V3 Technical Editorial Services

**For HL7 Contract Work Announcement
"V3 Technical Editor"**

Editing Process

8 June 2007

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1   Document Purpose

This document outlines the process to be used by the V3 Technical Editing team to perform work in the scope of the V3 Technical Editing project. It does so in order to set expectations and coordinate activities among the team, the affected committees, and the project manager and director. It is based on a draft process created as part of the original proposal, but it has been modified to address issues identified in the first iterations of execution.

The process outlined addresses the current project to edit V3 documentation, not the creation of processes and capacities to enforce editorial standards in future operations.

The processes are designed to leverage existing processes and minimize additional effort as much as possible.

Note that the editing team will edit copies of identified documents: it is up to the committees that own the documents to accept or reject changes, and to promote accepted recommendations into the normal publishing and balloting processes.

2 Scope

HL7 documents should be brought to a state of clarity where issues with the underlying methodology are articulated as such and readers are impeded by neither prose complexity nor methodological issues. In addition, it must be clear to readers what documents serve what purposes.

The documents in question are human-readable texts designed to orient users. Artifacts including UML diagrams, schemas, databases and message specifications are not in scope for this effort, except as they are used as explanatory devices within the text: e.g., while the Reference Information Model itself is not in scope, the diagrams published in the RIM document are to be reviewed for consistency with the accompanying text.

Because the documents belong to HL7 technical committees, the owning committees are responsible for taking editorial recommendations and implementing them in published and balloted documents. In order to do so, the owning committees must also determine which recommendations are to be considered substantive, thereby requiring a ballot for adoption.

3   Process

3.1   Scope determination

The board-appointed technical project lead will determine the appropriate target committees or documents to address in this phase. If a committee disagrees with this determination, the board will resolve the disagreement.

3.2   Document review

Ockham will follow a process to review documents with their technical committees as outlined in the following activity chart and detailed below:
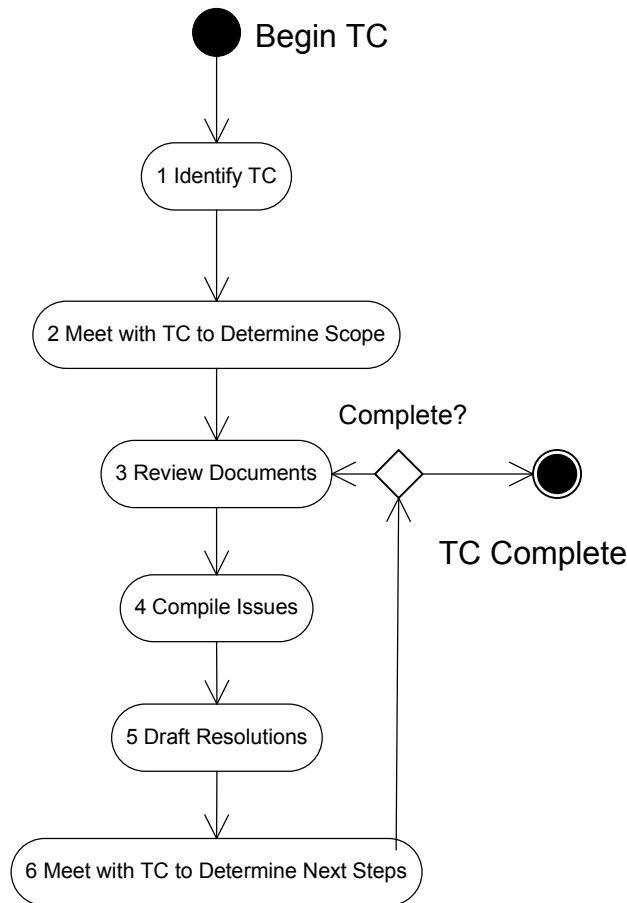
In this diagram, each TC is treated as a unit. The flow is conceptual: it is probable that most TCs will have some documents that are addressed quickly and others that require more time to complete.

1. The technical project lead identifies the documents and committees to be in scope for the current SOW.
2. Ockham meets with the committee to review specific needs and issues, to identify a point or points of contact, to identify target documents, and to prioritize the work. At this point, a statement of the document's objective and target audience will be identified or drafted.
3. Ockham reviews identified document(s) for issues.

4. Ockham compiles issues for review.
5. Ockham drafts resolutions to issues, if appropriate, and may use the Wiki to facilitate communication.
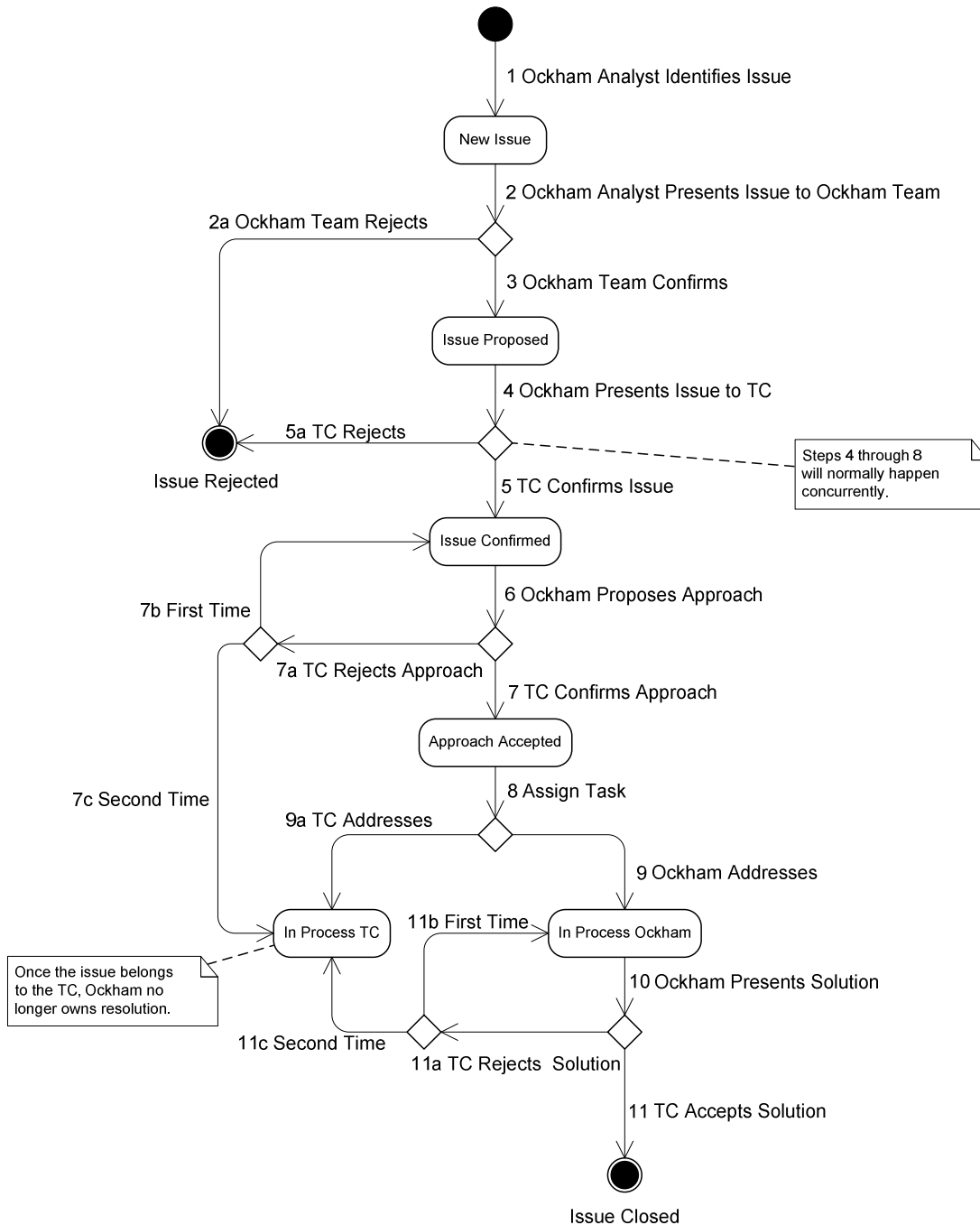6. Ockham and the committee meet to review issues and resolutions

At this point, the TC may determine that Ockham has done all that can be done outside the purview of the committee, or it may ask for subsequent iterations of work—whether to complete or improve upon work already drafted or to undertake new efforts.

The time that the review, editing, and revision of a document will take is expected to vary dramatically. The team will slot the documents into quarterly phases, but it is expected that many of them will span two or more phases.

3.3   Issue review

Each issue identified will be tracked within the following activity chart.

Note that several steps may be taken in a single meeting. Note further that a committee may accept, reject, or request refinement for any issue raised or solution proposed, independent of committee decisions on other issues and solutions. Finally, note that after a certain number of iterations (two, in the illustration, but negotiable), an issue will pass into the committee's responsibility. The assumption at this point is that the issue requires a committee decision, and that further involvement by Ockham will not be of value until the committee has taken action.

1 Ockham Analyst Identifies Issue

New Issue

2 Ockham Analyst Presents Issue to Ockham Team

2a Ockham Team Rejects

3 Ockham Team Confirms

Issue Proposed

4 Ockham Presents Issue to TC

5a TC Rejects

Issue Rejected

Steps 4 through 8 will normally happen concurrently.

5 TC Confirms Issue

Issue Confirmed

6 Ockham Proposes Approach

7b First Time

7a TC Rejects Approach

7 TC Confirms Approach

Approach Accepted

7c Second Time

8 Assign Task

9a TC Addresses

9 Ockham Addresses

In Process TC

11b First Time

In Process Ockham

Once the issue belongs to the TC, Ockham no longer owns resolution.

10 Ockham Presents Solution

11c Second Time

11a TC Rejects Solution

11 TC Accepts Solution

Issue Closed

All decisions, including acceptance, rejection, and task assignment, are up to the committee, according to the rules the committee has adopted for decision-making.

Once a committee has accepted a solution, we do not propose to introduce new processes for implementation. It is the committee's responsibility to use existing channels to ballot changes that require balloting.

3.4   New document Creation

While Ockham can assist in the identification, specification, and management of new document creation, editorial independence requires that a separate entity, for instance the committee, be responsible for document creation.

3.5 Maintenance

Maintenance of edited documents is the joint responsibility of the respective committees and Publishing.

4 Feedback

Committees may provide process feedback directly to the editing team, to the technical lead, or to the advisory committee. In the latter cases, the lead or advisory committee will provide feedback to the editing team at the regular status meetings. The team can modify the process between phases or, in urgent cases, immediately.

Completion metrics will help determine how work is scoped between Ockham & the V3 editing project, the normal work of the TCs, and maintenance staffing.

Quality feedback is part of the process outlined within the TC: either the TC or the designated project team or contact will work closely with Ockham on the edited documentation. In addition, the presentation of draft documents on the Wiki may elicit feedback from other stakeholders—provided the TC elects to use it.

Finally, the project will require the assistance of an advisory group to provide member input into the editing process. This will ensure that the team's activities do not diverge unduly from the membership's expectations. The advisory group should represent a broad cross-section of the V3 community, and it should offer members an additional channel for providing feedback to the project team, which it can provide to the team at status meetings. The advisory group, however, does not direct project activities: this is the task of the technical lead.

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5 Appendix: Issue Log

This is a sample format for issues.

Issues for the RIM document, Normative edition			
Location	**Description**	**Resolution**	**Status**
Act 6.34	question of how specific to make discussion of inertness		3 Identified
Act 7.10	act.ID clarification of rationale for multiplicity of ID. See Entity ID text.		3 Identified

"Act 6.34" indicates the 34th line of the 6th page of the attached "Act" document—a Microsoft Word document containing text copied from the Normative Edition.

"Description" is a brief description of the issue. It is best understood by reviewing the indicated text.

"Resolution" includes both work-in-progress notes as well as any final disposition by the committee

"Status" indicates the procedural status of the issue. The number refers to the diagram in section 3 of this document.

The respective committees may add dimensions for internal status tracking, judgment concerning whether an item is substantive, or other attributes.