WELCOME BACK!

HOW WAS DINNER?

HOW DID YESTERDAY GO?

Agenda - Today

Wednesday, February 12, 2014 - 8:30 am – 4:30 pm (lunch provided)

- Team building exercise(s) throughout the day
- Determine Version to use
- Communication & Updates
- Tools used
- Issues Process
- Discussion on the high level business processes for the Order-to-Invoice process for the Buyers and Sellers
- Explanation of Business Use Cases (BUC)
- Review high level BUC from AEC Project – modify for CPCC
- AGIIS Data Synchronization Process
- Discussion on accountability

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Agenda - Today

Wednesday, February 12, 2014 (cont)

- Review the Business Rules from SC Project

- Review project template for Buyer & Seller

- Discussion on fears/concerns/constraints of the CPCC project

- Discuss data requirements for ShipNotice (shipment notification)

- Start on the data mapping for the ShipNotice message

- Wrap up day by 4:30 pm

- ***Dinner on your own****. Some may want to get together*

Validate Goals & Objectives

Goals & Objectives

- Effectively improve the supply chain by implementing transactions at a production-level exchange of XML-based messages that supports the order-to-invoice business process by Dec 31, 2015 with 2 major distributors (~10-20% of the Canadian crop protection (CP) sales) and 4 manufacturers (at least 3 with ~10-20% each of the CP business) - *(Does this need to be revisited?)*

- 80% of all participants will have connectivity with at least one trading partner by Dec 31, 2015. *(Does this need to be revisited?)*

- Leverage Ag eStandards, implementation business rules, AgGateway implementation tools, the AGIIS directory, and business use cases from the AEC Project to complete the review by May 31, 2014. *(Does this need to be revisited?)*

- Improve customer service and achieve response-time improvements for all participants. *(Does this need to be revisited?)*

Discussion on Scope

- Any concerns?

- Any companies not able to meet these timelines?

Determine Version

5.0 vs. 5.3

Version V5.0 vs V5.3

Discussion as to whether to go with the newest version of the standards V5.3:

- Pros: Minor changes from V5.0 so it is backward compatible; new structures for Seed including SeedCountPerPound, LotNumberQuantity and ProductFamilyName on SN & Invoice (which does not exist in V5.0); could be leveraged easier for Seed manufacturers; additional enumerations on some of the current V5.0 attributes;

- Cons: Some development costs for those implementing V5.0 in US or with Elemica;

Changes

V5.2 to V5.3
- Added "UFTRSCode" to cidxListProductIDAgency.
- Added "ResponsibleParty" to cidxListPartnerRoles.
- Added "GovernmentAssigned" to cidxListPartnerAgencyAttribute.

V5.1.1 to V5.2
- Added the following code list values to cidxListPriceType: FOBOriginPrice and FOBDestinationPrice
- Added the following code list value to cidxListReferenceType: TransferNumber
- Added the following code list value to cidxListPartnerRoles: Reporter
- Changed ProductInformation/PackagingInformation maximum occurrence from one to unbounded
- Added integer element SeedCountPerPound as a child of ProductSubLineItem. The occurrence is optional and unbounded.
- Added element LotQuantity to ProductSubLineItem. It is optional and may occur up to one time.

V5.0 to V5.1.1
- Added "ControlTotalDate" as an enumeration value to the simple type "cidxListEventDateType"
- Changed "EventDateTimeType" complex type compositor from sequence to choice and added "DateTimeRange" as an option

COMMUNICATION & UPDATES

Communication & Updates

Top 10 most threatening unsolved issues for companies and projects *(Partners in Leadership)*:

1. **Poor communication**
2. People development
3. Empowerment
4. Misalignment
5. Entitlement
6. Work and personal life imbalance
7. Poor performance
8. Senior management development
9. Cross function strife
10. Programistic

Communication & Updates

Communication	Distribution	Schedule
Project Update in the Newsletter	General Membership	Quarterly
Project Update	Council & Participants	Monthly
Participant's Update (during implementation)	Project coordinator	Monthly
Articles in trade journals?	Industry	?
Case Studies	Industry	?

PROJECT TOOLS

Project Tools

- Website – document storage
- Standards
  - 5.0/5.3 Ag eStandards Schemas - TBD
  - Mapping Spreadsheets – will be working on later
- Business Rules
  - Issues Process
    - Issue Tracker
    - AGW S&G team participation
- Business Use Cases – will be working on later
- Dashboard – track implementation

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Project Tools

- AGIIS Directory – discussing later
  - Data Synchronization process
- Technical data information
- T/P Checklist
- Buyer/Seller task template
- Roles & Responsibilities list
- AEC Documentation

Issues Process

Issues Process

- When an issue arises – tracking on our issues log and business log to capture

- B/T team discuss to come to resolution

- If unable to resolve, escalated to Project Board

- If issues is a recommendation to submit to Standards & Guidelines (S&G) Committee, participants need to submit request and attend meeting to explain and support request

- Some resolutions may become business rules, others may not

Example of Issues Log

Issue #	Project	Submit Date	Person / Company	Description of Implementation Issue	Review Date	Follow-up Action/Comments
1						
2						
3						

Issues Log - Example

Issue #	Submit Date	Person / Company	Description of Implementation Issue	Review Date	Follow-up Actions/Comments	Recommendation Date	Action/Experience/Suggested Solutions
1	01/22/04	J. Davis - Agrium	Request to consider a standard format for OrderResponse message in e-mail format as an option to XML response. Some distributors are unable to receive an OrderResponse electronically, so the manufacturers are sending emails instead of the XML message. There is a need for a standard format or possibly a stylesheet that would transform an OrderResponse into an email at the distributor location so as to not impact the manufacturer process.	2/11/04	Currently, 2 of the distributors are unable to receive an OrderResponse electronically, so the manufacturers are sending emails instead of the XML message, or possibly a stylesheet that would transform an OrderResponse into an email at the distributor location so as to not impact the manufacturer process. This is a technical issue that some form of work-around will need to be recommended.		A task force has been assigned to look into a standard format for OrderResponse email for the distributor to use at their end, so that it does not change the manufacturer process
3	01/22/04	Carol Hustedde	For Customer Pick-Up (CPU) orders, the following are elements that need to be transmitted (although they are optional for all other orders): In the OtherPartner structure - PartnerRole (attribute "ShipFrom"), PartnerName, PartnerIdentifier.		The Order T/F recommended that the elements be considered "recommended" for the Ag industry.		Added the elements to the mapping document as recommended.
4		G. Garrett	In the OrderCreateProperties, the manufacturers are asking the distributors to record that differ to indicate CPU. A couple were using the TransportMethodCode (value of "CE") and others were using the ShipmentTermsIdentifier (value of CPU). Distributors do not want to have to send and program for both elements, need resolution		Order task force reviewed on a number calls.		Resolution was that all manufacturers would program to receive the "CE" in the TransportMethodCode as the way to determine if the customer is picking up the order. The Elemica group of manufacturers will recode.

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Example of Business Rules

Number	Project	Issues Log #	Message(s) Affected	Key Words	Business Rules
1	AEC/SC	AEC #1	All	Recommended Elements	The Ag industry has business needs that differ from the industrial Chemical industry. With the schema standards, the Ag industry may use optional elements as "Recommended", which equates to "required to send" within the Ag industry for the Ag eStandards. The Seed segment also has some situations that elements may be required based on some conditions, these are then referred to as "conditional" (that it is only required in certain conditions).
2	AEC	AEC #3	All	DateTime	For version 4.0 or higher we use GMT time in the format =YYYY-MM-DDTHH:MM:SSZ". DO NOT send zero time until specifying midnight GMT. If you do not want to specify a specific time then Date should only be sent YYYY-MM-DD (such as in the element RequestedDeliveryDate).

AGW S&G Committee

- Need participation on S&G Committee
- Value:
  - Know what changes all the segments are working on
  - Providing input into those process – especially for this project
  - Support any requests this project proposes
- Volunteers?

TEAM EXERCISE

Instructions

Break into your "color" group

1. Review the list and as a group you have 10 minutes to provide the best answers.

2. Work as a group, and observe how you are working as a group.

Results

Results

- **Ignominious**
  - **Deserving shame; humiliating**
- **Diffident**
  - **Lacking self-confidence**
- **Variegated**
  - **Having marks of different colors**
- **Congeries**
  - **A collection**
- **Eremite**
  - **A hermit**

Results

- **Neophyte**
  - **A rookie**
- **Valetudinarian**
  - **A sick or weak person**
- **Ephemeron**
  - **Short-lived**
- **Irenic**
  - **Promoting peace**
- **Bricolage**
  - **Something constructed with whatever materials are available**

Results

- **Sylvan**
  - **Related to the forest**
- **Brobdingnagian**
  - **Very large; enormous**
- **Apogee**
  - **The apex or highest point**
- **Farrago**
  - **An assortment**
- **Quondam**
  - **Having occurred previously**

Results

- **Defenestrate**
  - **Throw out of a window**
- **Brio**
  - **Liveliness; animation**
- **Starveling**
  - **Of poor quality**
- **Nonagenarian**
  - **Someone aged 90-99**
- **Lacuna**
  - **An absent or missing part**

Terminology/Glossary

Review the Fuzzy Names

Terminology/Glossary

- Different companies – different terminology & processes
- Different countries – different terminology
- Sometimes we need to define terms
- We will need to capture – we didn't track well in the original AEC Project – other than in the Business Rules
- AgGateway has a glossary within S&G and as we look at term to be defined, that will be the first avenue to search – some terms may be regional

BUSINESS PROCESS & BUSINESS USE CASES

BUSINESS PROCESSES

Which processes does your company do?

Use Case Tutorial

Air Travel

Note: Much of the material in this section was taken from the book *Writing Effective Use Cases* by Alistair Cockburn, Copyright 2001 by Addison-Wesley.

Use Case

- A sequence of actions that actors perform within a system to achieve a particular goal.

Scenario

- A scenario reflects one instance of how a use case would execute under a given set of circumstances.

- Also know as *use case instance*, *instance scenario*, and *analysis scenario*.

- A use case collects together all the scenarios—successes and failures.

Stakeholder

- A stakeholder is someone or something that has a vested interest in the behavior of the system described in the use case.

Actor

- An actor is someone or something that interacts with the system for the purpose of completing an event (or accomplishing a task).

- Note: Every actor is a stakeholder, but not every stakeholder is an actor.

Primary Actor

- A primary actor is the stakeholder that calls on the system to deliver on of its services.

- The primary actor has a goal with respect to the system—one that can be satisfied by its operation.

- The primary actor is often, but on always, the actor who triggers the use case.

Basic Story for This Tutorial

- What happens when you travel on a commercial airline from Toronto to Winnipeg?

- Who or what are the actors?

- Who or what is the primary actor?

- Who or what are the other stakeholders?

Use Case Name

- Name the use case with an active verb phrase that represents the goal of the primary actor.
- The name sets the tone and association for the audience and can provide a focal point for the writer.
- Meaningless, generic names will not set reader expectations or provide a convenient reference point.
- An appropriate name provides a handle for the use case.

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Context of Use

- *Context of Use* is a longer statement of the goal, if needed, including its normal occurrence conditions.
- Simply stated, *Context of Use* is a brief description of the use case.

Scope

- *Scope* refers to the design, or business process, scope. *Scope* refers to the system being considered as black-box.

- This is a little more challenging to define in the context of business processes than it is for software applications.

Level

- There are three defined levels:
  - *User-Goal Level* is the goal the primary actor has in trying to get work done or the one the user has in using the system.
  - *Summary-Level* goals involve multiple user goals. They serve three purposes in describing the system:
    1. They show the context in which the user goals operate.
    2. They show the life-cycle sequencing of related goals.
    3. They provide a table of contents for the lower-level use cases.
  - *Subfunction-Level* goals are those required to carry out user goals.

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Preconditions

- Preconditions define what must be true before the use case can start.

- More formally: Constraints on the state of the system before the use case can be triggered.

Minimal Guarantees

- Minimal guarantees are the fewest promises the system makes to the stakeholders, particularly when the primary actor's goal cannot be achieved.

- This is optional—don't get hung up trying to come up with something.

Success Guarantees

- The *success guarantee* states what interests of the stakeholders are satisfied after a successful conclusion of the use case, either at the end of the main success scenario or at the end of a successful alternative path.

- It is generally additive to the minimal guarantees.

- Optional—don't get hung up trying to come up with something.

Trigger

- The trigger specifies the event that gets the use case started.

- Sometimes the trigger precedes the first step of the use case, sometimes it is the first step.

- Time can be a trigger (e.g. every night at 3 a.m. my disk defrag utility starts)

Main Success Scenario

- The *Main Success Scenario* is the scenario that represents the most common path to success (goal achievement).
- May also be referred to as *Flow of Events*.

Action Steps

- A simple action in which one actor accomplishes a task or passes information to another actor.

- Guidelines
  - Use simple grammar
  - Show clearly "who has the ball"
  - Write from a bird's eye view
  - Show the process moving forward
  - Show the actor's intent, not the movements

Extensions

- *Extensions* are deviations from the *Main Success Scenario.*
- *Extensions* are also referred to as *alternative flows* and *exceptions*.

Technology or Data Variations

- Technology or Data Variations express different ways in which a step can be accomplished. The *what* is the same, but the *how* differs.

- Optional—don't get hung up trying to come up with something.

Postconditions

- Postconditions define what must be true after the use case ends.

- More formally: Constraints on the state of the system after the use case has successfully completed.

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Use Case Factoring

- Factoring allows one to shorten use cases, making them more readable. It also may result in use cases that can be reused elsewhere.

- Break-out collections of steps that can form a meaningful use case on it's own.

- For our tutorial example, break out:
  - Check-in process
  - Security-clearance process
  - Boarding process
  - Arrival process

Questions?

Go to use cases

Break into your "color" teams

1. Review the Use Case given – review determine if it is valid

2. Determine what type of Summary or Sub-functional use cases

3. Return in 20 minutes (taking a bio or break during this time)

DATA SYNCHRONIZATION

Data Synchronization

- **What is Data Synchronization?**
  - **Data synchronization** is the process of establishing consistency among data from a source to a target data storage and vice versa and the continuous harmonization of the data over time. It is fundamental to a wide variety of applications, including file synchronization and mobile device synchronization e.g. for phones or PDAs (definition from Wikipedia)

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Data Synchronization

- **Challenges of Data Synchronization** - There are numerous challenges of implementing efficient and reliable data synchronization processes.
  - Not performed on regular basis – data become outdated/obsolete
  - Some prefer not to use literal information in their database –"In the field information is more accurate than the industry directory" – "data keeps changing"
  - Internal Data structures vary - Structuring the data difficult on the outbound or inbound – legacy systems
  - When conflicts of data occur, it must be managed and resolved - record update precedence or "record owner"

Data Synchronization

- **Why is it important to synchronize the data?**
  - To ensure that you and your Trading Partners (TPs) know what entities and products you are sending

- **Why use AGIIS?**
  - Industry agreed upon identifiers
  - One location for information
  - Industry and host maintained – not internally
  - Data can be imported into a business system in a standardized format
  - Allows for subsets - companies assigns their proprietary codes to the industry identifiers – only 1 cross-reference
  - Only the identifiers need to be sent - the content resides in each TP's or computer business system

Data Synchronization

Business Rules on Synchronization:

• All project participants will synchronize their data with the AGIIS directory.

• AGIIS identifiers will be used for all messages for the domain/agency attributes for PartnerIdentifier and ProductIdentier.

• The GLN/AWSA will be used to identify all entity locations used within the messages; AGIIS GTIN-14 will be used for product identification.

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Data Synchronization

Business Rules on Synchronization

- Synchronization means that partner systems and messages contain exactly the same literal AGIIS identifiers for the entities and products used. Synchronization does not mean that the partner systems and messages contain the literal AGIIS entity demographics or the literal AGIIS product name because valid reasons exist for some discrepancies.

- However, participants should be aware of and agree to the demographics and product names their trading partners will use. In general, the demographics and product names should be similar enough to what's in AGIIS so that it's clear they mean the same thing.

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Data Synchronization

Business Rules on Synchronization

- Product synchronization includes verification that the AGIIS Reporting UOM is the UOM used in all XML messages. Synchronization is a two-step process: 1) Each partner synchronizes with AGIIS. 2) Pairs of trading partners synchronize with each other to validate scope and descriptions (entity demographics and product names).
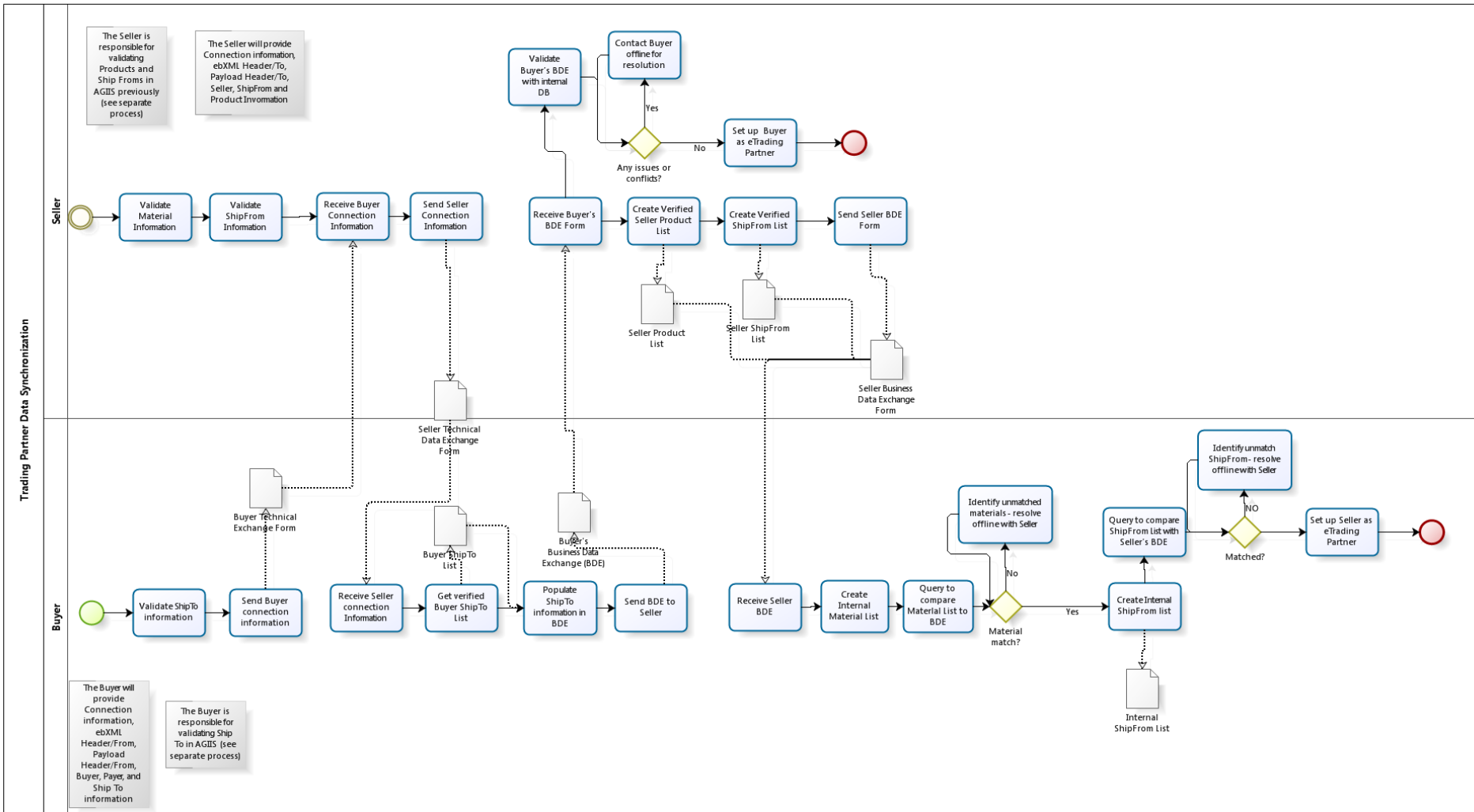
Data Synchronization

Business Rule (continued)

- **In general,** the demographics and product names should be similar enough to what's in AGIIS so that it's clear they mean the same thing. Product synchronization includes verification that the AGIIS Reporting UOM is the UOM used in all XML messages. Synchronization is a two-step process: 1) Each partner synchronizes with AGIIS. 2) Pairs of trading partners synchronize with each other to validate scope and descriptions (entity demographics and product names).

Identifiers

GS1 – is an organization in both US – CA

- GS1 – assigns GS1 prefixes to companies in their country
- GS1 prefixes are needed to create GLN (Global Location Number) and GTINs (Global Trade Item Numbers)
- AgGateway owns 55 GS1 (US) prefixes to use to assign GLNs in the US
- GS1 Canada will assign the GLNs for the Canadian locations
  - Rod will be working with GS1 to see if we can have a web services from AGIIS to GS1 CA
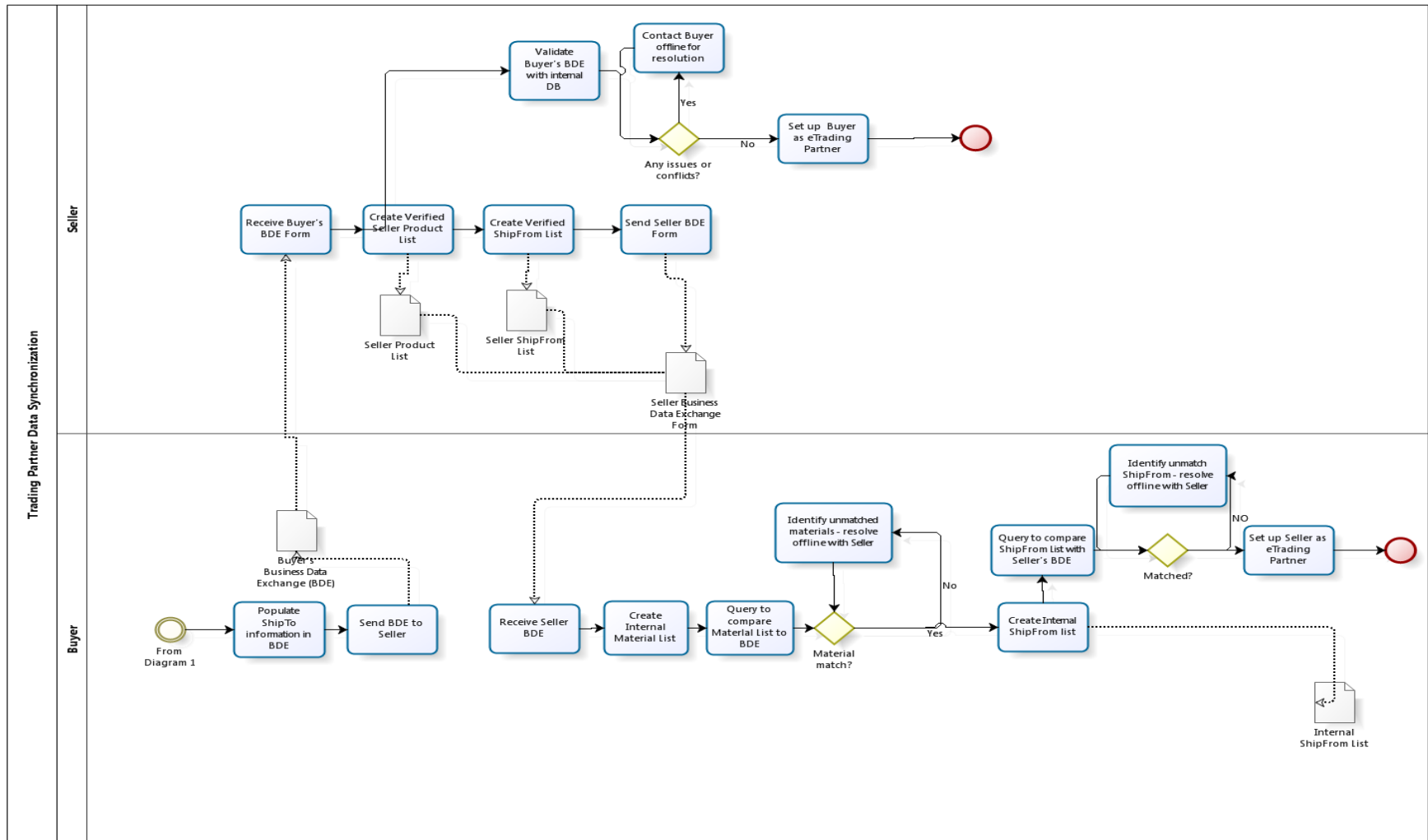
Data Synchronization
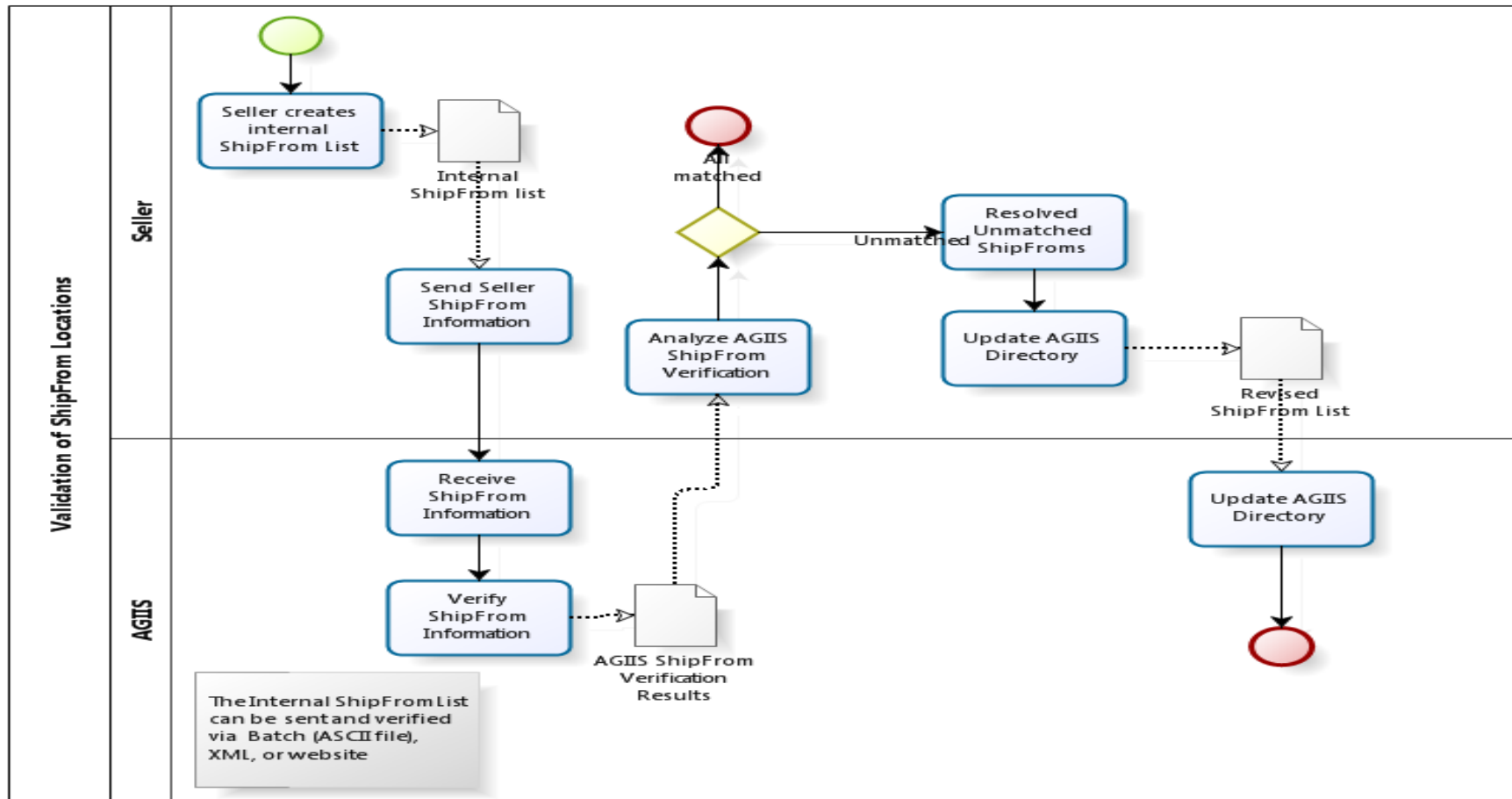# TP Process

Data Synchronization
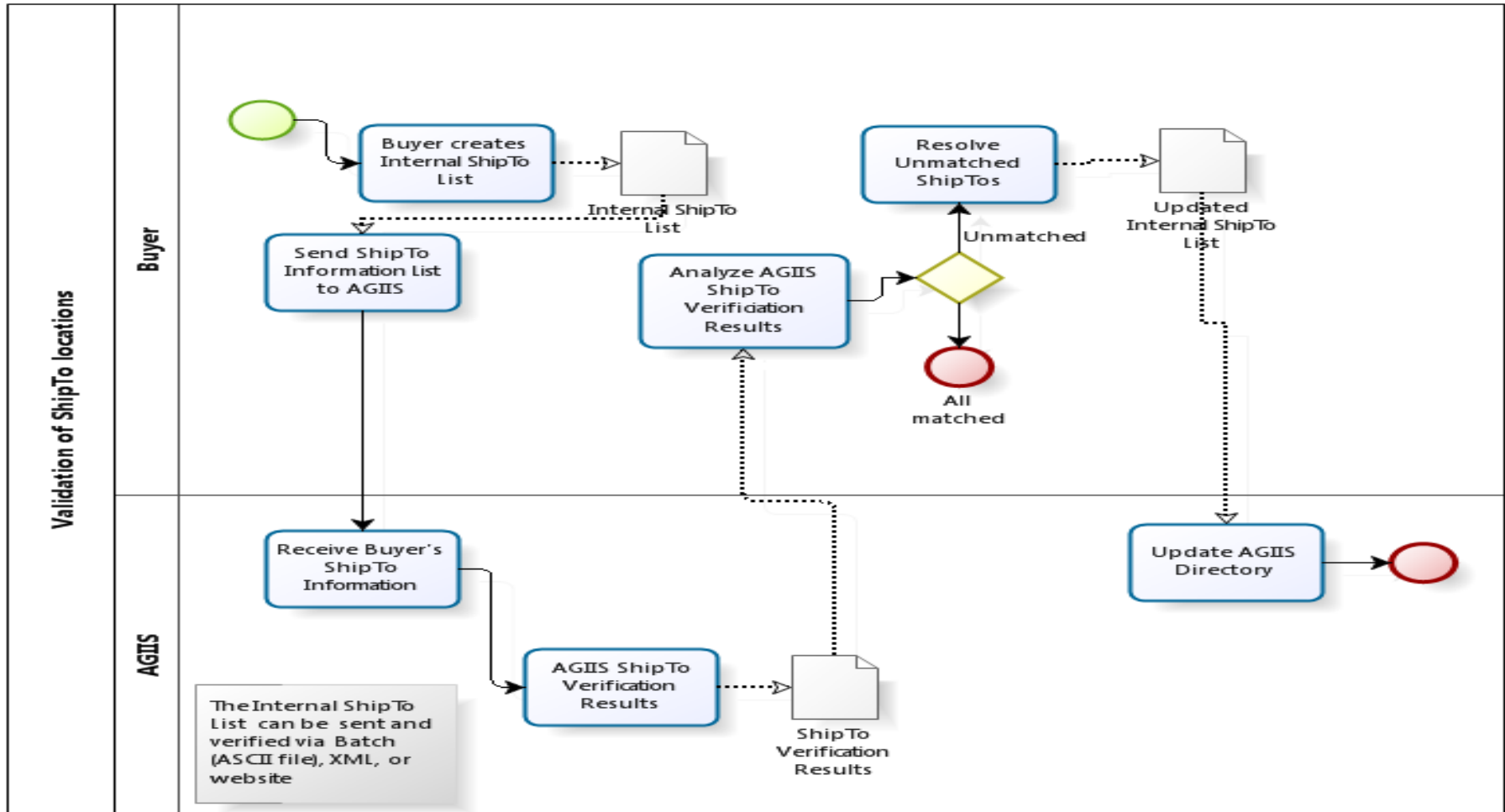# TP Process – Diagram 1
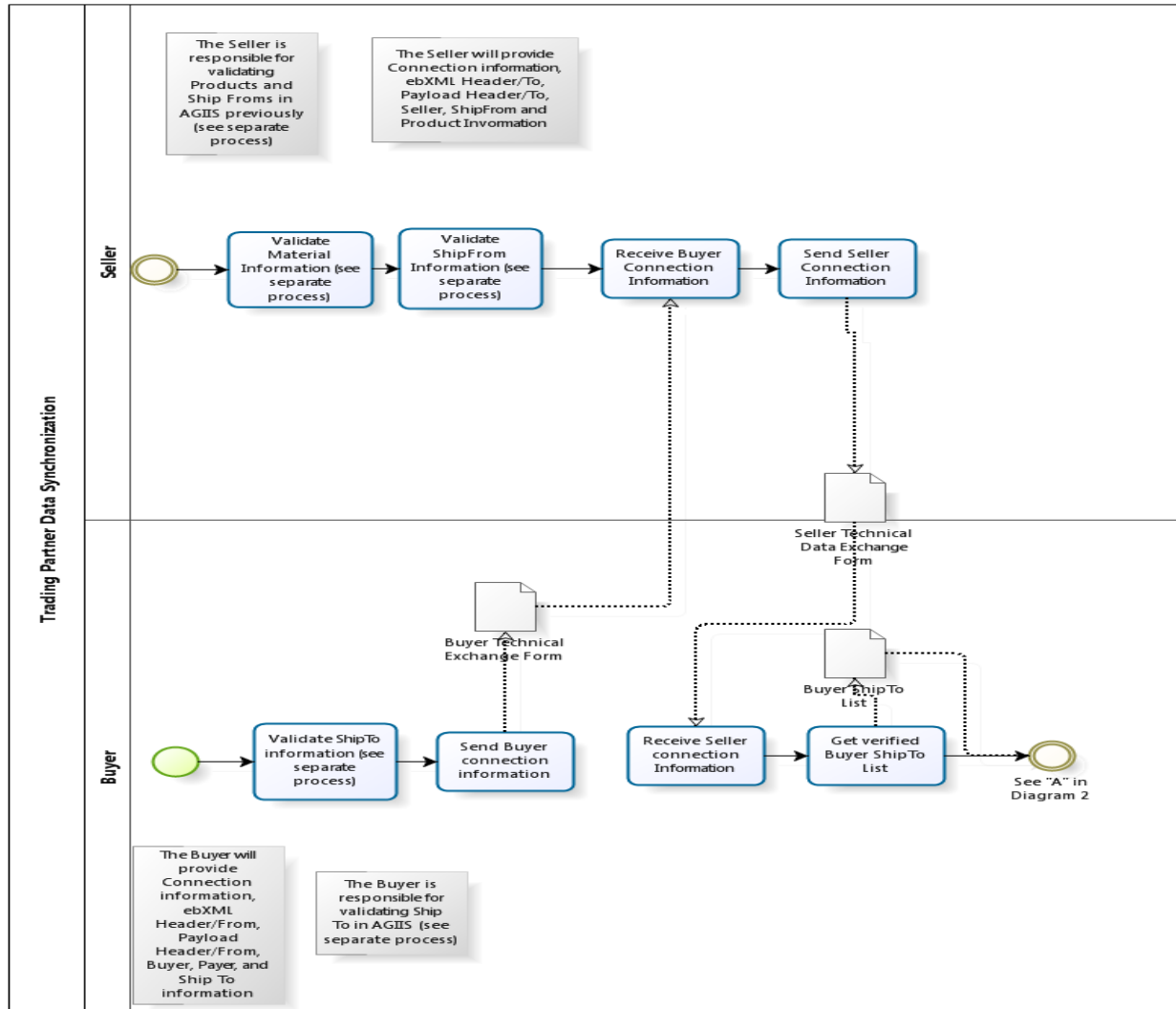
Data Synchronization
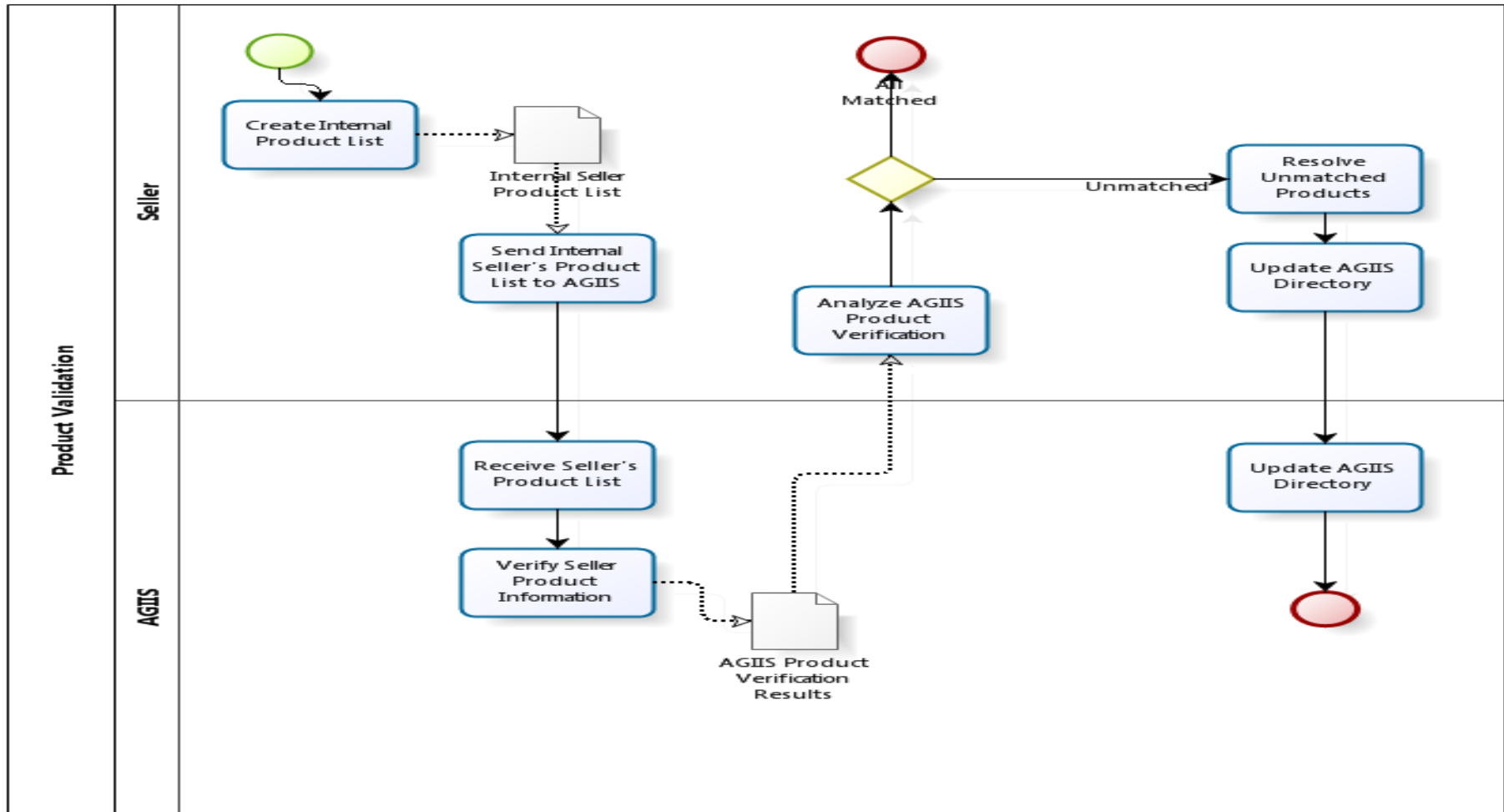# TP Process – Diagram 2

Validation of ShipFrom Locations

Validation of ShipTo Locations

Material Validation

QUESTIONS ON SYNCHRONIZATION?

Your source for eBusiness innovation.

Discussion on Fears & Concerns Constraints & Risks of the CPCC Project

Break into groups with the manufacturers in this room and Channel Partners in the Zea Roomand create a list of Fears & Concerns and another of Constraints & Risks

You have 10 minutes to complete

Fears/Concerns - Mfgr

- Unknown – what we don't know

- Canadian business isn't US

- Do we have the internal US resources (People)

- Internal Resource Competition

- How Big is this?

- Version Choices V5.0 vs V5.3

Constraints/Risks - Mfgrs

- Limited Channel partners to connect with

- Resources

  - $

  - Time

  - Scheduling

- DAS new SAP instance

- What about other customers?

- UNKNOWN

Fears/Constraints/Risks - CP

- Outnumbered – capacity to implement many at once (C)
- Timelines – business resource constraint (C)
- Master Data – GTIN $, GLN (F)
- Testing process /certification effort (F)
- Vendor experience (F)
- Organizational change management (F)
- Business stakeholder buy-in (F)
- Technical $ - resource constraints (C)
- How to calculate and prove ROI, IRR, NPV (F)
- Partner not meeting project milestones (F)
- What does this take to sustain (resources) (F)

REVIEW BUSINESS RULES FROM AEC PROJECT

DATA REQUIREMENTS FOR ORDERCREATE

Data Requirements Gathering

- All Buyers will be in the Zea Breakout Room
- Sellers will remain in the big room
- Select someone to scribe & someone to present to the group
- You are to collect 2 lists:
  1. Data requirements
  2. Data you would "like to have"

- What does "requirements" mean:
  - Absolutely need to have in order to place or receive an order
- "Like to have"
  - Anything that you don't absolutely need but would be nice to have

15 Minutes to complete

Data Requirements

- SoldTo (buying company)
- ShipTo
- BillTo
- Vendor/Seller
- Buyer
- Contact Name – placing order
- PO#
- PO Date
- PO Type
- Prod Code #
- Product Description & Pkg size
- Qty & UOM

- DeliveryDate
- Terms – Payment
- Terms – Shipping
- CPU or Deliver
- Price/Cost
- Currency
- Special Instructions – text/notes
- Cancel Date
- FOB

Wrap Up – for today

Dinner on your own – those that want to get together – Kathy said to meet in lobby .