



BIS3 Upgrade

OpenPEPPOL Cross Community Face 2 Face Meeting
Brussels October 30-31, 2018

Objective of project



- Project to upgrade the following PEPPOL BIS specifications so that they are aligned with the PEPPOL BIS5 invoice specification which is based on the CEN/EN 16931 eInvoicing standard.
 - PEPPOL BIS 1A Catalogue Only
 - PEPPOL BIS 3A Order Only
 - PEPPOL BIS 18A Punch Out
 - PEPPOL BIS 28A Ordering
 - PEPPOL BIS 30A Despatch Advice
 - PEPPOL BIS 36A Message Level Response
 - PEPPOL BIS 42A Order Agreement
 - PEPPOL BIS 63A Invoice Message Response

Key tasks

- Aligning with Invoice BIS.
 - Changing documentation format from Word to AsciiDoc.
 - Processing and adoption of new requirements RFC 's.
 - Adopting unit testing for validation objects.
 - Aligning Syntax bindings between documents.
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- Only concerned with UBL 2.1 syntax.





Alignments



Business terms
VAT
Codes and Identifiers
Rules and validations
UBL syntax binding
Documentation

Business terms



- Qualified reference elements added to Order.
- Removed type and date from contract references
- All addresses changed to include 3 lines instead of two.
- Added address information for tax representatives, where appropriate.
- Use of business terms aligned across BIS specifications.
- Use of label elements aligned between Order agreement and Punch Out.
- Contact information aligned across BIS.
- Allowance and charge classes aligned in terms of use of percentage, reason code and VAT.

VAT

- Exchange rates for VAT currencies removed.
- VAT calculation aligned with EN calculation model.
- Structure of VAT information aligned with EN VAT structure.



Code and identifiers



- Customization and profile identifiers made mandatory in all BIS.
- Party and item identifiers restricted to ICD code list.
- Aligning use of code lists, examples are the allowance/charge lists and VAT category codes.
- Assigning fixed code lists and removing requirements for code attributes.
- Action code lists aligned between BIS's.

Rules and validations



- Rule mandating either sellers or standard item Id added to all except Order.
- Internal calculation of allowances and charges aligned.
- Added validations to prevent use of empty elements.
- Automated unit testing adopted for all BIS using code snippets instead of full files.
- Rules separated into Basic rule and Business rules. Basic rules auto generated.
- Various redundant rules removed.
- Validation on elements values and calculations aligned with EN.

UBL syntax bindings



- Alignment of syntax bindings.
- Party name remapped to party legal name.
- "Your reference" remapped to Customer reference from Buyer/Contact/Id

Documentation



- All documentation moved to AsciiDoc or XML form and maintained as code in GitHub.
- BIS specifications moved from Word to browsable website.
- Data model and syntax bindings moved from BIS document to browsable data model.
- Code lists for all BIS maintained jointly and hyperlinked where used.



Requests for change



General



- Price type element modified in Catalogue, Punch out and Order Agreement.
- Harmonize Contracted Item Indicator and reference to contract.
- BuyersItemIdentification element in the BIS 28A Ordering and 30A Despatch Advice messages.

Order



- **Added** Batch/LOT and serial numbers
- **Add** cac:DespatchLine\cac:Item\cac:AdditionalItemProperty,
- **Add** description to BIS specification

Despatch Advice



- **Add** postal Address information and Person information
 - DespatchSupplierParty, SellerSupplierParty, BuyerCustomerParty, OriginatorCustomerParty
- **Order** reference added on line level.
- Change to DespatchAdvice BIS 30A, SFTI 20170622.xlsx

Order Response



- **Use** code list 1229 instead of 1225 as status code on line level.
- **Introduce** the use of line status code to indicate already delivered items.
- **Introduce** a document status code to confirm order reception.

Punch Out



- **Added** delivery address to price on line level.
- **Introduce** support for reserving goods by adding line validity period.
- **Item** specification document reference made unbounded.

Catalogue



- **Enable** the use of standard item numbers to reference between related items.



Review

Received comments

- Italy
- Equinor
- Sweden
- Norway





Migration plan



Main migration steps



- A – Phase in
 - date at which the updated BIS becomes supported in the PEPPOL network as an optional specification. At this date it should be able to download any specification for the updated PEPPOL BIS.
- B – Transition
 - the date at which the updated BIS replaces the current BIS as the mandatory element. The previously mandatory BIS becomes optional.
- C – Phase out
 - the date after which the BIS that was mandatory at “A”, and became optional at “B”, is no longer supported in the PEPPOL network.

Migration dates



- A Phase in date, November 15th 2018
- B Transition date, April 18th 2019, same as BIS3 Billing transition/deadline.
- C Phase out date, December 31st 2019.

Migration rules



- “Old” End-users registered in a SMP before the phase-in date (2018-11-15)
 - It is mandatory to support the current PEPPOL BIS versions that are registered in the SMP for an individual end user, until the transition date (2019-04-18).
 - Supporting new PEPPOL BIS versions is optional until the transition date (2019-04-18).
- “New” End-users registered in a SMP after the phase-in date A (2018-11-15)
 - It is optional to support the current PEPPOL BIS versions and the new PEPPOL BIS versions that are registered in the SMP for an individual end user until the transition date (2019-04-18).
- For ALL end-users after the transition date B (2019-04-18)
 - After the transition, the PEPPOL BIS3 Upgrade becomes mandatory and the PEPPOL BIS2 Current becomes optional.
- For ALL end-users after the Phase-out date C (2019-12-31)
 - BIS2 messages can no longer be exchanged in the PEPPOL network.