ODS
Open Data Standards

Open Data Standards:

Governance Process for Updates and Releases

Version 1.1

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27/10/2021	1.0	First version of document	Matt Donovan – OasisLMF	ODS SC – no further comments
26/07/2022	1.1	* Added the version control table * Minor updates to sections 5 & 7 mentioning the mailing list.	Matt Donovan - OasisLMF	N/A

1.0 Purpose

The purpose of this document is to outline the process around the governance and communication of updates and releases of ODS. Its key that changes are reviewed and communicated clearly to all users of ODS to ensure minimal disruption to the community.

2.0 The Role of the ODS Steering Committee

The role of the ODS Steering Committee (SC) is to govern ODS, agree on its development path and support its growth to ensure it remains a beneficial initiative to the cat modelling community. The SC meet every quarter, adhere to its terms of reference (ToR) and uphold the open and transparent nature of this data standard.

3.0 GitHub: Versioning of Changes

Any updates or enhancements to data and schemas within ODS are categorised into three main levels that follow the *SemVer* convention (https://semver.org/), where the version numbers (i.e., "v1.2.1") would represent the MAJOR.MINOR.PATCH. outlined below:

- **MAJOR** version when you make incompatible changes e.g., changing column names, changing the structure of the data.

- **MINOR** version when you add functionality in a backwards compatible manner e.g., adding a new column with a default value, adding a new allowed value for an existing field.

- **PATCH** version when you make backwards compatible bug fixes e.g., correcting a typo in a column label.

3.1 Using GitHub Branches

Multiple branches are used in Github to ensure updates or enhancements can be developed and contributed to without affecting the current version of the data or code. A basic use of branches is highlighted below, and more information can be found at GitFlow model.

- **Master Branch:** This is the 'default' branch where the current operational data and schema is located. This is the version that the ODS user community should be referring to during their 'day to day' activities.

- **Feature Branch:** Any new features or 'tools' should be developed using this branch.

- **Develop Branch:** Any updates ("major" or "minor") to the data or schema should be done in this branch. *'Release Candidates'* are released to this branch (explained in 3.2).

3.2 GitHub: Release Candidate

A 'release candidate' (RC) is used as a "pre-release" to support the user community when transitioning to a new version and testing the new developments. All developments to the data and code are available on the **develop** branch and 'tagged' as the new version suffixed by "rc". The version of the RC can also change if 'patches' or corrections are required, so a number is added to the end i.e., "v2.0.0rc1".

An RC can occur for either major or minor updates and is decided by the *technical working group* (TWG*) as part of their review process which is discussed in section 4.0.

Once the RC has been agreed and signed off, the full release with all updated code and data will be merged to the **master** branch.

All releases are accompanied by 'release notes' in the repo that highlight all changes that have been implemented.

4.0 Communication and Review of ODS Updates

Suggestions for updates to any data schema within ODS can be submitted by anyone and should be done as an 'issue' on the GitHub repo, outlining the details and rationale. Any suggestions sent by email (or other means) will also be directed to submitting an 'issue' in GitHub. Any accompanying data, links to code and additional comments should be included in the 'issue' which will document any edits made, ensuring transparency and providing a clear audit trail.

Once the 'issue' has been submitted, the TWG will review the proposed updates with the original sender and all dialogue will be documented in the 'issue'.

The materiality of the update (using the versioning convention outlined in 3.0), any user acceptance testing required (UAT) and external dialogue through email or virtual calls will also be included in the 'issue' to maintain full transparency.

The TWG discussed in this document refers to the review of **property data standards. When ODS expands to support other lines of business, those data standards will be maintained by alternative and appropriate TWGs.*

4.1 Technical Working Group (TWG)

The TWG is not a 'fixed' group of people but is flexible and changes depending on the 'issue'. It does contain a few consistent members (from Oasis and Nasdaq) who 'maintain' ODS on a regular basis but also heavily includes the person(s) from the ODS community who has submitted the proposed changes or updates.

The TWG will initially review the 'issue' submitted on the repo and all dialogue will be open and accessible for further comment and feedback from the community.

A part of this review determines the level of significance of each 'issue' raised (as explained in 3.0) and review of any UAT and development required.

4.2 Signoff: 'Minor' or 'Patch' Updates

If the updates are considered 'minor' or 'patches', it's unlikely any UAT will be required. If UAT is considered necessary, this will be planned and agreed by the TWG during review and communicated via the 'issue'.

Explicit signoff **will not** be required by the steering committee (SC) but a majority agreement is required by the TWG and contributors as **'minor signoff'** in the 'issue' before the changes can be implemented and documented as a release.

Any concerns with the proposed changes will be reviewed and discussed as part of this process.

4.2.1 Time Frames for Minor Releases

It's likely minor issues will not be time-sensitive, and the release will occur at the end of the following month** . This will provide a time frame of **at least four weeks** which should be sufficient time to perform any UAT and for the community to be comfortable with the changes.

**OasisLMF follow a monthly release cycle of the last Thursday of the month, however as ODS is independent, a release can occur anytime when required.

4.3 Communication and Signoff for 'Major' Updates

If the updates are considered 'major', the impacts of these changes will need to be considered and reviewed extensively.

The details and rationale of what is required along with any UAT will be planned and an appropriate timeframe will be agreed by the TWG if they are considered time sensitive. A notification will be sent to the SC (either via email or as an agenda point at the next meeting) outlining what major changes are being considered and for any feedback or concerns to be voiced.

The updates will be available through a RC on the **develop** branch so any UAT can be done from those updates. If there are multiple enhancements as a part of the major release, these updates can be 'drip-fed' through multiple RCs to give users time to start UAT rather than waiting for all developments to be available in the same RC.

All UAT should be performed within **3 months of notification to the SC.** Communication surrounding UAT should be done via the 'issue'.

Once UAT has been completed, the changes will be presented at the next SC for review and signoff which will need to be agreed by **a majority.** If the SC voice significant concern, then further discussion and review will be required by the SC and TWG to gauge the balance between the benefits to the community versus the concerns.

Signoff can be agreed in either a real or virtual meeting or even via email if its time-sensitive rather than waiting for the next SC meeting.

4.3.1 Time Frames for Major Releases

Following signoff from the SC, the major releases will occur at the end of the month. **If there is less than 10 days to the end of the month, the release will occur at the end of the following month****.** The version of ODS will then increase from the first digit, i.e., from v1.1.0 to v2.0.0 as explained in section 3.0.

5.0 Communication of Updates to the ODS Community

Communicating developments made to ODS is key to maintaining transparency and to ensure the wider ODS community are aware of the latest version and what developments have been made.

Oasis always recommend the ODS community to use the "watch" feature in Github, which is customisable to ensure they receive notifications when an 'issue' has been submitted or something has been added to the repo.

As curators of ODS, Oasis LMF send out an email notification to the wider ODS community on the mailing list (which also contains the SC) that will contain a link to the repo highlighting the changes being proposed or released. Anyone can be added to the mailing list at their request or a recommendation.

Oasis publishes articles and information on ODS through the various social media platforms, namely *LinkedIn* and *Twitter*. Oasis also include a section on ODS in their quarterly newsletter which is published to the community.

A key message that is repeatedly captured within these publications is that ODS remains independent of Oasis. Releases of ODS are not reliant on Oasis having been updated to support the changes.

6.0 Implementation of Other Lines of Business

As ODS expands to support other lines of business as well as use cases for the public and humanitarian sectors, appropriate "sub committees" will be formed to include specific expertise in those areas who will then report up to the ODS SC to provide regular updates.

7.0 Overview of Governance Process

ODS Version Releases

Updates from **develop** branch (inc the release candidate if major) are released into the **master** branch of the repo at the end of that month or the following month. The SC will be notified of this version change via email and via GitHub notifications. The wider community will be notified via the mailing list, LinkedIn, Twitter or the Oasis LMF newsletter.

Signoff

TWG signoff update via 'issue' and its implemented and documented in the **develop** branch in ODS repo.

Details of the update are presented at the next SC meeting. If updates are time sensitive, they can be signed off via email.

Majority of SC signoff update?

Yes

No

Update is presented again to SC for review at the next meeting

Review and UAT

No UAT required

Any further feedback from the community can be added to the issue for further discussion.

UAT required

When UAT completed

UAT to be done **within four weeks** and all communication should be included in the 'issue'.

Notification of proposed changes is sent to SC and all UAT should be completed **within 3 months of this notice.** UAT will be done from the updates in the "release candidate."

Further discussion and UAT is required until SC agree signoff (via email if time sensitive)

Initial Scope of Update
(Major.Minor.Patch)

Patch or **minor** update

Scope of updates are submitted as a GitHub 'issue' on ODS repo and reviewed by ODS TWG. Significance of update is determined (major.minor.patch)

Major update

All details, rationale and possible consequences to be considered and documented within an 'issue' on ODS repo.