



CEDS ELEMENTS USE CASES

Process Flow and Rubrics

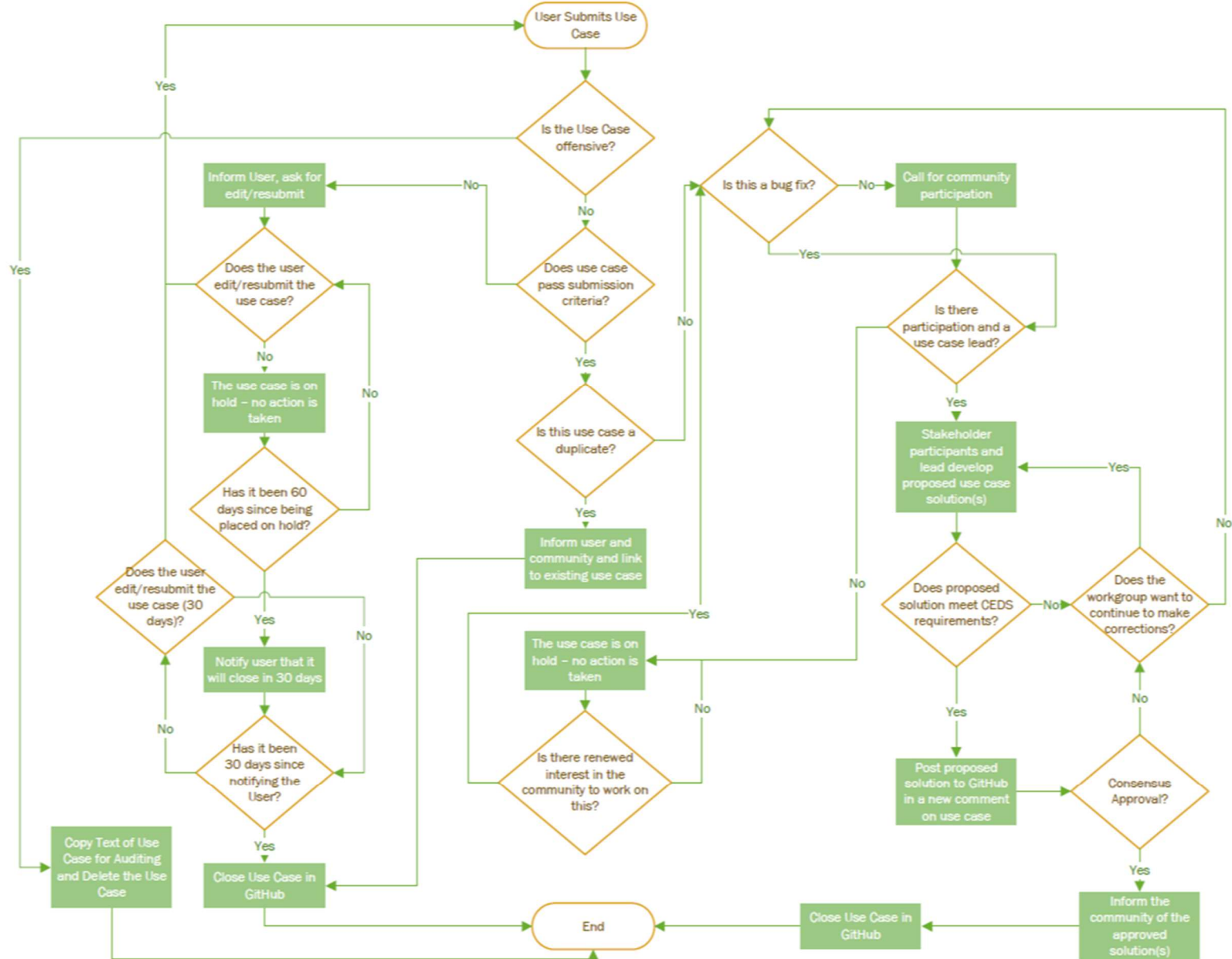
Version 1.0

This document provides the process flow and rubrics involved in decision making to advance, close, or hold on a use case submitted in the CEDS Elements repository.

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CEDS Elements Process Flow



CEDS Elements Use Case Rubrics for Process Flow

Rubric – Is the Use Case Offensive?

This rubric is used to determine if the use case (issue) presented on the CEDS Open Source Community GitHub site meets the criteria that would consider it offensive.

- The use case cannot contain anything that a reasonable person would consider intimidating, hostile, or abusive. The use case cannot contain any offensive text based on race, color, religion, sex (including pregnancy), national origin, age, disability, or genetic information. Offensive text may include, but is not limited to, offensive jokes, slurs, epithets, threats, intimidation, ridicule or mockery, insults, or put-downs.
- The CEDS team will err on the side of caution and close any use case and/or comment deemed offensive.
- Action that follows:
 - Yes – Copy Text of Use Case for Auditing and Delete the Use Case
 - If the use case content is deemed offensive, the CEDS team will copy the content of the use case and save it for auditing and then will take action to delete the use case from the site. The CEDS team will contact the stakeholder who submitted the use case to provide them with the reason why it did not pass submission criteria.
 - No – Proceed to “Rubric – Does use case pass submission criteria?”

Rubric – Does use case pass submission criteria?

This rubric is used to determine if a use case (issue) presented on the CEDS Open Source Community GitHub site meets the criteria to move forward to calling for community participation in attempting to solve/address the use case.

- The use case must be relevant
 - The use case must be relevant to education data within the P-20W spectrum.
- The use case must be complete
 - The use case must contain valid contact information (email or phone) so that further details related to the use case can be obtained.
 - The use case must contain the Use Case Description.
- Action that follows:
 - Yes – Proceed to “Rubric – Is this use case a duplicate?”
 - No – Inform User, ask for edit/resubmit

- If the use case does not pass the submission criteria, the CEDS team will attempt to contact the stakeholder who submitted the use case to provide them with the reason why it did not pass submission criteria.
- If the use case does not pass the submission criteria, the CEDS team will add a comment in GitHub indicating the use case does not pass submission criteria along with the reason for not passing submission criteria.
- If the use case does not pass the submission criteria, the label “incomplete use case” will be applied to the use case.
- The use case will be placed on hold pending edits or a new use case from the stakeholder. This hold will last for 60 days if no action is taken by the stakeholder and then will be followed by additional actions – see “Rubric – Has it been 60 days since being on hold?”
- The CEDS team will add the label “incomplete use case” to the use case.

Rubric – Does the user edit/resubmit the use case?

This rubric is used to determine if the user edited or resubmitted the use case that originally did not meet the criteria for a valid use case.

- The existing use case has been modified and/or resubmitted or the user added comments to the use case to complete the use case.
- Action that follows:
 - Yes – Proceed to “User Submits Use Case”
 - If the user edits or resubmits the use case, the Use Case Process will start again and the CEDS team will once again review the use case to determine if it passes submission criteria.
 - No – The use case is on hold – no action is taken
 - If the user does not edit or resubmit the use case, the CEDS team will allow a period of 60 days to elapse where the use case is on hold and no further action is taken. This period of 60 days begins when the CEDS team adds a comment in GitHub indicating the use case does not pass submission criteria along with the reason for not passing submission criteria. See – “Rubric – Does use case pass submission criteria.”

Rubric – Has it been 60 days since being on hold?

This rubric is used to determine if the use case has been on hold for 60 days or more prompting an additional process in the flow to begin.

- Sixty days have elapsed since the date when the CEDS team placed a comment on the use case that did not pass submission criteria. See “Rubric – Does use case pass submission criteria.”
- Action that follows:
 - Yes - Notify user that it will close in 30 days

- If the creator of the use case provided contact information, the CEDS team will send an email and/or call the stakeholder and indicate the use case will be closed in 30 days, if it has not been updated.
- The CEDS team will indicate an intent to close the use case in 30 days by adding a comment on the use case in GitHub and will again provide the reason for the use case not meeting submission criteria.
- No – Proceed to “Rubric – Does the user edit/resubmit the use case?”

Rubric – Has it been 30 days since notifying the user?

This rubric is used to determine if the use case, which was placed on hold for 60 days, has now been on hold for an additional 30 days after notifying the user that it will be closed.

- It has been 30 days since either emailing or calling the individual who created the use case or 30 days since placing a second comment on the use case in GitHub.
- Action that follows:
 - Yes – Close Use Case in GitHub
 - If the user does not edit or resubmit the use case, the use case will be closed by the CEDS Team.
 - No – Proceed to Rubric “Does the user edit/resubmit the use case (30 days)?”

Rubric – Does the user edit/resubmit the use case (30 days)?

This rubric is used to determine if the user edited or resubmitted the use case that originally did not meet the criteria for a valid use case.

- The existing use case has been modified and/or resubmitted or the user added comments to the use case to complete the use case.
- Action that follows:
 - Yes – Proceed to “User Submits Use Case”
 - If the user edits or resubmits the use case, the Use Case Process will start again and the CEDS team will once again review the use case to determine if it passes submission criteria.
 - No – Proceed to “Rubric – Has it been 30 days since notifying the User?”

Rubric – Is this use case a duplicate?

This rubric is used to determine if the use case submitted is a duplicate of an already existing use case.

- The existing use case contains the same issue or is asking for the same solution. Similar use cases will be grouped and likely worked on at the same time by the same stakeholders. A duplicate use case is not the same as a similar use case. A duplicate will clearly contain the same issue.
- Action that follows:
 - Yes – Inform user and community and link to existing use case
 - The CEDS team will complete the following tasks:
 - Contact the user and let them know the use case is a duplicate and inform them of the existing use case to follow.
 - Add the label “duplicate” to the use case
 - Add a comment to the use case providing a link to the existing use case.
 - Close the use case.
 - No – Proceed to “Rubric – Is this a bug fix?”

Rubric – Is this a bug fix?

This rubric is used to determine if the use case (issue) presented on the CEDS Open Source Community GitHub is a bug fix and details the criteria for what a “bug fix” entails. A bug fix bypasses the need to call for community participation as it will generally be a task that one individual can complete though it does not exclude participation from occurring.

- The change required is at least one of the following:
 - A misspelling in any of the components of an element (element name, element option, usage notes, definition, etc.)
 - A grammatical change for an element definition, usage note, option definition, or description.
 - A URL correction.
- The change required IS NOT a breaking change:
 - Does not change the meaning of a definition of an element.
 - Does not change the code of an option set.
 - Does not change a table name, column name, or code in the IDS or DW (including misspelling)
 - Does not add to or take away from a table in the IDS or DW.
 - Does not add or remove an element.
 - Does not add or remove an option.
- Action that follows:
 - Yes – Proceed to “Rubric – Is there participation and a use case lead?”
 - The CEDS team will add the label “bug” to the use case.
 - No – Call for community participation

- If it is determined the use case is NOT a bug fix, there will be a call for community participation to work on the use case.
- The CEDS team will reach out to the individual who submitted the use case to see if they are interested in leading the development of the addition or change.
- The CEDS team will add the label “volunteers needed” to the use case.
- The CEDS team will add the label “enhancement” to the use case.

Rubric – Is there participation and a use case lead?

This rubric is used to determine if the use case (issue) presented on the CEDS Open Source Community GitHub site that has met the criteria to call for community participation has enough participation and someone to lead the development work to move forward with developing a solution.

- An individual is available to lead the development work.
- The individual available to lead the development work has indicated development related to this use case is greater than one individual can complete, participation has been called for, and participation enough to meet the need according to the expectations of the lead exists.
- Action that follows:
 - Yes – Stakeholder participants and lead develop proposed use case solution(s)
 - If there is a lead and participation enough to complete the development work to resolve the use case, the development work will commence.
 - The CEDS team will change the use case label from “volunteers needed” to “in development”
 - No – The use case is on hold – no action is taken
 - If there is no lead or a lead, but participation is not enough to complete the development work, the use case will remain on hold until there is renewed interest to complete the work. See – “Rubric – Is there renewed interest in the community to work on this?”

Rubric – Is there renewed interest in the community to work on this?

This rubric is used to determine if the use case which has been placed on hold now has renewed interest prompting the CEDS team to call for community participation. Any one of the items below would be considered renewed interest:

- A similar use case is posted on the GitHub site.
- A stakeholder contacts a CEDS team member asking about the use case or topic in the use case and has an interest in seeing it completed.

- Any CEDS team member or stakeholder decides to lead a development effort around this use case.
- Action that follows:
 - Yes – Proceed to “Rubric – Is this a bug fix”
 - No – The use case is on hold – no action is taken
 - If there is no renewed interest, the use case will remain on hold indefinitely until there is renewed interest.

Rubric – Does proposed solution meet CEDS requirements?

This rubric is used to determine if the solution provided by the stakeholders meets all criteria required by CEDS.

- Element Additions or Changes
 - CEDS Naming Standards are adhered to (<https://ceds.ed.gov/pdf/naming-standards.pdf>)
 - Source documentation related to how the addition or change was determined was provided.
 - An analysis of applicable standards that cover the category of data (e.g. A4L, Ed-Fi, PESC, IMS Global, etc.) for this addition or change was conducted and documentation was provided. The documentation contains the analysis of the other standard(s). The documentation indicates if the element exists in the other standard or if what exists conceptually aligns to the CEDS element being changed or to the new element being proposed. If there is any conceptual divergence from the other standard, that will be documented and provided to the community.
 - For any new element where an existing definition or standard has not already been created or vetted for this addition or change, at least three distinct stakeholder agencies or organizations have reviewed the addition and agree with the addition or change.
- IDS Additions or Changes
 - All additions or changes comply with CEDS Naming Standards above and table and column names use the technical names in CEDS.
 - All additions or changes comply with the contributing guidelines posted for the IDS here: <https://github.com/CEDStandards/CEDS-IDS/blob/master/Contributing.md>.
 - Normalization follows the existing pattern of the IDS which honors the superclass-subclass model.
 - All option sets for an element are housed in their own table prefixed with the three letters “Ref” followed by the technical name.
 - At least three distinct stakeholder agencies or organizations have reviewed the addition and agree with the addition or change.
- DW Additions or Changes
 - TBD
- Action that follows:
 - Yes – Post proposed solution to GitHub in a new comment on use case

- If the proposed changes meet the CEDS requirements, the stakeholder will be instructed to post the proposed solution to a new comment on the use case. The entire community will then be informed in multiple ways (see “Rubric – Consensus Approval”) to review the proposed changes.
- The CEDS team will change the use case label from “in development” to “pending community approval”
- No – Proceed to “Rubric – Does the workgroup want to continue to make corrections?”
 - If the proposed changes do not meet the CEDS requirements, the lead/workgroup will be informed of the reason why and they can either decide to make changes to meet the requirements or cease to work on the use case.

Rubric – Does the workgroup want to continue to make corrections?

This rubric is used to determine if the workgroup or lead who developed the solution for this use case, which either does not meet CEDS requirements or does not have consensus approval, is going to continue to work on it.

- The existing workgroup that developed the solution decides to continue development work and the lead agrees there is enough participation to meet the need according to the expectations of the lead.
- Action that follows:
 - Yes – Stakeholder participants and lead develop proposed use case solution(s)
 - If the workgroup decides to continue to make corrections, work on the use case will progress until they are ready to see if the proposed changes meet CEDS requirements.
 - No – Proceed to “Rubric – Is this a bug fix?”
 - If the lead/workgroup decides to discontinue making corrections, the process will take this use case back to determining if it’s a bug fix or an enhancement. If enhancement, there will be a new call for community participation.

Rubric – Consensus approval?

This rubric is used to determine if there is consensus among the community of CEDS stakeholders to move the proposed solution to the use case into production as an adopted part of the CEDS standard.

- Actions that occur at the beginning of this step:
 - Announcement – An announcement to the entire community detailing the addition or change will be provided through the GitHub site in the comments section with a link to all supporting documentation.
 - Announcement – An announcement to the entire community detailing the addition or change will be provided through the CEDS Grads community site through a discussion thread with a link to all supporting documentation.
 - Announcement – A summary document of all changes proposed will be created and posted on the GitHub site monthly (when applicable changes exist) and will be reviewed at the CEDS OSC Monthly Review Meeting.

- After all three announcements above to entire community have been completed, a period of time will elapse depending on the type of change to the standard in which consensus approval is determined.
 - Bug Fix – 30 days
 - Existing element in one domain/entity added to another domain/entity with no change to the element – 30 days
 - Option Set Update for Existing Element Where Option Set is a Standard Determined by a Standards Body Outside of CEDS (e.g., International Organization for Standardization (ISO)) – 30 days
 - Non-breaking change – 60 days
 - Breaking change – 90 days
- If there are no comments rejecting the addition or change and the period of time has elapsed, the addition or change will be considered approved.
- Any rejection to the additions or changes proposed require a specific reason for the rejection with an example of how this change will negatively impact the field. This rejection can be provided via the Communities360 discussion thread, the GitHub comments for this specific use case, or directly to the CEDS team. In the case of the rejection being provided via the discussion thread or directly to the CEDS team, the CEDS team will document the rejection in the GitHub comments for this specific use case.
- Action that follows:
 - Yes – Inform the community of the approved solution(s)
 - The CEDS Team will complete the following tasks:
 - Add a comment to the use case indicating the proposed solution has been approved by the community
 - Change the use case label from “pending community approval” to “approved by community”
 - Fold these changes into the next iterative version release of the elements and provide release notes
 - Close the use case
 - No – Proceed to “Rubric – Does the workgroup want to continue to make corrections?”
 - Valid rejections (a rejection/comment that contains a specific reason for the rejection with an example of how this change will negatively impact the field) stop the timeline and require the development team to review the rejection and make considerations. Stakeholders rejecting the changes agree to providing a reasonable amount of time to the development team to assist in a solution that will meet the needs of all stakeholders including the stakeholder who issued the rejection. Stakeholders rejecting the initial use case, but who are not available to assist in determining a solution going forward, forfeit their right to a second rejection on this use case.
 - Following any rejection and new development, the consensus approval step and timeline will start over again.