

A-NZ Peppol Stakeholder Working Group - Attachments Focus Group

Meeting Summary - 19 September 2022

Item #	Outcomes
1	<p>Introduction Matt Lewis welcomed everyone to the group and acknowledged Traditional Owners in Australia and NZ and ran through the meeting agenda.</p>
2	<p>Developing principles / guidance Matt reviewed the topics covered so far and started to outline some of the principles and expected outcomes the group may look to develop.</p> <p>The group discussed:</p> <ul style="list-style-type: none"> • Varied Access Point (AP) and Business Management Software (BMS) capabilities and size/format limitations. • Limitations within the current Peppol BIS semantic model including the attachment function is not intended for including PDF copies in invoices but that this use continues to play an important role in change management in A-NZ. • Use of attachment metadata to support automation including potential to raise requests for change to OpenPeppol if required. <p>Matt acknowledged there are still ongoing conversations on use cases, education for sending attachments, recommendations to OpenPeppol and virus scanning.</p>
3	<p>Virus scanning attachments Matt shared that section 10 of the Peppol Service Provider Agreement (which applies to Corner 2 and Corner 3 participants) includes obligations for Service Providers to protect against and avoid the transmission of any viruses. The group discussed potential considerations for C1 and C4 participants to protect themselves and their trading partners. This is currently not mandated but it is highly encouraged.</p> <p>The group discussed the applicability of the Service Provider Agreement and whether the expectation for virus scanning applies equally to both C2s and C3s. The group broadly agreed that C2s "MUST" virus scan attachments but there was no consensus on whether C3s "MUST" or "SHOULD" virus scan. To reach a majority position, the group may vote on this or take it to the wider working group.</p> <p>Hilary Appleton (ATO) took an action to engage the Peppol Authority Governance team to see whether this topic came up when discussing the SP agreements and/or security working group.</p>
4	<p>Survey update Matt shared the draft of the attachments survey and ran through the questions for feedback. It was noted that the survey is aimed at C1s and C4s but that C2 and C3 Service Providers are also welcome to participate. The group agreed that it was</p>

	<p>beneficial to add in documents not currently supported as attachments.</p> <p>The survey is now available and will close at 5pm AEST on Friday 30 September. Complete the survey here.</p>
<p>5</p>	<p>Use cases</p> <p>Simon Foster asked the group for additional attachment use cases outside of those already discussed by the group i.e. legal notices / regulatory compliance and marketing messages. The group discussed the opportunity to add extra metadata (e.g. a code list with 10-15 items) to help with identifying attachments and how to handle them. This would be beneficial from an automation perspective and also allow accounts payable staff to filter out certain attachments.</p> <p>The group discussed and identified the following additional use cases:</p> <ul style="list-style-type: none"> ● Usage and statement data ● Supporting documentation e.g. timesheets, vehicle usage data ● CAD drawings <p>The group raised that some customers want to see more transactional or detailed data in attachments (i.e. usage data). It was noted this is more industry-based rather than interoperability-based. More line-level usage data to assist with approval was raised. The group also noted that other Peppol documents should not be embedded and referenced instead.</p> <p>The group agreed to review the list of use cases and get wider feedback to bring to the next meeting.</p> <p>The group also discussed other considerations including:</p> <ul style="list-style-type: none"> ● Time sensitivity of the attachment ● Has it been viewed by the user ● Security classification ● Does it require protection
<p>6</p>	<p>Wrap up and next steps</p> <p>At the next meeting, the group will look to:</p> <ul style="list-style-type: none"> ● Talk about metadata in more depth and consider the pre-award and post-award models - expect a pre-reading pack ● Cover the survey results and insights ● Cover other Peppol working groups running at the moment <p>It was noted that this group's recommendation on virus scanning will be shared to the Peppol security group for their consideration. DSPANZ, ATO and MBIE will also report back survey results and insights.</p> <p>A placeholder for the next meeting has been issued for 10 October at 1.00pm AEST / 3.00pm NZST.</p>
<p>7</p>	<p>Meeting close</p>