Managing Defects and Proposed Amendments

Rex Jaeschke, IS 29500 Project Editor

(rex@RexJaeschke.com)

2009-03-05

Contents

Introduction

As editor of IS 29500, I have responsibility for the handling of defects and the production of Technical Corrigenda. Similarly, each editor of any amendment to IS 29500 will have responsibility for the production and maintenance of that amendment.

§1 of this paper shows how I intend to use the Defect Report log to generate the first set of Technical Corrigenda.

The approach used to track and manage defects and proposed amendments is left to the corresponding editor. However, if the editors of the corrigenda and amendments all use the same, or very similar, approach, WG4 members and the end users of those documents will be better served. As such, in §2 of this paper, I have taken the liberty of proposing an approach for tracking Proposed Amendments, and the subsequent generation and processing of amendments, which is similar to the one I plan to use for defect processing. (Regarding the final format of Technical Corrigenda and Amendments, I am awaiting confirmation from ITTF that my approach is acceptable.)

1. Technical Corrigenda

1.1 Terminology

The corrections resulting from Defect Reports (DRs) are published by ITTF as *Technical Corrigenda* (CORs). However, until a Technical Corrigendum is actually published, it is known as a Draft COR (DCOR). The first Technical Corrigendum is known as DCOR1 (and COR1), the second as DCOR2 (and COR2), and so on. (After a revision of the base standard, DCORs and CORs are numbering starting at 1 again, but against the revised standard.)

The *DR log* is WG4's working list of DRs submitted against the base standard, their status, and running commentary on their disposition. (Document SC34-WG4/2009/N 0025 is an example of the DR log.)

IS 29500 is a multipart standard, which allows for its Parts to be maintained independently. As such, DRs logged against 29500 are actually logged against one or more of its Parts. (For convenience, the DR log currently has DRs for all Parts mixed together.) For example, if 100 DRs result in edits against Parts 1, 2, and 4, three separate DCORs (CORs) are needed, one per Part. This collection of DCORs (and resulting CORs) is herein called a *DCOR (or COR) set*.

1.2 Converting the DR Log into a DCOR (and then COR)

The DR log will be maintained in its present form right up until WG4 agrees on the set of closed DRs to include in DCOR1. The editor will then create a separate DCOR for each Part having closed DRs that result in edits to that Part. Each DCOR will contain *only* the editing directions needed to modify the corresponding Part of the base standard, IS 29500:2008. The SC 34 Secretariat will begin a separate letter ballot on each DCOR.

Although the DCORs (and CORs) will contain edits for the schemas as printed in the annexes, it makes sense to actually apply those edits to the electronic version of those schemas, and to attach a zip containing the new version to the DCOR sent to ITTF, to be published along with the COR.

An inspection of a random sample of published CORs showed that text insertions and removals were described by showing the affected base standard text, followed, separately, by the replacement text without any visual distinction of the actual changes. Instead, the editor's plan is to show the original text with deleted text struck through in red, and inserted text underlined and in blue, ala popular word-processing "tracked change notation". (Even if a reader viewed the resulting DCOR (COR) without the benefit of color, he/she should be able to distinguish the struck-through and underlined text from the unchanged text.)

When WG4 agrees on the set of closed DRs to include in DCOR1, it is very likely the log will contain other DRs that remain open. These other DRs will be extracted into a new version of the DR log with the old log being archived. That way, the new DR log will only contain content relevant to the committee's current work.

1.3 Future Corrigenda

There has been some discussion of having a regular schedule for producing corrigenda, such as “every *x* months”. Once we have reached the Copenhagen meeting, more NBs likely will have gotten engaged in the process, and we’ll have a better idea of the quantity of DRs to expect beyond that. As such, it seems useful to address this topic at that meeting.

In any event, we can work on multiple corrigenda at a time with each having its own schedule.

2. Amendments

2.1 Terminology

Additions of, or changes to, features in an IS often are published by ITTF as *Amendments* (AMDs). However, until an amendment is actually published, throughout its life, it has several (virtual) stages:

1. Working Draft (WD)
2. Proposed Draft Amendment (PDAM) [this step can be omitted]
3. Final Proposed Draft Amendment (FPDAM)
4. Final Draft Amendment (FDAM)
5. Amendment (AMD)

This set of stages mirrors that for developing a standard. Stage 1 and 2 can be combined, as can Stages 2 and 3, and Stages 1, 2, and 3.

The first amendment is known as Amd 1 (PDAM1, FPDAM1 and FDAM1), the second as Amd 2 (…), and so on. (After a revision of the base standard, AMDs are numbering starting at 1 again, but against the revised standard.)

The *PA (Proposed Amendment) log* is WG4's working list of submitted proposed amendments, their status, and running commentary on their disposition. If there are multiple editors for amendments, each editor will need to maintain his/her own PA log.

IS 29500 is a multipart standard, which allows for its Parts to be maintained independently. As such, PAs to 29500 actually apply to one or more of its Parts. For example, if 20 PAs result in edits against Parts 1, 2, and 4, three separate FPDAMs (AMDs) are needed, one per Part. This collection of FPDAMs (and resulting AMDs) is herein called an *FPDAM (or AMD) set*.

2.2 Managing the PA Log

As new proposals for amendments are received by WG4 they will be added to the PA log, which, over time, will be updated to reflect the status of each proposal.

Any entry in the DR log that is determined to be an amendment proposal (rather than a defect) will be moved from the DR log to the appropriate PA log, with a residual place-holder being left in the DR log indicating that move. PA log entries will each have a unique ID, which will be different from DR numbers.

It is possible (but not too likely) that a PA log entry might be re-characterized as a defect, in which case, it will be moved to the DR log. (While, initially, such a move may sound odd, over time, a WG might change its criteria for determining whether a proposal is a defect or an amendment; the rules are not absolute.)

2.3 Converting the PA Log into an (F)PDAM (and then FDAM)

The PA log will be maintained in its present form right up until WG4 agrees on the set of PAs to include in (F)PDAM1. The editor will then create a separate (F)PDAM for each Part having closed PAs that result in edits. Each (F)PDAM will contain *only* the editing directions needed to modify the base standard, IS 29500:2008. The SC 34 Secretariat will add a cover page and begin a separate letter ballot on each (F)PDAM.

Once an FPDAM has been approved, the SC 34 Secretariat will ask ITTF to begin a separate letter ballot on the corresponding FDAM.

When any FDAM is sent to ITTF for publication as an AMD, ITTF will add a cover page of its own.

Although the FPDAMs (and AMDs) may well contain edits for the schemas as printed in the annexes, it makes sense to actually apply those edits to the electronic version of those schemas, and attach a zip containing the new version to the FDAM sent to ITTF, to be published along with the AMD.

When WG4 agrees on the set of PAs to include in (F)PDAM1, it is very likely the log will contain other PAs that remain open. These PAs will be extracted into a new version of the PA log with the old log being archived. That way, the new PA log will only contain content relevant to the committee's current work.

2.4 Future Amendments

There has been some discussion of having a regular schedule for producing amendments. Once we have reached the Copenhagen meeting, more NBs likely will have gotten engaged in the process, and we'll have a better idea of the quantity of PAs to expect beyond that. As such, it seems useful to address this topic at that meeting.

In any event, we can work on multiple amendments with each having its own schedule. (Of course, each amendment requires a new authorization from its parent SC.)