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A-NZ Peppol Stakeholder Working Group - Access Point Migration & Exit Focus Group

Meeting Summary - 14 July 2022

Item #	Outcomes
1	**Introduction** Maggie Leese welcomed everyone to the group and acknowledged Traditional Owners in Australia and NZ. Andrew Stein acknowledged the new participants to the group.
2	**Focus group purpose and expected outcomes**
3	**Background on work completed so far** Acknowledged that the Access Point members of the Focus Group had met prior to bringing in the business participants to talk through access point migration and exit scenarios to draft a set of principles / recommended practice. Discussions so far have primarily focused on SMEs who will often not know about Peppol or who their Peppol Service Provider is when compared to larger organisations. Andrew covered the following terms used by the focus group and the meaning attributed to them: - Deregister - deregistering an end user (i.e. removing their SML listing) from their current Peppol Service Provider. This means that the end user's Peppol ID is "released" and can be registered by another provider. - BMS - Business Management Software which integrates with a Peppol Service Provider to provide eInvoicing services, e.g. accounting software or ERP. - SP - Service Provider which encompasses both Access Points and Service Metadata Publishers (SMPs) as many Access Points in A-NZ provider their own SMP services.
4	**Agreed principles / recommended practice** Andrew ran through the draft agreed principles / recommended practice and opened up to questions from the group. Question about educating end users on what deregistration means if they are not familiar with Peppol. It is anticipated that principle 5 will help with this education and provide end users with enough information to make an informed decision about deregistration. Feedback was given to state that while examples are provided, it will be up to the SP / BMS to determine the wording they'll provide to end users. Adding information around "deregistering will not stop you from being able to re-register again in the future" was also suggested to further educate users. The group discussed possible Service Level Agreements (SLAs) around deregistration. While the actual deregistration process will often be a commercial decision between the end user and the BMS / SP, it was agreed that an example SLA statement would be helpful. There was a suggestion to add further information to the following principles:

	● Principle 5 - BMS should indicate a timeframe to the end user about deregistration, once the end user confirms the request to leave e.g. "Thank you for confirming your request to deregister your Peppol service. The deregistration will be finalised within [specified time, e.g. 24 hours]." ● Principle 6 - "it should be as real time as possible" Discussion about large business / government Service Provider switches and how they should be handled. In summary: ● Assumption that a project manager will help coordinate the switch ● The existing and gaining Service Provider should cooperate and coordinate the switch so there is limited outage to the end user ● The end user isn't expected to be involved in the negotiating of the technical process ● End users (i.e. large business / government) should communicate to their customers / suppliers about any potential implications, e.g. service interruption and timeframe, similar to communicating system outages to stakeholders. During this discussion the importance of exit clauses in contracts between end users and Service Providers was noted both in terms of switching and Service Providers exiting the market. This has not been explicitly stated in conversations yet as it generally only applies to large businesses. Small businesses won't necessarily have any influence over their contracts with their BMS. It's anticipated that a working group will need to be formed in the future to examine the applicability of implementing the Peppol migration pattern. It was agreed that the current set of principles is a good starting point to address current issues. There was a question about how an end user would know about an exiting SP or if their BMS did switch their SP. It is expected that either the SP or BMS will communicate to their end users about this change and what they can expect in terms of different features and/or costs. In the next session, the group will look to replay some of the conversations had about when an SP or BMS is hostile. It was noted that while OpenPeppol can remove SML entries, there are no documented procedures on how this should happen including the expected communication to end users.
5	**Next steps** Andrew Stein and the A-NZ Peppol Authorities will provide an update and playback of the agreed upon principles at the A-NZ Peppol All Stakeholders Working Group meeting on 28 July. The next for the focus group will be scheduled for 4 August at 11.30am / 1.30pm NZST.
6	**Meeting close**