Standard Upper Ontology Development Guidelines
Version 1.0 D1

Editor: Matthew West

1. Introduction

The purpose of these guidelines is to set out the process and deliverables for Work Programme within the Standard Upper Ontology Group.

2. Process

2.1. Stage 0 – Activity Approval

A proposal shall be submitted as a motion to the Standard Upper Ontology Group (SUO) defining the objectives of a Work Programme and include an outline of the deliverables of the Work Programme. The motion shall also include the nomination of a Project Manager for the Work Programme.

The motion may include reference to initial material, or deliverable material for any later stages of the process.

The motion may include the nomination of additional roles within the work programme, e.g. deliverable editor.

If the motion is passed the Work Programme becomes a recognised part of the Standard Upper Ontology activity.

2.2. Stage 1 – Draft Material Development

Draft Material may be developed towards or in support of the project deliverables. This may be circulated for comment at the discretion of the Project Manager. No formal vote on this Draft Material is taken, but interested parties can raise issues against it. It is good practice to develop and maintain a formal issues log, but at this stage it is not required.

Issues shall be raised using the pro-forma in Annex A, and sent to the SUO list. The issue resolution process is defined below in Clause 3.

2.3. Stage 2 – Draft Standard Proposal

When the project is satisfied that they have the material in a form that constitutes a technically complete Standard, they may propose it as a Draft Standard. A formal vote is taken. The following responses are allowed:

- Abstain
- Yes
- Yes with comments
- No with comments

"Yes with comments" does not require the issues raised to be resolved before the document is accepted as a Standard. This might be appropriate when there are editorial issues, or perhaps minor technical ones. "No with comments" means that the document is not considered fit for purpose as a standard, i.e. there are major technical issues that need to be resolved. It does not mean that the voter does not support the intent of the standard. That is decided when the work Programme is approved.

Following the result of the vote, if the majority vote in favour, the document may pass to the next stage.

2.4. Stage 3 – Standard Proposal

The project should attempt to resolve any issues raised as a result of the Draft Standard ballot and then when the Project Leader is satisfied that as many issues as possible have been resolved, then the document can be submitted for vote as a Standard.

The voting is as for a Draft Standard. The standard is passed if a majority vote for it, but in the event that there are any "no with comments" votes, the Project Leader should consider resolving the issues and resubmitting the document for a further vote.

2.5. Stage 4 – Revision

A Standard may have issues raised against it. A log of these issues shall be maintained by the SUO Chair. A Project to resolve one or more issues against a Standard may be proposed.

3. Issue Resolution Process

Any voting member of the Standard Upper Ontology Group may raise an issue against a document. An issue has an importance level that is one of the following values:

Editorial	A defect that does not affect the technical performance of the document and do not affect its understandability. Examples include spelling, grammar, or layout.
Minor Technical	A defect that is technical in nature, but is easy to fix. Examples include errors in construction of formal language statements.
Major Technical	A defect where the scale and impact of the defect may require significant thought and work. Examples include axioms stated in such a way that they do not have the intended effect, and missing material.

The project shall maintain an issue log for all issues raised against the document that has reached Draft Standard level or beyond. The issue log shall be publicly available.

An issue is resolved when the project and the issue raiser agree that it is.

The status of an issue has one of the following values:

Raised	The issue has been raised, but the project has not yet responded to the issue.
Accepted	The issue has been accepted as valid by the project, but no resolution has been identified and agreed with the issue raiser.
Rejected	The issue has not been accepted by the Project. A reason must be given.
Withdrawn	The issue has been withdrawn by the issue raiser.
Resolved	The resolution to the issue has been agreed in principle by the issue raiser and the project. The resolution is documented in the issue log, but has not yet been reflected in the document.
Completed	The resolution of the issue is reflected in the document to which it refers.

An issue is considered outstanding unless it is either completed or withdrawn.

Annex 1   Issue Pro Forma

Issue Raiser:

Date Raised:

Status:

Issue level:

Title:

Clause:

Issue:

Proposed Resolution (optional):

Discussion:

Agreed Resolution (project and issue raiser):

Completion Date: