

## CHARTER

### LOGISTICS FUNCTIONAL WORKING GROUP

1. **Purpose.** This document serves as the Charter for the Logistics Functional Working Group (LFWG). It is a written understanding between the Federal Electronic Data Interchange Standards Management Coordinating Committee (FESMCC) and the Department of Defense (DoD) Electronic Data Interchange Standards Management Committee (EDISMC) defining the LFWG objectives, scope, general terms of reference, and general methods of operation. The FESMCC and DoD EDISMC agree that the LFWG will consolidate the logistics support functions and responsibilities within a single organization.
2. **Authority.** The FESMCC, under the authority of FIPS 161-2, establishes interagency functional working groups for selected business areas including but not limited to logistics; procurement; finance; transportation; and communications, control and security, as required, to provide a focal point for development and maintenance of implementation conventions. The FESMCC also coordinates the functional working groups to ensure that they are working quickly and efficiently to provide useful implementation conventions (ICs) for the Federal Departments and Agencies in accordance with responsibilities detailed in the FESMCC Charter and Operating Procedures.

Similarly, Defense Information Systems Agency (DISA) is the DoD Executive Agent for managing DoD Information Technology (IT) standards, including ensuring standardization across service systems and infrastructures. The DoD EDISMC is the principal DoD organization within which to develop and maintain a consistent, comprehensive approach to electronic data exchange (EDI) issues and related IT matters. Because of the diversity and scope of business areas and technical matters, the DoD EDISMC charters a series of DoD functional working groups with the responsibility of harmonizing business and EDI standards issues through the development of a consistent approach to exchanging business data among the various trading partners.

Due to the need for close coordination and comparability of operating objectives among Federal Departments and Agencies, including the DoD, agreement has been reached that a single functional working group should be established to deal with logistics matters. Accordingly, the Logistics Functional Working Group is established as a combined Federal/DoD working group. It shall derive its authority jointly from its parent bodies and will support the

responsibilities of both the FESMCC and DoD EDISMC through the resolution of standards-related issues affecting logistics functional requirements.

The LFWG is responsible for overseeing all matters related to the exchange of logistics business data. In performing these responsibilities it will follow procedures and direction adopted by the FESMCC, to include IC formats, common methodologies and constructions, etc. When necessary the LFWG will coordinate functional area requirements among the other FESMCC and DoD EDISMC functional working groups, as required, to ensure a consistent approach to all such matters.

The signing of this Charter by the Chair, FESMCC and the Chair, DoD EDISMC formally recognizes this body as a Federal Civilian working group level forum jointly working with the DoD.

3. **Objectives.** The primary goal of the LFWG is to act as a single forum for all Federal Departments and Agencies as well as the DoD member Services and Agencies to participate in a dialog and resolution of all matters related to the use of EDI as an enabling technology in the conduct of all logistics business areas. This will be accomplished through the following objectives:

- o Increase the use of electronic commerce (EC) and EDI among the Federal Government logistics community
- o Support the implementation of new and evolving business processes and practices, utilizing EC and EDI to the maximum extent possible as a means of achieving operating efficiencies
- o Promote an orderly approach toward business process transitions in order  
to maintain user satisfaction through the implementation process
- o Utilize EDI standards in a consistent manner
- o Promote and develop a standard methodology for communicating logistics  
business information
- o Satisfy all user requirements in a timely manner

4. **Scope.** The LFWG assumes responsibility for all logistics matters not specifically assigned to other functional working groups including, but not limited to, supply, inventory management, maintenance, program management, environmental, and administration functions. It will serve as the forum as well as the sanctioning body for the development and acceptance of Federal Government and/or DoD-wide agreements on logistics business matters. Specifically, the LFWG scope of responsibility will include:

- o Ensure that all logistics business requirements are met within a timely manner through the use and development of EC and EDI standards.
- o Maintain a working knowledge of both the American National Standards Institute (ANSI) Accredited Standards Committee (ASC) X12 and United Nations Electronic Data Exchange for Administration, Commerce and Transport (UN/EDIFACT) EDI standards used in the conveyance of logistics business data
- o Resolve technical differences among the LFWG membership in order to achieve consensus for the development, portrayal, and conveyance of logistics business information
- o Review and approve ICs, data maintenance or other work products prepared by Departments, Services and Agencies for purposes of EC and EDI implementation prior to submission to the appropriate parent body
- o Act as the advocate of all LFWG work products reviewed and voted upon by the parent body
- o Ensure that all IC and data maintenance work is consistent with EDI standards, structures, usage, and formats
- o Ensure that all IC and data maintenance work is consistent with prescribed formats and requirements
- o Accept, coordinate, and develop solutions for specific work requests presented to the LFWG when sufficient resources are made available

from

- o either the parent body or requesting organization
- o Preview and provide recommendations to submitters of logistics work products prior to formal submission to the LFWG
- o Preview and coordinate an LFWG position on work products developed by other working groups

5. **Membership and Voting.** The LFWG will have co-chairs elected by their respective LFWG memberships and confirmed by their respective parent bodies. Co-chairs are elected for a period of two years. Membership in the LFWG is automatically conveyed to a single voting representative from each member organization of their respective parent bodies. (Note. The DoD FESMCC representation to the LFWG will be satisfied through DoD EDISMC membership and participation.)

Organizations not holding membership on either the FESMCC or the DoD EDISMC may request membership in the LFWG by submission of a written request to either co-chair. The request should document the nature of the organization's involvement in logistics matters, confirming that such membership does not conflict with representation from the existing FESMCC or DoD EDISMC member Department, Agency or Service, and a designation of a primary and alternate

organization representative(s). Acceptance of the request for LFWG membership will be discretionary for the co-chairs based upon an assessment of the submission request and as ratified by the LFWG membership.

The primary organizational representative (including government civil servants or uniformed members) as well as a designated alternate voting member, shall be identified in writing to the co-chairs. The LFWG will maintain an active list of all working group members. Organizations are encouraged to promote continuity of representation to this position in order to ensure a knowledgeable and consistent approach to the work of the group.

Because of the wide range of logistics business areas, voting members are not expected to be functional experts in all matters falling under the purview of the LFWG. Accordingly, each LFWG member may augment attendance at any meeting with functional business experts and observers in order to ensure that a sufficient degree of expertise and consideration is provided to the subject under review. Nevertheless, voting responsibility continues to reside only with the voting representative.

The LFWG recognizes that substantial work, including policy development and system design, is underway in a number of Federal Departments and Agencies and DoD organizations which will impact the work of the LFWG and other functional working groups. The LFWG will consult with representatives from any such organization as technical experts and advisors in order to ensure that all LFWG work products are consistent with overall Federal and DoD policy and IT initiatives.

Each LFWG member organization will hold one vote. Approval of any matter under vote will result from a simple majority of votes cast by LFWG members in attendance at the time a vote is taken. No provision will be made for providing proxies or accepting votes from members not in attendance. Votes from the co-chairs will only be cast whenever a voting matter has not reached a simple majority.

## 6. **Method of Operation.**

### (a) Cognizance.

The LFWG will establish, maintain, and publish a list of ANSI ASC X12 Transaction Sets for which it has primary cognizance as designated by the corresponding parent body. Corresponding UN/EDIFACT messages are also deemed the responsibility of the LFWG. Where ongoing Federal, Service or Agency business areas are known but where no supporting transaction sets or

messages exist, the LFWG will retain primary cognizance in those business areas for all EC and EDI standards work products.

In certain business scenarios multiple business disciplines will utilize the same transaction set or message to convey functional business information. When multiple functional working groups utilize the same transaction set or message to convey business information, unless specifically directed to the contrary by the FESMCC, the LFWG will retain primary cognizance over the standards and will coordinate the development of a consistent approach to usage and data exchange.

Cognizance is deemed to include development of new EDI standards, data maintenance to existing standards, and ICs.

The LFWG will determine the number of business functions to be included in any single IC. In making this determination, the LFWG will endeavor to minimize the number of ICs being issued for each transaction set. However, other factors related to a decision to combine business functions within a single IC will include the complexity and clarity of the resultant IC, the degree of relationship existing among the business functions, and the acceptability of the product to the business trading partners.

(b) LFWG Meetings.

The co-chairs will schedule LFWG work items on the agenda, as required. In developing meeting schedules the co-chairs will consider FESMCC, DoD EDISMC, ANSI ASC X12, and UN/EDIFACT meeting schedules, standards publication schedules, and user requirements. The LFWG will maintain a calendar identifying meetings and other factors affecting the work of the LFWG.

LFWG meetings will be scheduled no less frequently than biannually. However, at the discretion of the co-chairs, meetings may be held more frequently. Every attempt will be made to provide LFWG members with a minimum 30 day advance notice of any LFWG meetings, the anticipated work agenda, and work products consistent with their availability.

Every attempt will be made to rotate meeting locations to centrally agreeable sites to minimize the travel costs incurred by the LFWG members. Meeting duration will not exceed one week in length.

(c) Procedures.

All logistics work requirements for the LFWG will be provided to the co-chairs via the FESMCC or the DoD EDISMC, directly by a LFWG member, or directly by the Chair of another Federal or DoD functional working group.

Acceptable work requirements may include, but are not limited to:

- o draft ICs for review or preview,
- o draft EDI standards data maintenance for review or preview,
- o other working group requirements to be incorporated into existing ICs falling under the cognizance of the LFWG,
- o other working group draft data maintenance for EDI standards falling under the cognizance of the LFWG, and
- o undeveloped work products or requirements.

In cases requiring extensive work beyond the normal LFWG meeting schedule the co-chairs may authorize temporary ad hoc task groups for the purpose of completing this work. Separate task group meetings are authorized at the discretion and availability of task group members to meet projected user requirements.

Additional resources required to provide technical advice, support for work development, etc. May be requested from the co-chairs by a LFWG representative. Resources will be provided by the co-chairs based upon availability and at the discretion of the co-chairs.

All work requirements will be processed on a "first in, first out" basis unless the co-chairs deem it appropriate to reorganize the workload based on user requirements and any other appropriate factors.

Under normal circumstances, any work products that are ready to progress from the LFWG to the FESMCC or to the DoD EDISMC will not be delayed in order to add functionality requirements. However, if in the opinion of the co-chairs, the functional requirement is so significant as to limit the usability of the work product, the product may be delayed pending incorporation of the functionality. If the work product is not delayed, the submitter of the added requirement will be so advised and will be asked to submit a new work product proposing a change to the original work product.

Changes to existing ICs can be submitted to the LFWG at any time. However, approval and subsequent incorporation of the change into the IC will be done consistent with FESMCC and DoD EDISMC guidance regarding version/release updating to ICs. This practice will be in effect as a means of ensuring a level of consistency and minimum disruption to the user population.

Therefore, every effort should be made by LFWG members to ensure the consistent attendance at LFWG meetings as well as a complete staffing of all work products prior to their submission to the parent approving authority. Every attempt will be made to inform the submitter of the approximate time for functionality incorporation.

Changes to existing EDI standards (including the development of new segments which will be incorporated into an existing transaction set or message) for which an approved IC already exists can be submitted to the LFWG at any time. Each such submission should be accompanied by a complete business case supporting the change as well as a draft change to the existing IC.

Changes to existing EDI standards (including the development of new segments which will be incorporated into an existing transaction set or message) for which no IC has been approved will be developed and processed in conjunction with the development of the IC. Each such submission should be accompanied by a complete business case supporting the change as well as a draft change to the existing IC. Each submission should be accompanied by a complete business case supporting the change as well as a draft change to the existing IC. Every effort should be made by the submitter as well as the LFWG to correlate the projected implementation plan requirements for the IC with EDI standards body meeting and approval schedules.

All logistics work requirements (including IC changes, IC development, and data maintenance to EDI standards) shall be introduced initially to the LFWG. Those requirements approved for progression which fall under the cognizance of another functional working group will be submitted to that working group in a manner and format prescribed by that working group. Either the co-chairs or a designated LFWG representative will coordinate with the other working group to define, explain, or actually develop the work product, at the discretion of the other working group chair.

The development of new EDI transaction sets or messages will be undertaken by the LFWG only after reaching consensus that existing standards cannot be used to satisfy user requirements. In such cases draft or skeletonized ICs are helpful, but not required, as a means of ensuring that all user functional requirements have been met. A more structured and complete IC will be developed by the LFWG as the new draft standard moves through the EDI standards body approval process. This practice will ensure that limited resources are expended in the most appropriate manner consistent with the development and approval of the new standard.

The co-chairs will submit concurrently to the FESMCC and DoD EDISMC all work approved by the LFWG. The co-chairs will act as the advocates for all such work as it progresses through the review and voting processes. All work products submitted will be in the format prescribed by the FESMCC. Any changes resulting from this process will be returned to the LFWG for consideration and incorporation by the LFWG.

(d) Conflict Resolution.

In progressing any work item the LFWG must satisfy all user business requirements. This does not mean that the technical solution proposed by the submitter must be adopted by the LFWG. An alternative solution may be proposed by the LFWG in order to meet the user business need as well as the requirement to maintain consistency among all logistics data exchanges. Should the submitter not agree with the LFWG proposal, an appeal may be made to the co-chairs for reconsideration. In cases of appeal disapproval by the LFWG, a final appeal may be submitted to the FESMCC by the user's voting representative.

7. **Charter Updates.** This charter will be updated as required to meet evolving procedures, identified business needs, and direction from the FESMCC and DoD EDISMC. Questions or comments associated with this Charter should be referred to the current LFWG co-chairs.

8. Charter Approval and Ratification

Approved by:                     //signed//                     08/22/96  
Donna Wesolowski, DoD LFWG Chair

Approved by:                     //signed//                     08/22/96  
Gary Hood, Federal LFWG Chair

Ratified by:                     //signed//                     08/28/96  
CDR Randy H. Hoffman, DoD EDISMC Chair

Ratified by:                     //signed//                     08/29/96  
Teresa Sorrenti, FESMCC Chair