**NAESB eForms Subcommittee**
03 August 2016

Consensus Items

* Footnote methodology – many-to-many with footnote IDs for each data element
* XSD – provided by FERC
* Filing Guidelines – provided by NAESB
* Yes/No – where applicable and practical, Element values should be “Yes” or “No” as this provides more clarity than “True” or “False”
* CPA Certifications - CPA certification filing process and the form filing process should be separate and similar to the model utilized today
* Validations
	+ Attribute-level validations
	+ Application-level validations
	+ Collected several examples of validations used by current form users
* XML Element References – XML tags should be unique identifiers; page/row/column information will be provided by a look-up table provided by FERC
* PDF Representation – the software that filers use to create the XML file should also be capable of creating a PDF version for internal filer use
* Attachments – attachments may be included in the filing, but they cannot be used in place of Element data.
* Positive/Negative numbers
	+ Signs of numbers in the Forms should be treated consistent with general accounting principles.
	+ Attribute-level validation could be incorporated in the XML if there is a single sign convention for a given element.

Open Items

* Attachments
	+ Use of attachments with footnotes
	+ Allowable file formats
* Validations
	+ Attribute-level validations - FERC
	+ Application-level validations – Software vendors
	+ Validation Messages – classes, format
* Schema Versioning
* Element Names – are abbreviations necessary?
* Form Submission Process Flow
* Form Submittal Mechanism
	+ Data Transport
	+ Acknowledgements
	+ Back-up process
* Footnote attachments
* Data Confidentiality
* PDF representation – is submission of a PDF (along with the XML) needed? Useful?
* Data Dictionary