OASIS UBL TC Meeting
Kars, Ontario

Jon Bosak, Pinax
Chair, OASIS UBL TC

Opening Plenary
19 September 2011

http://oasis-open.org/committees/ubl

OASIS STANDARD

Attendance (opening plenary)

At the meeting in person:

> Jon Bosak (chair)
>
> Mavis Cournane
>
> G. Ken Holman (host)
>
> Andy Schoka

Attending by phone:

> Arianna Brutti
>
> Andrea Caccia
>
> Betty Harvey
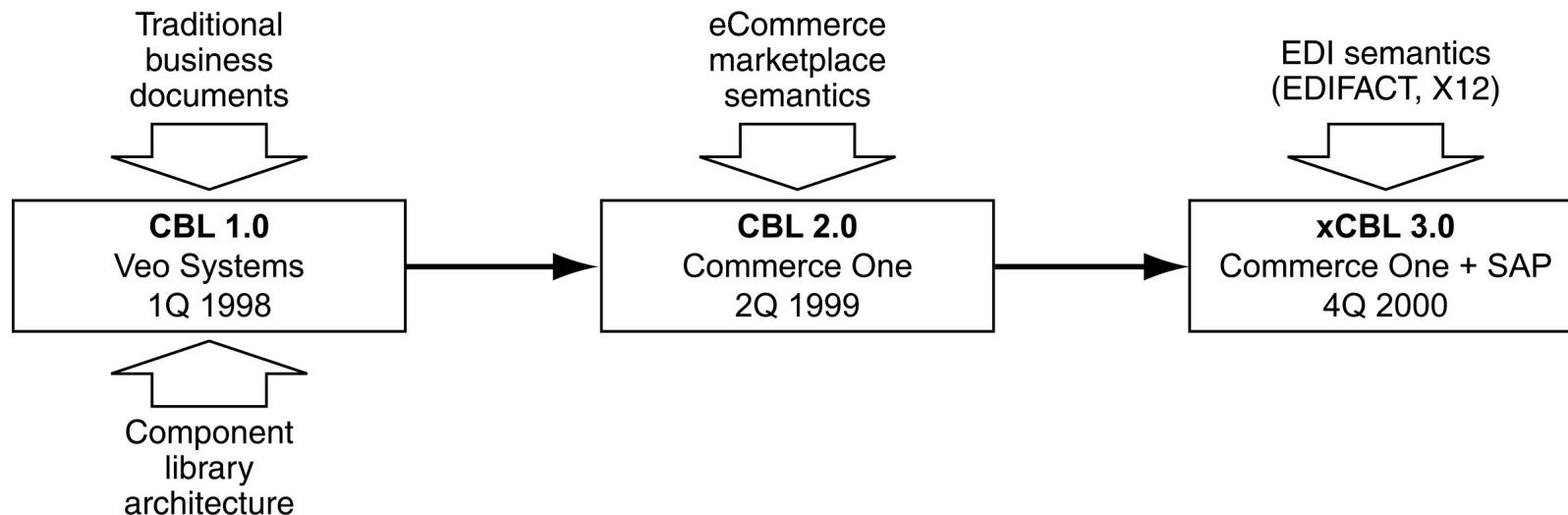>
> Sven Rasmussen
>
> Ken Vaughn

Ten years of UBL

- January 2001: First discussions between Sun Microsystems and CommerceOne

- April 2001: First "CBL" organizational meeting held at Sun Microsystems headquarters in Palo Alto, California

- June 2001: Name changed to UBL and proposed for development in UN/CEFACT

- June 2001: Proposal rejected by UN/CEFACT

- October/November 2001: First OASIS UBL TC meeting held at the Sun campus in Menlo Park, California

Let's take a minute to review where we've been....
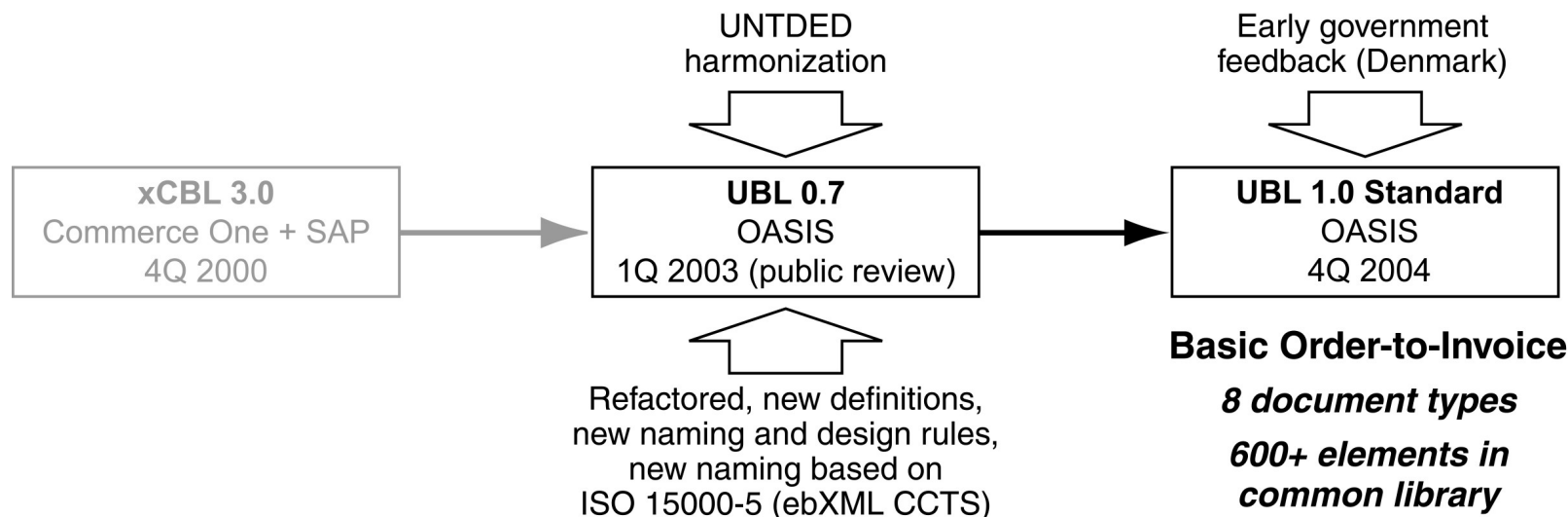
UBL Prehistory: CBL

CBL (the Common Business Language) had already been widely deployed before the UBL TC was formed in OASIS. The development of CBL 1.0 was funded by the U.S. government (NIST).

(Top arrows indicate semantic inputs; bottom arrows indicate technical inputs)

UBL Phase One: Order to Invoice

UNTDED harmonization

Early government feedback (Denmark)

xCBL 3.0
Commerce One + SAP
4Q 2000

→

UBL 0.7
OASIS
1Q 2003 (public review)

→

UBL 1.0 Standard
OASIS
4Q 2004

Refactored, new definitions, new naming and design rules, new naming based on ISO 15000-5 (ebXML CCTS)

Basic Order-to-Invoice

8 document types

600+ elements in common library

The UBL TC completely reworked xCBL 3.0 and made UBL the first (and only) integrated set of XML business schemas to be based entirely on UN/CEFACT Core Components (ISO 15000-5, CCTS 2.01).
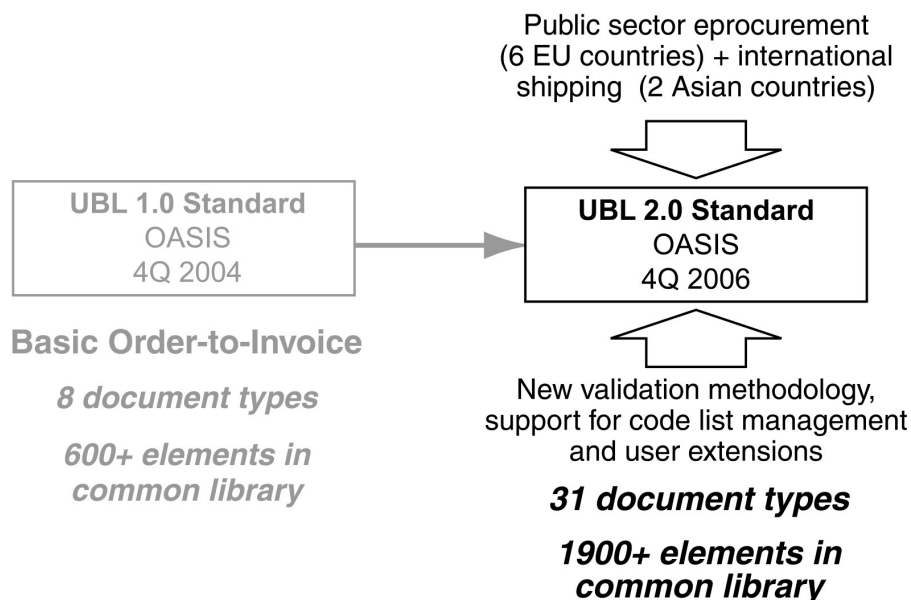
Northern European UBL group (2005)

Denmark   Danish Ministry of Science, Technology and Innovation (VTU), Danish IT and Telecom
              Agency (ITST)

Norway   Norwegian Ministry of Government Administration and Reform eProcurement Secretariat

              e2b Forum (an e-invoicing initiative in the private sector supported by the government)

Sweden   Single Face To Industry (SFTI), the public sector initiative in Sweden to promote e-business
              by the Swedish National Financial Management Authority (ESV), Swedish Association
              of Local Authorities and Regions (Sveriges Kommuner och Landsting), and Swedish
              Administrative Development Agency (Verva)

England   OGC buying solutions under Office of Government Commerce

Finland   State Treasury

              Tieke Finnish Information Society Development Centre

Iceland   Financial Management Authority (Fjársýsla Ríkisins)

              Iceland Committtee on e-business and Trade Procedures (ICEPRO)

UBL 2.0 (2006) was created largely in response to the requirements of this working group, which then published the Northern European Subset of UBL (NESUBL) in 2007. Agencies of two Asian governments, Singapore and Hong Kong, contributed four basic transportation-related documents as well.
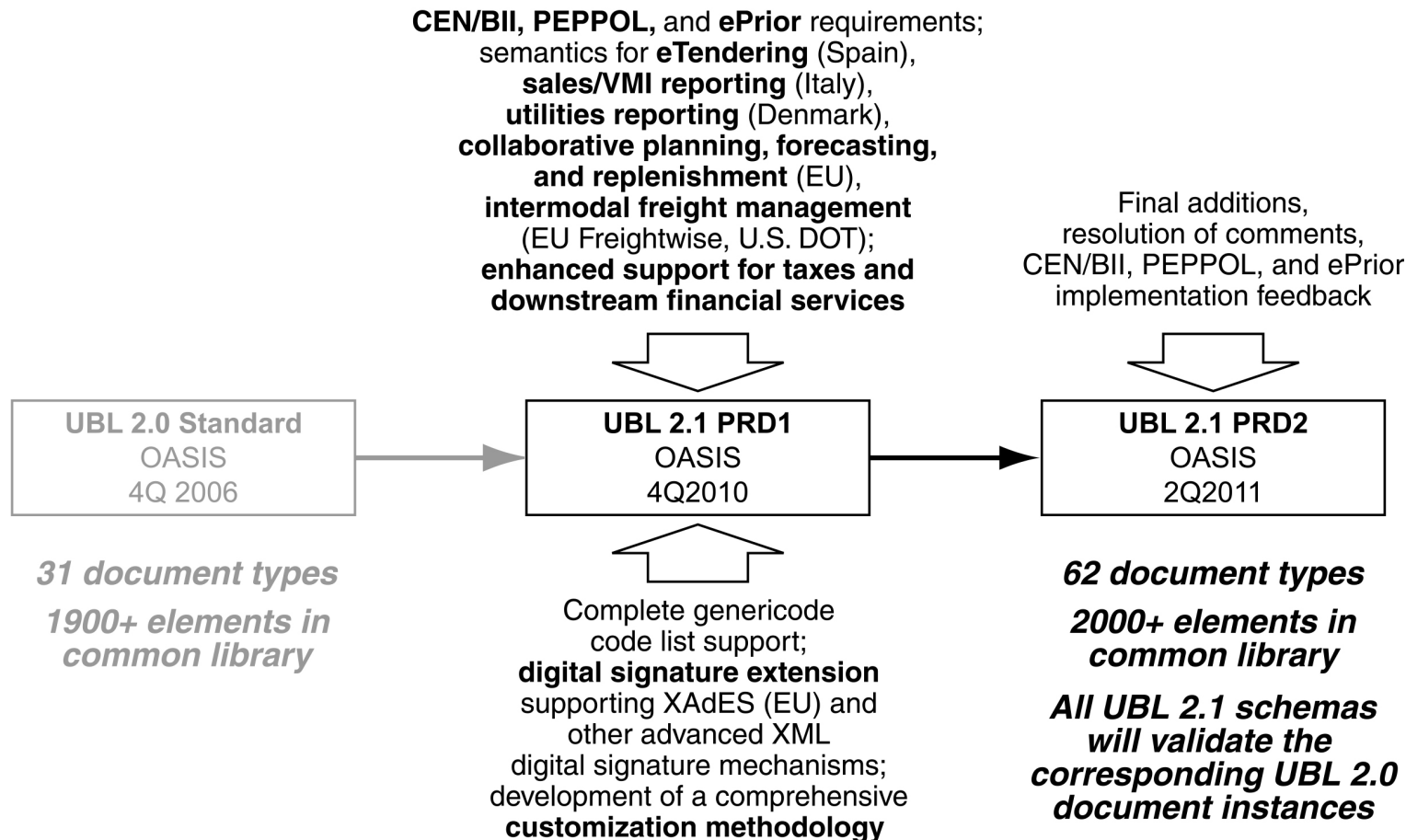
UBL Phase Two: Government procurement

Public sector eprocurement
(6 EU countries) + international
shipping (2 Asian countries)

⇩

UBL 1.0 Standard
OASIS
4Q 2004
→
UBL 2.0 Standard
OASIS
4Q 2006

⇧

Basic Order-to-Invoice

8 document types

*600+ elements in
common library*

New validation methodology,
support for code list management
and user extensions

31 document types

*1900+ elements in
common library*

The government contributions tripled the size of the UBL component library and nearly quadrupled the number of document types.

UBL 2.1 (phase two continued)

CEN/BII, PEPPOL, and **ePrior** requirements;
semantics for **eTendering** (Spain),
sales/VMI reporting (Italy),
utilities reporting (Denmark),
**collaborative planning, forecasting,
and replenishment** (EU),
intermodal freight management
(EU Freightwise, U.S. DOT);
**enhanced support for taxes and
downstream financial services**

Final additions,
resolution of comments,
CEN/BII, PEPPOL, and ePrior
implementation feedback

UBL 2.0 Standard OASIS 4Q 2006	UBL 2.1 PRD1 OASIS 4Q2010	UBL 2.1 PRD2 OASIS 2Q2011

31 document types

*1900+ elements in
common library*

Complete genericode
code list support;
digital signature extension
supporting XAdES (EU) and
other advanced XML
digital signature mechanisms;
development of a comprehensive
customization methodology

62 document types

*2000+ elements in
common library*

*All UBL 2.1 schemas
will validate the
corresponding UBL 2.0
document instances*

*The latest government and industry contributions have doubled the size
of the UBL document set – **but not the size of the common library.***

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STANDARD

UBL deployments (1)

- UBL Invoice has been required by law for the **Danish** public sector since 2005. 1.25 million UBL invoices are exchanged in the Danish public sector every month, with savings to the government estimated at 100 million euros annually

- All **Swedish** national agencies have been UBL-enabled since 2006, with savings estimated at USD 100 million annually

- The Danish government is now engaged in a major national effort to deploy UBL documents into the private sector; when the program is fully deployed in 2012, it is expected to save Danish businesses 550-700 million euros annually

- All ERP systems in the Danish market (Microsoft Dynamics, SAP, Oracle, etc.) have been locally adapted to support UBL invoicing; some, like Microsoft Dynamics C5, support it natively

UBL deployments (2)

- UBL Invoice has also been mandated by law for all public sector invoicing in **Turkey, Peru,** and **Norway** (effective 2012); larger savings will attach to these larger invoicing deployments

- As of 1 January 2011, all government agencies in **the Netherlands** are required to accept UBL invoices

- In **Spain**, documents for eTendering and eAwarding based on the UBL library have been legally required for government eprocurement since 2008; these document types are now part of UBL 2.1

- A project of La Cámara de Comercio de **Panama** funded by the Inter-American Development Bank (IDB) and intended for use by SMEs throughout Latin America has implemented UBL Order-to-Invoice using a combination of Excel spreadsheets and secure email

- CNIS (**China** National Institute of Standardization) has created a Chinese language localization of the UBL Common Library for use in developing Chinese UBL document types

UBL deployments (3)

- UBL is the basis for the ePrior eProcurement initiative of the **European Commission**, Directorate General for Information Technology

- UBL is the basis for testing and early deployment of PEPPOL (Pan-European Public Procurement Online), an EC-funded initiative driven by a consortium of government agencies representing 12 countries (**Austria, Denmark, Finland, France, Germany, Greece, Hungary, Italy, Norway, Portugal, Sweden,** and the **UK**) that will allow businesses to bid for public sector contracts anywhere in the EU

- UBL 2.1 freight management documents are being implemented by the **U.S. Department of Transportation** (Electronic Freight Management program) and the **European Commission** (Freightwise and e-Freight initiatives)

U.S. Department of Transportation Electronic Freight Management (EFM) pilot

- Integrated a major U.S. clothing distributor and 13 of its supply chain partners in the U.S. and China into an interactive real-time reporting system based on the exchange of UBL documents

- Savings estimated at 5.94 USD per consignment (enough to pay for implementation)

- Greatly increased timely data visibility among all the players

  - Forwarders received booking data 1 day earlier

  - Shipping notices were available 6-8 hours earlier than with EDI and were better than 90 percent accurate vs. 65 percent for EDI due to minimizing the rekeying of data
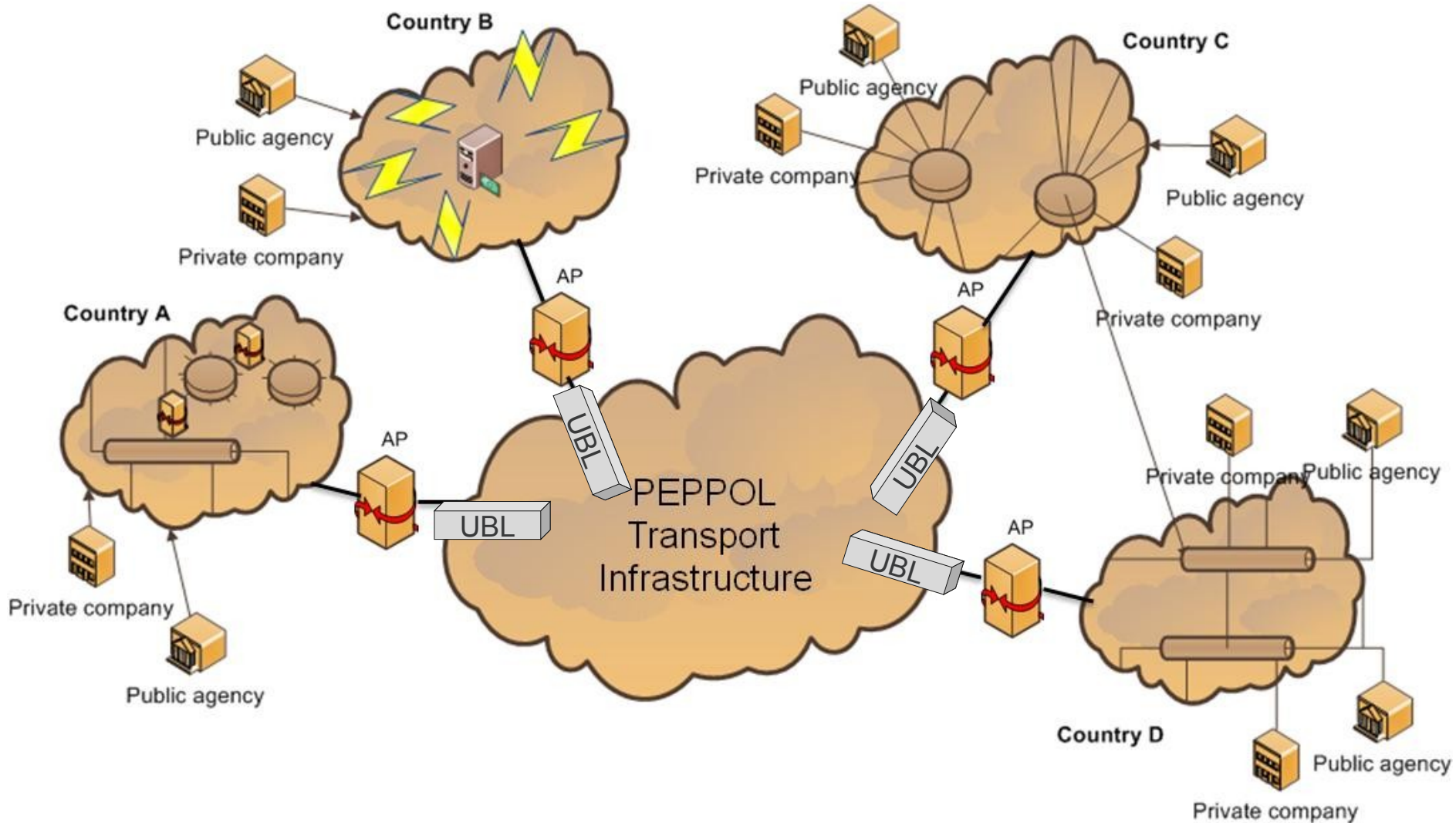
UBL in international freight management

- The USDOT EFM initiative and the EU Freightwise initiative are working on a joint memorandum of agreement to guarantee interoperability between the American and European electronic freight management infrastructures

- The US and EU initiatives have been the main contributors to the new intermodal freight management capabilities in UBL 2.1

- Both initiatives will be using UBL freight management documents

- The two frameworks will therefore not only interoperate with each other but also with other business processes (ordering, invoicing, etc.) using procurement-oriented UBL documents built from the same semantic library

- Thus entire infrastructures become extensible and to some degree interpenetrable and interoperable with each other

The 4-Corner Approach in PEPPOL

Our technical foundation: UBL NDR

- XML Naming and Design Rules originally intended for use within the UBL development effort have taken on a life of their own

    – Adopted by other XML design initiatives

    – Basis for UN/CEFACT NDR and subsequent efforts based on that

- A team has been working on a complete revision of the NDR documentation

- We expect to make major progress on the work of revision this week

- We also expect to create a Q/A tool that will generate schemas from the data models for comparison with the versions generated by eDoCreator

The future of UBL

- The UBL TC intends to stabilize UBL at 2.x
    - only minor releases in the foreseeable future
    - all backward-compatible with 2.0 to protect investments in software

- After 10 years, we have finally reached the last bullet in our OASIS TC charter: ***"To promote UBL to the status of an international standard for the conduct of XML-based electronic business"***

- We will be scheduling time later in the meeting to discuss the governance and maintenance of UBL following the release of UBL 2.1

This week's work items

- Subcommittee and team reports

- Consideration of structural revision of the UBL 2.1 PRD3 documentation

- Near-completion of UBL 2.1 PRD3 documentation (a few content changes are still pending)

- Near-completion of most other components of the PRD3 release package

- Revision of the OASIS DocBook template, with UBL as the use case

- Revision of 2.1 NDR documentation

- Discussion of governance of UBL after 2.1

- 2012 face-to-face meeting schedule

- Discussion of ASBIEs as XML constructs

- Review of UBL 2.1 work schedule

Reports

- SGTG (GKH): Three alternative envelope models have been delivered to the BDE team; a meeting is being scheduled to discuss. SGTG will be responsible for development of the spreadsheet-to-schema Q/A tool this week.

- HISC (GKH): No requests, no outstanding actions. Activity pending until we receive a request (accompanied by a resource) regarding UBL human interface.

- SBSC (GKH): We have received a number of contributions from Stephen Green proposing additional conformance clauses for a subset profile; add to the agenda for this week.

- NDR Team (BH/MC): BH has pulled the activity together and assigned chapters to team members. Juerg (NZ) has contributed major content to a new chapter 3. The result of our effort will be a much smaller document with fewer rules, renumbered/relabeled and better suited to prescriptive uses of the spec.

- Reports expected for the closing plenary: LATAMRSC, UN/CEFACT, MoUMG

Work/call schedule (preliminary)

Monday afternoon: Kars work sessions

Tuesday morning

- TSC call on Skype bridge

Tuesday afternoon

- 15:00 NDR con call on Skype bridge

Wednesday morning

- [available call slot]

Wednesday afternoon: Kars work sessions

Thursday morning

- Ad hoc governance call (not official TC meeting) 09:00 in Kars
- Closing plenary starting at 11 or so

Thursday afternoon: Kars work sessions

Friday: Kars work sessions

Doctype references in the hub doc

Right now we have for each process:

- Mention of one or more schemas

Right now we have in the package, for each doctype:

- Description in Table 1 (section 2.18)

- Link to .xsd in section 3.1

- Link to model in appendix C.2

- Link to summary report in appendix C.2

- Runtime schema (not linked from anywhere)

- RNC schema (linked from appendix G.2)

- Possibly an example (not linked from anywhere)

Proposal for restructuring the hub doc

Change 2.18 from table to list as follows:

- Document name
    - Description
    - Processes Involved (linked to process section?)
    - Submitter Role
    - Receiver Role
    - Annotated Schema (link)
    - Runtime Schema (link)
    - RNC Schema (link)
    - Document Model (links to odf, xls, uml)
    - Summary Report (link)
    - Example (link, if one exists)

Rename this "3.1" and substitute it for the existing Section 3.1

Delete the list of spreadsheets in Section C.2 (link to the new 3.1)

Not sure what to do yet with the common library

Requires explicit IDs on all sections and graphics