
**Project management guidelines for
terminology standardization**

*Lignes directrices pour la gestion de projets de normalisation
terminologique*

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 3.

Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this International Standard may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

International Standard ISO 15188 was prepared by Technical Committee ISO/TC 37, *Terminology (principles and coordination)*, Subcommittee SC 2, *Layout of vocabularies*.

Annexes A, B, C and D of this International Standard are for information only.

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Introduction

The use of consistent terminology upon which users publicly agree reflects the quality of the final version of a document in technical subjects. The objective of terminology standardization, which is the unification and harmonization of concepts, concept systems, terms and definitions, is to obtain a normative vocabulary in which only one term corresponds to one concept and only one concept corresponds to one term (ISO 10241), thus reducing ambiguity caused by polysemy, synonymy or homonymy and allowing for the creation of new terms in accordance with the principles and methods of terminology (ISO 704).

Standardized terminology, which results from the process of terminology standardization, consists of sets of single-concept designations belonging to special languages (ISO 1087-1) used in the various subject-fields of human knowledge. It improves communication and provides better access to and management of information. There are economic benefits to be derived when general consensus is achieved on the meaning of terms. This in turn contributes to the harmonization of concepts and terms (ISO 860), which facilitates trade and improves national productivity and access to international markets. Inconsistent use of terminology may lead to misunderstandings and potential economic losses.

The aim of standardization in terminology project management is to facilitate terminology standardization and to avoid the cost that would result from reworking proposed or existing standardized terminologies, and also from producing a terminology that lacks uniformity or fails to meet the requirements of the user. The ultimate objective is to keep the project productive and cost-efficient.

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Project management guidelines for terminology standardization

WARNING — It is of primary importance that technical committees carrying out terminology work follow the principles laid down by ISO/TC 37 (see Bibliography). Other terminology standardization projects should be subject to the same principles.

The ISO/TC 37 documents form the basis for terminology standardization and ensure a common understanding of policies and procedures with respect to terminology work. They should be used to ensure consistency in the standardization of terminologies.

Experienced terminologists should be consulted whenever possible. For information and assistance in terminology work, contact a national terminology organization or the ISO/TC 37 Secretariat at the following address:

Simmeringer Hauptstrasse 24
A- 1110 Vienna, Austria
Telephone: +43 1 74040 441
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E-mail: infopoint@infoterm.org

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1 Scope

This International Standard specifies guidelines setting out the phases and procedures to be followed in terminology standardization projects, as well as harmonization and uniformity projects, both inside and outside the framework of international standardization. It is divided into two sections, the first one dealing with terminology standardization in general, and the second dealing with terminology standardization within international standards bodies (ISO, for example). It answers a need expressed by many members of national and international standards bodies and managers of terminology working groups for a standard on the management of terminology standardization projects, rather than solely on the processes of terminology work, project management or quality assurance, which are covered in other standards.

It does not stipulate the principles of terminology work, which are treated in other ISO/TC 37 standards (see ISO 704 for example), nor the methodological approach to international harmonization of concepts, concept systems, terms and definitions, which are treated in ISO 860. It also does not deal with the rules for the preparation and layout of international terminology standards, outlined in ISO 10241, or provide advice for creating and using terminological databases, found in ISO/TR 12618. Finally, it does not deal with the guidelines on quality in project management found in ISO 10006.

These guidelines should be applied to all phases of terminology standardization projects, from the initial identification of needs to the final satisfaction of requirements and user expectations.

2 Normative references

The following normative documents contain provisions which, through reference in this text, constitute provisions of this International Standard. For dated references, subsequent amendments to, or revisions of, any of these publications do not apply. However, parties to agreements based on this International Standard are encouraged to investigate the possibility of applying the most recent editions of the normative documents indicated below. For undated references, the latest edition of the normative document referred to applies. Members of ISO and IEC maintain registers of currently valid International Standards.

ISO 704:2000, *Terminology work — Principles and methods*

ISO 860:1996, *Terminology work — Harmonization of concepts and terms*

ISO 1087-1, *Terminology work — Vocabulary — Part 1: Theory and application*

ISO 10006:1997, *Quality management — Guidelines to quality in project management*

ISO 10241:1992, *International terminology standards — Preparation and layout*

ISO/TR 12618:1994, *Computational aids in terminology — Creation and use of terminological databases and text corpora*

ISO 12620, *Computer applications in terminology — Data categories*

ISO/IEC Guide 2:1996, *Standardization and related activities — General vocabulary*

ISO/IEC Guide 51:1999, *Safety aspects — Guidelines for their inclusion in standards*

3 Terms and definitions

For the purposes of this International Standard, the terms and definitions given in the standards mentioned in the normative references and the following apply.

3.1 terminology project
project aimed at collecting, developing, analysing and recording the terminology of one or more subject fields

3.2 standardization project
project aimed at establishing provisions for common and repeated use

3.3 verification
confirmation by examination of evidence that specified requirements have been met

3.4 international standardization
standardization in which involvement is open to relevant bodies from all countries

[Guide 2:1996,1.6.1]

3.5 terminology standardization
establishment of terminology standards or of terminology sections in technical standards, and their approval by an authoritative body

3.6 risk
combination of the probability of occurrence of harm and the severity of that harm

[Guide 51:1999, 3.2]

4 Project management for terminology standardization

4.1 General

The management process through which a terminology project evolves, from its beginning to its completion and particularly when applied to standardization, unfolds through a sequence of phases: preparation, design,

implementation and review (annex A). The breakdown of the phases and responsibilities depends on the scope of the particular project.

4.2 Preparation phase

4.2.1 Introduction

This phase includes an evaluation of the feasibility of the project, a description of its legal, financial, and organizational framework and the preparation of specifications based on the feasibility study and framework (see Table 1).

Table 1 — Preparation phase

Phase		Requirements
Preparation	Feasibility	Establish the purpose of the project and its objectives Identify the potential user(s) Identify the users' needs Identify situations where significant risk could be incurred should misunderstandings arise and user groups require harmonization
	Framework	Define the legal aspects Define the financial aspects Identify the organizations participating in the project Identify language planning policies Define the national variants
	Specifications	Prepare a specifications document Develop acceptance criteria

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4.2.2 Feasibility

An evaluation of the feasibility of a project in terminology standardization involves:

- establishing the purpose of the project (who wants to do what for whom?);
- identifying the potential user(s) and their needs. This may be done by interviewing or administering a questionnaire to the members of the group involved;
- identifying situations where significant risk could be incurred should misunderstandings arise and user groups require harmonization (ISO 860).

4.2.3 Framework

The description of the legal, financial and organizational framework of the project involves:

- defining the legal aspects of the terminologies to be researched and standardized. Who owns the information? Who has the right to sell it, in part or in its entirety? Who is entitled to access the information and when?
- defining the financial aspects of the project. Who contributes financially to the project? What are the terms and conditions of this contribution? What are the amounts involved? Has a lump sum been allocated to the project or does budgeting depend on a detailed cost analysis which takes into account the number of terms to be researched, scheduling and human resources?
- identifying the organizations participating in the project and the conditions of their participation;
- identifying pertinent language planning policies;
- identifying which national variants within one language will be included.

4.2.4 Specifications

Based on the identified purpose and the framework of the terminology standardization project, specifications should be prepared in the form of a document stating all the requirements essential to complete the project. This document, particularly important for standardized terminology which has to meet a well-defined need and purpose, will facilitate the planning activities scheduled under the design phase.

The document should also contain a justification for the completion of the project, a detailed description of its context and background, an outline of the origin and the circumstances of the request, goals and objectives to be attained, and potential user(s) and their needs.

Criteria for the acceptance of the project should be developed and compared with previously established criteria for similar circumstances. See annex C for an example of acceptance criteria.

4.3 Design phase

4.3.1 Introduction

This phase includes project leadership and project planning (see Table 2).

Table 2 — Design phase

Phase		Requirements
Design	Project leadership	Select a leader
	Project planning	Set up a working group Establish a work plan: assign responsibilities and time frames delimit the scope of the project develop contingency plans establish work methods identify work tools establish the types of data to be recorded Record decisions Hold periodic meetings, as required

4.3.2 Project leadership

Given the importance of the role of project leaders in the management of terminology standardization projects, it is important to select a leader familiar with the subject field under study and also with the principles and methods of terminology work.

4.3.3 Project planning

Project planning for terminology standardization involves setting up the working group, establishing a work plan with time frames for completing the project, establishing project work methods and identifying work tools.

4.3.4 Working group

The project leader should select the working-group members, taking into account the subject field to be studied, user needs and the general representation of all parties concerned. It is essential that the standardized vocabulary be validated by subject-field experts. The members should also be chosen for their experience, motivation, language knowledge, potential to influence their respective professional communities regarding the implementation of standardized terminology and their ability to defend positions and resolve differences of opinion.

The size of the group should be as limited as possible in order to encourage good communication and cooperation, and thus maximize efficiency within the project. Usually, a working group has five to eight subject-specialist members. The presence of an experienced terminologist will improve the efficiency of the work and the accuracy of the resulting terminology. It is important that all participants involved in the preparation of standardized vocabularies understand the tasks they are expected to perform and how those tasks support the overall mandate of the group.

There are various organizational models for terminology standardization. Some of them follow the committee work pattern and others are “terminology-centred”. The traditional committee work models are: A) a terminologist as a consultant outside the working group, and B) a terminologist as a member of the working group. The “terminology-centred” models are: C) a terminologist producing a vocabulary with a specialist, and D) (a) terminologist(s) working with specialists as consultants. The terminologist may be a project leader in models C) and D). In some situations, it may be useful to divide the tasks between a terminologist and a terminographer (responsible for the recording and presentation of terminological data). Terminology standardization projects generally follow the committee pattern. Whenever possible, a professional terminologist should be selected. (See annex B for details concerning roles and responsibilities of each participant in the various models.)

The project leader should take appropriate measures to ensure that the members are familiar with the principles and methods of terminology work. To this end, an introductory tutorial in practical terminology work should be arranged for all the group members. The project leader should ensure that all members have ready access to ISO/TC 37 standards, general language dictionaries, technical vocabularies and other appropriate resources.

The management of terminology standardization projects should take into account the mandates and objectives of all participants in the project. Open lines of communication should be maintained among all interested parties.

4.3.5 Work plan

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A detailed schedule should be prepared for the project and included in the work plan. The schedule should include the specific responsibilities of each working-group member, a time frame for each phase of the project, and a target date for each process (see ISO 10241). An electronic project management system will greatly facilitate this task.

The scope of the project should be clearly defined at the project's outset according to the group's mandate and user-group considerations derived from needs analysis (see ISO 10241). This will aid in delimiting the subject field and the scope of the work (e.g. the number of concepts to be included in the project).

The work plan should include a detailed description of the subject field, with a justification of the subfields to be covered and those to be excluded, the choice of languages to be covered and the number of concepts to be included. For these important aspects of terminology work, see ISO 10241. The plan should also outline the tasks to be accomplished in the implementation phase (see 4.3) with their time frame, and define the relevant working methods. Preliminary provisions for maintenance of the terminology should be established. An itemized budget forecast for each task of the terminology project should be outlined, and cost control mechanisms developed. Mechanisms for disseminating the standardized terminology and ensuring its implementation should be considered.

Terminology standardization projects require a full assessment of possible delays and the development of contingency plans should such situations occur (e.g. the resignation or absence of working-group members, publication delays, scheduling).

4.3.6 Work methods

As outlined in ISO 10241, a working group should examine a limited number of concepts. Experience has shown that if the number of concepts is well over 200, a subdivision of the project into parallel or successive sub-projects becomes necessary.

The working group should apply the principles and methods of terminology work described in ISO 704. The group should also follow the various phases of the standardization process outlined in ISO 10241.

To avoid duplication of effort and reduce cost, all applicable terminology standardization work should be taken into consideration. Authoritative written and oral sources in the field should also be consulted.