CalConnect Directive: Standard document requirements

THE CALENDARING AND SCHEDULING CONSORTIUM

TC PUBLISH

CALCONNECT DIRECTIVE

CONTENTS

FOREWORD

The Calendaring and Scheduling Consortium ("CalConnect") is global non-profit organization with the aim to facilitate interoperability of collaborative technologies and tools through open standards.

CalConnect works closely with international and regional partners, of which the full list is available on our website (https://www.calconnect.org/about/liaisons-and-relationships).

The procedures used to develop this document and those intended for its further maintenance are described in the CalConnect Directives.

In particular the different approval criteria needed for the different types of CalConnect documents should be noted. This document was drafted in accordance with the editorial rules of the CalConnect Directives.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CalConnect shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be provided in the Introduction.

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

This document was prepared by Technical Committee *PUBLISH*.

This document, together with CC/DIR 10001, replaces the following documents:

— I0701 CalConnect Document Public Review and Comment

— I0702 CalConnect Document Classification and Numbering

— I0703 CalConnect Document Processes and Management

INTRODUCTION

CalConnect is committed in expanding the realm of standards in collaborative technologies with a focus on interoperability across the globe and communities of practice.

To facilitate its mission, the CalConnect Board of Directors has decided to align standardization and publication processes with international best practices, such as the ISO standardization process (ISO/IEC Directives, Part 1, ISO/IEC Directives, Part 1, Consolidated ISO Supplement, ISO/IEC Directives, Part 2) and the WTO Technical Barriers To Trade Agreements.

This document aims to achieve the said intention.

The document describes requirements for CalConnect standard documents.

1. SCOPE

This document provides requirements on document structure of the following types of CalConnect publication:

— Directive

— Standard

— Guide

— Specification

— Amendment

— Technical corrigendum

— Report

These publication types are described in CC/DIR 10001.

This document does not apply to the following types of documents produced by CalConnect, although processes described in this document can be optionally used as guidance:

— policy statements;

— internal administrative documents; and

— how-to guides.

2. NORMATIVE REFERENCES

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

— CC/DIR 10001, *CalConnect Directive: Standardization and publication*

3. TERMS, DEFINITIONS, SYMBOLS AND ABBREVIATED TERMS

For the purposes of this document, the terms and definitions given in ISO/IEC Directives, Part 1, ISO/IEC Directives, Part 1, Consolidated ISO Supplement, ISO/IEC Directives, Part 2 and CC/DIR 10001 and the following apply.

3.1. Terms and definitions

3.1.1
standardization work item

publishable work item that creates output that relates to standardization

3.1.2
standardization project

organized process with one or more *standardization work items* (Clause 3.1.1) that contributes towards a defined scope of work

3.1.3
project owner

entity with authority in charge of a *standardization project* (Clause 3.1.2)

3.1.4
document

written output of a *standardization work item* (Clause 3.1.1)

3.1.5
CalConnect deliverable

document (Clause 3.1.4) that could be a CalConnect Standard, Guide, Specification, Report

3.1.6
ISO TC deliverable

document (Clause 3.1.4) of an ISO TC as described in ISO/IEC Directives, Part 1

Note 1 to entry: According to ISO/IEC Directives, Part 1, ISO TC deliverables include the following types: International Standards, Technical Specifications, Publicly Available Specifications and Technical Reports.

3.1.7
CalConnect technical committee

CalConnect TC

internal committee of CalConnect tasked with a scope of work it is responsible for

3.1.8
document stage

stage of *document* (Clause 3.1.4) as specified in the CalConnect stages (as defined in CC/DIR 10001)

3.1.9
standardization project output

output of a *standardization project* (Clause 3.1.2)

Note 1 to entry: In this document, this explicitly means any documents and IP rights produced by the standardization project.

3.1.10
standardization body

standards-developing organization

SDO

entity that publishes *standardization work items* (Clause 3.1.1)

3.1.11
proposal for standardization

proposal for a new *work item* (Clause 3.1.1) for standardization

3.1.12
co-develop

collaborative development

act of developing a *standardization work item* (Clause 3.1.1) by multiple parties from the proposal *document stage* (Clause 3.1.8)

3.1.13
co-publish

collaborative publishing

act of publishing *documents* (Clause 3.1.4) of identical content by multiple parties

3.1.14
joint work item

standarization work item (Clause 3.1.1) *co-developed* (Clause 3.1.12) by both parties

3.1.15
joint publication

publication that is *co-published* (Clause 3.1.13) by CalConnect with an external *standardization body* (Clause 3.1.10)

Note 1 to entry: Both parties may jointly hold copyright of the joint publication.

3.1.16
Joint Coordination Group

JCG

advisory group with representatives from CalConnect and an external *standardization body* (Clause 3.1.10) on the execution and maintenance of a *co-publishing* (Clause 3.1.13) agreement

3.1.17
co-development document register

document register of a list of *co-developed* (Clause 3.1.12) *documents* (Clause 3.1.4) developed under this agreement, held by the corresponding *Joint Coordination Group* (Clause 3.1.16)

3.2. Symbols and abbreviated terms

IPR   Intellectual Property Rights

TCC   Technical Coordination Committee

4. PROJECT/DOCUMENT IDENTIFIER

4.1. General

CalConnect implements a numbering system for projects/documents.

4.2. Project index

A project/document index shall be maintained on the CalConnect website with documents listed by number, name, and type.

4.3. Project code

a. The project code shall be of the form [n], where [n] is any selected positive integer of five (5) or less digits.

b. The numbering system applies across all project types. Different project types shall not share an identical project code.

c. The project code shall be assigned on proposal acceptance of the project.

d. Co-published documents shall attempt to use an identical project code in both CalConnect and at the collaborative publisher to prevent potential ambiguity, if possible.

4.4. Document identifier

4.4.1. Representation

The document identifier takes the form of [type][stage] [code][:][y], where:

– [type] is the document identifier prefix;

– [stage] is the document stage;

– [code] is the project code of the project that created the document; and

– [y] is the 4-digit edition year.

4.4.2. Edition year

The edition year is the calendar year in which the document is published. On updates, a document will retain the same project code but may be assigned a different edition year in which the update is published.

4.4.3. Co-publishing

Co-published documents shall incorporate codes from all collaborative publishing parties in the document identifier, joined together via a "solidus" sign ("/").

EXAMPLE	CalConnect deliverables co-published with ISO are referenced as as "CC/ISO", with IETF as "CC/IETF".

4.4.4. Document types

Document types shall be represented in the "type" as follows:

a. Standard, "CC"

b. Directive, "CC/DIR"

c. Guide, "CC/Guide"

d. Specification, "CC/S"

e. Report, "CC/R"

f. Amendment, "CC/Amd"

g. Technical corrigendum, "CC/Cor"

h. Administrative, "CC/A"

EXAMPLE	"CC/Guide/DS 38002:2018" is a CalConnect Guide at DS stage with project number 38002, published in 2018.

4.4.5. Document stages

Document stages shall be represented in the "stage" as follows:

a. Published, "   " (blank)

b. Final draft standard, "/FDS"

c. Draft standard, "/DS"

d. Technical committee draft, "/CD"

e. Project group draft / Working draft, "/WD"

EXAMPLE 1	"CC/FDS 10668:2018" is a CalConnect standard document at FDS

	stage with project number 10668, published in 2018.

EXAMPLE 2	"CC/Guide/DS 20080:2018" is a CalConnect guide at DS stage with project number 20080, published in 2018.

NOTE Existing documents can be retrofitted to the scheme as practical.

5. DOCUMENT STRUCTURE

5.1. General

This section describes the document structure and element requirements of a CalConnect standard document.

5.2. Cover page

The cover page will contain:

a. CalConnect logo

b. Document number (Clause 4.3)

c. Document type (Clause 4.4.4)

d. Document title

e. Document status (Clause 4.4.5)

f. Date of publication

g. Responsible technical committee

h. Document authors and their affiliations, if any (Clause 5.6)

i. Incorporation by reference and hyperlink of the appropriate statements of Intellectual Property Rights, Appropriate Usage, Trademarks, and Disclaimer of Warranty

In co-published deliverables, as well as any further adoptions, the document shall retain the logographic marks of the publishing organizations.

5.3. Draft warning

This warning must be shown on the cover page for all draft documents.

WARNING FOR DRAFTS

This document is not a CalConnect Standard. It is distributed for review and comment, and is subject to change without notice and may not be referred to as a Standard. Recipients of this draft are invited to submit, with their comments, notification of any relevant patent rights of which they are aware and to provide supporting documentation.

5.4. Public review note

Certain CalConnect documents are intended for public review, as specified in CC/DIR 10001.

The following note must be shown on the cover page for all documents intended for public review.

> *INSTRUCTIONS FOR REVIEW*
>
> *This draft is intended for public review. Comments shall be submitted to*
>
> *...*

5.5. Technical committee

The responsible technical committee shall be shown on the cover page.

5.6. Authors, editors and their affiliations

Authors and editors of the CalConnect standard document shall be shown on the cover page.

Each individual author or editor shall be shown on the cover page with:

— their role (author or editor) within this document;

— an affiliation, if the author participates through a CalConnect corporate membership, where the affiliation must be a current CalConnect member at the time of publication. Otherwise, in the case an author is an individual member, no affiliation shall be included.

When a document is of the Directive type, no individual authorship shall be shown on the cover page, and only the responsible technical committee is displayed.

5.7. Contributor acknowledgement

Contributors other than authors and editors of the document as well as other contributing parties, shall be provided if appropriate within the Foreword.

5.8. Table of contents

A table of contents shall be provided in any user consumable format, including HTML, PDF and Word.

This does not apply to standard definition files (CSD XML) intended for machine consumption.

The table of contents may be omitted if the document is to be provided on paper medium with less than five (5) pages.

5.9. Sections and subsections

The body of the document shall have section and subsection identifiers to make it easy to refer clearly to specific items in the document.

5.10. Referable document elements

Document elements including numbered list items, examples, and notes shall be numbered uniquely within a clause. Such elements shall be cited within the document by their number and containing clause.

EXAMPLE 1	"Clause 3 a)"

EXAMPLE 2	"6.3.3 a)"

EXAMPLE 3	"8.2 Note 3"

EXAMPLE 4	"2.6 Example 9"

Tables, figures, formulas shall be numbered uniquely within the document. Such elements shall be cited within the document by their type and number.

EXAMPLE 5	"Table 2"

EXAMPLE 6	"Figure 5"

EXAMPLE 7	"Formula 12"

5.11. Foreword

The foreword shall be the first section of the document, unnumbered. It is a mandatory section.

The foreword shall contain a description of the CalConnect organization and provide the necessary copyright and trademark statements.

It is also the place to provide acknowledgements to contributors.

In a revised CalConnect standard, the foreword shall also describe a summary of changes from the previous edition.

5.12. Introduction

The introduction shall be the second section of the document, unnumbered. It is a mandatory section.

It shall describe the purpose and intent of the document, as well as potential use cases. The document's relationship with existing CalConnect or external standards, if appropriate to be explained, shall also be described here.

5.13. Scope

The scope shall always be provided as Section 1.

5.14. Normative and informative references

The section for normative references should be placed at Section 2 of the document.

Informative references shall be placed at the Bibliography section at the end of the document, unnumbered.

References in these sections shall be fully cited.

5.15. Terms and definitions

The terms and definitions sections shall be placed beginning at Section 3.

5.16. Annexes and appendices

Annexes are numbered sections provided after the main body text. An annex may be considered informative or normative.

Each annex is given a clause identifier of capital Latin letters starting from the A to Z (English order). The first annex shall be stated as (and referred to) "Annex A", the second "Annex B", and so forth.

Clauses within annexes shall start with the annex identifier, for example, the first subclause in Annex A is "A.1".

Appendixes are "annexes of annexes", and are given a clause identifier that incorporate the annex it belongs to, followed by a capital Latin letter starting from A to Z (English order).

For example, the first appendix of Annex A will be "Appendix AA", the second appendix of Annex C will be "Annex CB".

Clauses within appendix shall start with the appendix identifier, for example, the first subclause in Annex SA is "SA.1".

5.17. Change summary

Changes to a document from a previous edition shall be described in summarized, bullet-point form at the end of the Foreword (Clause 5.11).

5.18. Page numbers

For documents rendered on paper medium for user consumption, page numbers shall be provided on all pages.

Page numbers shall use Roman numbers of unnumbered initial sections, and Arabic numerals for the main body of text (including appendices).

5.19. Trademark and copyright statement

A trademark and copyright statement of the form shown below must appear on the cover page and the foreword.

Note that "yyyy" is the 4-digit year, such as "2009".

5.20. Draft documents

Draft documents should clearly indicate on the title page and every page of the document that they are a draft document.

5.21. Canonical representation

A CalConnect document shall be digitally represented in canonical form using the CSD XML (CalConnect Standard Document XML) syntax, in accordance with its defined grammar. This allows the CalConnect document to be digitally rendered into any kind of supported format, including HTML, PDF and Word.

CSD XML is an adopted form of Metanorma XML of the Metanorma standard document model.

BIBLIOGRAPHY

— [1] WTO Technical Barriers To Trade Agreements, World Trade Organization, *The WTO Agreements Series Technical Barriers to Trade*

— [2] ISO/IEC Directives, Part 1, *ISO/IEC Directives, Part 1, Procedures for the technical work*

— [3] ISO/IEC Directives, Part 2, *ISO/IEC Directives, Part 2, Principles and rules for the structure and drafting of ISO and IEC documents*

— [4] ISO/IEC Directives, Part 1, Consolidated ISO Supplement, *ISO/IEC Directives, Part 1, Consolidated ISO Supplement, Procedures specific to ISO*