



JOINT ELECTRONIC COMMERCE PROGRAM OFFICE

7676 Old Springhouse Road
McLean, Virginia 22102

Logistics EDI IPT

April 2, 1999

MEMORANDUM FOR: DISTRIBUTION

SUBJECT: Adoption of Commercial EDI Standards for DoD Logistics Business Transactions - Integrated Product Team (IPT)

The next meeting of subject IPT will commence at 0800 on April 22, 1999 at the Logistics Management Institute (LMI), McLean, VA. The tentative agenda is provided below (see Web site www.log.edi.migration.hq.dla.mil for administrative details). Attached for your review and comment are draft minutes and actions that resulted from the March 18-19, 1999 meeting. Subject to comment, the IPT Chairman will approve these minutes and actions on April 22, 1999. Point of contact is Mr. George Kingsley, (703) 767-0068. george_kingsley@hq.dla.mil.

Tentative Agenda:

<i>Information Briefings</i>	<i>Decision Topics</i>
• Implementation Plan Sections (Section Leads)	
• EDI Policy Status	
• DISA Architecture	
• Chairman Updates Actions	


RICHARD L. MODELL
Lt Col, USAF
IPT Chairman

Attachments:

1. Minutes of Meeting
2. Attendees
3. Action Items

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Director, Joint Electronic Commerce Program Office (CTC), (PTI)

Minutes
Adoption of Commercial EDI Standards for DoD Logistics Business Transactions
Integrated Product Team (IPT), March 18-19, 1999

The meeting commenced with the Chairman thanking everyone for attending, administrative announcements, introductions, and a review of the agenda. He stressed that much of the administrative work was behind the IPT and the task of writing the Implementation Plan was now our challenge. He went on to state that to meet this challenge, the entire IPT must keep an open mind and be flexible to new and innovative ideas and suggestions.

Breakout Sessions: The primary focus of this meeting was to provide Implementation Plan action groups an opportunity to meet (breakout sessions). These meetings were broken into two four-hour sessions over the course of the two-day meeting. For convenience, these minutes are structured to reflect these breakout sessions and subsequent action group status and discussions as a continuous flow.

- The Chairman began with a review of the Implementation Plan short-term (time-line) goals. The next step in the process of developing the Implementation Plan is the development of a “skeleton draft.” This draft will provide the IPT with a mechanism for determining weaknesses, gaps, requirements for additional action groups, etc. To this end, action group drafts should be provided to the LMI editor by April 6, 1999. The editor will develop the skeleton draft and provide the results to the membership via email on April 20, 1999. The primary focus of the April 22, 1999 IPT meeting will be to evaluate the plan content and develop a strategy for moving the process forward. At this point, the Chairman adjourned the IPT and moved the membership to their action groups with the following objectives:
 - ◆ Define and approve a section outline.
 - ◆ Identify action group internal issues and tasks associated with section development (writing, future meeting requirements, time lines, etc.)
 - ◆ Identify external issues and tasks associated with section development (coordination with other action groups, research, expertise requirements, etc.)
 - ◆ Identify section open issues and tasks.
 - ◆ In light of session objectives, develop a plan of action to satisfy implementation plan time line goals.
 - ◆ Provide a plan of action briefing to the IPT.
- Open IPT discussions resulting from action group briefings:
 - ◆ With the exception of the Navy, the IPT felt strongly that a “sunset date” must be established for the Services’ and Agencies’ use of DLSS. The underlying premise is that without a date, the DLSS users will be reluctant to move away from an established system that seems to have utility. The Chairman stressed the DUSD(L)(LSM) position that EDI is an enabler to business system processes and

as such, the replacement of DLSS must be an evolutionary process. The fundamental IPT position remained unchanged; a date must be established if the transition is to be successful. The discussion concluded with the Chairman suggesting that the membership raise this issue to their Logistics Information Board (LIB) members. This suggestion was based on the fact that the DoD EDI policy will be staffed through the LIB and as such is a logical forum to revisit this issue.

- ◆ The scope of the Implementation Plan was discussed. There was unanimous support for expanding the plan to include other EDI standards (UN/EDIFACT, XML, Shared Data Environment, etc.) that may have utility to the Department over time. On the other hand, there was also unanimous support for limiting the scope of this IPT to the implementation of ANSI ASC X12 standards for data transaction exchanges. The IPT agreed that ANSI ASC X12 standards offer the Department the best alternative available and provide a logical stepping stone to other less defined/established standards under development. The Chairman agreed that other EDI standards would be mentioned, but the focus of this Implementation Plan will be on the phased implementation of ANSI ASC X12 standards within DoD.
- ◆ Definitions of legacy and new systems were discussed. The Chairman made two suggestions relative to this discussion. First, he did not object to deleting the terms (legacy and new systems) and replacing them with an alternative such as DLMS compliant and non-DLMS compliant. However, he did leave the final determination open until after the development of the section dealing specifically with these terms (Part 2). The second suggestion was to combine the new and legacy system sections/action groups of the Implementation Plan. This suggestion was unanimously supported by the IPT in light of the duplication of many of the sub-elements of these two topics.
- ◆ The requirement for Service and Agency Implementation Plans was the next issue discussed. There was confusion regarding the timing of these plans (180 days after the completion of the over arching plan?) and whether or not the corporate plan could be approved without the Service and Agency plans. The Chairman left this issue open with the following guidance to the IPT/action groups: The corporate plan, at a minimum, must address what is required to be included in Service and Agency plans (provide an outline); what is required of the Service and Agencies in order to implement (timing, reporting, testing, training etc.); what are the corporate requirements that must be established to support the Service and Agency plans (technical and operational).
- ◆ The final topic discussed was the requirement to estimate Implementation Plan costs. These costs are those associated with corporate requirements (translation, mapping services, IC development, organizational costs, training, testing, etc.). The Chairman stressed that the final product (Implementation Plan) must estimate these costs over time. In addition, there must also be a strategy developed that can be provided to OSD that defines what type funding is required and in what time frame.

- Outlined below are the individual action group status and their current plan of action:

Action Group	Plan of Action
Introduction	This portion of the plan is being written off-line by the IPT support group. On-track to meet April 6, 1999 suspense to editor.
DLMS Implementation (New Systems) (Legacy Systems)	Initially, this section was composed of two action groups. As a result of this meeting, the groups were combined. The combined group will meet to approve a revised outline and assign writing responsibilities. There is a possibility of slippage beyond the April 6, 1999 suspense, but this should not affect the final suspense to have a skeleton draft by April 20, 1999.
Implementation Management Plan	This section is on-track to meet the April 6, 1999 suspense to the editor. The first cut draft is complete and being reviewed by the section members. The action group will re-visit the requirement for Appendix E and report back to the IPT.
Operation Management Plan	This section is on-track to meet the April 6, 1999 suspense to the editor. The first cut draft is complete and being reviewed by the section members.
Operating Concept	This section will conduct off-line meetings to further define the outline and assign writing responsibilities. There is a possibility of slippage beyond the April 6, 1999 suspense, but this should not affect the final suspense to have a skeleton draft by April 20, 1999.
Architecture	This section will conduct an off-line meeting on April 9, 1999. Their goal is to have the final draft to the editor NLT April 12, 1999.

- **Action Item Updates:**

- ◆ Minutes:

- ◇ The February 9-10, 1999 meeting minutes were approved as written.
- ◇ The March 4, 1999 meeting minutes were approved with one change. Page 6, second bullet, change “priorities” to read “criteria”.

- ◆ Funding nominations: The Chairman provided the IPT with the final list of projects selected for funding by the IPT funding action group. The list was unanimously approved by the IPT. Shown below are the next steps in the process:

- ◇ Director JECPO approval – April 1, 1999.
- ◇ Service and Agency funding requirement determinations (O&M vs Procurement).
- ◇ JECPO MIPR funds – week of April 5, 1999.

- ◇ Components send plans to JECPO – within 30 days of receipt of MIPR.
- ◇ Quarterly status updates to JECPO.

- ◆ The Chairman provided a short update on the status of the DoD EDI policy. The draft policy had been delivered to DUSD(L)(LSM) and it was in process. In addition, he mentioned that he would attempt to provide a copy of the draft policy to the IPT membership as soon as it was deemed releasable by the OSD staff.

- ◆ The Chairman updated the IPT on several ongoing IPT actions (2-9-99-04, 2-9-99-06, 2-10-99-01, 2-10-99-02, 3-4-99-01, and 3-4-99-03). Details of these actions can be found at attachment 3.

- ◆ The date of the next IPT meeting was the final topic of discussion. After canvassing the group to determine calendar conflicts imposed by the upcoming DISA conference, the Chairman moved the date of the next meeting from April 15, 1999 to April 22, 1999.

Testing Support: An information briefing was provided that outlined the Joint Interoperability Test Command's (JITC) capabilities. JITC provides a full range of testing support: program management; development of oversight and assistance tools; system acceptance and operational execution criteria. The briefer stressed that it is important to include testing early in the requirement development process. This involvement provides the tester an opportunity to be fully versed in strategies, definitions, concepts of operations, etc. This, in turn, reduces time and energy required later when bringing the tester up to speed on the total test requirement. JITC views their testing support capabilities from three perspectives: performance (load, stress, scalability [X12 and UDF transactions, Web-based including SSL, 100% tracking]); functional (tailored test for new features, live user input, Y2K assessment); operational (realistic scenarios and live data replay, multi-location capability, end-to-end assessment). JITC is currently supporting a number of other DoD organizations, and program examples include GCCS, GTN, DFAS, JECPO, DLA, etc. This briefing concluded with the Chairman thanking the briefer and suggesting that he may want to become involved in the development of the testing portion of the plan.

The meeting adjourned with the chairman thanking all for their participation and valuable insights. He went on to stress the importance of moving their portions of the Implementation Plan on to the LMI editor by the April 6, 1999 suspense date.

Attendees
Adoption of Commercial EDI Standards for
DoD Logistics Business Transactions, IPT, March 18-19, 1999

<i>Army</i>	<i>Navy</i>	<i>Air Force</i>	<i>USMC</i>
Ms. Dunnington	Mr. Minnick	Ms. Larson	Ms. Matsumoto
Ms. Spry	Cdr Smith	Ms. Richardson	Lt Col McGovern
Ms. Akins		Ms. Gregory	
MAJ Nelson		Maj Westgate	
Mr. Carey			
Mr. Hagadorn			
<i>JITC</i>	<i>DLA</i>	<i>TRANSCOM</i>	<i>Coast Guard</i>
Mr. Lynch	Ms. Broussard	LTC Perry	LT Copeland
	Ms. Pavlik	Mr. Creedon	
<i>NSA</i>	<i>MEDLOG</i>	<i>DFAS</i>	<i>DSCA</i>
Mr. Hobles	Ms. Agnew	Ms. Hughes	Mr. Freedenthal
<i>DISA</i>	<i>DLIS</i>	<i>JTAV</i>	Mr. Goldstein
Mr. Law	Mr. Behrendt	Mr. Crisci	Ms. Taylor
Mr. Hayes			<i>DLMSO/JECPO</i>
Mr. Kye			Mr. Yeakel
			Mr. Johnson, James
			Mr. Osterhus
			Lt Col Modell
			Mr. Johnson, Lenny
			Mr. St. Mark
			Mr. Pipan
			Ms. Burns
			Ms. Savage
			Ms. Johnson
			Mr. Thomas
			Ms. Hilert
			Mr. Egan
			Mr. Lewis
			Ms. Amyx
			Mr. Kingsley
			Mr. Gower

1-20-99-03	<p>Approve Implementation Plan Outline -</p> <ul style="list-style-type: none"> • Mr. Mark Crawford (project facilitator) will modify current Implementation Plan Outline with a sentence or two for each major heading and provide to IPT members by 1/28/99. IPT members will review and provide comments by 2/5/99 to Mr. Crawford. Mr. Crawford will brief for approval at the 2/9-10/99 meeting. • Chairman will assign Action Group leads for developing the following sections of the Implementation Plan: <ul style="list-style-type: none"> ◆ Part 1-Introduction ◆ Part 2 – DLMS Implementation Plans <ul style="list-style-type: none"> ◇ New Systems (separate group) ◇ Legacy Systems (separate group) ◆ Part 3 – Implementation Management Plans ◆ Part 4 – Operation Management Plans ◆ Appendix A – Operating Concept • Tasking will include a “data call” for each of the Services and DLA to identify by name Action Group leads and support members for each formed Action Group. In addition, Chairman will name IPT Support Group facilitator(s) for each Action Group. • Follow-up request sent to Services and Agencies for names of Action Group members. • Action groups established and staffed; drafting Implementation Plan sections. 	<p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Ongoing</p>	<p>Chairman</p>
1-20-99-04	<p>Service and Agency EDI Briefings -</p> <ul style="list-style-type: none"> • Briefings will be provided in accordance with outline provided in administrative portion of the minutes above. Briefings by other IPT participants are optional. Time will be provided on the agenda to accommodate this option. 	<p>Completed</p>	<p>Services and Agencies</p>

1-20-99-05	<p>DoD Logistics EDI Policy -</p> <ul style="list-style-type: none"> • IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting. • Chairman will consolidate inputs, revise policy, and brief to DUSD(L)(LSM) for approval. • Will research to determine preferred method to promulgate policy. • Draft policy delivered to DUSD(L)(LSM) 3/8/99. 	<p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Completed</p>	Chairman
1-20-99-06	<p>Candidate Program/Project Funding Nominations-</p> <ul style="list-style-type: none"> • IPT members will review and provide comments by 2/5/99 to Mr. Frank St. Mark (project facilitator). Mr. St. Mark will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting. Based on comments and follow-on issues, Mr. St. Mark will continue to move toward final resolution/approval of programs/projects by 3/18-19/99. • IPT approved criteria with minor comments 2/10/99. Mr. St. Mark will revise criteria and issue a “data call” for nominations 2/12/99. This data call will include available funds by appropriation. Suspense for nominations will be 3/1/99. Action Group will convene 3/2-3/99 and develop a prioritized listing of nominations for presentation at the 3/4/99 IPT meeting. • Prioritized listing, including new nominations received after original submission suspense was extended, will be presented to IPT 3/18-19/99 • Seeking Director, JECPO approval. 	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>	Chairman

1-20-99-07	IPT Voting Members - <ul style="list-style-type: none"> Chairman will revisit (based on IPT comments) the issue of IPT voting membership and reflect his findings in the next iteration of the IPT Charter. 	Completed	Chairman
1-20-99-08	DoD EDI Translator Requirements - <ul style="list-style-type: none"> Pending appointment of an “action group,” IPT Chairman will begin to define/scope the DoD EDI translator requirement. This issue is inclusive of Corporate/Service/Agency requirements. 2/10/99 DLA and DISA agreed to co-chair an Action Group to define and begin the process of requirement determination. 	Completed Ongoing	Chairman pending Action Group
1-20-99-09	IPT Non-DoD Issue Resolution - <ul style="list-style-type: none"> Develop a procedure, based on the fact that the IPT’s primary focus is on DoD EDI standards, on how non-DoD (GSA, NSA, NASA, etc.) elements will assist in issue resolution. 	Completed	Chairman
1-20-99-10	Civil Sector IPT Involvement - <ul style="list-style-type: none"> Develop a procedure by which civil sector EDI standards organizations can participate, advise, and consult on the IPT’s efforts. 	Ongoing	Chairman
1-20-99-11	DLMS/DLSS Enhancements - <ul style="list-style-type: none"> Mr. Don Egan will prepare a comprehensive list of enhancements that are present in DLMS, but not in DLSS. This list will be provided to the Chairman by 2/5/99 for review and briefed at the 2/9-10/99 meeting. Note: Hard copy of briefing charts provided as handout at 2/9-10/99 meeting. Briefing deferred to later meeting. Briefing given at 3/4/99 meeting 	Completed	Chairman
1-20-99-12	NASA and USPS - <ul style="list-style-type: none"> For participation in the 2/9-10/99 meeting, the Chairman will invite NASA, USPS, and DIA to participate in the IPT process. 	Completed	Chairman
2-9-99-01	DoD ROI Studies – <ul style="list-style-type: none"> Research to determine relevant DoD logistics EDI ROI studies completed/ongoing/ contemplated and provide results to IPT. 	Ongoing	Chairman

2-9-99-02	<p>DoD Logistics priorities –</p> <ul style="list-style-type: none"> • Research to determine the relative priority of EDI migration to commercial standards within DUSD(L). 	Completed	Chairman
2-9-99-03	<p>Migration Standard Capabilities –</p> <ul style="list-style-type: none"> • Research, compare, contrast capabilities of XML vice ANSI ASC X12, or other available logistics standards, and provide results to IPT. White paper is posted on the IPT web site. 	Completed	Chairman
2-9-99-04	<p>IPT E-Mail Address -</p> <ul style="list-style-type: none"> • Establish an IPT “common” e-mail address. 	Ongoing	Chairman
2-9-99-05	<p>IPT End-State –</p> <ul style="list-style-type: none"> • Research to determine a definitive “end-state” for EDI IPT. 	Completed	Chairman
2-9-99-06	<p>Similar Efforts –</p> <ul style="list-style-type: none"> • Research to determine if similar efforts are ongoing within DoD/Non DoD Agencies. When applicable, add link to IPT WEB page. 	Ongoing	Chairman
2-9-99-07	<p>“Oversight Organization” –</p> <ul style="list-style-type: none"> • In what will become a recommendation of the IPT, conceptualize and propose the “oversight organization” that will serve as the follow-on to this IPT. Major initial responsibility will be to oversee execution of Implementation Plan. 	Ongoing	Chairman
2-9-99-08	<p>IPT Scope –</p> <ul style="list-style-type: none"> • Assess the ramifications of expanding the implementation plan to include other enablers such as AIT, XML, e-mail, etc. This action can be accomplished through the redefinition of DLMS. DUSD(L)(LSM) will be briefed on the positives and negatives of this expansion. Results will be presented at the 3/4/99 IPT meeting. 	Completed	Chairman
2-10-99-01	<p>Other Implementation Plans/Policies –</p> <ul style="list-style-type: none"> • Research to determine other plans, strategies, policies, lessons learned, etc., that should be referenced or tied to this effort. 	Ongoing	Chairman
2-10-99-02	<p>Testing –</p> <ul style="list-style-type: none"> • Research and develop a strategy to determine future IPT testing requirements and test agencies to be utilized (Service and/or JITC). 	Ongoing	Chairman

