

Information Requirements – 8/25/04
Final Minutes Attachment
R98037

The purpose of this workpaper is to (1) propose a modification to the question to BPS and (2) propose a pictorial example of the difference between the BPS instructions and the IR proposal.

The question to BPS that IR adopted at its July 2004 meeting reads:

At its meeting on July 14, 2004, the Information Requirements (IR) subcommittee discussed request **R98037**. This request involves the Offer Upload / Download and Bid Upload / Download data sets, the existing Not Stand Alone Offer / Bid Terms and Conditions data elements and new "machine processable" data elements that tie the offers / bids together. The instruction from BPS (2/13/00) says:

Instruct IR to add a conditional data element to the Offer Upload and Offer Download. This "machine processable" data element should be used to tie the various offers together in the case where an offer is not a "stand alone offer" on that Transportation Service Provider.

In the Offer Upload, the Not a Stand Alone Offer Terms and Conditions usage would be Sender's Option (SO), however it would only be used when the "Stand Alone Offer Indicator" indicates the offer is not stand alone. From a business point of view, if such Not A Stand Alone Offer Terms and Conditions exist, they should be present in the Not a Stand Alone Offer Terms and Conditions data element. In the Offer Download, the usage would be Conditional, mandatory if provided in the original offer.

Instruct IR to add a conditional data element to the Bid Upload and Bid Download. This "machine processable" data element should be used to tie the various bids together in the case where a bid is not a "stand alone bid" on that Transportation Service Provider.

In the Bid Upload, the Not a Stand Alone Bid Terms and Conditions usage would be Sender's Option (SO), however it would only be used when the "Stand Alone Bid Indicator" indicates the bid is not stand alone. From a business point of view, if such Not A Stand Alone Bid Terms and Conditions exist, they should be present in the Not a Stand Alone Bid Terms and Conditions data element. In the Bid Download, the usage would be Conditional, mandatory if provided in the original bid.

It is unclear what the condition is supposed to be on the new 'conditional data element(s)'. IR has determined that the best implementation would be to add new data elements that are a 'package identifier' type of data element and would like BPS to consider the following:

The new package identifier be made business conditional and then make the Not Stand Alone Offer / Bid Terms and Conditions data element conditional with a multi-part condition. The first part of the condition would be that it is mandatory if (1) the Not Stand Alone Offer / Bid Indicator is 'no' and (2) the package identifier is not sent. The second part of the condition would be that it is sender's option if (1) the Not Stand Alone Offer / Bid Indicator is 'no' and (2) the package identifier is sent.

Proposed modification to the question to BPS:

At its meeting on July 14, 2004, the Information Requirements (IR) subcommittee discussed request **R98037**. This request involves the Offer Upload / Download and Bid Upload / Download data sets, the existing Not Stand Alone Offer / Bid Terms and Conditions data elements and new "machine processable" data elements that tie the offers / bids together. The instruction from BPS (2/13/00) says:

Instruct IR to add a conditional data element to the Offer Upload and Offer Download. This "machine processable" data element should be used to tie the various offers together in the case where an offer is not a "stand alone offer" on that Transportation Service Provider.

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In the Offer Upload, the Not a Stand Alone Offer Terms and Conditions usage would be Sender's Option (SO), however it would only be used when the "Stand Alone Offer Indicator" indicates the offer is not stand alone. From a business point of view, if such Not A Stand Alone Offer Terms and Conditions exist, they should be present in the Not a Stand Alone Offer Terms and Conditions data element. In the Offer Download, the usage would be Conditional, mandatory if provided in the original offer.

Instruct IR to add a conditional data element to the Bid Upload and Bid Download. This "machine processable" data element should be used to tie the various bids together in the case where a bid is not a "stand alone bid" on that Transportation Service Provider.

In the Bid Upload, the Not a Stand Alone Bid Terms and Conditions usage would be Sender's Option (SO), however it would only be used when the "Stand Alone Bid Indicator" indicates the bid is not stand alone. From a business point of view, if such Not A Stand Alone Bid Terms and Conditions exist, they should be present in the Not a Stand Alone Bid Terms and Conditions data element. In the Bid Download, the usage would be Conditional, mandatory if provided in the original bid.

It is unclear what the condition is supposed to be on the new 'conditional data element(s)'. IR has determined that the best implementation would be to add new data elements that are a 'package identifier' type of data element and would like BPS to consider the following:

The new offer / bid package identifier type data element would be made business conditional in the Offer / Bid Upload and then make the Not Stand Alone Offer / Bid Terms and Conditions data element in the same data sets conditional with a multi-part condition:

- The first part of the condition would be that ~~the~~ Not Stand Alone Offer / Bid Terms and Conditions is mandatory if ~~(1)~~(a) the Not Stand Alone Offer / Bid Indicator is 'no' in the Offer / Bid Upload and ~~(2)~~(b) the package identifier is not sent.
- The second part of the condition would be that ~~the~~ Not Stand Alone Offer / Bid Terms and Conditions is sender's option if ~~(1)~~(a) the Not Stand Alone Offer / Bid Indicator is 'no' in the Offer / Bid Upload and ~~(2)~~(b) the package identifier is sent.

Corresponding / similar changes would be incorporated in the Offer / Bid Download data sets.

Attached is a pictorial example, utilizing the Offer Upload, of the impact of the BPS' instruction as IR believes it is intended versus the proposal IR wants to make to BPS.

Documents impacted:

- 5.4.1 Offer Download** - data elements (Stand Alone Offer Indicator and Not Stand Alone Offer Terms & Conditions) and code values (Stand Alone Offer Indicator)
- 5.4.2 Bid Download** - data elements (Stand Alone Bid Indicator and Not Stand Alone Bid Terms & Conditions) and code values (Stand Alone Bid Indicator)
- 5.4.7 Offer Upload** - data elements (Stand Alone Offer Indicator and Not Stand Alone Offer Terms & Conditions) and code values (Stand Alone Offer Indicator)
- 5.4.8 Offer Upload Quick Response** - Validation Codes – Heading
- 5.4.9 Offer Upload Notification** - data elements (Stand Alone Offer Indicator and Not Stand Alone Offer Terms & Conditions) and code values (Stand Alone Offer Indicator)
- 5.4.18 Bid Upload** - data elements (Stand Alone Bid Indicator and Not Stand Alone Bid Terms & Conditions) and code values (Stand Alone Bid Indicator)

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5.4.19 Bid Upload Quick Response - Validation Codes – Heading

Offer Upload 5.4.7

