



PA roles and responsibilities

PA introduction session 3

Agenda

- PA key activities
 - PA Key Obligations in relation to local PEPPOL Governance
 - PA key obligations in relation to global OpenPEPPOL Collaboration
 - Local PA Management and Administration
 - PA feedback to Operating Office
 - Introduction to AP & SMP Dissemination and recruitment
 - Introduction to AP & SMP onboarding
 - Introduction to PA collaboration, knowledge sharing & dispute handling
 - Introduction to Usage reporting and statistics
 - Introduction to Global PA recruitment
 - PA involvement in OpenPEPPOL activities
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PA key activities

Local PEPPOL Authority activities

- PA Management and Administration
- Local PEPPOL Governance (TIA)
- AP & SMP Dissemination and recruitment (incl. local promotion and marketing)
- AP & SMP onboarding, education and D2D support
- Usage reporting and statistics

Non local PEPPOL Authority activities

- PA cross boarder collaboration, knowledge sharing and dispute handling
 - Support to Global PA recruitment
 - Participation in OpenPEPPOL, General Assembly, communities, workgroups etc..
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PA Key obligations in relation to local PEPPOL Governance

- Signing PEPPOL Access Point (AP) and Service Metadata Publisher (SMP) provider agreements with service providers, ensuring that they comply with the PEPPOL Transport Infrastructure Agreements (TIA) and protect the trustworthiness of the PEPPOL eDelivery network, its model and operations.
- Establishing procedures to monitor and control the service provider on-boarding, ensuring that the necessary tests have been executed according to the terms and conditions of the TIA
- Ensuring that all of their AP and SMP providers join OpenPEPPOL as members
- Providing support to AP and SMP providers during on-boarding and operations.
- Monitoring and following up on the performance of the AP/SMP providers in areas such as
 - Service Level Agreement compliance.
 - Disturbances in availability and/or performance of the AP/SMP service.
- Providing OpenPEPPOL AISBL with aggregated data regarding adoption and usage statistics on a regular basis.

PA key obligations in relation to global OpenPEPPOL Collaboration

- Ensure local dissemination of any updates to legal documentation, technical specification or implementation guidelines.
- Participate proactive in PA cross boarder collaboration, knowledge sharing and dispute handling.
- Support dissemination and implementation of Official OpenPEPPOL viewpoints and statements.
- Participate active in OpenPEPPOL CC & WG activities
- Support OpenPeppol AISBL in PA recruitment and on-boarding activities

Local PA Management and Administration

There is no Global demand to the organization of the Local PA, as long as it is in line with OpenPEPPOL Statutes, and supports the global processes and procedures of the organization:

- Legal documentation (including TIA documents) are to be maintained and archived locally, enabling OpenPEPPOL access on demand.
 - On-boarding of New PA or SMP's are to be reported to OpenPEPPOL Operating Office, to ensure that the mandatory membership is obtained
 - Changes in contact persons, addresses and/or organizational status are to be reported to OpenPEPPOL Operating Office
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PA feed-back to Operating Office

These are the responsibilities and area of collaboration with the OpenPEPPOL Operating Office

- ▶▶ Enabling access for Operating Office to Legal documentation (including TIA documents)
- ▶▶ Provide feed-back on changes in their TIA Annex 1 and 5 signed with OpenPEPPOL AISBL (to be presented to and approved by the MC)
- ▶▶ Provide feed-back on changes in the TIA signed with AP/SMP's
- ▶▶ Provide feed-back on address changes for AP/SMP's
- ▶▶ Change requests:
 - ▶▶ In TIA directly to CC leader (TICC) – Sven Rasmussen
 - ▶▶ For the BIS directly to CC leader (Post-Award) – Sören Pedersen
 - ▶▶ In eTendering etc. directly to CC leader (Pre-Award) – Isabella Rapisarda
- ▶▶ Technical alerts for publication on peppol.eu
- ▶▶ Local PA events regarding PEPPOL for publication on peppol.eu

Introduction to AP & SMP

Dissemination and recruitment

- AP & SMP members are free to choose any Open PEPPOLPA as their Authority
- By choosing a national PA as authority the AP/SMP members should be sure to apply to local legislation
- The local PA provides the member with the full Agreement package and support the AP/SMP during the TIA signing process.
- The Local PA supports the new member during the Test and implementation phase.
- The new AP/SMP needs to have been approved as an OpenPEPPOL member before the PA can initiate the request for a Pilot/Test Certificate.

Obligations of the Local PA

- Ensure validity and storage of legal documents
- Support and coordinate the AP/SMP test process
- Coordinate national activities for local AP/SMP members

OpenPEPPOL AISBL provides; updates to legal documentation, access to formal marketing materials and handles the membership approval process.

Introduction to AP & SMP onboarding

Application

1. Membership approval by MC
2. Sign TIA (Transport Infrastructure Agreements) with a PEPPOL Authority
3. Gather and Archive legal documentation

Step 1 is described in Membership approval guideline.

Step 2 is described in Guideline for TIA signing and issuing of certificates

Testing

1. The PEPPOL Authority sends a request for the TEST certificate, including TIA Annex 1 and copy of company registration documentation, to the PEPPOL Certification Authority (DIGST).
2. The PEPPOL Certification Authority prepares the test certificate and sends guidance to the Service Provider.
3. The Service Provider downloads Test certificate and executes test procedures.
4. The Service Provider sends documentation for test procedures to the PEPPOL Authority.

Certificate

1. The PEPPOL Authority sends the request for Production certificate to the PEPPOL Certification Authority
2. The PEPPOL Certification Authority prepares the production certificate and sends guidance to the Service Provider
3. The Service Provider downloads Production certificate and enters into production.
4. The AP/ SMP receives the OpenPEPPOL Certified logo
5. The AP/SMP can request for a OpenPEPPOL Certification letter

Step 4 is described in the TIA & Certification issuing guideline

Step 6 is described in the Accreditation letter guideline

Introduction to Usage reporting and statistics

The usage and statistics reporting is about showcasing the number of transactions going through the PEPPOL network (AP/SMP), counting the various transactions of invoices (eDelivery), which AP's has the highest number of receivers etc.

See examples of reporting below:

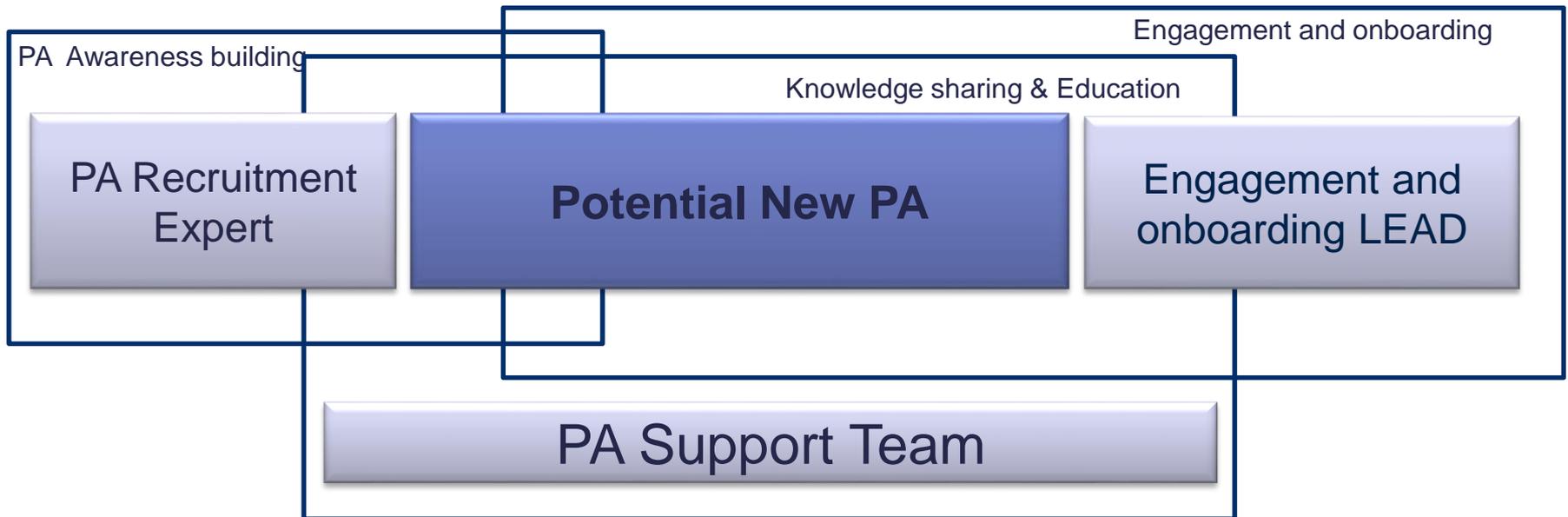
Top 10 - transaction in April		
Nr:	Aksesspunkt	Antall transaksjoner
1	Visma AutoInvoice	595 998
2	EVERY AS	485 065
3	Nets Norway AS	274 300
4	Basware	224 892
5	OpusCapita	169 590
6	Logiq AS	146 369
7	Compello AS	129 681
8	Pagero AB	98 219
9	Telenor Norge AS	88 066
10	IBX Norway A/S	79 409

EXAMPLE

Introduction Global PA recruitment: Collaboration model

OpenPEPPOL Managing Committee

Recruitment Coordinator



OO / BOM

Introduction Global PA recruitment

Activity overview



PA involvement in OpenPEPPOL activities

All PA's are invited to participate in

- OpenPEPPOL General Assembly (member privilege)
- Open PEPPOL PA Forum & PA summits (Exclusive PA privilege)
- OpenPEPPOL coordinating communities (member privilege)
- OpenPEPPOL Work groups (member privilege)
- OpenPEPPOL PA recruitment and support (Exclusive PA privilege)
- OpenPEPPOI Appointed Taskforce (Exclusive privilege)