Wave1 Digital Certificates Pilot Meeting
April 16, 2002
At CNI meeting, Washington, DC
Minutes

Members of Wave1 Institutions, the Organizing Committee and CREN met on April 16 to discuss the progress of the pilot implementations and to brainstorm ways to move the pilots forward.

At the beginning of the meeting each pilot institution gave a brief synopsis of the following:
- Efforts to date on the pilot
- Estimation of which steps they had completed on the 12-step timeline worksheet for digital certificate implementation
- List of sticking points that are slowing the process down.

Here is a summary of those synopses.

(1) MIT

Susan Minai-Azary reported that MIT is testing a migration scheme with production certificates. The CREN root will be used for the upcoming yearly cycle of certificates starting in June. Susan says MIT should be ready to bring up 200 pilot users in June. Susan held a lunchtime seminar for the library in February and will spend the time between now and June to get the 200-designated users ready for the pilot. To get ready Susan will need to test and incorporate the URL from JSTOR. (Let's get this url from Spencer.) In looking at the timeline, MIT has finished steps 1-3 setting up of the CA and also has the directory/database linked to their campus CA, step 5. They need to complete steps 4 and 6-12. The main sticking point for MIT is that a new library software is coming up for implementation in May and that will take time away from the project. (Do both MIT and U MN have a new library coming up?)

(2) University of Minnesota

Eric Celeste gave an account of his understanding of the University of Minnesota's efforts as Frank Grewe was not able to participate in the meeting. Eric mentioned that his facts were somewhat dated, as he hadn't discussed the project with Frank since February. Note: Judith met with Frank on April 22, subsequent to the meeting and this summary integrates notes from that meeting.

Frank requested a new CREN-signed certificate to establish a archival resource for auditors who might have questions about the process and the security for the generation and protection of the university of Minnesota's private key. The pilot will be proceeding with the earlier 6/14/2000 signed UMN CREN-signed certificate and will be done by the end of May 2002. After this pilot phase with their internal staff, certificates with the new the UMN CREN-signed certificate will be used.

Two primary changes were made for this second generation of a public/private key pair for the University of Minnesota.. First, the entire event was videotaped, the whole two hour event. Secondly, the key pair generation was performed by a laptop that will be dedicated to the function of storing the private key.

Since the new library is coming up in the May/June time period, Eric estimates the pilot won't begin until June. The target pilot users will be approximately 100 individuals: 50 from the library and 50 individual users who currently use JSTOR but are not familiar with digital certificates. Initially, users will need to use Netscape 4.7.9

This is a sticking point for Minnesota. Eric believes that users need to petition Microsoft to support client side certificates and the Macintosh version of IE. Because the browsers don't work well yet with digital certificates it will be harder for the users to convert. Eric believes Minnesota would be more willing to move ahead with digital certificates if they are more transparent to the user. At this point, Minnesota is trying to get comfortable with the idea of using digital certificates. The campus has not yet made a long-term commitment to their usage. Minnesota places itself as having completed steps 1-2 and working on steps 3-4. They haven't yet focused on steps 5-12.

(3) Princeton

Dan Oberst observed that Princeton is "all dressed up with nowhere to go." They have the hardware/software in place, but no compelling application to cause them to shift limited resources to the pilot. Currently, staff is tied up with middleware work and working on an Microsoft Exchange pilot and migration. Dan says Princeton is prepared to issue certificates and is in the process of renewing the CREN root and putting together a scenario for the signing ceremony. The key pair is being generated on the nCipher box and should be completed by the end of May. Princeton will use iPlanet for the directory. Conceptually, the library is on board. Princeton places itself as having completed 1-2 and 5. They need to finish steps 3-4 and 6-12. The main sticking point for Princeton is the combination of limited resources and the lack of a compelling application for digital certificates to drive the project.

(4) Dartmouth

Dartmouth is using a Sun Server and iPlanet for this project. Dartmouth has not yet requested the CREN-signed institutional certificate. They have an LDAP directory in place.

Dartmouth has identified 50-60 people to participate in the Wave 1 pilot. This is a group of selected users from the library, plus computing support staff, faculty and engineering. Dartmouth has decided to use the IT help desk to help with user education. Dartmouth also plans to issue client certificates in June. Given this status, Dartmouth has completed steps 1-2 and 4-5. Dartmouth needs to complete 3 and 6-12. Dartmouth's sticking points are similar to those of Princeton. Dartmouth lacks enough human resources to complete all its projects and without a pressing priority, tends to lose focus on the pilot.

(5) Georgia Tech

John Douglass has completed all the technical requirements for this project. He has completed steps 1-3 and 5. He still needs to decide which user group to select for the pilot. John faces two major sticking points. He wants to wait to proceed until he is comfortable with the program and he is hampered by the staff changes in the library. The technology director of the library left Georgia Tech and there is currently no one responsible for IT in the library. However, John believes that he can overcome this obstacle and bring users up fairly quickly once he is prepared to begin. Georgia Tech has completed steps 1-3 and 5. They need to complete 4 and 6-12.

(6) JSTOR:

Spencer Thomas is ready to provide the URL once he gets requests from the institutions.

Discussion and Next Steps

After the institutional summaries the group discussed the issues surrounding the pilot and the lack of urgency regarding use of digital certificates and the limited resources to implement. However, it was generally agreed that most pilots would be up and running by June.

Lastly, the group turned to the issue of pilot management. Judith suggested that regular phone conference meetings among pilot group members could provide a supportive environment and allow members to learn from one another's experiences on a more timely basis. After some discussion, the group agreed that a one-hour meeting every two weeks should serve this purpose. The group set Wednesday, May 1 at 11 am Eastern Time for the first phone conference. Attendees will be all those in attendance at the April 16th, in addition to Frank Grewe of Minnesota and Bob Brentrup of Dartmouth.

Organizationally, Judith offered to chair the first meeting with the hope that another pilot member would offer to chair future sessions. Larry suggested that Bob might be willing to take on this task. Ann will serve as support liaison to coordinate among members and take minutes.

Judith suggested that the focus of the next meeting be user education. In addition, she asked that members think about ways the group can work to keep the project front and center and moving forward in a timely fashion.