



ISO/TC 184/SC 4/QC "Quality committee"
Convenorship: **AFNOR**
Convenor: **Dubillot Véronique Mme**



References Overview Report, updated April 2022

Document type	Related content	Document date	Expected action
Meeting / Presentation	Meeting: VIRTUAL 25 Apr 2022	2022-05-09	


ISO/TC 184/SC 4 Industrial Data Quality Committee

References, overview, May 2021

updated April 2022

VÉRONIQUE DUBILLOT / CHANGSOO LEE

ISO/TC 184/SC 4/QC Plain English, Overview

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Objective

The objective is to provide a simple overview of the References, to compare our understanding and to share our difficulties.

09/11/2021

Agenda

- **ISO Code of Conduct**
- Drafting Standards material
- References, overview
- Quiz



ISO code of conduct

Respect others

Uphold consensus and governance

Behave ethically

Agree to a clear purpose and scope

Escalate and resolve disputes

Participate actively and manage effective representation


Work for the net benefit of the international community

Respect others	<p>We are committed to:</p> <ul style="list-style-type: none"> ▶ Respecting others and the professional culture of international standardization within ISO ▶ Conducting ourselves in a professional manner ▶ Respecting others and the diversity of professional opinions – scientific, technical, or otherwise ▶ Embracing the concepts of compromise and consensus-building in the development of ISO standards ▶ Accepting and respecting consensus decisions of the committee or working group and of the ISO/TMB ▶ Making the effort to hear and understand the views of all, regardless of the diversity of acceptable accents and levels of command of the language of the meeting
Behave ethically	<p>We will:</p> <ul style="list-style-type: none"> ▶ Act in good faith and with due care and diligence ▶ Avoid collusive or anticompetitive behavior ▶ Promote a culture of fair and ethical behavior, without prejudice against any ISO actor based on any human differences ▶ Refrain from debate and discussion that is disrespectful, threatening (mental or physical), or otherwise unprofessional in tone or which is offensive to other participants and damaging to ISO and the overall process of achieving consensus ▶ Treat all persons with respect and fairness and not offer or appear to offer preferential treatment to any person or group ▶ Refrain from disseminating false or misleading information or from withholding information necessary to a full, fair, and complete consideration of the issues ▶ Not harass, threaten or coerce any participant in an effort to persuade or sway votes. This does not preclude professional, respectful debate and exchange of views that contain information and/or present perspectives intended to persuade other participants to lend their support or opposition to issues, proposals, etc. in order to ultimately achieve consensus ▶ However, efforts to persuade support or opposition during the development of ISO deliverables shall not be done by committee chairs, managers, WG convenors or project leaders who must be neutral international facilitators of the work
Escalate and resolve disputes	<p>We will identify and escalate disputes in a timely manner to ensure rapid resolution.</p> <p>We will uphold the agreed dispute resolution processes.</p>

Work for the net benefit of the international community	<p>We recognize that the development of International Standards is for the net benefit of the international community, over and above the interests of any individual or organization. We are committed to advancing International Standards within their agreed scope and we will not hinder their development.</p>
Uphold consensus and governance	<p>We will uphold the key principles of international standardization: consensus, transparency, openness, impartiality, effectiveness, relevance, coherence and the development dimension.</p>
Agree to a clear purpose and scope	<p>We are committed to having a clear purpose, scope, objectives and plan to ensure the timely development of International Standards.</p>
Participate actively and manage effective representation	<p>We agree to actively participate in standards development projects.</p> <p>We will make our contributions to the work through the official procedures in accordance with the ISO/IEC Directives.</p>

<https://www.iso.org/files/live/sites/isoorg/files/store/en/PUB100397.pdf>

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<https://committee.iso.org/sites/tc184sc4/home/forums/quality-forum/training-materials.html>

ISO/TC 184/SC 4 Training Materials:

Drafting standards

- ISO templates
- ISO House Style
- ISO Drafting Made Efficient
- Guidelines for the submission of text and graphics to ISO/CS
- Guidance on legal statements in ISO standards
- Guidelines for coding IEC and ISO standards in NISOSTS
- DRG Directives
- Best practices for vocabularies and terminologies

Rice model

Directives

- ISO/IEC Directives, Part 2
- ISO/IEC Directives Part 1 and Consolidated ISO Supplement

ISO/TC 184/SC 4 Website, Quality Forum

- SC 4/QC workshop Materials
- SC 4 Suppl. Directives
- SC 4 boilerplate
- SC 4 Standing documents
- SC 4 Jira (develop)
- SC 4 Bitbucket (develop)

OBP

Access the most up to date content in ISO standards, graphical symbols, codes or terms and definitions. Preview content before you buy, search within documents and easily navigate between standards.


Electropedia

Electropedia contains all the terms and definitions in the International Electrotechnical Vocabulary.

What is a reference?

Oxford dictionary definition for « reference »

the action of mentioning or alluding to something

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What the Directives say 1/3

ISO/IEC Directives, Part 2, 2021, Clause 10

- The entire collection of International Standards published by ISO and IEC is interrelated and forms a system whose integrity has to be preserved.
- Therefore, references to particular pieces of text should be used instead of repetition of the original source material. Repetition introduces the risk of error or inconsistency and increases the length of the document. However, if it is considered necessary to repeat such material, its source shall be referenced precisely.
- Imprecise references such as “the following clause” or “the figure above” shall not be used.

ISO/IEC Directives, Part 2, 2021, Clause 10

- References can be made
 - to other parts of the document (e.g. a clause, table or figure - see 10.6), or
 - to other documents or publications (see 10.2).
- References can be
 - informative (see Clause 21), or
 - normative (see Clause 15).
- References can be
 - dated (see 10.5), or
 - undated (see 10.4).

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What the Directives say 2/3

ISO/IEC Directives, Part 2,
2021, 10.2

Permitted referenced documents

- **Normatively referenced documents shall be documents published by ISO or IEC** and shall have reached at least the enquiry stage
- **Informative reference** may be made to any other type of document.

In the absence of appropriate ISO or IEC documents, those published by other bodies may be listed as normative references provided that

- the referenced document is recognized by the committee as having wide acceptance and authoritative status,
- the committee has the agreement of the authors or publishers (where known) of the referenced document for its inclusion as a reference,
- the authors or publishers (where known) have also agreed to inform the committee of their intention to revise the referenced document and what points the revision will affect,
- the document is available under commercial terms which are fair, reasonable and non-discriminatory, and
- any patented item required for the implementation of the ISO and/or IEC deliverable in the referenced document is available to be licensed in accordance with subclause 2.14 of the ISO/IEC Directives, Part 1, 2021, “Reference to patented items”.

What the Directives say 3/3

ISO/IEC Directives, Part 2,
2021, 10.3

Presentation of references

- **Documents shall be referred to by their number, and if applicable, date of publication, and title.**
- For other referenced documents and information resources (printed, electronic or otherwise), the relevant rules set out in ISO 690 shall be followed.

ISO/IEC Directives, Part 2,
2021 Clause 10.3

.....

- To simplify cross-referencing to the Bibliography, entries may be numbered and cross-references made to the number of the corresponding entry.

EXAMPLE 4

The complete data set is provided in Reference [6].

What are the different types of references?

References to the document itself

To Clauses, figures, tables, elements.....

Figures, tables and annexes shall be explicitly referred to within the text.

Annex: normative or informative

References within the Terms and definitions Clause

References to external document

Always use the standard identifier (document number and type) rather than the title when referring to an ISO or IEC document in the text.

Dated or undated

Numbered or unnumbered

Avoid making reference to documents not yet published (but publicly available) or withdrawn

Normative or informative

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References to the document itself

- For an individual document, the form “this document” shall be used.
- If content has been subdivided into a series of parts,
 - reference in the text to the entire series including the individual document shall be made using the form “the ISO xxxx series” or “the IEC xxxx series”.
 - reference in the lists of documents in the Normative references clause and in the Bibliography; the standard identifier shall be followed by “(all parts)”

“... use the test methods of the IEC 60335 series ...”

- Use “Clause” only to refer to an entire clause. Do not use the words “subclause” or “reference”.
- Use the following forms:
 - “in accordance with Clause 4”;
 - “according to 4.1”;
 - “details as given in 4.1.1”;
 - “(see 4.1.1)”;
 - “as described in 4.1.2”;
 - “see Annex B”.
 - “See Clause B.2” or “See B.2”




SC 4
Supplementary
Directives

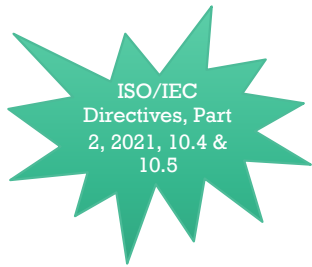
References to the Terms and Definitions Clause

Do not include cross-references in the text to the terminological definitions listed in Clause 3.

Cross-references to terms and definitions are only included within Clause 3.



ISO House Style,
References,
within the
document



References to external document 1/2

Dated

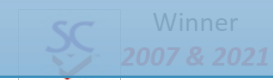
Dated references are references to

- a specific edition, indicated by the date of publication, or
- a specific enquiry or final draft, indicated by a dash.
- Within the text, references to specific elements (e.g. clauses or subclauses, tables and figures) of a referenced document shall always be dated, because subsequent editions could result in the renumbering of such elements within the referenced document.
- If the referenced document is amended or revised, the dated references to it will need to be reviewed to assess whether they should be updated or not.

Undated

Undated references may be made:

- **only to a complete document;**
- if it will be possible to use all future changes of the referenced document for the purposes of the referring document;
- when it is understood that the reference will include all amendments to and revisions of the referenced document.



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References to external document 2/2

Numbered or unnumbered

Always use the standard identifier (document number and type) rather than the title when referring to an ISO or IEC document in the text and do not use callout.

To refer to unnumbered documents in the Bibliography use callout.

Notice that when the callout is given as part of a sentence it is on the line (e.g. "is given in Reference [1]"); when it does not constitute part of the sentence, it is given as a superscript.


For non-ISO or IEC documents, it is possible to provide both a document number and a superscript callout.

Not yet published (but publicly available) or withdrawn

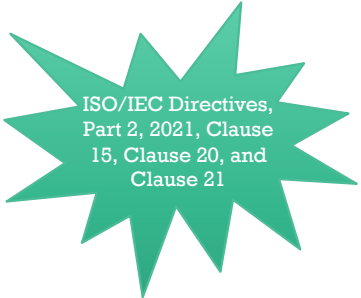
Dated or undated, the references can be made to a not yet published document, at the enquiry stage, if it is publicly available.

This is to be avoided if possible, but if needed add a footnote in both the text and the list it is located in, to note its status in the development process. The footnote is optional for an undated reference.

References to Websites are not recommended. Do not reference websites that have unstable content, such as Wikipedia.

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ISO/IEC Directives,
Part 2, 2021, Clause
15, Clause 20, and
Clause 21

Normative or informative?

A reference is normative when it is cited in the text in such a way that some or all of their content constitutes requirements of the document.

An annex is normative when it provides **additional normative text** to the main body of the document.

The status of the annex (informative or normative) shall be made clear by the way in which it is referred to in the text. Informative annexes may contain optional requirements.



Thank you for your participation

Let's keep in touch!

Veronique Dubillot

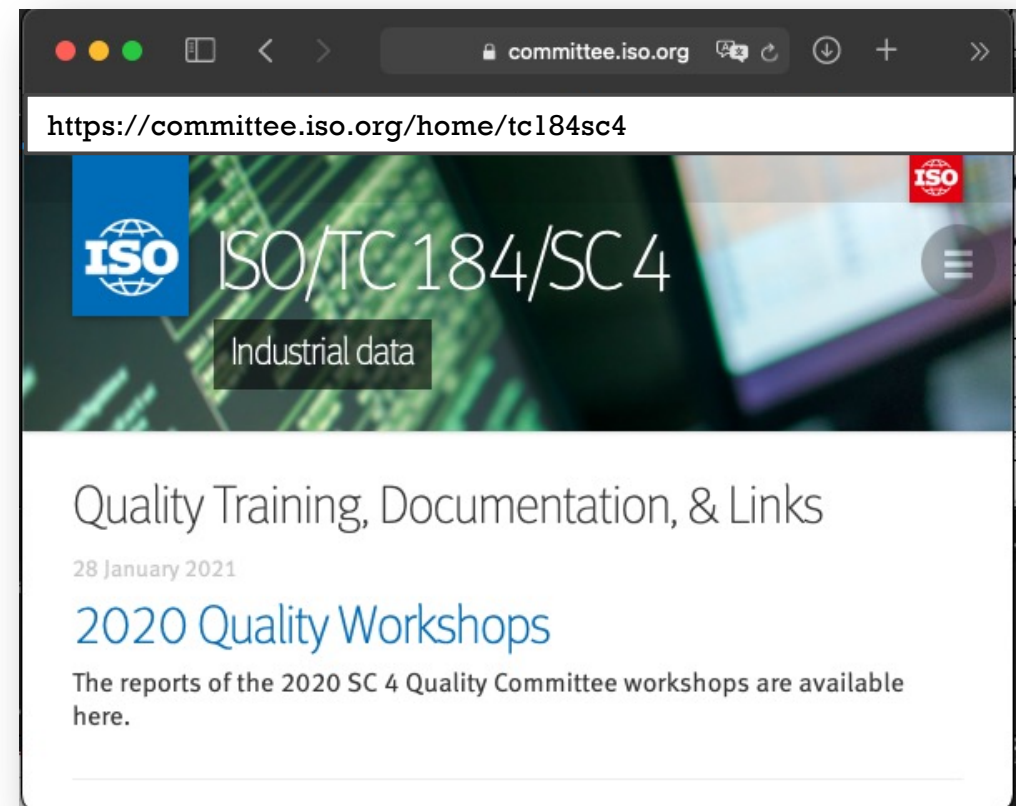
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ISO/TC 184/SC 4 Industrial Data



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