



18th International XBRL Conference

Best Practices Board Update Project Management

Ignacio Boixo – Lars Dyrner

Project Management: Status

- Call for participation June 2008
- Group is established 3. Oct 2008
 - 6 voting members

3 initial issues in the call

- Intellectual Property
- Stakeholder management
- Adoption strategies

(Example) Intellectual Property Policy - IPP

- IPP should be considered in any XBRL Project, especially in the development of XBRL Taxonomies.
- XBRL taxonomies are usually public (except internal use).
- Data formatted with XBRL may be public or confidential.
- XBRL taxonomies are not to be modified, so the IPP typically used in Open Source projects is not applicable here.
- Use of XBRL taxonomies is royalty free and very open, so the IPP typically used in commercial companies is not applicable here.

Intellectual Property: Recommendations

Copyright of XBRL Taxonomies

- Use and reproduction is royalty free and freely accessible. Modification of XBRL taxonomy is not allowed, but can be extended.
- In public sector, is owned by the regulator or competent authority. Copyright may be shared.

Patent claim call

- In international projects, or in countries where concepts are patentable, all the Working Group meetings **MUST** start with a patent claim call.

Intellectual Property: Recommendations

Trademark

The acronym of the XBRL taxonomy should be *registered* as trademark. (i.e. XBRL, COREP...)

Moral rights

In all the countries, the Law states that the names of the authors of intellectual creations **MUST** be acknowledged. This also applies to XBRL taxonomies and projects.

Project Management: Typical roles

- Taxonomy Developers
- Preparers/Filers
- Receivers/Users

Point of View: Information Systems (Narrow)
Other roles to be developed later....

Taxonomy Development P.M.

- Intellectual Property (IP) Policies
- Ownership and Sponsorship
- Taxonomy Acknowledgement and Approval
- Adoption Models (mandatory, negotiated, voluntary)
- Regulatory Frameworks
- Change Management & Versioning
- Project Communication and Publicity
- Business Cases & Project Scope
- Quality Control & Risk Assessment

Preparers P.M.

- Basics on creating XBRL Instance Documents
- Mappers & Tools extracting/formatting data
- Choosing appropriate software tools
- What to do and What not to do
- Change Management & Versioning
- Testing
- Documentation
- Finding available resources
- • • • •

Receivers P.M.

- Basics on creating XBRL Instance Documents
- Mappers & Tools inserting/updating data
- Choosing appropriate software tools
- What to do and What not to do
- Change Management & Versioning
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- Documentation
- Finding available resources
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Next PM meeting

- Washington,
- Friday 17. Oct. 2008, 10.00AM-12.00AM
- Key Bridge Marriot



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Thank you for your attention

Ignacio Boixo
boixo@bde.es

Lars Dyrner
ldyrner@kpmg.dk