



# **Rules for maintenance of ebIX<sup>®</sup> documents**

Status: Approved by ETC

Version: 2.1

Revision:

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## 1 Introduction

This document describes the rules for status of ebIX® documents and the consequences when updating the documents.<sup>1</sup>

The normal procedure would be that an ebIX® work group, including ETC, or ebIX® Forum, decides that a specific document should be written. The first status of such a document is then a “work document”. As long as the “work document” is not published, it only circulates within the members of ebIX®. The table in chapter 3 describes the procedures when a “work document” has been published for the first time, when it is further elaborated and when an existing published approved document for implementation is to be updated.

## 2 Statuses of a document

Below follows the explanation of various statuses of a document.

### 1) Status: ebIX® work document

- a. An ebIX® work group can decide that a work document should be published.
- b. The purpose of publishing the work document is to inform about what the document is describing and make it possible for other interested parties to read the information.
- c. The document must be approved for publication by the work group.
- d. There are no (direct) consequences when publishing the document, ebIX® is not expecting comments.
- e. The document is published at the web page of the work group.

After some versions of a work document, the document will be withdrawn, or reach the next status level:

### 2) Status: ebIX® document for comments

- a. After proof reading a document (by ETC or the ebIX® work group responsible for the document) it can be published after approval.
- b. The purpose of publishing a “document for comments” is to get comments from not only other groups within ebIX® but also all interested parties.
- c. The document must, after proof reading and handling the comments from this proof reading, be approved before publication.
- d. After having published the document we expect comments that will be handled by ebIX® according to ebIX® rules.
- e. The document is published at the ebIX® document web page.

A document in the status “for comments”, may be in that status for several versions until it is withdrawn or reaches the next status level:

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<sup>1</sup> The document was previously called *Rules for status and consequences for ebIX® documents*.

**3) Status: ebIX® document approved for implementation**

- a. ebIX® is publishing different kinds of documents. Business Information Models (BIMs) should be verified by the ebIX® work group and then approved by ETC before it is published. See further the table.
- b. The purpose of publishing a “document approved for implementation” is to implement, or make it possible to implement, the solution described in the document in one or more countries.
- c. The document will only reach this status after it has been approved by ETC or ebIX® Forum (depending on type of document).
- d. ETC or ebIX® Forum decide if a document should be sent on circulation for comments. Circulation for comments should last for at least 4 weeks (2 weeks for ETC). On request of at least one ebIX® member this period will be prolonged for up to another 2 weeks. The document should be considered as accepted if there are no comments. When to send documents for comments, see table below.
- e. Since the model (or solution) as described in the document now can be implemented, ebIX® also will give support to the ebIX® members doing the implementation.
- f. The document is published at the ebIX® document web page.

A document in the status “approved for implementation”, may be updated, and the last column in the table below describes this situation:

**4) Updating procedures**

- a. Business Information Models (BIMs) and other technical specifications must be approved by ETC before a new version is published. For Business requirements, the document should be approved by ebIX® Forum before the new version is published.
- b. The purpose of the updating procedure is to maintain the ebIX® document and the ebIX® standard.
- c. The reason why a document is updated is normally because of a suggestion for improvements or updates from one or several members, or because of new needs and similar. After a proposal it is then decided by the appropriate group to start an updating procedure of the document.
- d. Before a new version of a new document is published in the status “approved for implementation”, the document will often first have the status "document for comments"; this is decided by ebIX® ETC (or ebIX® Forum).
- e. ETC or ebIX® Forum decide if a document should be sent on circulation for comments. Circulation for comments should last for at least 4 weeks (2 weeks for ETC). On request of at least one ebIX® member this period will be prolonged for up to another 2 weeks. The document should be considered as accepted if there are no comments. When to send documents for comments, see table below.
- f. The document is published at the ebIX® document web page.

### 3 Overview

<b>Rules for maintenance of ebIX® documents (Agreed on ebIX® Forum meeting 2011-10-19)</b>				
	<b>Status: ebIX® work document</b>	<b>Status: ebIX® document for comments</b>	<b>Status: ebIX® document approved for implementation</b>	<b>Updating procedures</b>
<b>Approved by</b>	Approved by ebIX WG for publication.	Approved by ebIX® WG and/or ebIX® ETC, after proof reading within WG and/or ETC	For BIMs: Verified by ebIX® work group, approved by ETC.  For other technical specifications: approved by ETC	Verified by ebIX® WG and approved by ETC
			For Business requirements: Verified by ebIX® work group and approved by ebIX® Forum	Approved by ebIX® Forum
<b>Purpose</b>	Open for interested parties	Request other ebIX® WGs and all interested parties to comment on the WG results	Implementation in one or more countries	Maintaining the approved documents, giving new versions
<b>Conditions for reaching status</b>	Approval by ebIX® WG	Approval by ebIX® WG after circulation for comments	Proposed by ebIX® work group and/or ebIX ETC, approved by ebIX ETC or ebIX® Forum (depending on type of document) after circulation for comments	Proposed by ebIX® WG and/or ETC, based on suggestions from members, approved by ebIX® ETC or ebIX® Forum (depending on type of document) after circulation for comments
<b>Consequences</b>	None	Comments to be dealt with by WG according to ebIX® rules	Model available for implementation. Support will be provided to ebIX® members	The new version will often first have the status "document for comments" before approval; this is decided by ebIX® ETC (or ebIX® Forum)
<b>Location for publication on ebIX® website</b>	ebIX® project group page	ebIX® document page	ebIX® document page	ebIX® document page

## 4 Rules for versioning of ebIX® documents

Most ebIX® documents are having two levels of version numbering; Version and Release. In addition there is a Revision letter. Changes are not systematic nor does a change always have the same significance. For this reason ebIX® has introduced a version/release process to manage document changes. The distinction between these three notions is as follows:

- A **version** changes only whenever **there is a major modification of a document e.g. when the modification entails a functional change in any supporting software**. For example a change to the data model, schema, process flow, functional processes, etc. that impacts in one way or another the operational system. For the ebIX® UML model and for ebIX® Business Information models the version is the year, e.g. 2011, for other documents the version is a numeric value starting with "0" for documents in development.
- A **release** will for the ebIX® UML model and for ebIX® Business Information models be a letter i.e. "A" for the first release within a year and "B" for the second etc.<sup>2</sup>. Such releases of a model may require functional changes in any supporting software as a version change may require. For other ebIX® documents the release changes only whenever there is a **modification to the document that typically does not require a change to supporting software**. For example a correction of documentation errors, additional reason codes, coding schemes, etc. that does not affect the operational system. For these other ebIX® documents the release is a numeric value starting with "0".
- A **revision** indicator will be updated when there have been minor changes, like correction of spelling or improvements to provide better clarification. For the ebIX® UML model and for ebIX® Business Information models a revision number is specified after a first update. For other documents a revision letter is specified, starting with "A" for the first revised document.

With this process users can, for ebIX® models and technical documents, immediately determine if there have been only minor changes and that their software implementations not will require modification. The first official version of a document (not being an UML model or Business Information model) is assigned the number of "1". With each version change the release indication is reinitialised to 0.

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<sup>2</sup> Similar to UN/CEFACT versioning.