Conference Call Minutes, 2008-05-01

Minutes
ITANA Conference Call
May 1, 2008

Attendees
Jim Phelps, University of Wisconsin - Madison (chair)
Gary Chapman, New York University
Marina Arseniev, University of California -Irvine
Joshua Drummond, University of California-Irvine
Michael Enstrom, University of Wisconsin-Milwaukee
Tom Barton, University of Chicago
Tom Zeller, Indiana University
Leo de Sousa, British Columbia Institute of Technology
Curtis Bray, University of California-Davis
Sue Sharpton, University of Alaska
Bob Morgan, University of Washington
Jim Hooper, St. Louis University
Paul Hill, MIT
Ann West, Internet2/EDUCAUSE
Brendan Bellina, University of Southern California
Michael Daley, University of Michigan
Steve Mullins, University of Alaska
Steve Olshansky, Internet2
Dean Woodbeck, Internet2 (scribe)

Action Items

[AI] [Leo de Sousa] will send the list a link to his common template for gathering information on initiatives and technologies in the "watch" phase of the technology lifecycle.

[AI] [Leo de Sousa] will send to the list a document that describes the process of moving an initiative from R&D status to Invest status to Sustain status.

Agenda

(0) Roll Call. Agenda Bash.

1. Accept minutes of last call
2. Technology Lifecycle taxonomy - Leo (See attachment: BCIT Technology Lifecycle Taxonomy)
3. Grouper/ Signet Adoption - Marina
4. SLU Email Documentation - Jim H - (+http://www.4shared.com/dir/6750714/b11143ac/google.html+)
5. Future topics
    a. May 15 - Chas DiFatta - Mellon ESB Initiative
        i. Here's the public site for the project, http://tid.ithaka.org/enterprise-service-bus-project: http://tid.ithaka.org/enterprise-service-bus-project/mellon-esb-final-pres-v17.pdf
    b. May 29 - Joint call with University of Alaska - launching an EA initiative
    c. June 12 - Scott Converse - 6 Sigma in Higher Ed
    d. June 27 - Post Face 2 Face report out.

Technology Lifecycle

Leo de Sousa reviewed the Technology Lifecycle system that he uses at the British Columbia Institute of Technology, seeking comment and feedback. He distributed a PowerPoint file to the list. Here is a PDF version.

Watch - The lifecycle begins at the center of the diagram shown here, when someone at the institution begins watching a technology. Technology staff members are encouraged to spend the equivalent of a day per month watching things of interest and posting information on a bulletin board.**R&D** - Promising technologies move to the next category, R&D. Technologies at this stage includes initiatives and technologies that are currently under consideration, investigation, or evaluation for future implementation.

Invest - Technology moving out of R&D to the project mode enter this category for resource allocation, including financial investments and/or investments of human resources.

Sustain - This area includes roughly 80 percent of resources and encompasses initiatives and technologies that deliver core services to the community.

Contain - This includes initiatives that have been completed and technologies that are in the process of being phased out. When a project reaches this phase, the determination is made to no longer offer this type of service or look to the R&D area for a new technology that can provide the service.

End of Life (EOL)-This includes initiatives and technologies that are retired from service and are removed from the architecture and list of core services.

Leo mentioned that he has a template for use with technologies and initiatives in the "watch" phase, capturing comments and information as they move to the R&D phase. [AI] Leo will send the list a link to his common template.

He also uses a technology matrix. This provides a way to track the people watching technologies and initiatives, based on the person's area of specialization. For example, one person was assigned as a watcher for SunGard Banner. That person has been watching the progress of Banner 8, which was just released. Now that the new version is released, this technology will move to the R&D area of the lifecycle.

A question was asked concerning the criteria for deciding whether an initiative or technology moves from "watch" to "R&D." At a biweekly IT manager meeting, anyone can bring forward a project they've been watching and move it to the R&D phase. Moving from the R&D phase to the "invest" category requires documenting the project and estimating the resources required. An advisory board then reviews the proposal. <AI>Leo has a document that describes the process, which he will share with the list.Leo was asked about the process for deciding when to implement a new technology and when to stop supporting old technologies. This is done on a case-by-case basis. Last fall, for example, BCIT decided to move from Novell to the Microsoft Active Directory and there is a big push to implement SharePoint (which is now in the R&D category). This means supporting Lotus directories while moving SharePoint to production. Lotus directories will continue to be supported until SharePoint is in production and stable.

Grouper/Signet

UC-Irvine will implement Grouper for group management this fall and asked about the use and deployment and whether there are security/privacy concerns.

It was suggested to query the Grouper email list, which includes many institutions that have deployed Grouper. Version 1.3 will be released soon. Grouper is almost always deployed centrally, since part of the point is to have one groups management tool on a campus. The roll-outs tend to start with much central control, but one of the benefits is to allow decentralized access, so departments and other entities can manage groups, we well.

Grouper is designed to manage the groups, but not to be the groups information look-up point. For that function, Grouper can propagate the information to other systems, such as LDAP. It can also provision groups directly into applications.

In terms of privacy, Grouper has a complete set of access controls. So if you need to restrict a student course group, in terms of external look-up ability, you can do so.

From an architect's point of view, the questions about Grouper and Signet are whether the access control being implemented is policy-driven or if individuals are making decisions based on some past practice or using other criteria. If the control is policy-driven and rules-based, how will the architecture support that, given the de-centralized nature of establishing and populating groups?

Information about resources and support for Grouper and Signet are available at

http://grouper.internet2.edu
http://signet.internet2.edu

Documentation for Outsourcing Email

Jim Hooper from St. Louis University shared documentation developed for SLU's outsourcing of faculty and staff email to Google (student email is already at Google). He is looking for peer review on the documentation.

The documentation is online at http://www.4shared.com/dir/6750714/b11143ac/google.html

St. Louis is also looking to outsource its listservs and is looking for a vendor.

Some of the documentation is quite long and is tailored to meet the needs of the audience. In one case, for example, the information was condensed into a 12-slide PowerPoint presentation with just the basic concepts.

Please provide any feedback to Jim or start a conversation on the email list. Jim Phelps commented that, at Wisconsin, architects' involvement in roll-outs typically goes well beyond the date of deployment. In a project involving transcripts, for example, the facilitation went for a year after the project was live, as architects continued to explain the rationale.

Agendas for Future Meetings

May 15 - Chas DiFatta - Mellon ESB Initiative
http://tid.ithaka.org/enterprise-service-bus-project

http://tid.ithaka.org/enterprise-service-bus-project/mellon-esb-final-pres-v17.pdf
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Face2Face and CAMP

The hotel block for the Advanced CAMP held in conjunction with the Face2Face closes next week and the registration fee will increase on May 22.

Next Call, Thursday, May 15, 2008, 2:00 p.m. EDT