

Digital Service Providers Australia New Zealand

Access Point/SMP Migration & Exit Focus Group
Meeting 5, 14 July 2022

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Focus Group Purpose & Expected Outcomes

Purpose

The group is primarily for advisory and consultation purposes to facilitate open discussion and collaboration with stakeholders across the Peppol network, particularly end users and their providers, enabling them to:

- Share experiences and challenges throughout a stakeholders' Peppol journey
- Explore complex business and technical issues and propose solutions/options to local Peppol Authorities and/or OpenPeppol
- Consider opportunities/proposal to enhance the benefit/value of the Peppol framework to A-NZ end users

Expected Outcomes

Detailed discussions on specific issues will be addressed by focus groups, to enable in-depth understanding and cost-benefit analysis of various options. This may lead to:

- Proposing a solution/change to the relevant group, including the Peppol Authority and OpenPeppol for change management, e.g. via an OpenPeppol request for change (RFC).
- Forming a basis to develop guidance or best practice materials for the A-NZ Peppol community.
- Initiating discussion or escalating issues to OpenPeppol as required.

Today's Agenda

1. Acknowledgement of Country
2. Go through principles/practices
 1. Terms: BMS and SP
 2. Go through statements
 3. Questions or comments
3. Process for local Peppol Authorities and/or openPeppol to intervene and support deregistering end users from SML
4. Wrap up and Next steps

Agreed principles / recommended practice

- 1. All end users should have the ability to de-register. This should be enabled by the party whom the end user has a service contract with (e.g. BMS or Peppol SP).**
E.g. The deregistration process / information may be clearly stated in the contract or via product UI. For example, a button to request de-registration. This acknowledges SME end-users are often unaware of their Peppol SP.
- 2. Once the end user no longer has access to its service(s), the existing Service Provider (BMS or Peppol SP) must immediately deregister an end user from SML.** E.g.
 1. If an end user decides to switch to another BMS/Peppol SP; the deregistration date should be mutually agreed;
 2. If an end user loses access to services due to termination or suspension of licence/contract due to nil or late payments, the BMS/Peppol SP must deregister the end user from SML immediately.

The Peppol SP is responsible for ensuring the partnering BMS provider gives timely advice when a client leaves or has access removed.

- 3. Gaining SP (BMS or Peppol SP) cannot automatically 'force' the existing SP to release a Peppol ID. An end user can request deregistration:**
 1. With the BMS whom the end user has a contract/licence with
 2. as directed by the BMS, with the Peppol SP that integrates with the BMS
 3. With the Peppol SP whom the end user has a contract with.
- 4. The existing Service Provider (BMS or Peppol SP, whom the end user has a contract with) must verify that a deregistration request is valid, i.e. raised by an authenticated and authorised end user before completing deregistration.**

Agreed principles / recommended practice (Cont.)

5. **The existing SP (BMS or Peppol SP), should, in simple business terms, highlight the Peppol features/functions the end user will lose by switching.** The existing provider should provide enough information to support the end user to make an informed decision, which could specify:
 1. Which document type(s) is no longer supported;
 2. Which capability will be lost for each document type: send, receive, or both;
 3. A timeframe for the end user to consider and confirm whether they will proceed with deregistration
6. **'SLA' for single or small batch of deregistrations:**
 1. The technical process should be completed close to real time after the end users confirms their requests
 2. Practical considerations include communications between different system components (e.g. BMS to Peppol SP), or systems may have built-in schedules, e.g. updating user status every 24 hours.
 3. The above should be clearly documented in the service contract with the end user.
7. **'SLA' for bulk deregistration is negotiated on a case by case.**

Bulk deregistration may be involved when a BMS changes partnering Peppol SP or a Peppol SP ceases operation. This should be managed case by case (e.g. as negotiated between the BMS and the Peppol SP) and users in most cases will be unaware of the change.

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