

GENERAL
TRADE/CEFACT/CRP.2
3 September 1997

AD-HOC GROUP 1 (AC.1)
Research, Strategic Advice and Implementation Planning Group

Chairman Report

SOURCE: AC.1 CHAIRMAN
STATUS: CHAIRMAN REPORT
ACTION: FOR REVIEW; GE.1; September 1997 Session

Introduction

1. The group met during 28 July -1 August 1997 in Ann Arbor, MI, USA. In attendance were 10 AC.1 members, as well as one via e-mail helping with the editing function. Some members of AC.1 were also present during the open information session held during the Singapore JRT to review the issues list and draft copy of the Reference Guide.

Reference Guide

2. The group's initial work item was to completed the modification of the Reference Guide. The document is presented in CRP.5, with the title "Reference Guide – The Next Generation Of UN/EDIFACT – An Open-edition Approach using IDEF Models and Object Oriented Technology". This included some rather thorough discussion of comments on an earlier version as well as a further refinement of the overall concepts and illustrations.

Issues List

3. The balance of the week involved the development of a new and expanded issues list. The group was a bit in awe of, if not overwhelmed by, the breadth and depth of work which lies ahead. It most impressive to see the obvious thought and insight that everyone brought to the session. Much of the efforts during this phase of the work were not targeted at developing solutions. Instead, the focus was on identifying and developing ideas which will need to be fleshed out eventually as work items and an overall management/execution plan.

Membership

4. AC.1 is disappointed to note that Europe is not able to send any representatives to AC.1 to replace the vacancies created by the departure of some of its key members. The results of any UN/ECE group are dependent upon world-wide representation of the business issues. Currently, the only European participation (2 members) comes from the UK and France. Though they regularly contribute they would also benefit from the opportunity to discuss AC.1 issues with other European members.

Future AC.1 Meetings

5. As reported by the chair of AC.1 during the previous GE.1 session, AC.1 holds open information sessions during JRTs. In order to allow JRT members to understand and help AC.1 in its work, an issue list (see Appendix A) will be distributed to all JRT participants who than can attend the open session during the week to either obtain clarification or make a contribution.
6. The next two AC.1 meetings are scheduled for November 10-14 in Paris (see Appendix B for Draft Agenda) and March 9-13, 1998 in McLean Virginia. Now that the Reference Guide and a detailed issues list is being made public, AC.1 hopes that even more interest can be stimulate within the various organizations in order to expand AC.1's membership as it continues its work.

Future AC.1 Work Items

7. AC.1 will continue with its work program which was suspended in order to develop the Reference Guide as requested by WP.4GE.1 and the JRT. The work items include (but are not limited to):
 - Completion of Catalog Example,
 - development of all IDEF0, 1X and 3 models for the Framework,
 - development of all possible Scenarios based on that Framework,
 - development of all Object Classes including the documentation of its methods,
 - Feasibility Study and Pilot to verify the concept and benefits of OO-edition,
 - Impact Study and Migration Plan for the development of Open-edition Frameworks/Scenarios and Common Business Object Classes.

APPENDIX A

AC.1 Issues List

General Issue 1: Participation

How do we prove the benefits of modeling to ensure participation of the necessary business and modeling experts?

There is a requirement to prove benefits in terms of

- cost
- articulation of a business process through modeling

Unless there is potential for an increased number of trading partners and a decrease in implementation costs, there will be no motivation for modeling the business requirements.

General Issue 2: Organizational Impact

The production of a new type of EDI standards, with different requirements than traditional directory publication, will have an impact on the EDI standards organization.

There may be a requirement to assign roles (e.g. according to functional expertise). Roles foreseen include: business experts, modelers, model reviewers, message developers, information parcel developers, certifiers.

The structure could be either centralized (with modelers convened in one group) or decentralized (with modelers being available to every design group).

Resource issues also require resolution since there is a need to provide:

- tools for model development
- education and training
- OO expertise
- modeling expertise
- business expertise

The procedures for a new organizational structure should explain the process for :

- submission
- approval
- appeal
- registration
- maintenance
- certification of frameworks, messages and scenarios
- assessment of the business requirements for a new model
- membership and voting
- policy revision
- flow of work (with timeline)
- feedback

Can tracks 1 and 3 use the same organizational procedures or do we need 2 sets of procedures?

There is also a requirement to provide documentation about how modeling will be carried out (to identify which steps to do and when).

General Issue 3: Development Representation Requirements

Different types of expertise are required at different points in the process.

- Business process knowledge
- Business data information
- Policy/decision makers

Obtain a proper cross section of representation to accomplish weighted consensus

- Types of participants required
 - Modelers
 - Subject Matter Experts
 - Message developers
 - Software developers
 - Industry groups
 - Failed implementers
 - Partners [ISO, ODETTE, X12, etc.]
 - SME's
- Methods to use to increase involvement and include participation at appropriate point in time
 - SME's through industry groups
 - Methods beyond face to face meetings for representation
 - Email

General Issue 4: Repository

Resources

- Design
- Implementation

Content

- Frameworks
- Scenarios
- Class Libraries
- IMPDEF's

Management

- Administration Infrastructure
- Messages
- Maintenance
- Access Security
- Fees
- Synchronization with global directories

Registry

- Authority
- Identifier format and assignment
- Repository reference

General Issue 5: Prototype Project

Prototype Project

- Advance work and assumptions
 - Draft development methodology
 - Prototype project to validate the process
 - Suspension of the design rules
 - Full procedures [draft]
- Resources
 - Tool expert
 - Tool
 - Prototype group
- Prototype group selection considerations
 - Familiar with the use of modeling
 - Have a completed/partial model available
 - Have already produced message[‘s] utilizing the existing model
 - Have a problem domain with a scope sufficient to be representative of the problem and of a size which can be accomplished within a reasonable time frame [6 months]
- Process followed will comply with the full procedure [draft]

Current EDI Issue 1: Policy

Develop policy regarding grandfather-ing of existing directory entries if they do not fit modeled processes/data. If grandfather-ing is supported, what is disposition (marked as: unusable for new development; eventual deletion; not marked at all?). Perhaps grandfather-ing with revision: i.e.- a directory entry could be modified to fit the modeled process/data.

To what level of the directories will modeled process/data apply?

Current EDI Issue 2: Design Rules

The potential need to revise the existing message design rules.

Current EDI Issue 3: Design Methodology

Document the design rules for moving from models to messages and supporting directories.

Current EDI Issue 4: IMPDEF

Can IMPDEF be modified to support the scenario registry.

Open-edi Issue 1: Awareness

Create awareness that Open-edi means more than modeling; e.g. training, implementations, infrastructure (Functional Service View aka FSV), etc.

Open-edi Issue 2: Moving From Current EDI to OO-edi

Using benefits identified, motivate current EDI users to move to /participate in OO-edi by demonstrating that there is an easier way to do EDI.

Open-edi Issue 3: Documentation

Methodology for moving from IDEF1X models to object classes (IDEF1X/97 approach to be considered) and the methodology for moving from a framework to a scenario.

Open-edi Issue 4: Scenario Registration

Devise scenario registration procedure and certification (conformance) guidelines.

Registration of scenarios should include identification of legal environment.

Open-edi Issue 5: Certification

Promote market driven certification services.

Open-edi Issue 6: Interchange

Scenarios will be identified in each interchange

APPENDIX B

DRAFT AC.1 Agenda Paris, France, 10 - 14 November 1997 EDIFRANCE, La Defense

Item Description

Monday (10:00 - 18:00)

1. Welcome and Apologies
2. Approval of Agenda
3. Meeting Status Updates
 - 3.1. August 97, CSG (TMWG Mandate review & approval)
 - 3.2. September 97, CEFACT/GE.1
 - 3.3. September 97, JRT
 - 3.4. October 97, X12/SITG
 - 3.5. October 97, SC30 & SC30/WG1
4. Review of comments received on Reference Guide
5. Review of comments received on Issues List

Tuesday - Wednesday (9:00 - 18:00)

6. Continuation of development work on Catalog Framework Example
 - 6.1 Development of Class Library components
 - 6.2 Development of Object Interfaces

Thursday (9:00 - 18:00)

7. Progression of Issues List
 - 7.1. Organizational Impact
 - 7.2. Prototype Specification

Friday (9:00 - 15:00)

8. Update Issues List for JRT
9. Draft and approve resolutions for GE.1
10. Other business
11. Agenda for next meeting
12. Adjournment