. John said it is natural for a negotiation to go back and forth.

Mark started editing the section 'Deliverables' based on the community inputs. Mark and Jim talked about the nature of items to add in the 'Description of Work' section. Mark added the 'Structure of Bid' to list the expectations of proposals. Mark and Jim work on the document on sections 'Structure of Bid', 'Description of Work' and 'Deliverables'. The part "based on number, range, variety and price" was added to prevent from providing the same type of solution many times.

In the 'Deliverables' section, item 3 was dropped, because the vendor would be choosing their best choice of tool, and the outreach has already happened as well.

In the 'Structure of Bid' section, Mark added some notes after discussion to capture the concept of familiarity. And added item 1 in the list of 'Description of Work'. Jim said the 'Description of Work' part is where we list what we would like the vendor to do, and the 'Deliverables' are the items that we expect to receive at the end of the project. Jim explained some details that he believed are helpful.

Mark concluded the meeting; we have focused working on the first three parts of the SOW this week. By the next meeting, the SOW is estimated to be done.

Meeting ended.

Next meeting: Tuesday, 25 July 2023 and 14:30 UTC

Action items

No.	Action Item	Owner
1	Prepare the SOW for vendor	Mark and WG
2	Prepare to accept submission of proposals and evaluate	WG