

Minutes -RETS Day 2 - December 8, 2006
(Prepared by Alex Choi, Gina Accawi, Paula O'Brien, and Steve Verba)

RETS Workgroup Organization and Governance

8:45 a.m. – 10:15 a.m.

Steve Verba (Oracle) reviewed the background of RETS. A formal process was developed in 1999, but the membership at that time did not consist of a sufficiently large group of people. As time passes, the need for more rules and clearer policies becomes more apparent. In addition, how can workgroups function and accomplish work between meetings?

Current Leadership

- RETS Chair: Mark Lesswing, NAR
- RETS Tech Co-Chairs: Steve Verba, Paul Stusiak
- RETS Technical Workgroups
 - Technology: payloads, security
 - Business: implementation, marketing
 - Ad hoc
- Deprecated?
 - Core group
 - Advisory group

Question regarding RETS standing as a legal entity

- Who has IP rights to the RETS specification?
- Who can assign rights to RETS open source code?
- Separate entity model is used by MISMO and OSCRE

Recommendations

RETS Board of Governors

- 12 - 16 members meeting during conference time
- Comprised of business leaders
- Provides court of appeals, outside review of progress, business leadership, strategy, etc.

Architecture Review Committee

- Provide review of workgroup deliverables, change proposals, R&D, etc.
- Ideally, not vendors or consultants but MLS, TMS, broker org tech staff, plus tech co-chairs
- Elevates the end-user point of view

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- 6 - 8 members

Workgroups

- Assignments and time windows from chairs
- Deliverables include position of majority, minority, chairperson
- Reviewed by Architecture Review Committee
- Tech chairs may accept, send back, or vote
- Appeals to the Board of Governors and/or RETS chair if concerns remain after full process

Upshot

- Create RETS non-profit
- RETS Chair - Mark Lesswing
- Board of Governors
- RETS Tech Co-Chairs - Steve Verba and Paul Stusiak
 - Architecture Review Committee
 - R&D Group
 - RETS Technology Workgroups

Process

Comments from the Floor

Gregg Petch (MRIS) asked how disagreements would be resolved if the community wanted a major revision and the RETS Chair did not. Steve indicated that the Board of Governors could assist in appealing and further evaluation. The process is shepherded through by the RETS Technical Co-Chairs. Jeff Brush (Ronin Technologies) wanted to clarify that the Change Proposals need to be reviewed by a relevant workgroup, or researched at a minimum.

Steve Clarke (First American MLS) indicated that the change proposals should not be able to be buried by the workgroups without input from the community. Also, that the workgroups should have respect from the community as a whole. He indicated that a workgroup had gone so long in the past, that members of the workgroup had thought a task was completed and the group then came out with a different result. Also, he felt the right result seems to come out when the full group always approves at the end. Steve Verba replied that the common past practice of bringing change proposals to the group for discussion on the last day of the RETS conference did not allow for much review time and was not effective.

Matthew McGuire (First American MLS) stated that there are two sides, business and technical, shown in the flow chart. Matthew suggested that workgroups create teams from the community to submit change proposals to be approved. He also suggested the need for an ad hoc workgroup. The Chair is the president, technical (architecture) committee, board of governors (steering), and the remainder are the interested parties.

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Stuart Schuessler (Clareity) indicated that there were more boxes on the screen than those who participate in RETS. Stuart reiterated that in the early days of RETS, change proposals would be run by various influential members of the community before being presented. Stuart also stated his opinion that the two implementations rule caused a dramatic drop in the number of change proposals and that the momentum slowed the development of the RETS 1.x standard. Stuart stated he also had concerns with the number of layers in the proposed process.

In closing, Steve mentioned that all of the feedback provided would be taken into consideration as NAR considers its own position on any changes to organization and governance of RETS.

RETS Compliance

10:15 a.m. – 12:00 p.m.

Paula O'Brien (Ronin Technologies) began by discussing the Site Audit proposal from the RETS Roadmap.

The Site audit is a compliance test that would be executed against a live MLS RETS implementation. The results would be reviewed with the MLS and its RETS vendor to address non-compliance issues. The results are not released to the public. This is help to address compliance issues with RETS and RETS implementors, not to point fingers.

Paula opened the floor for the group to discuss its thoughts about the site audit process. She asked the group if there were any business or technical issues that may be raised before further discussing this process with Mark Lesswing (RETS Chairman). Paula reiterated that the site audit process discussed within this workgroup was a proposal for the RETS Roadmap pending NAR approval, and right now no site audits were scheduled to take place.

A question was asked if MLS vendors with compliant RETS products would be audited.

Paula responded that yes, they would be targets for inclusion. Currently her suggestion is that the larger vendors may have 3 or 4 sites audited per trimester, but this is up for discussion. The question was raised as to how access should be given for this testing. Paula replied that all RETS access is given by the MLS board. She suggested that perhaps NAR would assist in requesting access for these site audits. The MLS board and RETS vendor should assign resources before the site audit proceeds.

The group asked about testing different user roles. Paula replied that her initial thoughts were that Site audit testing would have the privileges of a basic/limited user that can perform all RETS transactions a server offers. Paula said that the site audits are concerned with standard names mapping and transaction execution, and does not need the kind of user role that would have access to private Agent information.

The group described the possible scenario where a new vendor sold RETS to firms. The brokers are not interested in the participating in this a Site audit. How is compliance checked? Paula stated that this may be an issue for discussion between the MLS board and NAR. The request can be made but an MLS always has the right to opt out of granting access to its data for a Site Audit.

The group questioned if a RETS vendor states they are RETS compliant should there be some legal ramification when it turns out that the RETS vendor is not compliant? Should RETS certification be revoked? Paula said she would address this question with the RETS technical chairs and chairman.

The group asked what would happen if a RETS vendor wants to be RETS compliant at the site level but their broker or MLS doesn't want to participate for privacy reasons. Paula replied that the RETS vendor can always be certified compliant at a product level.

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The group asked who is responsible for maintaining RETS certification for a product. The RETS vendor or the MLS. The group pointed out that the RETS vendor takes direction from the MLS. The question was raised as to whether an MLS board could be punished for a non-RETS compliant server? Paula replied that she would have to raise this question with the RETS technical chairs and chairman.

The group asked non-compliant RETS data was found, who would be responsible for changing it. This could be caused by non-printable characters in the RETS field which were entered by an Agent (a data quality not a transformation issue).

Metadata, for instance, is handled by the RETS server. A Site audit can check for this. But the MLS is responsible for assisting the vendor in mapping its database to metadata.

Paula reiterated that site audit results should address the overall site condition, which includes all of the issues raised above. It will be responsibility of the MLS to discuss the non-compliance issues with their RETS vendor and together work towards a solution.

The group stated that if the site audit effort is presented properly to the MLS then site certification will be seen as good (business) and good marketing.

The group questioned re-certification requirements. Discussion suggested that re-certification could be required annually. Re-certification could be circumvented by a MLS or RETS vendor creating an environment with perfect data and conditions. The group wondered whether surprise site audits could be done. This would be a real-world certification.

Update Workgroup

1:00 p.m. – 2:30 p.m.

Paula O'Brien (Ronin Technologies) began by highlighting the basic differences between update in RETS 1.x and RETS2. This first meeting of the workgroup will be to draw out issues so that a RETS2 Update charter can be created.

Paula indicated that Update can include items that are discussed in other RETS workgroups in 2007. For example, Update includes data validation. In the RETS Roadmap, data validation is one topic covered by the Rules workgroup. Update may also include rules related to business process, which are also a part of rules workgroup.

Steve Verba (Oracle) agreed with Paula's statements and added that MISMO is currently looking at business rules which include data validation. MISMO is interested in passing rules from business partner to another.

Steve asked Stuart Schuessler (Clareity) and Sergio Del Rio (T4BI) to discuss their experiences implementing Update in RETS 1.x.

Sergio stated that His RETS server work used Stuart's Validation Expression proposal and added extensions to it and the metadata. FMLS has done the same too. FMLS developed a proxy RETS server to add more metadata.

Paula stated that currently RETS2's CRUD model supports a simple Update for XML or other objects, with error and warning lists. This RETS2 Update has already been deployed into a production RETS2 server used by First American for their TMP transaction system's publishing functionality. The Lucero RETS2 client uses the interface to update documents.

Steve Clarke (First American MLS) stated that RETS 1.x Update was not widely implemented by server vendors because of the complexity of implementing. He suggested that the RETS community encourage RETS vendors to implement Update using RETS2.

As RETS2 expands its Update model it should look at concepts used by MRIS.

Paula asked the group about functionality such as Auto-populate, and the group felt that was a good feature to include.

Sergio stated that clients have found it convenient to use Validation rules to report errors to the end-users before sending the data to the server. At least two clients working with MRIS' RETS update do this. Steve Clarke agreed that it would be beneficial for the RETS server to be able to express rules to the client. The group agreed that having a way to validate data before submitting it to the server is beneficial but not mandatory.

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Currently the RETS2 Update transaction does have an error and warning list in the Update Response for a client to present server-errors back to the end-user.

Paula clarified that since RETS2's Update works with XML payloads, validation of XML involves different tools and methods than validating query string posted data from RETS 1.x. Tools such as schematron, xsl and even javascript are options when expressing validation of XML data.

Paula asked the group if there were other areas that can use Update but do not require validations. Stuart identified Lookup fields. Matthew McGuire (First American MLS) agreed.

Steve Verba proposed that RETS2 Validation could be a WSDL action: there could be service to validate a field or a client can query for a payload providing more detail and local validation.

Paula asked the group if it made sense to have RETS Standard MLS Update payloads. Paul Stusiak (Falcon Technologies) said yes and suggested candidates such as NRDS (membership data) and Media. Others such as Listing and Property may be too MLS specific. The group agreed that there appeared to be room for RETS standard MLS Update payloads to be defined.

Sergio stated that RETS vendors may have different types of validation. Jeff Brush (Ronin Technologies) asked if RETS2 validation could support more than one type of validation. Paula agreed that this sounded feasible, as long as it were discoverable by the client.

Steve Verba suggested an R&D paper be written to describe possible validation rules for RETS2.

Another Update Workgroup call will be scheduled in the near future.