

Collaborative Tools Strategy

University of California, Berkeley

Spotlight: Tool Selection Criteria

Goal 3 of the Campus Collaboration Tools Strategy for UC Berkeley, "Provide criteria and guidance to IT staff to assist decisions about which collaborative tools to formally support," sets out targets for establishing and maintaining criteria to guide the selection of the collaborative tools that receive formal support on campus. The following are an initial attempt to define these criteria.

A. Identifying when and how to adopt a collaborative tool:

1. Identify the specific collaborative behaviors that users seek to facilitate or augment.
2. Consider whether those collaborative behaviors are either common or strategic. Because estimating the cost savings that will result from the adoption of new services and tools can be difficult, the breadth of need or the strategic importance of the effort in need can be powerful indicators of value.
3. Identify collaborative tool categories (e.g. wikis, discussion forums, issue tracking systems, and workflow systems) that can facilitate or augment those specifically-identified collaborative behaviors.
4. Use resources such as the collaborative tools registry proposed in Goal 2 of this strategy to research tools already in use on campus, and that may be adapted for the needs discovered in points 1 and 2, above. The levels of support vocabulary described in Goal 2 will be useful in this regard.
5. Select specific collaborative tools to support and customize for local needs.

B. Deciding among particular tools. Campus IT providers and users should select services and solutions that:

1. Are most suitable for their intended use based on the criteria below, without regard to sourcing model.
2. Allow wide availability to the communities that need them. (Collaborative tools are increasingly useful the larger the community that has access to them, so we should look for solutions that we can easily make available to all of the people who have a use for it.) This, in many ways, translates to finding ways to reduce costs. Disk space is one of the biggest cost factors for most collaborative tool providers, so campus IT providers should focus on ways to acquire storage at lower prices.
3. Use open standards for data representation and transport. In campus provided or supported tools and services, both within and outside of collaborative contexts, favor open standards for representing and transporting data (IMAP, CalDAV, XML-based data formats, etc.), as well as simple, consistent interfaces (e.g. RESTful or SOAP/WS-* web services, RSS/Atom feeds, etc.) through which data can be accessed. This gives collaborating partners substantially greater ability to collaborate around the same data, and facilitates choice among tools and services.
4. Easily integrate with CalNet authentication and directory services (and in the future, with any CalNet authorization services).
5. Make it possible to delegate administration, so that the ability to create and manage workspaces, user accounts, and the like can be provided at the appropriate level.

6. Allow data to be safeguarded appropriately, by enabling storage of restricted, highly valuable, or sensitive data only on trusted hosts, and by offering highly granular permissions to provide access only to authorized parties.
7. Provide a robust Application Programming Interface (API) through which the tool can be integrated with other campus systems and data sources.
8. Support data import and export, via an API or other means, to facilitate migration to a successor tool. Even if the tool provides such capabilities, data stewards should maintain a local archive of critical data stored in externally-provided services, in the event that the original becomes inaccessible or unusable for any reason.
9. For web-based tools, support cross-browser and cross-platform compatibility, so the tool is functional to users of multiple browsers on multiple operating systems (e.g. Windows, Mac, mobile devices, accessibility)