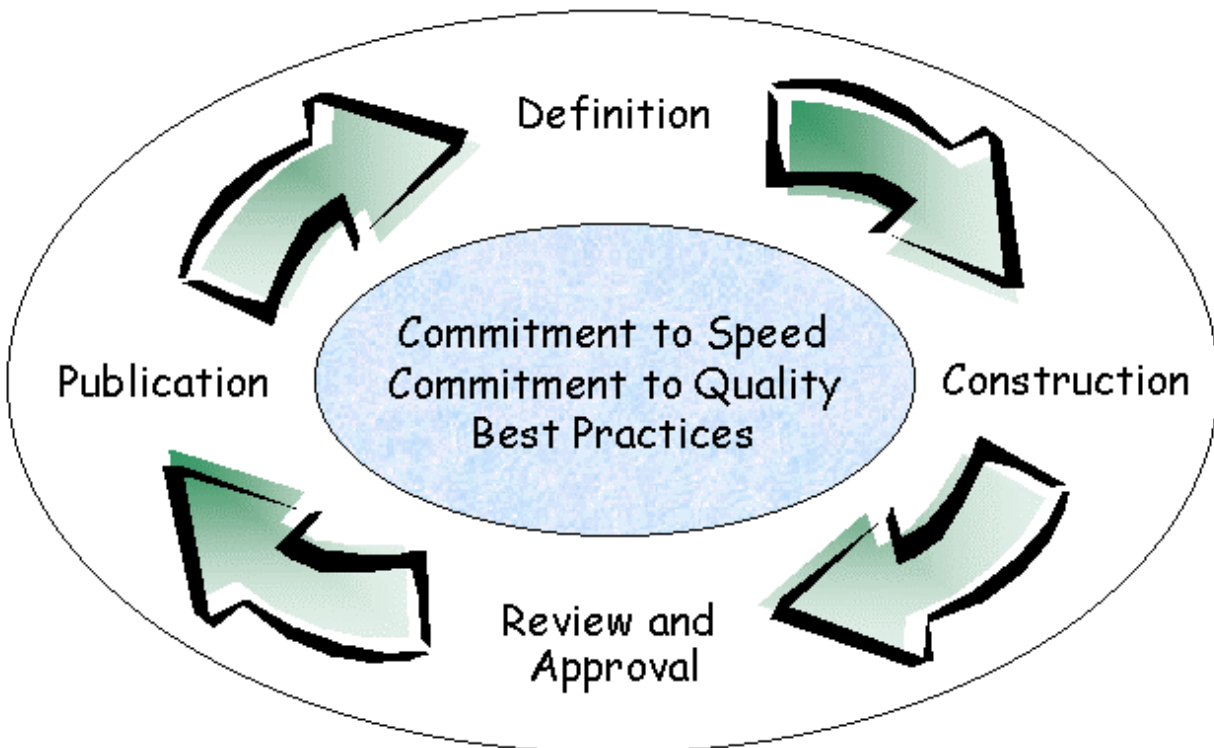


# *Open Applications Group*

## Development Methodology 2009 Version



# Open Applications Group Development Methodology

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## Introduction

The purpose of the document is to describe the Open Applications Group development methodology, including the process for building an integration specification. This document assumes an overall familiarity with the Open Applications Group. This includes the technology, the architecture, and the current deliverables, including The Open Applications Group Integration Specification (OAGIS), the OAGi XML Architecture.

OAGIS is downloadable from our web site at: <http://www.openapplications.org>.

This document describes several topics:

1. Open Applications Group development process and principles.
2. How the development meetings are run.
3. When to choose a Working Group due date.
4. How to propose a specification to the Open Applications Group.
5. How to design the specification content.
6. How to leverage the principle of re-use.
7. How to build the specification in the OAGi formats.
8. How to get an interface specification approved and published by the OAGi Working Group.

If you have any questions or comments, please write us at [info@openapplications.org](mailto:info@openapplications.org) or visit our web site at [www.openapplications.org](http://www.openapplications.org).

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# Development Principles

## Introduction

The Open Applications Group is focused on delivering practical specifications defining business software component interoperability to real and present problems for customers and vendors.

Because of this, the development methodology of the Open Applications Group is focused on:

- Short time frames where possible to build and deliver the content necessary to specify the integration for targeted scenarios.
- Date driven Working Groups that drive for quality solutions based on real content.
- The Working Group leader/proposer of the Working Group picks the date when they wish to have the project completed, subject to meeting schedules. *Dates for project completion should be chosen by the end of the Construction Phase of the development methodology that is described later in this document.*

The Open Applications Group Development Methodology is based on rapid application development principles. The methodology draws upon best practices learned from experiences these principles. The specific techniques used to enable this are:

- Joint Application Design (JAD)
- Prototyping
- Short project schedules
- Small Working Groups

## Planning Assumptions:

1. You must be a member of the Open Applications Group to participate in a Working Group. It is possible that certain "Invited Experts" may be allowed when invited by the Working Group Leader and approved by the OAGi staff or Board of Directors.

### Invited Experts:

- Must be appointed by the Working Group Chair and approved by the OAGi Architect.
- Must sign the OAGi IP Policy document.
- May contribute and render expert knowledge but not vote on working group issues.

2. It takes a minimum of three OAGi members to form a Working Group. All Working Group members must formally join the Working Group and they must have a signed OAGi Membership Agreement and Signed OAGi IPR Agreement on file with the OAGi for their organization or for themselves. The OAGi IPR Agreement and Membership Agreement are freely available on the OAGi web site at [www.openapplicationsgroup.org](http://www.openapplicationsgroup.org).
3. To formally join a Working Group, the OAGi member must sign the signature page in the Project Definition. This sets the scope of contributions to the scope of the Project Definition.
4. Working Group members must participate in the process if they want their contributions to be included in the final deliverables of the Working Group. This participation may include email lists, teleconferences, and face to face meetings. It is not required that members attend all Working Group meetings in order to vote on the Working Group content. If a member misses too many meetings, though, the Working Group Leader may ask the member to abstain from voting because of their lack of knowledge and participation.
5. Projects will not be re-started when new members join the meetings. If a member gets involved late in the process and wishes to change the Working Group content, they may propose a new Working Group to re-consider the content and they can bring the work back through a full cycle for review and approval by the Working Group.
6. No feature regression is permitted. This means that no capabilities that are available in any previous version of OAGIS may be removed in and future version.
7. Backward compatibility must be maintained. This is usually accomplished by add to the capabilities of a scenario or a Business Object document, but not ever taking away capabilities that would render the existing implementations obsolete. One method for dealing with this requirement is to ensure that the Business Object document is appropriately revised using the Revision Number capabilities.

This enables the current users to continue to rely on a BOD at a revision level to remain intact.

8. Content will be reused whenever possible. This is a key factor in keep OAGIS as a coherent, Canonical Model for its users. Extensions to current work are allowed and encouraged to order to extend the current specification to meet new requirements.

The Working Group Members and the Working Group Leader are responsible for ensuring the maximum amount of reuse.

9. Consistency across Working Groups and deliverables. An OAGi architect is assigned to each Working Group for review and consulting purposes. This architect will help the Working Group leader when necessary on project as well

as content issues.

The architect will also review all deliverables during the project to ensure maximum re-use and consistency of business content and technical architecture in all deliverables.

10. All OAGi documents must be reviewed and approved by either the OAGi Chief Architect or the OAGi CEO before they are published. This includes drafts, beta, review, or final versions of documents. All drafts, beta, and review documents, when made public, must include the OAGi IPR Public Wording that defines the IPR rules associated with the document. All final documents must contain the OAGi License Agreement.

### **Meeting Procedures:**

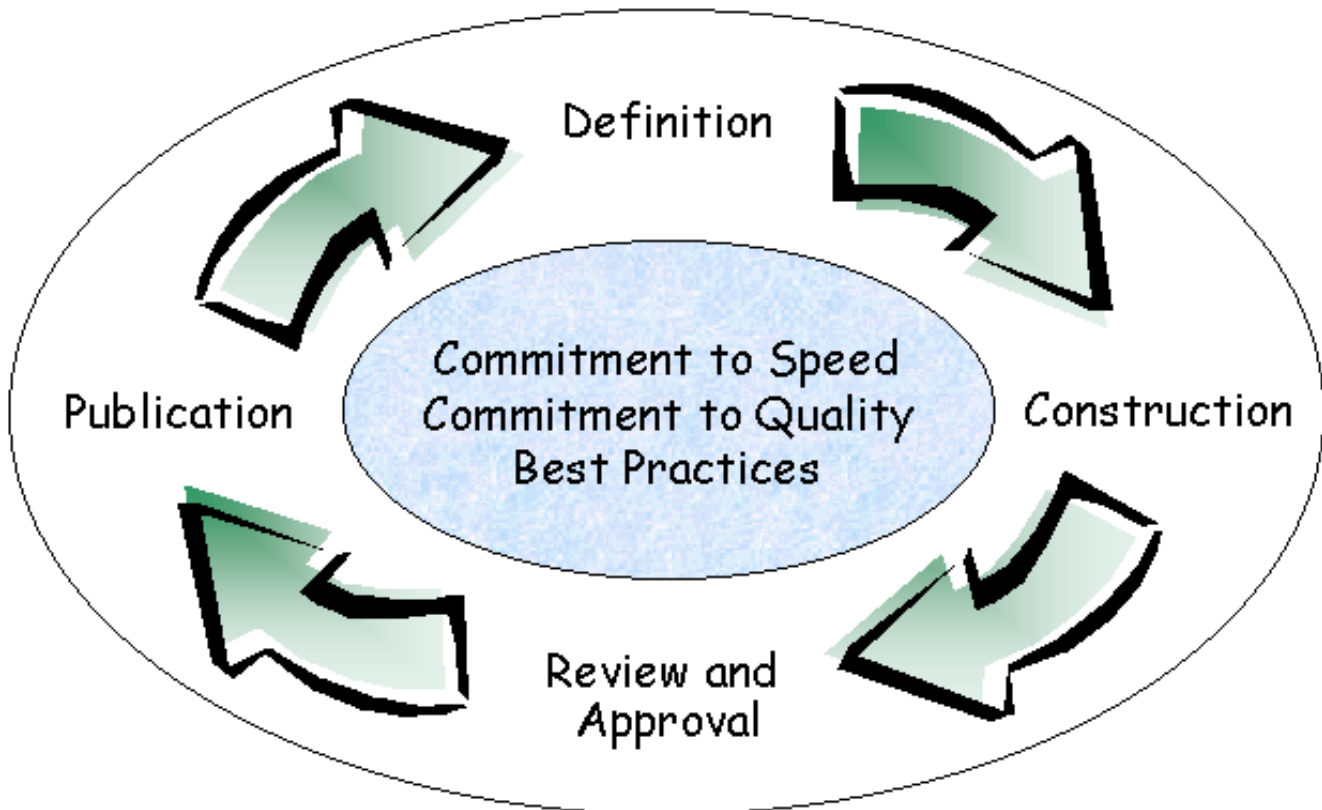
- Meetings may be held face to face, by teleconference, using web based collaboration tools, or in any other manner agreed to by the Working Group. The Working Group Leader will publish an agenda for the meeting.
- The Working Group Leader runs the meetings.
- Minutes are mandatory. They must include, at a minimum, Working Group name, date and time, meeting attendees, meeting agenda, decisions made, action steps, next planned meeting date and time.
- The meetings are run by consensus. Consensus is defined by agreement of the majority in sentiment or belief [syn: general agreement]. We will strive for people to get to the point where they can say; "I can live with this."
- Anyone in the meeting may comment and make suggestions any time during a review unless otherwise stated.
- Sometimes we may ask that the Working Group holds their questions until after a presentation, but this will be stated when this is necessary.
- We ask that no negative remarks be made about any persons in the meeting.
- We ask that no negative remarks be made about any member organization during the meetings.
- No one can express negative remarks concerning a proposal or a specific point unless one has a constructive alternative proposal.
- If important issues come up during a discussion, that issue will be taken off line so the Working Group can stay on topic unless the Working Group wishes as a group to address it at that time.
- Votes are usually taken for formal approvals of specifications or proposals.
- One vote per organization. If a member company has more than one representative on the Working Group, they have a collective single vote. The rules for voting are described in the Open Applications Group bylaws.

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## Summary Overview of Process

### Process Flow

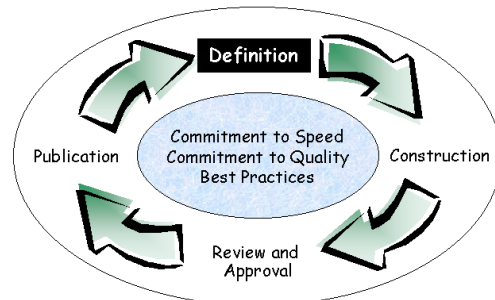
The best way to visualize the entire process for building specifications and XML message is to review the diagram just below. This process will be described in more detail and each phase will be described with activities and deliverables.



## Definition Phase

The Open Applications Group Development Methodology has four phases:

- 1) Definition
- 2) Construction
- 3) Review and Approval
- 4) Publication



This section describes the first phase, the Definition Phase. Each of the other phases are described in detail later in this document.

### Purpose of Definition Phase

The purpose of the Definition Phase is to define the scope of the Working Group, pick a Working Group leader and team, develop a work plan and document what is to be done.

### Deliverables of the Definition Phase

The Definition phase has three primary deliverables. The Working Group Leader is responsible for all of these deliverables.

1. Project Definition, including scope, planned deliverables, Working Group, and schedule.
2. A Power Point based template is available for the Definition Phase.
3. Working Group member signatures.
4. Yahoo groups setup for Working Group.

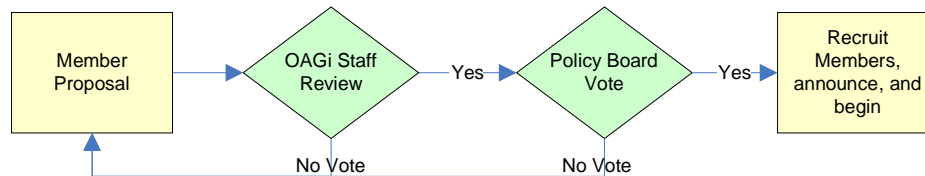
### Enhancements to OAGIS

Modifications to OAGIS can come from many ways. This document primarily addresses new content work that requires process modeling as well as data modeling. It is recognized that sometimes the project only requires modifications to existing OAGIS content. This is allowed and encouraged as it is a key feedback loop mechanism to keep OAGIS vibrant and relevant.

Where ever possible, we have tried to made annotations in this document with options for those building enhancements. If you have any questions, please contact the OAGi staff and they will be glad to help out.

Of course, sometimes the project definition requires both new work, and modifications, and we support that also in one project definition. The OAGi staff can provide examples of all of the above cases.

### Process Flow of Definition Phase



### Activities of the Definition Phase

1. Build the Project Definition. A template is available for this purpose. The Project Definition contains the following items:
  - Proposed Scope
  - Key Deliverables Summary
  - Scenario Diagram
  - Business Workflow
  - BOD's/Nouns to be added
  - BODs to be changed
  - Working Group Working Group Members
  - Planned Schedule
  - Assumptions, Dependencies, and Issues
  - Outside Resources
2. Propose the Working Group to the OAGi technical leadership staff.

The OAGi staff will review the Project Definition with the Working Group leader and help them finalize the scope, approach, etc. If they have any concerns, they will escalate them to either the OAGi Architecture Working Group, or to the OAGi Executive Committee for discussion and resolution.

This process will continue until the Project Definition is approved, modified, or cancelled.

3. Bring the Project Definition to the OAGi Policy Board for final approval.

The OAGi staff will work with the Working Group to bring the Project Definition for a formal review and vote.

4. Pick the Working Group.

When the Project Definition is approved, it is time to pick the Working Group if this has not already been done.

This can be done by asking for volunteers during a Working Group meeting or by sending out an email to the Working Group members asking for their participation. The OAGi CEO or an OAGi Chief Architect can help with this task if the Working Group leader wishes.

You must be a member of the Open Applications Group in good standing to be a member of a Workgroup. The one exception to this policy is the invited expert role. These rules are defined in detail the section describing working on workgroups later in this document.

5. Set up a Yahoo Group for Working Group Facilitation and Communication.

Go to <http://groups.yahoo.com> and set up a group for your Working Group. The standard naming convention is: OAGI-nameof Working Group. An example of this might be: oagi-receiving.

6. Frequency of Workgroup meetings.

The Workgroup leader may call teleconferences or face to face meetings to accomplish the work of the Project Definition Phase and any other phase of development of the OAGIS standard.

The frequency of meetings may be determined by the team, for example once a week, twice a month, one a month etc. In addition, face to face meetings may be held during the regular quarterly face to face OAGi meetings, and in addition, at any time at the discretion of the Workgroup Leader and the team.

## **Special Note on Selecting Scope for the Project Definition**

### **Perform Gap Analysis**

Before you decide to build a new BOD or re-use an existing BOD, you should look to see if an existing Scenario is similar to what you want to do. The Scenario shows the names of the XML Schemas that you should use to implement the scenario.

Look for a BOD that sounds like it may meet your needs and do gap analysis to determine how closely the BOD may fit your requirements. You should use the following rules of thumb:

1. Use the BOD unchanged if possible.
2. Modify the BOD if it is missing key requirements. BOD modifications can be part of the Workgroup scope as much as building new BODs and Scenarios.
3. Build a new BOD as a last resort.

If you must build a new BOD, go to the component libraries in OAGIS to look for content before you build new components.

These can be found in the Resources library in OAGIS, under the Components directory. We have Common, Core Components, Financial, and Operational. Operational currently includes CRM, Logistics, Manufacturing, and Order Management.

### **Organizing the Working Group**

Once the Working Group is chosen, the two primary actions steps are for the Working Group Leader to ensure are accomplished.

1. Signatures from the Project Definition must be obtained before the member can formally participate in the Working Group.
2. A new Yahoo Group needs to be set up at "groups.yahoo.com". The naming convention for the Yahoo Group should be <oagis-workinggroupname>. All Working Group members should join this group. If the Working Group is sponsored by a Council, it is recommended that the naming convention is <oagi-councilname-workinggroupname>.
3. A schedule of meetings should be set up to begin working the issues and moving the project ahead. These meetings can be teleconferences or face to face meetings. The first meeting should cover the following topics:
  - Overall scope and intent of the Working Group
  - Identification of areas of interest of each member
  - Identification of Working Group member roles
  - Assigning of action steps to research or define the work to be accomplished

**Please Note:** More on the topic of Working Group members and their roles and efforts for Working Groups is covered in the last section of this document. The section is entitled: "Working on Open Applications Group Working Groups".

### **Setting the desired completion date**

If you have a specific time frame you need to finish, it is important to schedule this like any project. Of course, the duration is directly connected to the scope of work and the number of persons on the Working Group.

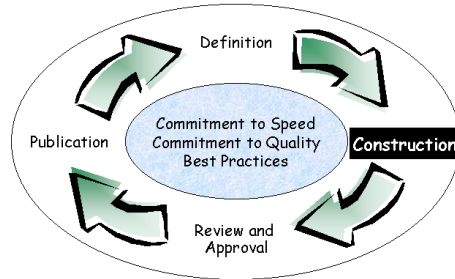
We encourage short durations, if possible, to drive work out the door quickly and to avoid bureaucracy. 6 months is a good target time frame.

NOTE: Some times it is desirable for the Working Group members to wait until they are in the Construction Phase before setting the project completion date. Often not enough information is known during the Definition Phase to give an accurate completion date. If a date is chosen during the definition phase of a Working Group, it should be considered a Planned Date and not a Committed Date.

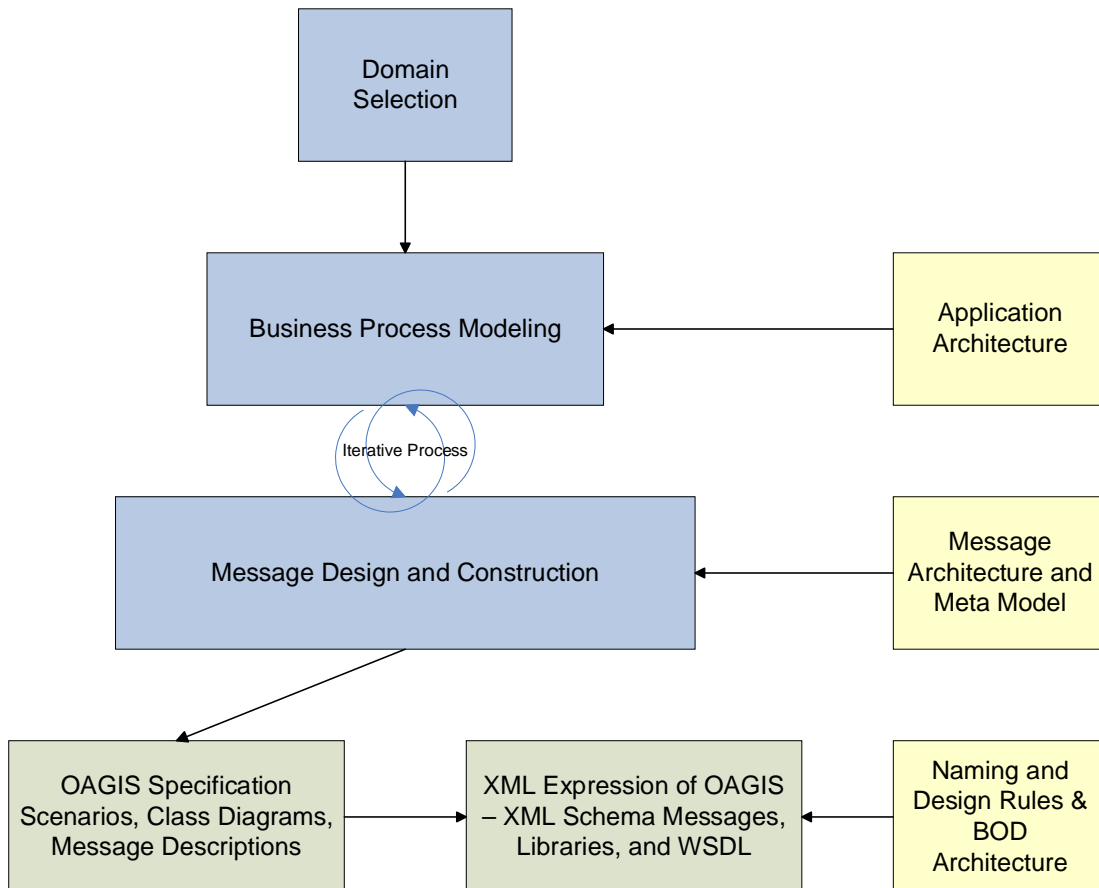
# Construction Phase

## Purpose of the Construction Phase

The purpose of the Construction Phase is to build the content of the OAGIS deliverables and to ensure involvement of the members to obtain a quality deliverable that can be supported by the membership.



The construction phase workflow is depicted below:



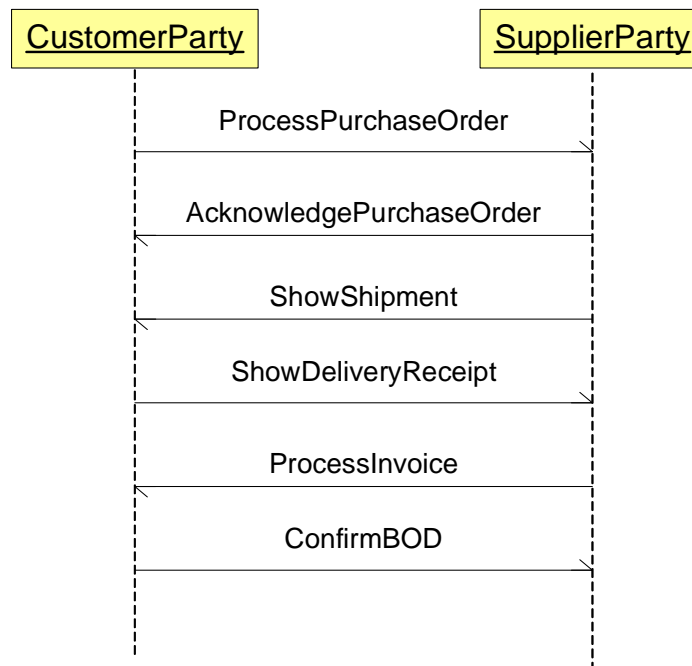
## Deliverables of the Construction Phase

### 1. Integration Scenarios

The Open Applications Group requires the use of the UML Sequence Diagram for depicting the Scenario. We also require documentation for the Scenario, including but not limited to the items below. There is a sample format available for the working group to review. More detail is included in the activities section below.

- Assumptions about the process
- Component Definitions – Description of the boxes depicting components, applications, or entities used in the Sequence Diagram.
- Business Sequence or Flow
- Exception Handling

An example of a Scenario is just below.



### 2. Business Object Document definitions

OAGIS requires the use of UML Class Diagrams for designing new BODs. If the BOD work is based on existing content, this step can be bypassed, but it is still

highly recommend that you model the existing BOD and then modify the Class Diagram so the others can see the before and after design.

All modifications to Nouns, Components, and Elements must be documented in a change document if they are not captured in the new Class Diagram.

### 3. XML Schema Files - BODs

The Business Object Documents must be expressed in XML Schema during this phase. New BODs may be constructed or existing BODs may be modified as part of this process. More detail is included in the activities section below.

### 4. XML Examples

It is incumbent upon the Working Group to develop examples of the Schema's with a real instance of an XML document using realistic data. Most XML tools will do this automatically from the Schema.

## Activities of the Construction Phase

### **BUILDING THE SCENARIO:**

The design of the integration scenario drives the model for integration. The scenario needs to be designed and thought through before the BODs can be designed. The scenario design process leads to the "discovery" of the BODs necessary to complete an integration scenario.

When working through the problem, think of using the following as a checklist to ensure that all needs of the integration scenario are met. Come back to this list as you work through the project.

Component Identification	This creates the boxes in the scenario diagram.
Process mapping & reconciliation	This creates the arrows in the scenario diagram.
Data mapping & reconciliation	This creates the data structure and elements in the BOD chapter.
Data synchronization	Think of sequence in the scenario. What needs to be synchronized before transaction flow begins.
Transaction Processing	What are the transaction flows necessary between business software components?  Does this scenario require What is the sequence of transactions or business events? This sequence is captured in Section Two of OAGIS in the scenario description chapters.
Query and Reporting	What are the requirements for asking for information between business software components? This will help determine if the Verbs

Get and Show are required.
----------------------------

**NOTE:** Try to reuse existing content where possible.

To start building the scenario, we suggest you start with existing Scenarios for re-use. You can use any tool you prefer to build the UML Diagram, as the OAGi staff will import it into the complete OAGIS model. It would be best if you used a tool that others are using, and the OAGi staff can help you obtain the right tool.

It is very important to capture all of the information about the integration scenario, not just the picture.

It is important to capture the assumptions about the integration scenario. This includes information such as the business environment. Examples of this include single cycle or dual cycle accounting, process or discrete manufacturing, request and reply or publish and subscribe assumptions. Other examples would be whether this is an external process or an internal process. Take care; many internal processes are becoming external processes in today's world.

Other information to be documented includes the component definitions, process flow sequence and interdependencies, and any exception handling necessary under the specific circumstances.

### **BUILDING THE BOD:**

OAGIS requires the use of UML Class Diagrams for the data design. We recommend starting at the Noun level, but starting at the Component level is acceptable. Failure to do so will result in non-approval of the deliverables.

OAGIS requires the use of the most recently approved OAGIS Naming and Design Rules for building schemas. Failure to do so will result in non-approval of the deliverables.

Once you have the data design the way you want it, it is easy to pick the Verbs you require. Use the requirements from the Scenario to make these decisions. OAGi also has a separate document on picking and using Verbs you may want to refer to during this step of the process.

Whether you are building a new BOD or modifying an existing BOD, please check with the OAGi Chief Architect to ensure that you have the most current revision of content.

When developing new Elements, Components, or Nouns, make sure that the definition is clear and concise. Use examples and synonyms where possible to clarify semantic meaning.

If there is a generally accepted definition of a term from an industry accepted body of work, use it wherever possible. Examples of this are the Financial Accounting

Standards Board (FASB), and the American Production and Inventory Control Society (APICS).

**Please Note:** If the value or values for a Element can be specified, please define the value.

If there is a universally accepted standard for values of a Element, use the standard. Examples of previously adopted standard values include ISO639/2 for Language and ISO1000 for Unit of Measure.

Duplicate names for Elements, Components, and Nouns are not allowed. Please be careful when developing these.

When developing new element names, use the Data Types that OAGIS has included from UN/CEFACT. These provide an important consistency to the OAGIS specification both inside and when mapping to other standards.

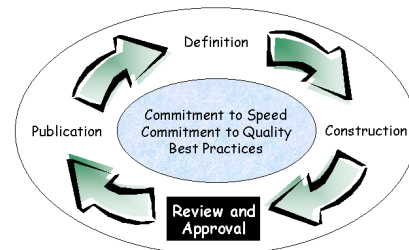
## **DOCUMENTATION**

All elements, attributes, and components must be fully documented. In the final versions of OAGIS deliverables, these must be in the annotations portions of the Schema. Please look at the existing schemas for examples.

## Review and Approval Phase

### Purpose of the Review and Approval Phase

The purpose of the Review and Approval Phase is to create buy in from the members of the Open Applications Group, ensure that members can and will support the work, and to ensure quality deliverables.



### Deliverables of the Review and Approval Phase

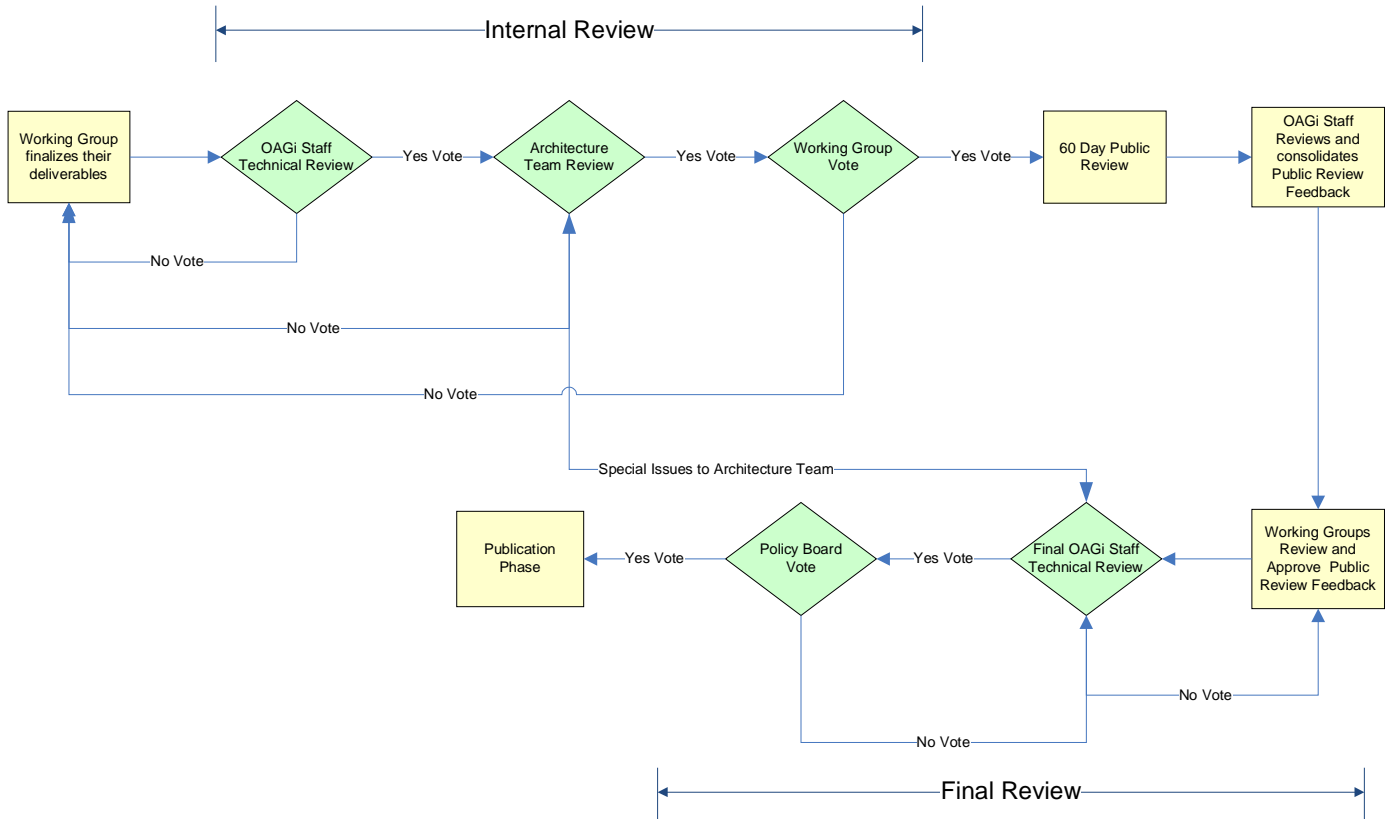
1. Final version of Integration Scenarios.
2. Final versions of BODs, including all documentation.
3. Affirmative vote by the Working Group.
4. Completed a 30 day or 60 day Public Review depending on the scope of changes. This decision will be recommended to the Policy Board by the OAGi staff and the Policy Board will make the final decision.
5. Review and approval of Change Requests from the Public Review.
6. Affirmative vote by the Architecture Working Group.
7. Affirmative vote by the OAGi Board of Directors.

### Summary of Activities of the Review and Approval Phase

1. Review final deliverables with OAGi Architect/CTO and vote.
2. Review final deliverables with OAGi Architecture Team and vote.
3. Review final deliverables with Working Group and vote.
4. Work with the OAGi Architect to finalize the deliverables for Public Review.
5. OAGi staff will execute the formal public review period.
6. OAGi staff tracks all change requests during the Public Review Process.
7. OAGi staff reviews, categorizes, and consolidates the change requests from the Public Review with the related Working Groups.

8. Review and disposition the consolidated change requests with the affected Working Groups.
9. Perform final OAGi staff technical review.
10. Present the results to the OAGi Policy Board for final approval.

### The overall Review and Approval process is pictured below



### Reviewing your Deliverables in the Working Group

1. For the review sessions with the Working Group, you should be prepared to bring all of the three deliverables in their draft form. These three deliverables are:
  - The scenario description(s) in UML Sequence Diagram Format.
  - The description of the Scenario as explained in the Construction phase.
  - The BOD Schema with documentation annotations.
  - Detailed proposed changes to the component libraries necessary to change or build the BOD.
2. These deliverables above should be made available to the Working Group one week before the next Working Group meeting to give the members a chance to familiarize themselves with the documents.

3. It is the responsibility of the Working Group Leader and their Working Group to develop the Schema. The OAGi architect assigned to the Working Group will be glad to help with this task. They will require that the Working Group participate directly if the Working Group does not have to expertise to do all of this work themselves.
4. The XSD and documentation for the BOD(s) will need to be considered at this point to ensure that it can be available as soon as possible.
5. It is also the responsibility of the Working Group Leader and their Working Group to develop the example of an instance of an XML document based on the Schema. The OAGi architect assigned to the Working Group will be glad to help with this task. They will require that the Working Group participate directly if the Working Group does not have to expertise to do all of this work themselves.
6. Facilitate a review walkthrough session with the Working Group and ask for feedback.
7. The Working Group members are responsible for bringing the documents in process back to their subject matter experts, if necessary. This is important to ensure a high quality product that meets expectations for all members. The feedback may be provided by email or during the next working meeting to the Working Group Leader.
8. The Working Group leader is responsible for making changes to the proposal based on feedback from the Working Group. These changes are to be completed and emailed to the Working Group member's two weeks before the beginning of the next Working Group meeting review.

### **OAGIS Public Review Process**

The purpose of the OAGIS public review process is to ensure the quality of the work, to preserve the integrity of the open standards process, and to give the public a good idea of what they will be seeing in the form of the standard in the not too distant future.

The OAGi staff may bundle the work with other completed projects and merge it all into the base OAGIS for an overall planned release of OAGIS. This is done with strict source code processes and revisioning processes. OAGi manages versions of OAGIS as a software vendor manages their software releases.

The OAGi staff will build a web site page for the public review with information on the review, including a summary of the content and the duration of the review. The new version of OAGIS will be posted for download and a registration page will be built.

The public review is then announced and also made prominent on the front of the OAGi web site.

During the public review, reviewers will be able to download the version of OAGIS in question, review it, and provide feedback with a feedback form posted on the OAGi web site. OAGi staff will gather and track all comments in preparation for the close of the review.

Once the public review is completed, the release candidate of OAGIS will be taken off the web site. All comments are reviewed, and determinations made on accepting or rejecting each one. All work accepted will be incorporated in the final version of OAGIS in preparation for the Publication Phase.

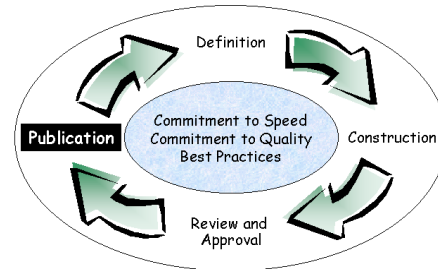
Note: The public review process requires special legal disclaimers to be included with the deliverable or for any deliverable that has not been completely finalized as an OAGi Standard. This legal wording can be obtained from OAGi staff.

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## Publication Phase

### Purpose of the Publication Phase

The purpose of the Review and Approval Phase is to bring the document from the development process and complete final editing, translate to HTML and publish on the OAGi web site, and create downloadable zip files for downloading from the OAGi web site.



### Deliverables of the Publications Phase

1. Final OAGIS Specification available for download from the OAGi web site, including Documentation, Scenarios, BODs, Component libraries, sample XML, and any other deliverables deemed necessary.

### Activities of the Publication Phase

1. The OAGi staff Architect will merge the work of all of the Working Group leaders into a final version for publication.
2. All identified defects will be fixed at this time.
3. A press release may be constructed and published announcing the new release of OAGIS.

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# Working on Open Applications Group Working Groups

## Introduction

You must be a member of the Open Applications Group to participate in a Working Group. All Working Group members must sign the Project Definition that Working Group.

It is possible that certain “invited experts” may be allowed when invited by the Working Group Leader and approved by the OAGi staff or Board of Directors. These “invited experts” must also sign the IP Policy Agreement as all Working Group members do in order to participate.

Working Group members must participate in the process if they want their contributions to be included in the final deliverables of the Working Group. This participation may include email lists, teleconferences, and face to face meetings. It is not required that members attend all Working Group meetings in order to vote on the Working Group content. If a member misses too many meetings, though, the Working Group Leader may ask the member to abstain from voting because of their lack of knowledge and participation.

**NOTE:** All face to face meetings and teleconferences must take attendance and note in the meeting minutes.

## **WORKING GROUP LEADER ROLE:**

The Working Group leader may come from any OAGi member if good standing.

The Working Group Leader is usually the primary author of the Working Group deliverables. This is not required if other members of the Working Group are willing to collaborate on developing deliverables.

The Working Group Leader presents the status of the project at Working Group Meetings. Usually between face to face meetings the Working Group Leader may call one or more teleconferences with the Working Group Members to continue the work remotely.

The amount of effort that goes into this activity is determined by the capacity of the Working Group Leader to this work in addition to their regular job responsibilities.

This may be driven by several factors, including the date the Working Group Leader wants to complete the project. Often the date is based on the Working Group Leader's requirement to complete something so they can ship product for their organization.

**Other Roles:**

The other roles on the Working Groups generally require less time commitment, although it is important to remember that a member's time commitment is controlled by their ability to contribute time and effort.

There are two other roles for persons on OAGi Working Groups. They include:

**CONTRIBUTOR ROLE**

The contributor is an active member of the workgroup and participates in the meetings, emails and may contribute and work on the content of the Working Group. This is a voting role as well.

All Contributors must be OAGi members. All Contributors must sign the Working Group specific IP Policy based on the Project Definition.

**INVITED EXPERT ROLE**

The OAGi Working Group Leader may, at their discretion and with the approval of OAGi Staff or the Board of Directors, invite certain non-member experts to contribute to the Working Group. This person must also sign the OAGi IP Policy before they can participate in this role.

This is a non-voting role.