# Update of ODS Versioning

## 1.0 Aim

The aim of this document is to propose changes to the management of the versioning of ODS.

## 2.0 Introduction

Currently, the ODS community submit 'issues' on the GitHub repositories as suggestions for updates and changes to the OED schemas. These 'issues' are reviewed and discussed openly via GitHub where feedback from the community is encouraged. During review, these issues are identified as 'major' or 'minor' updates and in accordance with the current ODS governance process, all major updates require steer co (SC) signoff. Minor updates are implemented by the technical working group (TWG) without the need to be escalated to the SC.

In general, this process works, but in practice, the suggested updates which are mainly considered 'minor', build up, and in addition to the few 'major' suggestions received throughout the year, all constitute an annual 'major' release at year-end as seen by OED v2 and v3 (year-end of 2021 and 2022 respectively). Some community feedback suggests that having annual 'major' releases is too frequent which increases the risk of users falling behind the latest version of OED. This increases the pressure on internal resources required to change their processes to accommodate the updates.

## 3.0 Proposal

The proposal is to:

- Reduce the cadence of the major releases to 18-24 months. The exact time frames will be dictated by the community and the implementation required for 'major' updates.
- Refine the definitions of what are 'major' and 'minor' releases.
- Define the cadence of minor releases.

## 4.0 Definitions of 'Major' and 'Minor' Updates

The main difference between 'major' and 'minor' updates depends on whether they cause breaking changes, resulting in the older version of the schema no longer being compatible for current validation tests.

### 4.1 'Major' Updates

Updates that cause breaking changes.

- Removing fields from the schema.
- Adding *'required'* fields to the schema.
- Moving fields between input files (i.e., from 'ReinsScope' to 'ReinsInfo' files)
- Removing occupancy or construction codes.
- Changing or removing any other codes currently used in the OED schema. I.e., any codes contained in the tabs *'Peril Values', 'Financial Code Values', 'Currency Values', 'Country Values', Area Code Values', 'Other Values' tabs* in the *OED specification .xlsx.*
- Reducing the 'valid value range'.
- Changing the 'allow blanks' field.
- Changing the 'default' values.

### 4.2 'Minor' Updates

Updates that **do not** cause breaking changes:

- Adding new fields to the OED schema.
- Adding new occupancy or construction codes.
- Adding new codes in the *'Peril Values', 'Financial Code Values', 'Currency Values', 'Country Values', Area Code Values',' Other Values' tabs* in the *OED specification .xlsx.*
- Increasing 'valid value range'.

The new version will be backwards compatible so the community can continue using the previous **minor** version.

### 4.3 Patch Updates

Patch updates will remain in place for small errors in the schema and bug fixes to the ODS tooling.

## 5.0 'Minor' Version Control

The continuous management of the ODS versioning will remain with the TWG which predominantly involves, but not limited to, key people from Oasis, Nasdaq and the person who originally submitted the request in GitHub. All comments and input will remain open for community contribution.

The 'minor' suggestions will be reviewed **quarterly** by the TWG, and a minor release will occur if considered necessary. This will depend on the urgency and appropriateness of the suggested updates.

All other current governance and signoff processes regarding 'major' updates will remain unchanged and will still require signoff from the SC.

The changes between versions will continue to be documented in the changelogs on the GitHub repo and communications around all updates will continue to be circulated to the community via email and LinkedIn.

### 5.1 Version Control Tooling

In the coming months, Oasis will implement a tool that automatically translates between minor OED versions and will highlight the updates in each minor release. For example, if a new occupancy code '12345' is added in OED v3.4.0 and a model was developed using OED v3.3.0, the tool will convert locations using occupancy code 12345 to the relevant code in v3.3.0 so those risks will still be modelled.

This tool will ensure the model vendors only need to supply the version of OED their model supports without providing all their required fields in the *model keys service*.

## 6.0 Management of Previous Versions

All previous versions of the OED and ORD schemas will be listed on the GitHub repos and accessed using the GitHub 'tags'.

A 'major' release will include the latest minor version (v3.4 for example) plus any recent 'major' suggestions for updates to make the next version of OED, v4.0.