

LSMT User manual

This manual explains how to use the the new features implemented in the [Liaison Statement Management Tool](#).

For convenience any existing link in this book points to the beta server beta.lsmst.yaco.es. When the tool will be adopted by the IETF then the host of the links should be changed to datatracker.ietf.org.

The users used in this manual were created for convenience and have no relation with the existing ones at the IETF database. For example, the user 'internal2' that could appear in some screenshot is used with the role of IETF Chair but has nothing to do with the real IETF Chair.

Users allowed to send liaison statements

Sending liaison statements on behalf of the various IETF entities

The following individuals have the ability to transmit and post outgoing liaison statements.

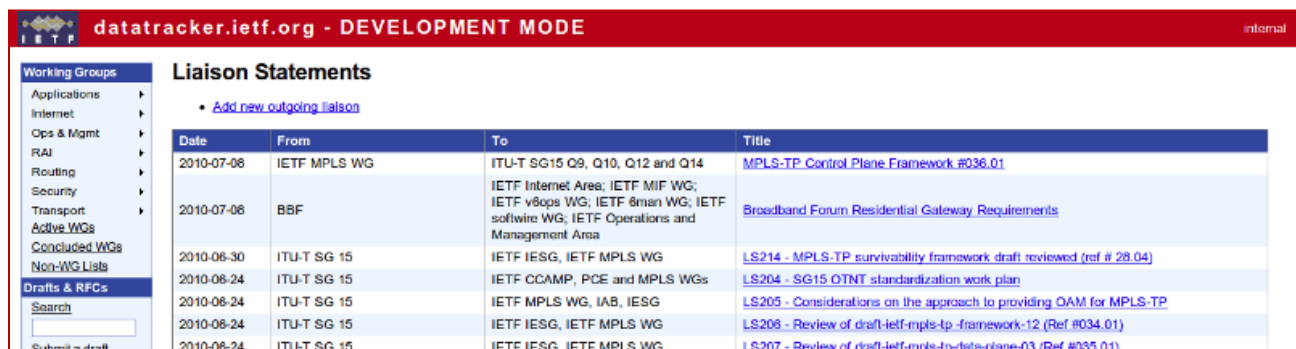
- IETF Liaison Managers: on behalf of any IETF entity
- WG Chairs and WG Secretaries: on behalf their working groups
- Area Directors: on behalf of their Areas
- The IESG Chair: on behalf of the IESG
- The IETF Chair: on behalf of the IETF as a whole
- The IAB Chair: on behalf of the IAB
- The IAB Executive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

In order to send a new liaison statement any of these individuals needs to login into the tool by using the ' [Sign in](#)' link at the top of the page.



Login link

When logged in the user will see in the top of the page a link to send new liaisons.



Add new outgoing liaison statement link

Sending liaison statements on behalf of the Standards Development Organizations (SDOs)

The following individuals have the ability to transmit and post incoming liaison statements on behalf of their respective

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Users allowed to send liaison statements

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SDOs.

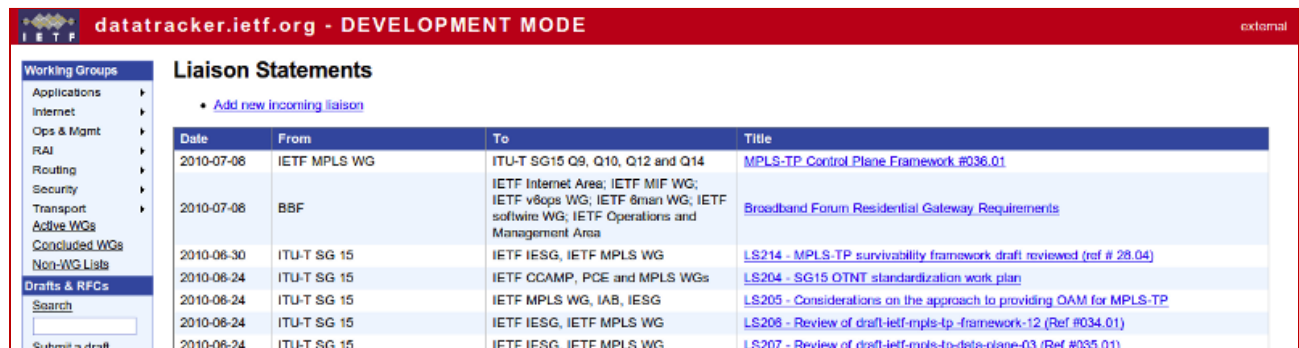
- IETF Liaison Manager: on behalf of any SDO (only post)
- SDO Liaison Manager
- SDO Authorized individual

As for outgoing liaisons the individual needs to login into the tool by using the ' **Sign in** ' link at the top of the page.



Login link

When logged in the user will see in the top of the page a link to send new liaisons.



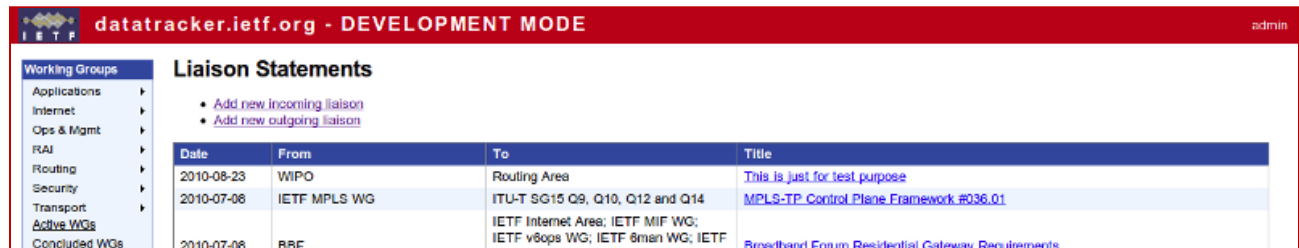
Add new incoming liaison statement link

Users that can send outgoing and incoming liaison statements

There is a user type able to send incoming and outgoing liaison statements. They are the IETF Liaison Managers. When they are authenticated on the tool they can see two links to send new liaisons (one for incoming and one for outgoing liaison statements).

Please, note that IETF Liaison Managers only can post to the webpage incoming liaisons that were originally submitted via e-mail by a representative of the Liaison Manager's SDO. So in their submit form they only have a 'Post only' option.

If an user without the role of IETF Liaison Manager is at the same time one of the allowed to send outgoing liaison statements (e.g., a WG Chair) and one of the allowed to send incoming liaison statements (e.g., an SDO Authorized Individual) then that user will also have the two links to send new incoming or outgoing liaisons.



Add outgoing and incoming liaison statements links

The liaison form

Basically outgoing and incoming liaison forms have the same (or almost the same) look.

From	
From *	WIPO (External User)
Reply to *	esanchez@yaco.es
To	
Organization *	The IETF
POC	The IETF Chair <chair@ietf.org>
Other email addresses	
Response contact	
Technical contact	
CC	The IESG <iesg@ietf.org> Emilio Sanchez <esanchez@yaco.es>
Purpose	
Purpose *	
Liaison Statement	
Title *	
Body	
Attachments	No files attached
Add attachment	
Title	
File	Examinar...
Please fill title and file to attach a new file	
<input type="button" value="Send and Post"/> <input type="button" value="Post Only"/>	

Incoming liaison form

The 'From' fields

The user needs to identify which entity the liaison statement comes from. If the user is allowed to send liaisons statements on behalf of more than one entity they can select one from a select box. For users who can only send liaison statements on behalf of an entity the from field is not editable.

• Fields marked with * are required. For detailed descriptions of the fields see [Field help](#)

From	
From *	WIPO (External User)
Reply to *	
To	

The 'From' fields

Having identified the entity the user must input the email address used as reply-to.

The 'To' fields

The user must identify which entity receives the liaison statement.

The screenshot shows a web form with the following fields and a dropdown menu:

- To** (Section Header)
- Organization *** (Text input field)
- POC** (Text input field)
- Other email addresses** (Section Header)
- Response contact** (Text input field)
- Technical contact** (Text input field)
- CC** (Text input field)
- Purpose** (Section Header)
- Purpose *** (Text input field)
- Liaison Statement** (Section Header)
- Title *** (Text input field)

The dropdown menu for **Organization *** is open, showing the following options:

- The IETF
- Main IETF Entities**
- The IETF
- The IESG
- The IAB
- IETF Areas**
- Applications Area
- General Area
- Internet Area
- Operations and Management Area
- Real-time Applications and Infrastructure Area
- Routing Area
- Security Area
- Transport Area
- IETF Working Groups**
- Access Node Control Protocol
- Ad-Hoc Network Autoconfiguration
- ADSL MIB
- Application-Layer Traffic Optimization
- Audio/Video Transport
- Basic Level of Interoperability for SIP Services

The 'To' fields

For incoming liaisons all the IETF entities could be selected from a select box. In that case the Person Of Contact (POC) field is filled automatically.

For outgoing liaisons all the SDOs plus an 'Other SDO' option could be selected from a select box. If the 'Other SDO' option is selected then the SDO name must be filled. In any case for outgoing liaisons the poc field must be entered by the user.

The 'Other email addresses' fields

The user could enter the addresses for 'Response contact' and 'Technical contact'. These addresses will be included in the cc field of the liaison statement.

The remaining CC addresses are included automatically.

The 'Purpose' fields

The user must input what is the purpose of the liaison statement.

The screenshot shows a web form with two main sections: 'Purpose' and 'Liaison Statement'. The 'Purpose' section has a dropdown menu for 'Purpose' with 'For action' selected, and a 'Deadline' text field. The 'Liaison Statement' section has a 'Title' text field and a 'Body' text area. A calendar overlay is displayed over the 'Deadline' field, showing the month of August 2010. The calendar has a header with 'August' and '2010', and a grid of days from Sunday to Saturday. The date 23 is highlighted in yellow.

The 'Purpose' fields showing the calendar

When selecting 'For action' of 'For comment' purpose a deadline must be entered.

When selecting 'Other' purpose a brief text explaining the purpose must be entered. A deadline could be entered if needed.

The screenshot shows the 'Purpose' section of the form. The 'Purpose' dropdown menu is set to 'Other'. Below it is a large text area for 'Other purpose'. At the bottom of the section is a 'Deadline' text field.

Selecting other purpose

The date format for deadline field is 'yyyy-mm-dd' and it can be easily selected from a calendar.

The 'References' fields

The new liaison can contain a reference to an existing liaison. The user could use this field to indicate that the new liaison is a response or a follow up of the old liaison.

The screenshot shows the 'References' section of the form. It has a header 'References' and a sub-header 'Related Liaison'. Below the sub-header, it says 'No liaison selected' and there is a button labeled 'Select liaison'.

The 'References' fields without a liaison selected

When clicking the 'Select liaison' field a dialog with the complete liaison lists will be displayed so the user could select easily any liaison.

Select a liaison				
Date	From	To	Deadline	▲ Title
2010-05-10	IETF CODEC WG	ITU SG 16 Q8, 9, 10/16	--	IETF Response to ITU Liaison Statement LS 124 Regarding Codec activity in IETF
2008-11-29	IAB	ITU-T	--	Liaison on the Cooperation Between the IETF and the ITU-T on the Development of MPLS Technology for Transport Networks
2003-06-01	ITU-T SG 15	IETF CCAMP WG and Sub IP Directors	--	Address Space Relationships in ASON
2003-11-01	ITU-T SG 4	IETF	--	Announcement of Consent for Q.811 and Q.812 (LOWER/UPPER LAYER PROTOCOL PROFILES FOR THE Q AND X INTERFACE)

Selecting a liaison from the liaison list

The 'Body' fields

Any liaison statement must include a title, so the user must input it.

Body and attachments are optional but at least one of them must be presented.

Liaison Statement	
Title *	<input type="text" value="This is just for test purpose"/>
Body	<div></div>
Attachments	No files attached
Add attachment	
Title	<input type="text"/>
File	<input type="text"/> <input type="button" value="Examiner..."/>
<input type="button" value="Please fill title and file to attach a new file"/>	

The 'Body' fields

Files can be attached by input a title and selecting a file in the 'Add attachment' fieldset. When these fields are filled the user can click the 'Attach' button to include the new attachment.

Liaison Statement	
Title *	<input type="text" value="This is just for test purpose"/>
Body	<div></div>
Attachments	No files attached

Add attachment	
Title	<input type="text" value="An attached file"/>
File	<input type="text" value="/home/esanchez/ietf_test/file"/> <input type="button" value="Examinar..."/>
	<input type="button" value="Attach"/>

Attaching a new file

The user can attach as many files as necessary before submitting the form.

Liaison Statement	
Title *	<input type="text" value="This is just for test purpose"/>
Body	<div></div>
Attachments	An attached file (file_attach_01.txt) Remove An attached PDF (pdf_attach_01.pdf) Remove
Add attachment	
Title	<input type="text"/>
File	<input type="text"/> <input type="button" value="Examiner..."/>
<input type="button" value="Please fill title and file to attach a new file"/>	

Multiple files attached

Submitting options

Generally two options are presented to submit the form: 'Send and Post' and 'Post only'.

Using 'Send and Post' posts the liaison statements in the liaison statements web page and send it by email. If the tool is not in production mode no emails are sent, in that case a page with the contents of the email (including head) is displayed.


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external

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Related Sites
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IETF tools
IAB
RFC Editor
IASA/AOC/Trust
IANA
IRTF

Simulated Mail for Liaison Statement

Demo version of this tool does NOT actually send the liaison statement to the recipients.
Rather, the actual email body (including mail header) is displayed below.
In production mode, you will not see this screen.

From: esanchez@yaco.es
To: stbryant@cisco.com, adrian.farrel@huawei.com
Cc: The IETF Chair <chair@ietf.org>, Emilio Sanchez <esanchez@yaco.es>, =?utf-8?q?Emilio_A=2E_S=C3=AInchez_L=C3=B3pez?= <emilio.sanchez@gmail.com>
Bcc: statements@ietf.org
Subject: New Liaison Statement, "This is just for test purpose"

Title: This is just for test purpose
Submission Date: 2010-08-23 06:16:27.501933
URL of the IETF Web page: /liaison/1017/
Please reply by 2010-08-28
From: WIP0 (External User <esanchez@yaco.es>)
To: Routing Area (stbryant@cisco.com, adrian.farrel@huawei.com)
Cc: The IETF Chair <chair@ietf.org>, Emilio Sanchez <esanchez@yaco.es>
Response Contact: Emilio A. Sánchez López <emilio.sanchez@gmail.com>, Emilio A. Sánchez López <esanchez@gmail.com>
Technical Contact: Emilio A. Sánchez López <emilio.sanchez@gmail.com>, Emilio A. Sánchez López <esanchez@gmail.com>
Purpose: For action
Body:
Attachment(s):

An attached PDF <https://datatracker.ietf.org/documents/LIAISON/file1102.pdf>
An attached file <https://datatracker.ietf.org/documents/LIAISON/file1101.txt>

[Return to liaison list](#)

Version 2.52-dev,
2010-05-07

Page showing the email contents when in development mode

'Post only' option does not send any email.

Liaisons that need prior approval

When sending outgoing liaisons on behalf of some IETF entities an 'Obtained prior approval' field is shown in the 'From' fieldset. The user must 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.

From

From *
Performance Metrics for Other Layers (Internal User)

Reply to *
esanchez@yaco.es

Obtained prior approval
☐

Be sure that you have prior approval

If the user doesn't need prior approval this field will be disabled.

When sending a liaison statement that needs prior approval and the user doesn't check the approval field then this liaison remains in pending state and the proper individuals are informed via email that a liaison statement needs their approval.

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admin

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- IPR Disclosures
- Liaison Statements
- IESG Agenda

Related Sites

- Main IETF site
- ETF tools
- IAB
- RFC Editor
- IASA/AOC/Trust
- IANA
- IRTF

Simulated Mail for Liaison Statement

Demo version of this tool does NOT actually send the liaison statement to the recipients.
 Rather, the actual email body (including mail header) is displayed below.
 In production mode, you will not see this screen.

From: esanchez@yaco.es
 To: The IETF Chair <chair@ietf.org>
 Cc: None
 Bcc: None
 Subject: New Liaison Statement, "An statement on behalf the IETF without prior approval" needs your approval

The following liaison statement will remain pending (and not public available) in the system until you approve it:

Title: An statement on behalf the IETF without prior approval
 Submission Date: 2010-08-23 06:22:02.310013
 URL of the IETF Web page: /liaison/for_approval/1018/

From: The IETF (IETF Liaison Manager User <esanchez@yaco.es>)
 To: IEEE 802 (esanchez@yaco.es)
 Cc: Bernard Aboba <Bernard_Aboba@hotmail.com>, The IETF Chair <chair@ietf.org>, The IESG <iesg@ietf.org>
 Reponse Contact:
 Technical Contact:
 Purpose: For information
 Body: Just for test!
 Attachment(s):

No document has been attached

Please visit /liaison/for_approval/1018/ in order to approve the liaison statement.

[Return to liaison list](#)

Page showing the email sent informing of a pending liaison (development mode)

Approving pending liaison statements

When an user that are be able to approve liaison statements (e.g., the IETF Chair) logs into the tool he or she could see if there are some pending liaisons.

datatracker.ietf.org - DEVELOPMENT MODE

AD Dashboard

- My Documents
- Next Telechat
- Discusses

Working Groups

- Applications

Liaison Statements

- [Add new outgoing liaison](#)
- [You have 1 pending liaison statement that needs your approval](#)

Date	From	To	Title
2010-08-23	WIPQ	Routing Area	This is just fo

A links informs you that there are some pending liaisons that need your approval

When clicking the pending liaison link a list of pending liaison is displayed. The user could examine any pending liaison by clicking on its title.

datatracker.ietf.org - DEVELOPMENT MODE
internal2

AD Dashboard

- My Documents
- Next Telechat
- Discusses

Working Groups

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- Internet
- Ops & Mgmt
- RAI
- Routing
- Security
- Transport
- Active WGs

Pending Liaison Statements

- [Return to liaison list](#)

Date	From	To	Title
2010-08-23	The IETF	IEEE 802	An statement on behalf the IETF without prior approval

Your pending liaison list

When the liaison is revised by the user then he or she can approve it by clicking on the "Approve" button.


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[My Documents](#)
[Next Telechat](#)
[Discusses](#)
Working Groups
[Applications](#) ▶
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Liaison Statement: An statement on behalf the IETF without pri

Submission Date: 2010-08-23

From: The IETF ([IETF Liaison Manager User](#))

To: IEEE 802 (esanchez@yaco.es)

Cc: [Bernard Aboba](#)
[The IETF Chair](#)
[The IESG](#)

Response Contact:

Technical Contact:

Purpose: For information

Deadline: None

Attachments: (none)


Body: Just for test!

Approve the liaison

Liaisons with deadlines

Liaisons that have a deadline date need that some action to be taken before deadline.

The system send a reminder when a liaison is getting close to its deadline (See cron task configuration). To avoid sending these reminders the user needs to mark the liaison as "already taken care of".


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Liaison Statement: LS210 - Request and problem statements for monitoring

Submission Date: 2010-06-24

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

To: IETF MPLS WG (swallow@cisco.com, loa@pi.nu)

Cc: paf@cisco.com
stbryant@cisco.com
adrian.farrel@huawei.com
rcallon@juniper.net
mpls@ietf.org
yoichi.maeda@ntt-at.co.jp
steve.trowbridge@alcatel-lucent.com

Response Contact: tsbsg15@itu.int
greg.jones@itu.int
hiroshi.ota@itu.int

Technical Contact: hhelvoort@huawei.com

Purpose: For comment

Deadline: 2010-10-31


Attachments: [LS210 - Request and problem statements for temporal and hitless path segment monitori](#)

Liaison with a deadline that needs some actions to be taken"

Users allowed to take care of a liaison

Any user that has received the liaison by email and have an account in the tool can mark this liaison as "already taken care of".

Secretariat and Liaison managers can mark any liaison as "already taken care of".

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Liaison Statement: LS210 - Request and problem statements for monitoring

Submission Date: 2010-06-24

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

To: IETF MPLS WG ([swallow@cisco.com](#), [loa@pi.nu](#))

Cc: [paf@cisco.com](#)
[stbryant@cisco.com](#)
[adrian.farrel@huawei.com](#)
[rcallon@juniper.net](#)
[mpls@ietf.org](#)
[yoichi.maeda@ntt-at.co.jp](#)
[steve.trowbridge@alcatel-lucent.com](#)

Response Contact: [tsbsg15@itu.int](#)
[greg.jones@itu.int](#)
[hiroshi.ota@itu.int](#)

Technical Contact: [hhelvoort@huawei.com](#)

Purpose: For comment

Deadline: 2010-10-31 Already taken care

Attachments: [LS210 - Request and problem statements for temporal and hitless path segment monitoring](#)

Liaison marked as "already taken care of"

Administration of the LSMT

The LSMT is able to recognize the roles of the individuals authenticated in the system (if they are WG chair, WG secretaries, ADS, ...). All such information already exists in the database.

The secretariat should administrate a couple of new things: IETF Liaison Manager role and SDO Authorized Individuals.

Assign the IETF Liaison manager role

In order to assign the IETF Liaison Manager role the secretary must enter the django's admin interface and select the user (Auth application, model User) who he or she wants to assign the role.

Django administration

Site administration

Announcements

Announced froms

Announced tos

Announcements

Scheduled announcements

Auth

Groups

Users

Find the user in the django's admin interface

In the user edition page the group 'Liaison_Manager' must be added to the user groups.

Designates whether this user should be treated as active. Unselect this instead of deleting accounts.

☒ Superuser status
Designates that this user has all permissions without explicitly assigning them.

User permissions:

Available user permissions

Q

admin | log entry | Can add log entry
admin | log entry | Can change log entry
admin | log entry | Can delete log entry
announcements | announced from | Can add
announcements | announced to | Can add
announcements | announcement | Can add
announcements | scheduled announcement
announcements | announced from | Can ch
announcements | announced to | Can cha
announcements | announcement | Can cha
announcements | scheduled announcement
announcements | announced from | Can de

Choose all

Chosen user permissions

Select your choice(s) and click +

Clear all

Important dates

Last login: Date: 2010-08-24 Today |
Time: 05:13:29 Now |

Date joined: Date: 2010-08-06 Today |
Time: 11:29:27 Now |

Groups

Groups:

Secretariat
Area_Director
IETF_Chair
IAB_Chair
Liaison_Manager

In addition to the permissions manually assigned, this user will also get all permissions granted to each group he/she is in. Hold down "Control", or "Command" on a Mac, to select more than one.

Delete Save and add another Save and continue editing Save

Edit the user groups

Administration of SDOs

For each SDO the Secretariat should maintain who is the Liaison Manager of the SDO and who are the Authorized Individual for that SDO.

All these persons can be assigned easily from the SDO edit page into the django's admin interface.

Django administration Welcome, **admin**. [Log out](#)

[Home](#) > [Liaisons](#) > [SDOs](#) > [W3C](#)

Change SDO

[Update Authorized List Reminder](#) [History](#)

Sdo name:

Liaison Managers		
Person	Email priority	Delete?
103881 <input type="text"/> Q Mark Nottingham	<input type="text" value="2"/>	<input type="checkbox"/>
<input type="text"/> Q	<input type="text"/>	
<input type="text"/> Q	<input type="text"/>	
<input type="text"/> Q	<input type="text"/>	

SDO Authorized Individuals	
Person	Delete?
<input type="text"/> Q	
<input type="text"/> Q	
<input type="text"/> Q	

[✖ Delete](#) [Save and add another](#) [Save and continue editing](#) [Save](#)

Assign liaison managers and authorized individuals to the SDO

Requesting an updated authorized individual list

The systems sends quarterly reminders to SDO Liaison Managers in order to provide the Secretariat with updated lists of SDO's Authorized Individuals ([See cron task configuration](#)). If the Secretariat wants to send a reminder manually he or she has two ways to do this:

1. Requesting an updated list for ALL the SDOs:

In the top of the SDO list page there is a link labeled 'Update Authorized List Reminder', by clicking it and confirming the next message an email will be sent to ALL SDO's Liaison Managers.

Django administration Welcome, **admin**. [Log out](#)

[Home](#) > [Liaisons](#) > [SDOs](#)

Select SDO to change

[Update Authorized List Reminder](#) [Add SDO](#) [+](#)

Action: [Go](#)

<input type="checkbox"/> SDO
<input type="checkbox"/> 3GPP

See the send reminder link at the top of the page

Django administration Welcome, **admin**. [Log out](#)

[Home](#) > [Liaisons](#) > [SDOs](#) > [Send reminder](#)

Send a reminder to each SDO Liaison Manager

You can send a reminder to each SDO Liaison Manager to request an updated list of persons authorized to send liaison statements on behalf of his SDO

By clicking the 'Send' button you will send a request to **all** the SDO Liaison Managers. In order to send the request to one SDO Liaison Manager go to the SDO edit page.

[Send](#)

Confirm you want to send a reminder

2. Requesting an updated list for one SDO:

In the top of the SDO edit page there is a link labeled 'Update Authorized List Reminder', by clicking it and confirming the next message an email will be sent to the Liaison Managers of this SDO.

Sysadmin work

The sysadmin must do some work to configure correctly the tool.

Edit settings.py or settings_local.py

Some new variables have been introduced in the settings.py of the tool. Sysadmin needs to ensure that they receive the correct value.

The email address from which all liaison emails come:

```
LIAISON_UNIVERSAL_FROM = 'Liaison Statement Management Tool <lsmt@' + IETF_DOMAIN + '>'
```

The filesystem path where the liaison attachments will be saved:

```
LIAISON_ATTACH_PATH = '/a/www/ietf-datatracker/documents/LIAISON/'
```

The url from where the webserver serves the liaison attachments

```
LIAISON_ATTACH_URL = '/documents/LIAISON/'
```

Configure some cron tasks

Send reminders to update the SDO Authorized Individual List

In order to send quarterly automated reminders to update the SDO Authorized Individual List a cron task must be set.

The next template could be used as reference:

```
PYTHONPATH = /your/tool/installation/path/  
0 0 1 */4 *    /your/tool/installation/path/ietf/manage.py remind_update_sdo_list
```

Send reminders when a liaison gets close to its deadline date

In order to send automated reminders warning that liaisons are close to their deadline date a nightly (or daily) cron task must be set.

The next template could be used as reference:

```
PYTHONPATH = /your/tool/installation/path/  
5 0 * * *    /your/tool/installation/path/ietf/manage.py check_liaison_deadlines
```

Adjuntos