

THE ATLAS OF BEING AND BECOMING

Research, Evidence & Validation Specification

Governing specification for source-sensitive comparative metaphysical-existential research

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Governing: Current governing status

This specification is the sole active authority for Atlas research method, evidence, provenance, comparison, representation, validation, synthesis, canonical records, PublicationClaim traceability and release readiness. Publication Architecture Specification governs editorial corpus, chapter architecture, coverage priorities, reader journey, print/digital allocation and manuscript structure. The dated GateRun snapshot at the end records the 28 July 2026 handover state. The specifications define the project's requirements and adopted architecture. Research completion, manuscript completion, implementation, validation, rights clearance and release authorization are established separately by the applicable records and decisions.

Governing — Document control

Field	Current value
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Paired editorial authority	The Atlas of Being and Becoming — Publication Architecture, Coverage Map & Detailed Table of Contents Specification

The edition date identifies document preparation, not adoption. The reference-basis date describes the stated review, the snapshot date the operational state summarized, and a GateRun date an actual recorded run. A later reference check neither constitutes a GateRun nor changes a historical verdict. Adoption and version decisions are governed by §13.

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Headings and bookmarks are the authoritative navigation structure; page numbers may change as records and annexes are maintained.

Decision and use guide

Governing: Decision

Adopt this specification as the sole authority for Atlas research method, evidence, comparison, provenance, validation, governance, synthesis, canonical records, PublicationClaim traceability and release readiness. Use it during targeted research and manuscript development under Publication Architecture Specification. Do not create parallel methodological rulebooks for individual chapters, Positions, traditions, datasets or tools.

The two governing files are complementary. Publication Architecture determines what the project researches and publishes and how the editorial argument is organized. This specification determines what counts as valid, traceable, comparable, reviewable and releasable evidence supporting that architecture. Editorial selection does not validate evidence, and methodological validity does not determine chapter placement.

Governing — Two-document authority map

Authority area	Governing home
Research method, evidence, provenance, comparison, representation, validation, synthesis, canonical records, PublicationClaim traceability and release readiness	This specification
Editorial corpus, chapter architecture, coverage priorities, reader journey, print/digital allocation, manuscript scale and production sequence	Publication Architecture Specification

Normative language

MUST and MUST NOT identify release or governance requirements. SHOULD and SHOULD NOT identify strong defaults that require an explicit rationale to depart from. MAY identifies permitted implementation choices. A local workflow, software choice or editorial preference cannot weaken a MUST-level requirement.

Governing commitments

Governing — Governing commitments

Commitment	Governance status	Operating rule
Comparative unit	GOVERNED INVARIANT	Position is the primary comparative unit; traditions, regions and broad families are context, not default answer-sets.
Atomic evidence unit	GOVERNED INVARIANT	Claim is the smallest release-grade citable attribution or assertion.
Question status layer	GOVERNED INVARIANT	QuestionResponse remains a separate Position-by-question status layer and is not replaced by Claim records.
Analytical substrate	GOVERNED INVARIANT	D1-D15 remains the analytical substrate; exactly one primary response state plus optional CAT category warning is mandatory.
Claim semantics	GOVERNED INVARIANT	claim_attachment and claim_origin remain separate controlled dimensions.
Comparison discipline	GOVERNED INVARIANT	Comparison uses proposition-scoped, typed, stackable relations with explicit dimension, scope, disanalogy links, tertium validity and genealogy/independence metadata.
Evidence and governance	GOVERNED INVARIANT	Source-fit evidence, exact locators, concept control, internal plurality and rights/governance controls are mandatory.
Canonical authority	GOVERNED INVARIANT	The Canonical Evidence Store is the sole authoritative factual source; the Digital Atlas System and its public or generated views are derivative.
Status separation	GOVERNED INVARIANT	Gate verdict, evidence maturity, criterion results, representation readiness, editorial role, planning confidence, validation dependency, synthesis level and synthesis maturity are independent axes.
Publication-claim discipline	GOVERNED INVARIANT	Every thesis-bearing publication claim resolves to canonical premises, rationale, scope, defeaters and review state.
Synthesis boundary	GOVERNED INVARIANT	L0–L2 is the current synthesis ceiling; L3–L4 remain gated; L5 is outside Atlas database inference.

Role-based reading paths

Governing — Role-based use guide

Role or task	Primary path
Research lead and primary coder	Part I; Annex A for controlled values; Annex B for record completion.
Comparative and synthesis lead	Sections 6 and 11; Annexes A–C.
Specialist, translation or source-community reviewer	Sections 5–7 and 9–10; relevant Annex B records and Annex C criteria.
Data and validation lead	Sections 8–10; Annexes B–C; the dated GateRun snapshot.
Release officer	Sections 10–13; Annex C evidence; current recorded GateRuns.
Editorial or publication user	Publication Architecture Specification for placement and commissioning; this specification for evidence, comparison, rights, synthesis and release limits.

Governing: Core thesis

The Atlas compares source-identifiable bounded Positions to determine how they answer, deny, reframe or leave open recurring questions about reality and life; which similarities remain after translation, genealogy and category controls; and where scoped incompatibilities persist. It maps structured possibilities without treating recurrence as evidence of metaphysical truth.

Governing: Human-operability rule

No mandatory Atlas research, review, validation, publication or release rule may require AI assistance to understand or execute. AI is an optional accelerator and cannot serve as evidence source, independent reliability coder, specialist or source-community reviewer, final translation authority or release decision-maker.

Part I — Research method

Governing — Section front door

Purpose	Establish the bounded research object, analytical questions, claim and response semantics, evidence and translation controls, comparative method, representation safeguards and coverage discipline.
Primary users	Research leads, coders, subject and language specialists, provenance/governance leads and comparative researchers.
Authority status	Governing
Decision or rule	Positions are described emically, evidenced atomically, coded without forced answers and compared only at explicit proposition, dimension and scope.
Required output	Comparison-ready Position packages and valid ComparisonEvents.
Go to	Part II for canonical validation, review, gates, synthesis, publication traceability and release.

1. Research object, scope and principles

1.1 Research object and units

The Atlas studies metaphysical-existential architectures: source-identifiable configurations of claims, refusals, practices, concepts, arguments and orientations concerning reality, world structure, embodiment, mentality, personhood, knowledge, value, the human condition, causation, agency, transformation, death, desired conditions and world relation.

Governing: Primary comparative unit

A bounded Position: specific enough that its claims can be sourced and its scope stated; broad enough to form a coherent answer-set across the questions actually relevant to that Position.

The atomic evidence unit is a citable Claim: the smallest substantive assertion released by the Atlas, with evidence links, locator(s), provenance, attachment, origin, confidence, interpretation status and version metadata.

1.2 Included scope

- Religious, philosophical, mystical, esoteric, secular, naturalistic and sufficiently documented local or Indigenous Positions.
- Scientific findings where they bear on Atlas questions, while empirical results remain distinct from philosophical or metaphysical interpretations.
- Lived practices, ritual, social embodiment, material forms and experience reports where they materially constitute or transform a Position.
- Partial metaphysical theses, using underdetermined or non-salient states rather than inflating a narrow thesis into a complete Position.

1.3 Non-goals and optional modules

- Ranking Positions or adjudicating metaphysical truth by recurrence, popularity, cultural prestige or database frequency.
- Constructing a universal theology, perennialist synthesis or single civilizational hierarchy.
- Treating institutional history, politics, law, ritual description or anthropology as exhaustive project objects rather than context or modules where analytically necessary.
- Claiming literal exhaustiveness over all worldviews or treating database size as a substitute for source-sensitive interpretation.
- Using public availability as a substitute for cultural authority, consent, rights, specialist review or exact provenance.

Optional modules are activated only when structurally salient: suffering and evil; desire and attachment; sexuality and reproduction; gender and kinship; ritual and sacrament; mystical or contemplative experience; language, symbol and ineffability; time and history; social order and political ontology; ecology and place; aesthetics; revelation and prophecy; intermediary beings; and eschatological chronology. Optional modules **MUST NOT** be treated as universal analytical domains.

1.4 Governing research principles

Governing — Research principles

Principle	Operational rule
P1. Position-first	Traditions, schools, communities, texts, thinkers and periods are contextual entities around bounded Positions; they are not assumed to possess one doctrine.
P2. Emic-before-etic	Describe the source's own problem-space and vocabulary before applying Atlas categories.
P3. Revisable meta-language	Atlas domains are analytical tools, not claims that all cultures partition reality identically.
P4. Multi-resolution representation	Move from broad context to concepts, Positions, claims, evidence and locators without treating these levels as equivalent.
P5. Internal plurality is data	Historical change, disagreement, region, authority level, lived/normative divergence and genre differences are represented rather than averaged away.
P6. Negative and open representation	Denial, reframing, non-salience, variation, underdetermination, indeterminacy, source insufficiency and category warning are valid outcomes.
P7. Typed comparison	Lexical, semantic, functional, structural, phenomenological, epistemic, genealogical, ontological, incompatibility and category-mismatch relations are distinct claims and may stack only under explicit coherence rules.
P8. Source-fit evidence	Evidence quality is evaluated relative to claim type; there is no universal source ladder for text, ethnography, history, philosophy, oral performance and science.
P9. Claim-level traceability	Every released substantive attribution resolves to human-verifiable evidence or is explicitly an Atlas inference with a documented derivation chain.
P10. Cross-level normalization	Unlike comparands are compared only after bounding them as Positions at an explicitly normalized analytical scale.
P11. Community authority where applicable	Public availability does not erase cultural authority, consent, access restrictions or community governance.
P12. Synthesis is earned	Pattern claims require selection basis, counterexamples, coverage, genealogy/independence analysis, sensitivity testing and level-appropriate review.
P13. Canonical evidence, downstream views	Profiles, matrices, fault-line essays and publication chapters are generated from or traceable to one Canonical Evidence Store.
P14. Failure is diagnostic	Repeated category failure triggers controlled schema review; researchers do not force difficult cases into categories to preserve the taxonomy.
P15. Independent status axes	No compact display label may collapse or waive an unmet verdict, evidence, readiness, role, dependency, level or maturity condition.
P16. Publication arguments are traceable	Thesis-bearing publication claims record canonical premises, inference rationale, scope, defeaters, review state and prohibited stronger reading.

Governing: Core discipline

Accurate non-answers, legitimate internal variation and explicit category warnings are valid research outcomes. Completeness means faithfully representing what a bounded Position answers, denies, reframes, varies, leaves open or cannot presently support. It does not require an ANS response in every analytical cell.

2. Research model and objects

The core production sequence is Position -> Concept -> Claim/Evidence -> QuestionResponse -> Comparison -> Synthesis -> PublicationClaim -> Review/Gate/Release. Supporting context, source-instance, practice, experience, readiness and provenance objects do not alter that chain.

Governing — Core operating chain

Step	Core object	Operational meaning
1	Position	Define exactly what is being studied and at what historical, textual, community or thesis scope.
2	Concept	Establish source terminology and translation/semantic constraints before normalization.

Step	Core object	Operational meaning
3	Claim + EvidenceLink	Extract evidence-bearing assertions atomically and attach human-verifiable support or explicit derivation.
4	QuestionResponse	Determine how the bounded Position answers, denies, reframes, varies, leaves open, or cannot presently support an Atlas question.
5	ComparisonEvent + ComparativeRelation	Compare exact claim pairs under an explicit tertium, relation dimension, temporal/Position scope, disanalogy and genealogy status.
6	SynthesisRecord	Generalize only at a permitted synthesis level and maturity state. Keep level and maturity separate, and meet the applicable requirements for selection, coverage, negative cases and sensitivity testing.
7	PublicationClaimRecord	Trace each thesis-bearing publication claim to canonical premises, rationale, scope, defeaters and prohibited stronger reading.
8	ReviewRelease + CriterionResult + GateRun	Record review results, gate evidence and verdicts, unresolved issues, version and authorization without collapsing independent status axes.

Governing summary — Compact object overview; full definitions are in Annex B

Object group	Included objects and use
Context	Worldview family, tradition, branch, historical formation, community, agent, corpus, time span and geography situate research; they are not default answer-sets.
Research core	Position, Concept, Claim, QuestionResponse and CategoryWarning define the unit, terminology, atomic assertions and answer/non-answer status.
Evidence and interpretation	SourceRecord, SourceInstance, EvidenceLink, Argument, Practice, ExperienceReport and Interpretation support claims without collapsing evidence forms.
Comparison and synthesis	ComparisonEvent, ComparativeRelation, SynthesisRecord and PublicationClaimRecord carry proposition-scoped comparison and bounded inference.
Review and governance	RepresentationReadiness, SourceCommunityCoverage, ReviewRelease, CriterionResult, GateRun and AIProvenance record review, authority, rights, evidence and release state.

Governing: Multi-parent graph rule

No entity is required to have one parent. Hybridization, transmission, polemic, multiple authority streams and overlapping communities MUST be representable without forcing false single-parent hierarchies.

3. Analytical domains D1–D15

The fifteen domains are neutral research prompts, not assumed compartments of reality. A Position may answer, deny, reframe, leave open, vary, render indeterminate, lack adequate sources for or expose category distortion in any domain. Annex A contains the one authoritative set of neutral master questions and illustrative subfields.

Governing summary — D1–D15 operational index

Code	Domain
D1	Ontology & ultimacy
D2	Cosmogenesis & world structure
D3	World-partitioning, materiality & human/nonhuman relations
D4	Human constitution & embodiment
D5	Mind & consciousness
D6	Self, personhood & identity
D7	Epistemology & authority
D8	Axiology, meaning & value
D9	Human condition & diagnosis
D10	Causal order & dependence
D11	Agency, freedom & constraint

Code	Domain
D12	Praxis & transformation
D13	Death & continuity
D14	Telos / desired condition
D15	World relation & normative orientation

3.1 High-risk boundary rules

Governing — Binding domain-boundary rules

Boundary	Rule
D3 vs D6	D3 asks how categories/personhood/interiority are distributed across kinds of beings; D6 asks what constitutes self/personhood/identity within the bounded position.
D4 vs D6	D4 is human constitution and embodiment; D6 is self/personhood/identity. A body theory does not automatically settle personal identity.
D5 vs D6	Consciousness and personhood are never presumed coextensive.
D1/D5/D6 vs D7	Claims about ultimacy, mind, consciousness, self or subjecthood do not by themselves establish what can be known, who or what can know, or by what means. Ontological, consciousness and personhood claims remain separate from epistemic authority or access and require distinct source-grounded Claims.
D7 vs D12	D7 asks what can be known, by what means and under what authority; D12 asks what practices or processes transform understanding, character, status or mode of being. Transformative effect does not by itself establish epistemic warrant, and epistemic warrant does not by itself establish transformation.
D9 vs D7/D12	D9 diagnoses error, ignorance, disorder or predicament; D7 records epistemic authority or access, and D12 records transformative process. A diagnosis does not automatically supply a method of knowing or a remedy; each claimed link requires separate evidence.
D8 vs D14	D8 concerns value/meaning generally; D14 concerns a desired or culminating condition. A position may have values without a cosmic telos.
D10 vs D11	Causal/metaphysical order is distinct from agency/free will/responsibility. One does not automatically entail the other.
D12 vs D14	Praxis is process/practice; telos is a desired condition. Preparatory practice is not itself the final state.
D15 vs D8/D12	D15 captures normative relation to world/others/community; it must not duplicate general value theory or enumerate practices.

Governing: Cross-domain coupling rule

A Position may connect or separate claims about reality, epistemic authority or access, diagnosis and transformation, including claims about a knower, subject or equivalent role where these are source-relevant. Researchers MUST decompose any such architecture into atomic Claims and QuestionResponses under the applicable existing domains.

A claimed link, such as transformation as a condition, consequence or constituent of knowing, must be source-grounded or recorded as an explicit Atlas inference with premises, direction, scope, defeaters and review. No such link is inferred from shared English terminology, textual sequence, a D5 consciousness claim, or the mere presence of contemplative, ritual, therapeutic, ethical or soteriological practice.

Condition, consequence, constituent, separation and similar terms remain prose characterizations, not controlled values. Where the Position denies, reframes, varies, leaves open or renders the distinction non-salient, preserve that result through the existing response states and CAT rather than forcing a directional or subject-bearing model.

Implementation note: within one Position, encode the architecture through separate Claims, QuestionResponses, Arguments or derivations and source links. Across Positions, compare the resulting claim structures through existing ComparisonEvents and relation types. Do not use ComparativeRelation as a substitute for an intra-Position claim, and do not use P5 or any D5 record as a proxy for D6 or D7.

4. QuestionResponse and claim semantics

Governing: One primary state plus optional CAT

Every Position-by-question QuestionResponse MUST contain exactly one primary state: ANS, DEN, REF, NSA, VAR, UND, IND or INS. CAT is an orthogonal category-warning modifier and MAY accompany any primary state. CAT is never itself a primary state. Exact meanings and decision tests are governed in Annex A.

4.1 Status discrimination order

1. Evaluate category fit first. If Atlas framing distorts the source, attach CAT, record the warning scope and handling instruction, and continue to determine the primary state.
2. Test boundary adequacy before VAR. If materially different answers can be separately bounded, revise the boundary instead of using VAR for avoidable heterogeneity.
3. Use VAR only when plurality is constitutive of the adequately bounded unit; link competing subpositions or claims and the variation basis.
4. Use DEN when the Position explicitly rejects the question's presupposition or answer class.
5. Use REF when the Position transforms the question into a materially different problem-space.
6. Use ANS when the Position gives a substantive answer.
7. Use NSA when the question is not structurally important to the bounded unit.
8. Use UND when evidence is adequate but the Position itself leaves the issue open.
9. Use IND when relevant evidence exists but stable interpretation cannot presently be established.
10. Use INS when the current evidence package is too weak or incomplete to decide.

Governing: VAR admission rule

Before assigning VAR, the researcher MUST test whether materially different answers should be represented as separate bounded Positions or subpositions. VAR is permitted only when plurality is constitutive of the declared unit or the higher-level contested unit is itself the research object. Record the boundary assessment, variation basis and linked subpositions or claims.

UND is a property of the bounded Position; INS is a property of the current evidence package. Better evidence may resolve INS. It cannot resolve UND without expanding or changing the Position under study.

REF describes what the Position does with the question. CAT warns that Atlas framing or translation risks distortion. REF+CAT, DEN+CAT and ANS+CAT are valid when supported.

4.2 Claim attachment and origin

Claim attachment and claim origin are separate. Attachment records whether a claim is definitional, explicit, derived or contextual. Origin records whether the attribution is source-grounded or an Atlas inference. Logical compatibility is not an attachment class; a claim is not attributed merely because it is compatible with a Position. Exact controlled meanings are in Annex A.

- Definitional claims require a boundary rationale showing why removal would materially change the bounded Position.
- Derived claims require source-grounded premises and an explicit inference rationale; they are not presented as direct source assertion.
- Contextual claims cannot by themselves convert UND, NSA or INS into ANS for the bounded Position.
- Every upward aggregation from text or thinker to school or branch preserves attachment and scope; no default inheritance is allowed.
- Claim function and claim origin remain separate. A comparative claim function does not show whether the statement is source-grounded or Atlas-generated.
- PublicationClaim records do not replace Claim records; they make thesis-bearing publication inference explicit.

5. Evidence, provenance and concept control

5.1 Source-fit evidence

Evidence quality is evaluated relative to claim type. There is no universal source ladder across text, oral performance, ethnography, history, philosophy and science.

Governing — Source-fit evidence packages

Claim type	Preferred evidence package	Mandatory caution
Textual/doctrinal	Critical edition/source-near witness; primary text/oral record; specialist translation/commentary	Original language/locator where possible; record redaction, dating, manuscript, recension and translation disputes.
Historical development/influence	Primary historical evidence + specialist historical scholarship	Similarity is never evidence of transmission by itself.
Lived worldview or practice	Ethnography, sociology, oral history, community scholarship/voices	Do not infer lived practice from normative texts alone.
Indigenous/local ontology	Source-community scholarship/voice where available + rigorous ethnography + linguistic/contextual evidence	Record cultural authority, access/rights, researcher mediation and disagreement; never aggregate a generic Indigenous worldview or unbounded Position.
Philosophical argument	Primary philosophical source + specialist interpretation + explicit argument reconstruction	Separate attribution from assessment of whether the argument succeeds.
Phenomenological report	First-person/ethnographic report + context + interpretive scholarship	Experience report is not automatic proof of its metaphysical interpretation.
Scientific/empirical	Peer-reviewed studies/reviews; authoritative datasets/consensus statements	Keep empirical result distinct from metaphysical extrapolation.
Contemporary position	Recent primary publications + current specialist literature	Version/date profiles; contemporary positions can change rapidly.

5.2 Orthogonal source and epistemic fields

Source proximity, source form, authority relation and claim-specific evidence role are independent dimensions. A SourceRecord is not forced into one exclusive class when several forms or authority relations materially apply. Evidence role belongs on the EvidenceLink, because it is claim-specific. Claim function, confidence, scholarly status, evidence completeness, interpretive dependence, attachment, origin and representation readiness remain separate fields; Annex A governs their values and Annex B their record placement.

5.3 Exact locators and traceability*Governing — Minimum human-verifiable locator by evidence form*

Evidence type	Minimum locator
Book / critical edition	Edition + page; add chapter/section/verse where available and stable.
Journal article / chapter	DOI/stable ID + page/section; paragraph only where pagination is unavailable.
Primary text with standard divisions	Work/witness + book/chapter/section/verse/karika or equivalent; page may be supplementary.
Web source	Stable URL + page title + access date + section/anchor or quoted-text pointer sufficient for human verification.
Audio/video	Artifact ID + timestamp start/end + SourceInstance ID.
Oral performance/interview	SourceInstance event metadata + native oral unit ID where applicable + artifact ID/timestamp + transcription/translation version.
Dataset/scientific evidence	Persistent dataset identifier/version + table/variable/record/query or analysis artifact required to reproduce the cited result.
Archive/manuscript	Repository + collection + box/folder/item/witness/shelfmark + folio/page/segment as applicable.

Governing: Zero-tolerance traceability rule

A release-candidate source-grounded substantive Claim with a missing, non-human-verifiable or merely bibliographic locator fails G6. A bibliography entry alone is not a Claim locator.

5.4 Oral, performed and interview provenance

Release-candidate oral, performed or interview evidence requires an event-level SourceInstance. The complete field set—identity or ethical restriction rationale, role and affiliation, event context, place/date, recorder or collector, native unit ID where applicable, language, transcription, translation, authorization and rights, artifact locator and editorial history—is governed in Annex B.

Governing: Ethical stop condition

Do not reconstruct or guess performer identity, consent, community authority or access rights from a published transcription. If a required event or authorization chain cannot be lawfully and ethically documented, retain the record as restricted/internal or select another eligible source event.

5.5 Provenance interoperability and governance

The Atlas logical model is serialization-agnostic. Sources, source instances, claims and profile snapshots may map to PROV Entities; transcription, translation, coding, review, comparison and synthesis to Activities; and authors, performers, researchers, reviewers, communities and institutions to Agents. PROV-O is a crosswalk, not a replacement for Atlas objects.

FAIR-style findability and interoperability do not imply unrestricted openness. Where Indigenous or local knowledge is implicated, CARE-aligned authority, responsibility and ethics controls apply. Authorized community-supplied Traditional Knowledge or Biocultural Labels are preserved; researchers do not self-assign community Labels. Public accessibility does not override rights, protocols or cultural authority.

5.6 Translation and Concept control

Governing: Translation is a research object

A shared English bridge term is never sufficient evidence of shared conceptual structure, and grammatical form must not be converted into an alien ontology by default. The complete ConceptRecord field set is governed in Annex B.

- Never infer conceptual equivalence from a shared English translation.
- Never infer a substance ontology merely because a source term is rendered as an English noun.
- When no stable English equivalent exists, retain the native term and compare functions, structures, arguments and usage rather than inventing lexical identity.
- Every SEM or OEQ claim involving translated concepts states both overlap and material non-overlap; OEQ additionally states failure conditions.
- Where the source rejects or transforms the Atlas framing, assign the applicable primary response state under §4.1. Use DEN for an explicit rejection of the presupposition or answer class, and REF for transformation into a materially different problem-space. Add CAT separately where the Atlas framing or translation risks distortion; CAT never replaces the primary state.
- AI-proposed translation MAY be used only as a triage candidate; release requires human and source-grounded language verification.

6. Comparative method

Every comparison is a recordable research event. It declares bounded comparands, exact Claim pairs, the tertium or question, and the relation dimension, mode and scale. It states the temporal and Position scope, source adequacy on each side, relation scope and directionality. It also records disanalogy links, tertium validity, genealogy and independence status, confidence, unresolved issues and any cross-level normalization. Exact relation meanings are governed in Annex A; complete record fields are in Annex B.

Governing: Granularity gate

A religion family, one text, one thinker, a community, a scientific field and a metaphysical thesis are not equivalent comparands. Cross-level comparison is permitted only after each side is bounded into Positions answering the same question and the asymmetry is documented.

Multiple relations MAY hold simultaneously. Each accepted type is stored as a separate ComparativeRelation inside one ComparisonEvent. Functional or structural resemblance may coexist with proposition-level incompatibility; genealogy is independently supported, disputed or unassessed.

Governing — Minimum relation-coherence rules

Combination	Rule	Required handling
relation:FUN + relation:INC	Permitted	Comparable function may coexist with incompatible propositions; scope and dimension must be explicit.
relation:STR + relation:INC	Permitted	Shared relational architecture may coexist with ontological incompatibility.

Combination	Rule	Required handling
relation:OCO + relation:INC	Prohibited at the same coherence key	May coexist only under different propositions, dimensions or scopes.
relation:OEQ + relation:INC	Prohibited at the same coherence key	Same-scope equivalence and incompatibility cannot both hold.
relation:OEQ + relation:OCO	Redundant at the same coherence key	Prefer OEQ; use OCO only for a different or wider scope.
relation:GEN + other relations	Orthogonal	Genealogy does not entail lexical, semantic, functional, structural or ontological similarity.
relation:MIS + same-tertium positive relation	Prohibited	Revise the tertium or create a replacement ComparisonEvent before asserting a positive relation.
relation:LEX to stronger relations	No entailment	Lexical resemblance is never sufficient evidence for SEM, FUN, STR or stronger relations.

6.1 Comparison workflow

1. Selection: define the research question, comparands, exact Claim pairs, relation dimension, scale, scope and inclusion rationale.
2. Independent emic description: source-ground each comparand before juxtaposition.
3. Atlas encoding: map QuestionResponses using the applicable primary response state, retain any separate CAT warnings, and preserve material translation tensions.
4. Juxtaposition: align claims without declaring equivalence.
5. Tertium test: mark the tertium VALID, REVISED or DISTORTING; a DISTORTING event cannot carry a positive relation under that tertium.
6. Disanalogy search: actively seek differences, missing categories and counterexamples and link them to canonical Claims.
7. Relation classification: assign zero or more relation types, each as one ComparativeRelation with exact scope and evidence.
8. Coherence validation: test the relation set against the logical coherence key and matrix.
9. Redescription: revise either comparand if comparison exposes hidden assumptions.
10. Genealogy and explanation: investigate transmission, shared inheritance, contact, independent convergence or unresolved dependence.
11. Synthesis eligibility: determine whether the comparison remains L1 or may contribute to a higher-level candidate.

7. Diversity, representation and coverage

7.1 Internal diversity and aggregation

In the variation audit, assess each of the following dimensions for the bounded Position, recording material variation where present.

- Diachronic change across periods.
- School or lineage disagreement.
- Geographic development and transmission.
- Authority level: tradition-authoritative, scholastic, reformist, vernacular, contested or marginal.
- Normative versus lived worldview.
- Elite, popular and ritual configurations.
- Individual versus communal scope.
- Source-genre differences, including myth, metaphysics, law, ritual manual, hagiography, poetry, commentary, ethnography and experiment.

Governing — Aggregation labels and restrictions

Label	Meaning	Restriction
Text-specific	Only the named source/corpus	No upward generalization.
Thinker-specific	Named agent	Do not label school-wide without evidence.
School/lineage-specific	Bounded school/lineage	Record dissent and chronology.

Label	Meaning	Restriction
Multi-branch / widespread	Several major branches/regions	Coverage MUST be named; widespread does not mean universal.
Cross-Position abstraction	Atlas/scholarly synthesis	Always ATLAS_INFERENCE; must not be presented as emic self-description.
Contested	Material dispute within bounded Position	Present competing positions rather than choosing silently.

7.2 Representation readiness and source-community coverage

Source grounding, specialist review, community governance, rights/access and release eligibility are independent fields and must be assessed separately. Any compact INT/SRC/REV/COM/REL label is a derived display only and cannot waive an unmet component. Exact values are in Annex A; complete record fields are in Annex B.

Where source-community coverage applies, the record states applicability, coverage basis and level, authority scope, rights and protocols, limitations, engagement, feedback action, authorized Local Contexts metadata and release basis. No single person is presumed to represent an entire community.

Governing: Lived-worldview rule

When evidence permits, separate normative doctrine, historical manifestation and lived worldview. A tradition-authoritative text is not evidence of contemporary practice by default, and a single ethnography is not an unmediated community voice.

7.3 Inclusion, coverage debt and saturation

A candidate enters the research universe only when it is boundable, sufficiently documented for at least one substantive domain, comparatively relevant and ethically/epistemically feasible.

Among eligible candidates, assess the following selection considerations.

- Historical influence or cultural importance.
- Conceptual distinctiveness or category-challenging counterexample.
- Geographic and linguistic coverage.
- Representation of oral and lived as well as textual traditions.
- Underrepresented lineages or philosophical genres.
- Potential to expose limitations in the schema.
- Source quality and availability.
- Contribution to comparison across multiple domains.

The Atlas MUST maintain a coverage-debt register rather than claim literal completeness. At minimum it tracks macro-region, period, religious or secular status, textual/oral/lived evidence type, philosophical genre, family or lineage, source language, source-community coverage applicability/status and major underrepresented solution-spaces. Publication Architecture Specification determines which debts are editorially material; this specification determines whether evidence used to close them is adequate.

Expansion pauses when priority debts fall below an agreed threshold; new candidates mainly instantiate represented solution-types without materially changing relation or fault-line structure; important counterexamples have been actively sought; and the next coverage increment has low conceptual yield relative to research cost. This is conceptual saturation, not exhaustiveness.

Part II — Operating control

Governing — Section front door

Purpose	Convert valid research into controlled canonical records, reviewable workflows, gate evidence, bounded synthesis, traceable publication claims and release decisions.
Primary users	Research and validation leads, data engineers, independent coders, specialist and source-community reviewers, release officers and publication integrators.
Authority status	Governing
Decision or rule	The Canonical Evidence Store is authoritative; generated or public views are derivative; provisional work may proceed but cannot be released as validated evidence.
Required output	A named canonical build, review and gate evidence, release-authorized views and a GO or HOLD decision.
Go to	Annexes B–C for complete schemas, validation constraints, packet specifications and templates.

8. Canonical authority and validation

8.1 Four-layer authority model

Governing — Canonical, system, generated-view and public layers

Layer	Definition	Authority rule
1. Canonical Evidence Store	Versioned Position, QuestionResponse, Claim, Concept, Source/SourceInstance, Evidence, Comparison, Synthesis, Review, PublicationClaim and AIProvenance records.	Sole authoritative factual source.
2. Digital Atlas System	Software and services that manage records, enforce access controls, validate data and generate views.	Operational system; not independently factual or canonical.
3. Generated Evidence Views	Matrices, profiles, tables, maps, provenance traces, dashboards and exports generated from a named build.	Derivative; authoritative only through a trace to the named canonical build.
4. Public Digital Atlas	Released interface and authorized content subset.	May expose only release-authorized records and views; internal or restricted records are not publishable merely because they exist in the store.

Every Generated Evidence View **MUST** identify its schema version, vocabulary version, canonical_build_id, query or generation version and output hash. Canonical is reserved for the Canonical Evidence Store, canonical records and named canonical builds; it is not a synonym for interface, software or a manually authored summary.

8.2 Identifiers, versioning and serialization

- Use opaque, version-neutral persistent identifiers; do not encode domain numbers, worldview-family labels or mutable classification semantics in IDs.
- Superseded records remain addressable. New versions use explicit revises or supersedes links rather than destructive overwrite.
- Canonical records **MAY** be implemented in JSON, relational tables, RDF or knowledge graphs, or another durable store, but governed semantics, cardinalities and validation rules are invariant.
- UTF-8 JSON validated with JSON Schema Draft 2020-12 is the reference interchange profile. An RDF projection **MAY** use SHACL for equivalent constraints and PROV-O as a provenance crosswalk.
- Machine-readable controlled values **MUST** be globally unambiguous through field qualification or namespace. Short display codes may appear only where their field or namespace is visible and the plain-language expansion is available.

8.3 Core object purpose and readiness

Governing summary — Canonical object purpose and required readiness

Object	Operational purpose	Required before
PositionRecord (entity:PO)	Defines the bounded comparative unit, boundary assessment and source/context scope.	Before QuestionResponse coding, cross-Position comparison or publication attribution.
QuestionResponse (entity:QR)	Records exactly one primary response state for a Position-by-question intersection, with optional CAT warning links and VAR boundary data.	Before D1-D15 matrices, Position profiles or comparison claims that depend on response status.
CategoryWarning (entity:CW)	Preserves category, partitioning or translation distortion without replacing the primary response state.	Before comparison or publication where Atlas framing risks distorting the source.
ClaimRecord (entity:CL)	Stores the smallest substantive citable assertion with attachment, origin, evidence/derivation, confidence and review.	Before a substantive attribution can support a QuestionResponse, comparison, synthesis or publication claim.
ConceptRecord (entity:CN)	Controls source terms, translations, semantic range, historical variation and false-friend risk.	Before high-risk normalization, translation-sensitive claims, relation:SEM/OEQ comparison or public concept glossing.
SourceRecord / SourceInstance / EvidenceLink	Provides source identity through orthogonal source fields, event/witness detail, exact locator, claim-specific evidence role, rights/access and editorial history.	Before claim_origin:SOURCE_GROUNDED release claims or oral/performance provenance can pass validation.
ComparisonEvent / ComparativeRelation	Declares exact claim pairs, tertium, dimension, normalized scale/scope and typed relations with linked disanalogies, coherence and genealogy/independence metadata.	Before any cross-Position relation is treated as release-ready or used for synthesis.
SynthesisRecord (entity:SY)	Stores bounded pattern or fault-line claims at a declared level and independent maturity with selection, negative cases, counterexamples and sensitivity.	Before L1-L4 synthesis can be cited or published.
PublicationClaimRecord (entity:PC)	Connects a thesis-bearing publication claim to canonical premises, rationale, scope, defeaters, level where applicable, review and prohibited stronger reading.	Before chapter theses, major comparisons, synthesis claims or explicit limitations are release-ready.
ReviewRelease / CriterionResult / GateRun	Separates review scope, criterion outcomes, gate verdict, evidence maturity, unresolved issues, version and authorization.	Before review evidence, gate state, supersession or authorization is treated as authoritative.
RepresentationReadiness (entity:RRD)	Stores source grounding, specialist review, community governance, rights/access and release eligibility independently.	Before a derived readiness summary or public representation decision is used.
AIProvenance (entity:AI)	Records permitted AI assistance, affected fields and independent human verification.	Before AI-assisted substantive fields or generated views enter release scope.

8.4 Validation layers and build manifests

Governing — Four validation layers

Layer	Purpose
VAL-1 Structural	Types, required fields, cardinalities, qualified controlled values and ID format.
VAL-2 Referential	All foreign-key IDs resolve; no dangling claim, evidence, premise, disanalogy, relation, review or gate links.
VAL-3 Semantic conditional	Conditional rules such as VAR boundary assessment, DER derivation, source orthogonality, relation coherence, OEQ burden, GEN metadata, oral-event requirements, representation readiness and PublicationClaim premise chains.
VAL-4 Release/gate	R1-R9 and G1-G8 evidence tests, including human-review dependencies that cannot be reduced to schema validation.

Every candidate release build MUST record schema version, vocabulary version, canonical_build_id, canonical dataset hash, permitted source-artifact pointer hashes, generation-query or script version, reviewer and CriterionResult IDs, validation timestamp, output-view hashes and superseded build ID. A Generated Evidence View is not authoritative if it cannot identify its named canonical build. Annex C contains the complete V-01–V-20 validation matrix.

9. Workflow, roles, review and AI

9.1 End-to-end workflow

Governing — Workflow stages 0–3

Stage, owner and entry	Process, output, exit, review and handoff
0. Intake Input: Candidate Owner: Research lead	Process: Assess inclusion value and ethical/source feasibility. Output: Inclusion/feasibility decision. Exit criterion: Inclusion justified; ethical feasibility screened. Review: - Failure: hold/reject with decision record. Handoff: accepted candidate -> Bounding.
1. Bounding Input: Accepted candidate Owner: Research lead + specialist as needed	Process: Define period, geography, lineage, corpus, community, thesis and analytical level. Output: Bounded PositionRecord Exit criterion: Scope unambiguous. Review: R2 / R4 where applicable Failure: return to Intake or narrow scope with issue record. Handoff: bounded Position -> Source dossier.
2. Source dossier Input: Bounded Position Owner: Researcher / specialist	Process: Assemble source-fit package; identify languages, dating, access/rights, controversies and source-community applicability. Output: Source-fit dossier Exit criterion: Minimum evidence package, languages, rights/access and controversies identified. Review: R1 / R6 Failure: remediate evidence/access or hold candidate. Handoff: dossier -> Emic profile and concept control.
3. Emic profile Input: Source dossier Owner: Researcher	Process: Describe source problem-space before Atlas normalization. Output: Emic orientation Exit criterion: Source problem-space captured before Atlas coding. Review: R2 Failure: return to Source dossier/Bounding. Handoff: profile -> Concept control and claim extraction.

Governing — Workflow stages 4–7

Stage, owner and entry	Process, output, exit, review and handoff
4. Concept control Input: Sources + emic profile Owner: Researcher + language specialist where needed	Process: Record central terms, translations, semantic range, disputes and false-friend risks. Output: ConceptRecords Exit criterion: High-risk bridge concepts controlled; disputes/false friends recorded. Review: R3 Failure: obtain specialist evidence or restrict claim/comparison. Handoff: concepts -> Claim extraction and QR coding.
5. Claim extraction Input: Sources + concepts Owner: Researcher	Process: Split source-grounded assertions atomically; code attachment/origin; attach evidence/derivation and locators. Output: Atomic Claims + EvidenceLinks Exit criterion: Atomicity, scope, attachment/origin and locator tests pass. Review: R1 Failure: split/re-scope/re-source claim. Handoff: claims -> QR coding.
6. QR coding Input: Claims Owner: Primary coder	Process: Code D1-D15 QuestionResponses using one primary state plus orthogonal CAT warnings. Output: D1-D15 QuestionResponses Exit criterion: Every applicable question has exactly one primary state; CAT handled orthogonally. Review: R2 Failure: return to Claim extraction/Concept control for evidence or category resolution. Handoff: QRs -> Variation audit.
7. Variation audit Input: QRs + context Owner: Researcher	Process: Check dissent, chronology, region, lived/normative divergence, genre variation and counterexamples. Output: Plurality / variation record Exit criterion: Material variation dimensions checked and linked. Review: R4 Failure: revise boundary/claims/QRs or hold aggregation. Handoff: validated Position package -> Comparison.

Governing — Workflow stages 8–11

Stage, owner and entry	Process, output, exit, review and handoff
8. Comparison Input: Comparison-ready Positions Owner: Comparative researcher	Process: Declare tertium, normalized scale/scope; create typed relations, disanalogies and genealogy/independence metadata. Output: ComparisonEvent + ComparativeRelations Exit criterion: Granularity, relation, disanalogy and genealogy/independence rules pass. Review: R5 / G3 where release confidence requires Failure: revise tertium/scale or return comparand upstream. Handoff: comparison records -> Synthesis candidate or chapter use.
9. Synthesis candidate Input: Validated relations Owner: Synthesis lead	Process: Register only permitted-level pattern/fault-line candidate; search active counterexamples and assess coverage/independence. Output: L1/L2 candidate record Exit criterion: Declared level threshold and counterexample burden satisfied. Review: R7 Failure: delimit/demote synthesis or return to Comparison/Coverage work. Handoff: candidate -> Specialist review / chapter synthesis.
10. Specialist/community review Input: Candidate records Owner: Designated reviewers	Process: Review high-impact scholarship, translation, equivalence and applicable community/rights representation. Output: Reviewed / revised records Exit criterion: Applicable specialist, translation, community/rights review completed. Review: R3 / R6 Failure: return specific record to responsible upstream owner with unresolved-issue record. Handoff: reviewed records -> Release/version.
11. Release/version Input: Reviewed records Owner: Data/validation engineer + release officer	Process: Run VAL-1 through VAL-4, CriterionResults for R1-R9 and applicable GateRuns; freeze canonical build; preserve history; generate views from a named Canonical Evidence Store build. Output: Frozen canonical build / release decision Exit criterion: R1-R9 and all applicable G gates pass; no unresolved Severity-1 defect. Review: GO / HOLD Failure: HOLD with bounded remediation returned upstream. Handoff: GO -> downstream release; HOLD -> targeted remediation and re-test.

A stage is complete only when its mandatory output exists and its exit criterion is satisfied. Downstream work may proceed provisionally only where explicitly marked, but no provisional dependency may be released as validated evidence. Failed exit criteria return the object to the responsible upstream stage with an unresolved-issue record.

9.2 Atomic-claim ingestion and role independence*Governing — Atomic-claim ingestion tests*

Test	Decision rule
One proposition	Could a reviewer accept one part and reject another? If yes, split.
One attachment	Does part have a different DEF/EXP/DER/CTX status? If yes, split.
One evidence burden	Do parts require materially different evidence or locators? If yes, split.
One scope	Does the sentence shift from text-specific to thinker/school/community-wide scope? If yes, split or state scope explicitly.
One inference	Does the sentence mix source assertion and Atlas inference? Separate the source-grounded attribution from the Atlas inference.

Governing — Roles, decision rights and prohibited self-certification

Role	Decision authority	Cannot independently certify
Research lead	Bounding, source package, claim decomposition and remediation path. May act as primary coder.	Final release; own reliability result; completion of readiness axes they alone supplied.
Primary coder	Primary QR/relation encoding after source preparation.	G2/G3 reliability for own labels or their own PublicationClaim review.
Independent coder	Blind held-out coding for reliability evidence. Minimum two; target three where feasible.	Own adjudicated labels as substitute reliability evidence.
Specialist reviewer	High-impact historical, philological, philosophical, translation and OEQ review.	Community authority merely by disciplinary expertise.
Source-community reviewer / governance liaison	Applicable representation scope, rights/protocol constraints, feedback pathway and release basis.	Whole-community representation by assumption.
Data/validation engineer	Structural, referential and conditional validation; build manifests; regeneration tests.	Substantive scholarly interpretation.
Release officer	GO/HOLD based on documented evidence and gate status.	A release-candidate canonical build for which the officer is the sole substantive author.

For G2 and G3, coders receive identical source excerpts, bounded Claim pairs or vignettes and codebook instructions, but not each other's judgments. Submitted blind packets are immutable. Raw outputs are retained after adjudication. Reliability is calculated on pre-adjudication labels; adjudicated labels become training or reference data, not replacement reliability evidence. Coder identity remains traceable internally to qualifications and conflict-of-interest declarations.

9.3 Definitions of done

Bounded Position — comparison-ready

- Boundary and scope are explicit, including assessment sufficient to distinguish legitimate VAR from boundary failure.
- Principal source-fit package exists using orthogonal source fields; emic orientation exists; high-risk concepts are controlled.
- Material Claims are atomic, scoped, attachment/origin-coded and evidenced or derived.
- Relevant D1–D15 QuestionResponses contain one primary state and orthogonal CAT warnings.
- Internal variation is audited and subpositions linked where applicable.
- Applicable RepresentationReadiness component states and unresolved issues are explicit.
- Version and reviewer metadata exists.

No Position enters cross-Position comparison unless every mandatory item is present or a documented exception explicitly blocks release.

ComparisonEvent — release-ready

- Comparands are bounded and normalized to an explicit analytical scale.
- Exact left and right Claim IDs, tertium, dimension, scale, temporal and Position scope and directionality are explicit.
- Source adequacy supports each relation; every relation contains exactly one type and the event relation set passes coherence validation.
- Mandatory material disanalogy is linked and explained; tertium validity is recorded and a DISTORTING tertium carries no positive relation.
- Genealogy or independence status is recorded where relevant; OEQ dimensions, failure conditions, disanalogy and specialist review are complete where proposed.
- Review status, unresolved flags, canonical IDs and version metadata are present.

A relation label alone never makes a ComparisonEvent release-ready.

PublicationClaim — release-ready

- The claim is linked to a chapter and section and classified as source attribution, comparative, synthesis, limitation or editorial decision.
- Every premise ID resolves to canonical Claim, QuestionResponse, ComparativeRelation, SynthesisRecord or relevant evidence records.
- The inference rationale states why the premises support the publication claim and distinguishes attribution, deduction, classification, explanatory inference or bounded editorial synthesis where material.
- Position, time, corpus, domain, relation dimension and prohibited stronger reading are explicit.
- Material counterevidence, negative cases, disanalogies, unresolved issues and their disposition are linked.
- Applicable synthesis level and maturity, review criteria, release state, version and supersession history are recorded.

9.4 AI and confidentiality

The front-matter Human-Operability Rule governs all use of AI.

Governing: Confidentiality rule

Unpublished, confidential, restricted or community-controlled material MUST NOT be entered into an external AI system unless that system and use are explicitly approved under applicable confidentiality, data-protection, rights and community-governance requirements.

Governing — Permitted and prohibited AI assistance

Permitted	Not permitted
Source discovery/search terms; extraction; duplicate detection; candidate record drafting; missing-field QA; possible relation candidates; view generation.	Invent doctrine; fabricate quotations/citations; infer consensus from model confidence; treat model translation as final; represent a community without traceable evidence; upgrade analogy to equivalence without evidence.
Transform verified records into profile/matrix views; flag missing locators/concepts/disanalogies.	Serve as independent reliability coder, specialist/community reviewer, final translation authority or source; self-certify evidence or release gates.

Governing: AI traceability rule

Every AI-suggested substantive statement must resolve to a human-verifiable evidence chain before release. AIProvenance records identify affected fields and human verification. “The model says” is never a source class.

10. Validation gates and release

G1–G8 are project-scale capability and acceptance gates. They are not replaced by chapter review, per-record release checks or schema validation.

Gate verdict and evidence maturity are independent: PARTIAL and PROTOTYPE are evidence-maturity values, never gate verdicts and never authorization for GO.

Full acceptance evidence and packet specifications are governed in Annex C. Current gate and release decisions are established by the applicable recorded GateRuns and release records under this section. The historical snapshot summarizes the state at its stated date and does not independently establish a later state.

Governing summary — G1–G8 governing purpose and consequence

Gate	Purpose	Consequence if unmet
G1 — Schema stability	Confirm no repeated core structural failure under current governed semantics.	Reopen schema review and keep release on HOLD.
G2 — Status discrimination	Demonstrate reliable eight-state QuestionResponse coding and orthogonal CAT handling.	Recode, retrain and hold affected arguments.
G3 — Relation reliability	Demonstrate reproducible full-taxonomy multi-label relation coding, scope, tertium and disanalogy.	Withdraw or weaken unreproducible relations and synthesis.
G4 — Oral/performance provenance	Demonstrate one complete release-candidate event/artifact chain.	Hold unsupported oral or performed claims.
G5 — Community representation	Demonstrate one adequate applicable coverage, authority, rights and release decision.	Restrict or hold affected representation.
G6 — Claim and PublicationClaim traceability	Achieve a traceability ratio of 1.000 for each of the two required non-empty release-candidate populations; apply Annex C §C3.6 to empty or incomplete evaluation scopes.	Remove or hold incomplete evidence or premise chains.
G7 — Production regeneration	Regenerate production views and controlled changes from named builds.	Hold Generated Evidence Views and public outputs.
G8 — Novelty refresh	Maintain a dated scoped originality and precedent review.	Revise public positioning language.

Governing: Capability gates and unit release

A project-level G4 or G5 PASS demonstrates that the governed process can be executed. It does not clear every record of that class. Each release-candidate oral/performed or community-applicable unit remains subject to per-record validation, RepresentationReadiness and review.

10.1 Release decision algorithm

1. Confirm all manifest evidence files, canonical IDs and checksums resolve.
2. Confirm structural, referential and semantic validation has zero unresolved Severity-1 defects.
3. Read human-review evidence for each gate; do not infer reliability, specialist or community review, rights clearance or production regeneration from schema completeness.
4. Mark every applicable gate with exactly one verdict. Record evidence maturity separately; it never substitutes for PASS.

5. Issue GO only when every applicable gate is PASS with complete gate-specific evidence and no unresolved Severity-1 defect. Otherwise issue HOLD with bounded remediation and rerun affected gates plus impacted regression checks.

Governing — Defect severity and release consequence

Severity	Rule
Severity 1 - Blocking	Potentially false attribution; missing release evidence/locator; rights/authorization breach; uncontrolled community representation; invalid OEQ burden; schema semantic violation; fabricated/unverifiable source; or regeneration failure permitting factual divergence. GO prohibited.
Severity 2 - Material	Record-level ambiguity, incomplete non-critical metadata, inconsistent interpretation requiring adjudication, or validation issue that does not yet falsify a release claim. Remediate or explicitly exclude from release-candidate scope.
Severity 3 - Minor	Presentation, formatting, redundant metadata, non-substantive naming or documentation defect. May remain open with owner/date if it cannot affect gate evidence.

Governing: No pass by documentation

A completed checklist proves only checklist completion. G2 and G3 require independent coding data; G4 an actual event/artifact chain; G5 an actual governed coverage and release decision; G6 complete Claim and PublicationClaim traceability; and G7 a running production regeneration test. Evidence maturity never authorizes GO.

11. Synthesis protocol

Governing — Synthesis product types

Product	Definition
Motif	Recurring content feature without a claim of deep structural identity.
Functional family	Different concepts or practices solving a comparable problem.
Structural architecture	Recurring relational sequence or organization across Positions.
Fault line	Stable, scoped axis of incompatibility among claims or structures; not total cultural opposition.
Genealogical family	Similarity substantially explained by transmission or shared inheritance.
Independent convergence candidate	Similar structure in historically independent contexts; independence argued, not assumed.
Category challenge	A Position exposes a flaw or parochial assumption in the Atlas schema.

Synthesis level and maturity are independent. L0 is a single-unit observation; L1 a pairwise relation; L2 a cluster pattern; L3 a cross-regional recurrence; L4 a provisional global morphology; and L5 a human universal or metaphysical-truth claim outside Atlas database inference. Exact definitions, registration permissions and maturity values are governed in Annex A; full SynthesisRecord fields are in Annex B.

Governing: L2 publication rule

An L2 candidate may be registered with at least three adequately described Positions and an active counterexample search. Reader-facing recurrence additionally requires a declared selection basis, effective genealogical support, negative-case search, linked counterexamples, material translation and boundary dependencies, sensitivity tests and level-appropriate review. Independent-recurrence language requires at least two adequately argued independent support clusters.

Governing: Current synthesis ceiling

The project MAY use L0–L2 findings in current manuscript research and planning. L3–L4 remain gated by broader coverage, genealogy/independence, negative-case and review requirements. L5 is never inferable from the Atlas database alone. Document completion does not make a SynthesisRecord release-eligible.

- Shared ancestry or known transmission reduces evidential weight for independent-convergence claims, though it may strengthen genealogical analysis.

- Parallel terminology in contact zones is investigated genealogically before being treated as spontaneous similarity.
- Every L2+ SynthesisRecord links counterexamples and states whether they falsify, delimit or refine the pattern.
- Every reader-facing L2 recurrence states its selection basis, material translation and Position-boundary dependencies and sensitivity results.

- A cross-domain synthesis linking ontology, epistemic access, diagnosis and transformation states the exact direction and scope of each link, includes uncoupled, negative and category-refusing cases, and does not infer subjecthood or epistemic access from consciousness.

A cross-pattern audit of existing SynthesisRecords does not itself authorize a new recurrence claim. Any new cluster relation must be registered and reviewed under §11; recording it in a PublicationClaim does not satisfy those requirements.

No recurring relation among being, knowing and becoming is treated as a universal sequence or evidence of truth.

- Graph centrality, frequency or corpus survival is not evidence of philosophical importance, historical priority or truth.

12. Publication interface and public-claims discipline

Publication Architecture Specification governs editorial selection and organization: corpus roles, chapter architecture, coverage priorities, research gaps, reader journey and print/digital allocation. This specification governs whether the supporting research, evidence, comparisons, provenance, representation, validation, synthesis and PublicationClaim chains are valid and releasable. The four-layer authority model in §8 controls the evidence-to-publication flow.

Manuscript prose remains human-authored for argument, readability and interpretation. Factual attributions trace to canonical Claim/Evidence chains; thesis-bearing inferences trace through PublicationClaim records. Publication Architecture may select validated material but cannot weaken evidence, readiness or gate requirements.

Governing: PublicationClaim traceability

Every thesis-bearing publication claim MUST resolve to canonical premises and record its inference rationale, scope, material disanalogies or counterexamples, synthesis level where applicable, review status and prohibited stronger reading. Human prose may synthesize and explain, but it may not become an untracked factual or inferential data store.

Print is authoritative as an authored argument at its declared publication version. Its factual attributions, factual exhibits and thesis-bearing claims trace to the Canonical Evidence Store and named canonical build. Comparative matrices and fault-line analyses query the same facts rather than maintaining independently authored factual summaries.

Publication-facing consequences of research gaps and unresolved project gates are maintained in Publication Architecture Specification, section 12. That dependency register does not maintain duplicate live GateRun verdicts.

12.1 Novelty and public claims

As of 19 August 2026, substantial prior art exists for worldview comparison, comparative philosophy and religion, structured religion/history databases, philosophy ontologies, provenance standards, graph validation, multilingual concept representation, typed relations, philosophy knowledge graphs, philosophy-as-way-of-life research and transformative-philosophy research. None of those components or themes supports an Atlas novelty claim by itself.

Governing: Permissible positioning

The Atlas may be described as a source-sensitive comparative research and publication architecture designed to generate structured reference views and narrative publication. Its distinctive target is to integrate bounded Positions, claim-level provenance, explicit answer and non-answer states, concept-level translation control, internal-plurality safeguards, typed comparative relations with mandatory disanalogy and genealogy status, source-community governance and gated synthesis in one multi-resolution system.

Its narrative argument may additionally be described as comparing how Positions connect or separate claims about reality, epistemic authority and access, diagnosis and transformative praxis. Where source-grounded and applicable, this includes qualifications of knowing or of a knower or subject. This is an integration claim, not a claim of historical priority, universal structure or metaphysical truth.

- Do not use “first-ever” or absolute historical-priority claims.

- Do not call the Atlas “the first global map of worldviews.”
- Do not claim it is “unique in history.”
- Do not call it “the first philosophy knowledge graph.”
- Do not call it “the first multilingual comparative ontology.”
- Do not claim that recurrence proves universal metaphysical structures or metaphysical truth.

Novelty status is dated. G8 MUST be rerun immediately before public submission or publication originality language if the existing review is no longer contemporaneous. Preprints and conference submissions are not automatically equated with mature peer-reviewed infrastructures. Publication Architecture Specification and other project documents inherit the permissible positioning, prohibitions and refresh discipline here rather than maintaining independent originality language.

13. Change control

Governing — Governed invariants, implementation choices and editorial baseline

Area	Governance status / rule
Core domains D1-D15	GOVERNED INVARIANT - change control required. Constitutive domain changes require evidence of repeated structural failure and formal methodological revision.
Primary response states + CAT	GOVERNED INVARIANT - change control required. Meanings are governed; examples and training material may expand without changing them. VAR boundary assessment and CAT orthogonality cannot be weakened.
Claim attachment / origin	GOVERNED INVARIANT - change control required. Meanings are governed; implementations may add non-conflicting metadata.
Orthogonal source model	GOVERNED INVARIANT - source proximity, source form, authority relation and EvidenceLink role remain separate.
Comparison relation taxonomy and coherence	GOVERNED INVARIANT - meanings, proposition scope, disanalogy links, tertium validity and same-key coherence burdens are governed; examples and review guidance may expand.
Provenance / rights / community requirements	GOVERNED INVARIANT - minimum burdens are governed; community-specific protocols may impose stricter controls.
Status and readiness axes	GOVERNED INVARIANT - gate verdict, evidence maturity, criterion result, representation readiness, editorial role, planning confidence, validation dependency, synthesis level and maturity remain separate.
Synthesis level / maturity	GOVERNED INVARIANT - L0-L5 meanings and maturity values are separate; L2 publication burden cannot be waived.
PublicationClaim traceability	GOVERNED INVARIANT - thesis-bearing publication claims require canonical premise chains, rationale, scope, defeaters, review and prohibited stronger reading.
Canonical minimum fields / cardinalities	GOVERNED INVARIANT - Annex B is authoritative. Non-conflicting implementation fields may be added without weakening semantics.
Canonical authority layers	GOVERNED INVARIANT - the Canonical Evidence Store is the sole authoritative factual source; system, generated-view and public-interface layers are derivative.
Serialization / database technology	IMPLEMENTATION OPEN. Technology may change while the logical model, interchange semantics and validation contract remain authoritative.
Local workflow tooling and non-conflicting metadata	IMPLEMENTATION OPEN, provided no MUST-level requirement or governed semantic is weakened.
Publication corpus and chapter design	ADOPTED EDITORIAL BASELINE governed by Publication Architecture Specification, subject to its versioned editorial change control and this specification's evidence/release requirements.

Governing — Defect classes and required action

Class	Meaning	Action
Field defect	Missing/awkward implementation field without core semantic failure.	Add or refine an implementation field; document version; do not change controlled-vocabulary meaning.
Data-quality defect	Bad locator, incomplete record, inconsistent metadata, incorrect attribution.	Correct record; preserve prior version; rerun affected validation/gates.
Category challenge	A bounded position exposes distortion or mismatch but remains representable with CAT/REF/MIS.	Record challenge; do not force an answer; monitor for recurrence.
Governance defect	Rights, authority, representation or access issue.	Restrict/hold/remove affected content; remediate governance evidence before release.

Class	Meaning	Action
Structural failure	Repeated inability to represent materially heterogeneous cases without changing a domain boundary, controlled-vocabulary meaning, source/status axis, relation-coherence rule or mandatory cardinality.	Reopen G1; pause authorization; conduct formal revision review.

- All released records carry version and review metadata; superseded records remain addressable and are never silently overwritten.
- A methodological revision is adopted only through an explicit version decision stating changed semantics, migration impact, validation impact and publication-interface consequences.
- Publication Architecture is updated only when editorial consequences require it; methodological field corrections that do not change corpus or chapter architecture do not automatically trigger an editorial revision.
- A controlled release build records schema and vocabulary versions, canonical_build_id, dataset hash, reviewer and CriterionResult evidence, validation timestamp, Generated Evidence View hashes and superseded build ID.

The SourceInstance identity/version and conditional-field contracts in Annex B §§B2.6 and B2.11, and the evaluation procedures in Annex C §§C3.2–C3.3 and C3.6, govern records and GateRuns assessed under the declared specification version. Any implementation must map existing fields and versions without destructive overwrite, validate the affected links and conditions, and apply the declared evaluation procedure before collecting new blind coding evidence. Publication use remains subject to §§10–12. Specifying these requirements does not change a historical GateRun verdict or authorize release.

- Document status, GateRun verdicts, readiness and GO/HOLD are separate; no successor document state is itself release authorization.

Governing: Change-control rule

Do not change the schema silently to accommodate difficult evidence. First record the field defect, data-quality defect, category challenge or governance issue. Structural revision is reserved for repeated failures to represent evidence faithfully under the current semantics.

Annex A — Controlled values and D1–D15 master definitions

Governing — Section front door

Purpose	Provide the sole full definitions of shared controlled values, domain questions and qualified machine labels.
Primary users	Coders, reviewers, data engineers, publication integrators and auditors.
Authority status	Governing
Decision or rule	Body sections explain decisions; this annex owns exact values and definitions.
Required output	Unambiguous qualified values used consistently in records, validation and generated views.
Go to	Annex B for field/cardinality placement; Annex C for tests.

A1. D1–D15 master definitions

Governing — D1–D15 neutral master questions and illustrative subfields

Code	Domain	Neutral master question	Illustrative subfields
D1	Ontology & ultimacy	What, if anything, is fundamentally real or most basic?	being/nonbeing; one/many; substance/process/event; emptiness; ultimacy; ontological pluralism; anti-foundationalism
D2	Cosmogenesis & world structure	What kind of world is this, and how does it arise, persist or transform?	origin; beginninglessness; creation; emanation; manifestation; dependent arising; cycles; levels/realms; persistence; transformation
D3	World-partitioning, materiality & human/nonhuman relations	How does the position distinguish - or refuse to distinguish - humans, nonhumans, materiality, life, environment, interiority and personhood?	human/nonhuman partitions; material/immaterial; living/nonliving; interiority/personhood distribution; animacy; relational ontology; nature/culture asserted/rejected/absent
D4	Human constitution & embodiment	What constitutes a human being, and what is embodiment?	body; soul/spirit if emically present; aggregates; organism; subtle bodies; psychosomatic unity; embodiment status
D5	Mind & consciousness	What are mentality, awareness, experience and cognition, if the position has such categories?	mind; consciousness; awareness; cognition; phenomenal experience; intentionality; mind-body relation; emergence/fundamentality
D6	Self, personhood & identity	What constitutes a self/person/subject, if anything, and what grounds identity or continuity?	self/no-self; subject; personhood criteria; social/relational personhood; memory; identity through change/death; distribution of personhood
D7	Epistemology & authority	What can be known, by what means, and under what authorities?	perception; inference; revelation; scripture; lineage; testimony; contemplation; divination; ritual efficacy; experiment; historical evidence
D8	Axiology, meaning & value	What matters, and what makes lives, actions or worlds good, meaningful, sacred or valuable?	good; sacred; beauty; duty; flourishing; meaning; value pluralism; nihilism; intrinsic/instrumental value
D9	Human condition & diagnosis	Does the position diagnose a fundamental difficulty, error, condition or predicament?	sin; ignorance; craving; finitude; alienation; reification; disorder; false judgment; no totalizing predicament
D10	Causal order & dependence	What kinds of causation, dependence, providence, karma, fate, chance or lawful order govern events?	causation; dependence/grounding; providence; karma; fate; chance; law; divine action; causal closure
D11	Agency, freedom & constraint	What kinds of agency are possible, and how are agents enabled or constrained?	free will; responsibility; spontaneity; distributed/nonhuman agency; choice; moral agency; structural/causal constraints
D12	Praxis & transformation	What practices or processes change understanding, character, status or mode of being?	ritual; meditation; knowledge; grace; devotion; virtue; asceticism; therapy; divination; social/political transformation
D13	Death & continuity	What ends, persists, returns, is restored or dissolves at death?	survival; rebirth; resurrection; ancestorhood; judgment; dissolution; continuity criteria; postmortem states
D14	Telos / desired condition	What counts as fulfilment, liberation, salvation, awakening, harmony, virtue, authenticity - or no cosmic end?	moksha; nirvana; theosis; sagehood; flourishing; resurrection; harmony; authenticity; no transcendent telos

Code	Domain	Neutral master question	Illustrative subfields
D15	World relation & normative orientation	How should beings relate to the world, others, community and the order of reality?	participation; exit/renunciation; transformation; stewardship only where emic; harmony; compassion; covenant; nonattachment; social/ecological relation

A2. QuestionResponse and claim values

Governing — Primary response states and CAT modifier

Qualified value	Meaning	Decision test
response_state:ANS	Answered / asserted	The bounded Position gives a substantive source-grounded answer.
response_state:DEN	Denied	The Position explicitly rejects the presupposition or answer class.
response_state:REF	Reframed	The Position transforms the question into a materially different problem-space.
response_state:NSA	Not structurally salient	The question is not an important organizing problem in the bounded Position.
response_state:VAR	Internally variable	Multiple materially different answers constitutively coexist within the adequately bounded unit.
response_state:UND	Underdetermined by Position	Even with adequate evidence, the bounded Position itself leaves the issue open.
response_state:IND	Indeterminate	Relevant evidence exists, but a stable interpretation cannot presently be established.
response_state:INS	Source-insufficient	More or better evidence could plausibly settle the record; the present source package is inadequate.
response_modifier:CAT	Category warning - modifier	The Atlas question, translation or partition risks importing an alien distinction; never a claim of total incommensurability.

Governing — Claim attachment values

Qualified value	Attachment	Rule
claim_attachment:DEF	Definitional / constitutive	Required for what makes the bounded Position the Position under study.
claim_attachment:EXP	Explicitly asserted	Directly stated in principal source(s) but not necessarily constitutive.
claim_attachment:DER	Derived / strongly implied	Follows by a documented inference from source-grounded claims; derivation MUST be explicit.
claim_attachment:CTX	Contextual	Needed to understand the Position but belongs to wider tradition, discourse or background rather than the bounded Position's commitments.

Governing — Claim origin values

Qualified value	Meaning
claim_origin:SOURCE_GROUNDED	Attribution is grounded in human-verifiable external evidence; release requires fit-for-purpose EvidenceLink(s) with exact locator(s).
claim_origin:ATLAS_INFERENCE	Atlas-generated derivation, comparison, abstraction, classification or synthesis; requires source-grounded input claims and an inference rationale and is never represented as a SourceRecord.

A3. Comparative relation values

Governing — Eleven comparative relation types and minimum burden

Qualified value	Relation	Minimum requirement
relation:LEX	Lexical resemblance	Terms or glosses resemble. No conceptual conclusion follows.
relation:SEM	Semantic overlap	Shared semantic range is specified together with non-overlap.
relation:FUN	Functional analogy	Items solve a comparable problem or play a comparable system role.
relation:STR	Structural homology	A relational architecture is shared; at least one material disanalogy required.
relation:PHE	Phenomenological resemblance	Reported experiential features overlap; cause and metaphysical interpretation remain separate.
relation:EPI	Epistemic-methodological analogy	Comparable modes of authority, justification, verification or reason-giving.
relation:GEN	Genealogical relation	Historical relation supported by evidence and subtype; similarity alone is insufficient.
relation:OCO	Ontological compatibility	Relevant propositions can jointly hold in the declared scope; this is not sameness.

Qualified value	Relation	Minimum requirement
relation:OEQ	Scoped ontological equivalence	Strong claim: approximately the same kind of entity or reality in a narrowly declared respect, with explicit dimensions and failure conditions.
relation:INC	Incompatibility	Exact propositions cannot jointly hold at the same declared coherence key.
relation:MIS	Category mismatch	The declared tertium or Atlas category distorts one or both comparands; no automatic claim of total incommensurability.

A4. Source, claim and readiness values

Governing — Orthogonal source fields

Field	Qualified values	Cardinality / note
source_proximity	source_proximity:PRIMARY / SECONDARY / TERTIARY / MIXED	Exactly one.
source_form	source_form:TEXTUAL / ORAL_PERFORMED / INTERVIEW / ETHNOGRAPHIC_OBSERVATIONAL / ARCHIVAL_MANUSCRIPT / AUDIOVISUAL / DATASET_EMPIRICAL / MATERIAL_VISUAL / OTHER	One or more.
authority_relation	authority_relation:SOURCE_COMMUNITY / PARTICIPANT_WITNESS / CRITICAL_EDITORIAL / SPECIALIST_SCHOLARSHIP / INSTITUTIONAL / EXTERNAL_RESEARCHER / MULTIPLE / NOT_APPLICABLE	Exactly one.
evidence_role	evidence_role:SUPPORTS / COUNTERS / CONTEXTUALIZES / EXEMPLIFIES / DISPUTES / TRANSMISSION_EVIDENCE / OTHER	Stored on each EvidenceLink.

Governing — Claim-level epistemic and interpretive fields

Field	Controlled values / rule
claim_function	claim_function:DES / HIS / INT / MET / EPI / NOR / PHE / EMP / CAU / COM / SPE
attribution_confidence	confidence:HIGH / MODERATE / LOW
scholarly_status	scholarly_status:BROAD_CONSENSUS / MAJORITY_TENDENCY / SUBSTANTIALLY_CONTESTED / MINORITY_INTERPRETATION / UNMAPPED
evidence_completeness	evidence_completeness:ADEQUATE / PARTIAL / SPARSE / INACCESSIBLE
interpretive_dependence	interpretive_dependence:DIRECT / LOW_INFERENCE / MODERATE_INFERENCE / HIGH_RECONSTRUCTION
claim_attachment	claim_attachment:DEF / EXP / DER / CTX
claim_origin	claim_origin:SOURCE_GROUNDED / ATLAS_INFERENCE; independent of claim_function and every source field
representation_readiness	Independent readiness fields under §7 and Annex B; no scalar source-of-truth status

Governing — Claim functions

Qualified value	Function
claim_function:DES	Descriptive
claim_function:HIS	Historical
claim_function:INT	Interpretive
claim_function:MET	Metaphysical/ontological
claim_function:EPI	Epistemic
claim_function:NOR	Normative/value
claim_function:PHE	Phenomenological
claim_function:EMP	Empirical/scientific
claim_function:CAU	Causal/explanatory
claim_function:COM	Comparative inference
claim_function:SPE	Speculative hypothesis

Governing — RepresentationReadiness values and use

Readiness field	Controlled state	Use
source_grounding	readiness:SATISFIED / PENDING / FAILED / NOT_APPLICABLE	Whether the source-fit evidence package is adequate for the represented scope.

Readiness field	Controlled state	Use
specialist_review	readiness:SATISFIED / PENDING / FAILED / NOT_APPLICABLE	Whether required subject, historical, philological or translation review is complete.
community_governance	readiness:SATISFIED / PENDING / FAILED / NOT_APPLICABLE	Whether applicable source-community authority, feedback and governance requirements are met.
rights_access	readiness:SATISFIED / PENDING / FAILED / RESTRICTED / NOT_APPLICABLE	Whether quotation, reproduction, access and use are authorized for the intended release context.
release_eligibility	readiness:ELIGIBLE / INELIGIBLE / PENDING	Computed only after every applicable component and release criterion is satisfied.
derived_display_summary	INT / SRC / REV / COM / REL	Optional human-facing summary; never the authoritative source for component status.

Governing — Gate, criterion, authorization and confidence values

Field	Qualified values
gate_verdict	gate_verdict:PASS / FAIL / PENDING / NOT_APPLICABLE
evidence_maturity	evidence_maturity:NONE / PARTIAL / PROTOTYPE / COMPLETE
criterion_status	criterion_status:PASS / FAIL / PENDING / NOT_APPLICABLE
authorization_decision	authorization_decision:GO / HOLD
confidence	confidence:HIGH / MODERATE / LOW

A5. Synthesis, genealogy and PublicationClaim values

Governing — Synthesis levels and minimum registration permission

Level	Claim	Minimum registration permission
L0	Single-unit observation	Source-grounded description only.
L1	Pairwise relation	Permitted after a complete ComparisonEvent and relation set.
L2	Cluster pattern	At least 3 adequately described Positions and an active counterexample search.
L3	Cross-regional recurrence	Multiple cultural/historical regions, genealogy/independence analysis and negative cases.
L4	Provisional global morphology	Broad coverage ledger, exclusions, robustness across schema revisions and specialist scrutiny.
L5	Human universal / metaphysical truth	Outside Atlas database inference; requires separate argument and evidence beyond recurrence.

Governing — Synthesis maturity values

Maturity value	Meaning
synthesis_maturity:PROPOSED	Registered candidate whose minimum level conditions are stated but not yet tested to publication burden.
synthesis_maturity:TESTED	Negative cases, counterexamples and required sensitivity checks have been performed and recorded at the applicable level.
synthesis_maturity:REVIEWED	Level-appropriate specialist review has been completed, but other release conditions may remain.
synthesis_maturity:RELEASE_ELIGIBLE	Every level-specific, evidence, review, traceability and publication-scope condition is satisfied.
synthesis_maturity:REJECTED	The candidate failed, was superseded or is retained only as a documented negative result.

Governing — Genealogy, independence, tertium and relation-dimension values

Vocabulary	Qualified values
genealogy_status	genealogy_status:SUPPORTED / PLAUSIBLE / DISPUTED / NO_EVIDENCE_FOUND / NOT_ASSESSED
genealogy_subtype	genealogy_subtype:DIRECT_INFLUENCE / SHARED_INHERITANCE / CONTACT_EXCHANGE / TRANSLATION_BORROWING / OTHER_DOCUMENTED
independence_status	independence_status:HISTORICALLY_INDEPENDENT / CONTACT_POSSIBLE / DEPENDENCE_KNOWN / UNRESOLVED / NOT_APPLICABLE
tertium_validity	tertium_validity:VALID / REVISED / DISTORTING
relation_dimension	relation_dimension:ONTOLOGY_ENTITY_TYPE / GROUNDING_CAUSATION / PERSONHOOD_SUBJECT_STRUCTURE / EPISTEMIC_AUTHORITY / PRAXIS_TELOS / SEMANTIC_RANGE / GENEALOGY_HISTORY / SCOPE_GRANULARITY / OTHER

Governing — PublicationClaim classes

Qualified value	Use
publication_claim_class:SOURCE_ATTRIBUTION	Thesis-bearing factual attribution to a Position or source.
publication_claim_class:COMPARATIVE	Claim about one or more ComparativeRelations.
publication_claim_class:SYNTHESIS	Claim derived from a SynthesisRecord.
publication_claim_class:LIMITATION	Explicit scope limit, unresolved issue or prohibited stronger reading.
publication_claim_class:EDITORIAL_DECISION	Material editorial placement or selection claim grounded in declared premises.

A6. Qualified-value and terminology discipline**Governing: Qualified-value rule**

Machine-readable controlled values **MUST** be globally unambiguous through field qualification or namespace. Short display codes **MAY** be used only where the governing field or namespace is visible and the plain-language expansion is available. Ordinary explanatory prose need not use namespace-heavy notation when meaning is already unambiguous.

Governing — Legacy aliases and migration rules

Legacy display code or field	Current qualified handling	Migration rule
SI as analytical entity	entity:SI = SourceInstance	Direct alias when the field is an entity type.
SI as former source class	No single alias; migrate using source_proximity, source_form and authority_relation, often including authority_relation:SPECIALIST_SCHOLARSHIP	Human review required; do not reinterpret silently.
INT as claim function	claim_function:INT = Interpretive	Direct field-qualified alias.
INT as former representation status	derived_display_summary:INT	Display-only migration; populate all readiness components independently.
COM as claim function	claim_function:COM = Comparative inference	Direct field-qualified alias.
COM as former representation status	derived_display_summary:COM	Display-only migration; community_governance remains an independent readiness field.
EPI as claim function	claim_function:EPI = Epistemic	Direct field-qualified alias.
EPI as relation	relation:EPI = Epistemic-methodological analogy	Direct field-qualified alias.
PHE as claim function	claim_function:PHE = Phenomenological	Direct field-qualified alias.
PHE as relation	relation:PHE = Phenomenological resemblance	Direct field-qualified alias.
PS / CE / SC / ER / HS / PA / ES source classes	No one-to-one source-class alias	Migrate to the orthogonal source fields and EvidenceLink role using the original source record and claim context.
Legacy compound gate status combining PARTIAL or PROTOTYPE with PASS	gate_verdict:PENDING plus evidence_maturity:PARTIAL or PROTOTYPE	Split the overloaded value; maturity never authorizes GO.

Governing — Controlled terminology

Term	Required definition or use
Position	Formal research entity. Capitalize in schema and governance contexts; use bounded position in explanatory prose after first definition.
Metaphysical-existential architecture	The source-identifiable configuration of claims, refusals, concepts, practices, arguments and orientations represented by a Position.
Worldview	Contextual or reader-facing term only; never an unmarked synonym for the formal Position entity.
Solution-space	Materially distinct answer, denial, reframing, open or category-challenging forms under a declared Atlas question or tertium; does not imply every source treats the matter as a problem to solve.
Fault line	Stable, scoped axis of incompatibility among claims or structures; not total cultural opposition.
Source-sensitive	Evidence, interpretation, translation, provenance and authority requirements proportionate to source type, claim scope, mediation and release context.
Canonical	Reserved for the Canonical Evidence Store, canonical records and named canonical builds.

Governing — Language-register discipline

Register	Example formulation
Normative specification	Every claim_origin:SOURCE_GROUNDED release claim MUST resolve to at least one fit-for-purpose EvidenceLink with a human-verifiable locator.
Scholarly explanatory	Claims attributed to a Position must be traceable to evidence that a reviewer can inspect.
General-reader publication	Every Atlas attribution must trace to evidence that an authorized reviewer can inspect. Public access to that evidence remains subject to rights and access restrictions.

Annex B — Canonical objects, schemas and cardinalities

Governing — Section front door

Purpose	Provide the sole complete catalogue of Atlas entities, graph relations, record fields, cardinalities and conditional requirements.
Primary users	Data architects, researchers completing records, validators, migration teams and auditors.
Authority status	Governing
Decision or rule	Implementations may add non-conflicting fields but MUST NOT weaken these minimum semantics or cardinalities.
Required output	Structurally complete canonical records and resolvable graph links.
Go to	Annex A for controlled values; Annex C for validation and gate tests.

Canonical field names are defined in Annex B. Controlled-value namespaces and meanings are defined in Annex A. A field may draw its permitted values from a differently named vocabulary only where the mapping is explicit. Display and export labels do not create additional canonical fields or alter controlled meanings.

B1. Entity catalogue and graph relations

Governing — Context entities

Qualified code	Context entity	Definition
entity:CF	Worldview family	Broad scholarly grouping for navigation only; never a single doctrine or unmarked synonym for Position.
entity:TR	Tradition	Historically continuous self-identified or scholarly identified tradition with explicit scope.
entity:BR	Branch / lineage / denomination	Institutional, doctrinal, lineage or practice subdivision.
entity:HF	Historical formation	Time-bounded configuration such as a textual milieu or historical synthesis.
entity:CM	Community / practice complex	Social locus in which a worldview is lived, transmitted, enacted or contested.
entity:AG	Agent	Thinker, teacher, author, compiler, interpreter, institution, performer or community voice.
entity:CO	Corpus / source-bearing object	Textual, oral, visual, ritual, material, archival or empirical source-bearing object.
entity:TM	Time span	Dates or period with uncertainty/dispute represented.
entity:GE	Geography	Places relevant to production, transmission, community or practice.

Governing — Analytical and governance entities

Qualified code	Entity	Definition
entity:Q	Analytic question	Neutral Atlas prompt under a domain.
entity:QR	QuestionResponse	Position-by-question intersection containing one primary response state, optional CAT warnings, boundary/variation data, summary and supporting claim links.
entity:CW	CategoryWarning	Scoped record of category, partitioning or translation distortion and its handling instruction.
entity:CN	Concept	Source-sensitive term/concept preserving language, translation candidates, semantic range and historical variation.
entity:PO	Position	Bounded metaphysical-existential architecture of commitments, refusals, practices and orientations.
entity:CL	Claim	Atomic substantive assertion.
entity:AR	Argument	Reason-giving, objection, inference or rationale.
entity:PR	Practice	Practice that enacts, cultivates, tests, expresses or transforms a Position.
entity:EX	ExperienceReport	First-person or reported phenomenological description kept distinct from metaphysical interpretation.
entity:IN	Interpretation	Scholarly, communal, source-community or Atlas interpretation.
entity:SR	SourceRecord	Bibliographic or material source entity with orthogonal source-proximity, form and authority-relation fields.

Qualified code	Entity	Definition
entity:SI	SourceInstance	Specific edition witness, oral/performed/interview event, recording, dataset or other event-level evidence instance.
entity:EV	EvidenceLink	Typed claim-specific link to a source/source instance, including evidence role and exact locator.
entity:CP	ComparisonEvent	Bounded comparison declaring comparands, claim pairs, tertium, scale, dimension, scope and normalization.
entity:CR	ComparativeRelation	Exactly one typed relation inside one ComparisonEvent; relation sets are represented by multiple records.
entity:SY	SynthesisRecord	Pattern, fault-line or morphology record with independent level and maturity.
entity:PC	PublicationClaim	Thesis-bearing publication attribution, comparison, synthesis, limitation or editorial-decision claim linked to canonical premises.
entity:RV	ReviewRelease	Review scope, reviewer, unresolved issues, criterion links, version and any authorization decision.
entity:CT	CriterionResult	One R1-R9 or G1-G8 criterion outcome with evidence, role, date and rationale.
entity:GR	GateRun	One gate verdict and independent evidence-maturity record for a dated run.
entity:RRD	RepresentationReadiness	Independent source-grounding, specialist-review, community-governance, rights/access and release-eligibility fields.
entity:AI	AIProvenance	Record of permitted AI assistance and independent human verification at object/field level.

Governing — Graph relations

Relation	Meaning
is_context_for	Context entity situates an analytical entity.
expressed_in	Position/claim appears in a source or source instance.
held_by / practiced_by	Position/practice attributable to agent/community.
develops_from	Historical or conceptual development relation.
responds_to / rejects	Polemical or argumentative relation.
influenced_by	Genealogical influence with evidence.
contested_by	Internal/external disagreement.
interpreted_as	Links source evidence to interpretation.
supports / counters / contextualizes / exemplifies / disputes	EvidenceLink roles connecting evidence to a claim.
answers / reframes / leaves_open / varies	QuestionResponse semantics.
compared_with	Creates a ComparisonEvent with declared tertium and claim pair.
premise_for	Links canonical records to a PublicationClaim.
reviewed_by / satisfies_criterion	Links records, reviews and CriterionResults.
revises / supersedes	Version relation preserving prior records.

Governing: Graph rule

No entity is required to have one parent. Hybridization, transmission, polemic, multiple authority streams and overlapping communities MUST remain representable without forced single-parent hierarchies.

B2. Core record schemas

B2.1 PositionRecord

Governing — PositionRecord minimum schema

Field	Cardinality	Minimum constraint
position_id	1	Persistent opaque/stable identifier; no mutable taxonomy semantics.
preferred_label	1	Research label; distinguish emic self-designation where available.
self_designation	0..*	Native/community/self-identification where applicable.
scope_statement	1	Boundary by period, corpus, school, thinker, community, thesis or other declared criterion.
boundary_assessment	1	Why the declared unit is analytically coherent and when subpositions are required.
context_links	1..*	Links to relevant context entities.

Field	Cardinality	Minimum constraint
principal_sources	1..*	Source dossier links.
emic_orientation	1	Concise source-grounded problem-space before Atlas encoding.
representation_readiness_id	1	Link to independent readiness component fields.
source_community_coverage	0..1	Required where applicable; structured record.
version_review	1	Current version, reviewers and change history.

B2.2 QuestionResponseRecord

Governing — QuestionResponseRecord minimum schema

Field	Cardinality	Minimum constraint
response_id	1	Persistent ID.
position_id	1	Exactly one bounded Position.
question_id	1	Exactly one Atlas question.
primary_status	1	Exactly one response_state:ANS/DEN/REF/NSA/VAR/UND/IND/INS.
category_warnings	0..*	CategoryWarning records; response_modifier:CAT is orthogonal.
summary	1	Concise response or non-response description.
claim_links	0..*	Mandatory for ANS/DEN/REF/VAR unless a justified edge case is recorded.
status_rationale	1	Why this state rather than adjacent states; critical for NSA/UND/IND/INS.
boundary_assessment	0..1	Required when VAR is considered or boundary adequacy is disputed.
variation_basis	0..1	Required for VAR; why plurality is constitutive of the unit.
subposition_links	0..*	Required for VAR where bounded subpositions exist; claim links otherwise.
internal_variation_links	0..*	Competing claims, periods or communities if contested.
review_version	1	Reviewer and revision data.

B2.3 CategoryWarningRecord

Governing — CategoryWarningRecord minimum schema

Field	Cardinality	Minimum constraint
warning_id	1	Persistent opaque ID.
response_id	1	Parent QuestionResponse.
warning_scope	1	Exact term, question, partition or translation affected.
distortion_description	1	What the Atlas framing risks importing, obscuring or falsely partitioning.
concept_links	0..*	Relevant concepts.
handling_instruction	1	How coding, translation and comparison preserve the warning.
review_version	1	Reviewer/date/version.

B2.4 ClaimRecord

Governing — ClaimRecord minimum schema

Field	Cardinality	Minimum constraint
claim_id	1	Persistent ID.
position_id	1	Attributed bounded Position.
claim_text	1	Concise Atlas paraphrase; quotations stored separately and sparingly.
attachment	1	claim_attachment:DEF/EXP/DER/CTX.
claim_function	1	One qualified claim_function value.
concept_links	0..*	Source-language or technical concepts materially implicated.
claim_origin	1	claim_origin:SOURCE_GROUNDED / ATLAS_INFERENCE.
evidence_links	0..*	SOURCE_GROUNDED release claims require fit-for-purpose EvidenceLink(s) with exact locator.
derived_from_claims	0..*	Required for DER and ATLAS_INFERENCE as applicable; ultimately source-grounded.
inference_rationale	0..1	Required for DER or ATLAS_INFERENCE.
consensus_status	1	One scholarly_status value from Annex A §A4; independent of confidence and evidence completeness.

Field	Cardinality	Minimum constraint
confidence	1	confidence:HIGH / MODERATE / LOW from Annex A §A4, meaning attribution confidence for this Claim; not truth, consensus or release eligibility.
evidence_completeness	1	evidence_completeness:ADEQUATE/PARTIAL/SPARSE/INACCESSIBLE.
interpretive_dependence	1	interpretive_dependence:DIRECT/LOW_INFERENCE/MODERATE_INFERENCE/HIGH_RECONSTRUCTION.
internal_variation	0..*	Known exceptions or alternate Positions.
interpretive_notes	0..*	Translation, category or philological cautions.
review_version	1	Reviewer, date and version history.

B2.5 ConceptRecord

Governing — ConceptRecord minimum schema

Field	Requirement
concept_id	Persistent identifier.
original_term_script	Source-language form; multiple orthographies/witnesses permitted.
transliteration	Named system where relevant.
literal_gloss	Minimal lexical gloss, explicitly not final philosophical interpretation.
translation_candidates	Established alternatives with source/support.
semantic_range	Genre/period/school/context-specific range.
grammar_notes	Morphology/syntax/lexical category where philosophically material.
historical_development	Change through time or schools.
source_anchors	Representative uses with exact locators.
specialist_interpretations	Major readings and disputes.
false_friend_warnings	English/cross-traditional terms that invite illicit equivalence.
translation_confidence	High / Moderate / Low plus reason.

B2.6 SourceRecord, SourceInstance and EvidenceLink

Governing — SourceRecord minimum schema

Field	Cardinality	Minimum constraint
source_id	1	Persistent opaque identifier.
source_proximity	1	One qualified proximity value.
source_form	1..*	One or more material or communicative forms.
authority_relation	1	Relationship of creator or institution to represented subject.
full_citation	1	Complete human-readable citation or material description.
creator/date/language	1..*	Structured source-description entries covering creator(s), date or period, and language where the source is language-bearing. Unknown or disputed values are explicitly qualified; absence of language in a wholly non-linguistic source is stated rather than supplied. Instance-specific evidence is bounded separately in SourceInstance.
edition_or_version	0..1	Edition, witness, archive, dataset or publication version.
stable_identifier	0..1	URL, DOI, repository or persistent identifier; web access date where applicable.
source_limitations	0..*	Dating, mediation, authority, completeness, access or interpretive limitations.

Governing — SourceInstance common identity contract

Every SourceInstance has a persistent opaque source_instance_id and resolvable linkage to the SourceRecords that identify its source context. Event-specific requirements apply in addition to the common identity and version contract. Bibliographic identity alone is not an event or witness identity.

Field	Cardinality	Minimum constraint
source_instance_id	1	Persistent opaque, version-neutral identifier for the bounded evidence instance. EvidenceLink.source_instance_id and artifact references use or resolve to this identifier.
source_ids	1..*	Resolvable SourceRecord.source_id values identifying all source contexts material to this instance. Multiple parent sources are permitted; linkage must not force a single-parent hierarchy.

Field	Cardinality	Minimum constraint
instance_scope	1	Exact edition, witness, recording, event, dataset version or other evidence-instance boundary; state the distinguishing identifiers and context. Record supported uncertainty without collapsing distinct instances.
review_version	1	Structured version/review envelope defined below. The pair source_instance_id + record_version identifies an immutable record version; citations and audits resolve the version actually used.

Governing — SourceInstance version and review envelope

Field within review_version	Cardinality	Minimum constraint
record_version	1	Non-empty immutable version token, unique within source_instance_id. It identifies the record version, not the source's edition or dataset version.
recorded_at	1	ISO 8601 date/time of this record version, with time-zone offset. It is not a claimed date of the source event or review.
responsible_agent_ids	1..*	Resolvable Agent identifiers for those responsible for recording this version. Responsibility does not by itself establish independent review.
review_ids	0..*	Resolvable ReviewRelease.review_id values tied to this exact record version and scope. At release, one or more completed applicable reviews are required; all required review types must be covered.
supersedes	0..*	Exact source_instance_id + record_version references for any replaced record versions. Empty only where no version is replaced; every referenced version remains addressable.
change_note	1	Factual account of initial definition or the change in this version, including material scope and review consequences; no destructive overwrite.

A metadata correction retains source_instance_id and creates a new record_version. A different evidence-bearing edition, witness, recording, event or dataset version is a distinct SourceInstance, even when it shares a SourceRecord; record supersession where it replaces a cited instance. Uncertain place, date or attribution must remain explicit and must still permit a reviewer to distinguish the cited instance. If identity, source linkage, evidence scope or required review cannot be established, the instance is not release-eligible.

For the event fields below, 0..1 is the maximum cardinality across all source forms; each stated trigger makes exactly one structured value mandatory. That value may contain multiple documented participants or artifacts without merging distinct events. The release consequences in Annex B §B3 apply field by field.

Governing — SourceInstance event, performance and interview fields

Field	Cardinality	Minimum constraint
performer_or_interviewee	0..1	Required (1) for oral/performed/interview evidence. Identify the relevant performer, reciter, diviner, narrator, interviewee or other source agent(s), or record the ethical-restriction rationale and lawful verification route. Unknown identity is not ethical restriction and must not be guessed from transcription.
role_and_affiliation	0..1	Required (1) for oral/performed/interview evidence. State each relevant participant's role and supported community, lineage or institutional affiliation; retain self-designation where documented. Record uncertainty or the permitted ethical restriction, not an invented authority or affiliation.
event_context	0..1	Required (1) for oral/performed/interview evidence. Identify the performance, ritual, divination, interview, elicitation, sermon, teaching or collection context and its relation to the cited artifact. Missing context is an unresolved requirement.
place_date	0..1	Required (1) for oral/performed/interview evidence. Record documented event/collection place and date or period, with explicit uncertainty, disagreement or precision limits. Lack of exact precision is not permission to invent it; inadequate event identification blocks release.
collector_recorder	0..1	Required (1) for oral/performed/interview evidence. Name the collector, interviewer, recorder or documenting institution and its role, or retain a justified ethical restriction with an authorized verification route. Unavailable provenance remains unresolved.
oral_unit_id	0..1	Required (1) when the source system provides a native oral-unit identifier for the cited unit. Otherwise omit and document that no such identifier system applies in event_context. A missing known identifier cannot be treated as not applicable.
language_dialect	0..1	Required (1) whenever the instance contains language-bearing evidence. Record documented language(s), dialect/variety and relevant script, with uncertainty where supported. For a wholly non-linguistic performance, document that determination in event_context; it does not waive performance review.
transcription	0..1	Required (1) when a transcription exists or is used, and for spoken, sung or recited content on which a textual attribution, coding or comparison relies. Identify artifact, standard, responsible transcriber and version, with disputed readings. A solely non-linguistic performance may omit it with a reason in event_context and direct artifact review; a missing required transcript blocks release.

Field	Cardinality	Minimum constraint
translation	0..1	Required (1) when translation or a translated gloss is used in attribution, comparison, review or publication. Identify translator, language pair, method, artifact/version and material alternatives. Original-language-only use may omit it only where no translation is needed for the intended use or competent review, with a documented rationale; unavailable required translation blocks release.
authorization_rights	0..1	Required (1) for every release-candidate oral/performed/interview instance and whenever another cited instance has use-specific rights or protocols. Record consent/authorization or other applicable lawful rights basis, restrictions, embargoes, community protocols and permitted uses. Public availability is not consent; absent required authorization blocks release.
artifact_locator	0..1	Required (1) for oral/performed/interview and audiovisual evidence; also when another evidence form requires an instance-level artifact to satisfy §5.3. Give human-verifiable artifact ID and timestamp/segment or exact textual locator, resolving source_instance_id and the cited record version. An inaccessible mandatory chain is not not-applicable.
editorial_history	0..1	Required (1) for oral/performed/interview evidence and wherever editing, normalization, translation, excerpting, redaction or publication transformations materially affect a cited instance. Record known transformations and their responsible agents/versions, or a supported finding that none occurred. Unknown history remains a limitation; uncertainty material to attribution or authorization blocks release.

Governing — EvidenceLink minimum schema

Field	Cardinality	Minimum constraint
evidence_id	1	Persistent identifier.
claim_or_interpretation_id	1	Claim-specific target.
source_id	0..*	Resolvable SourceRecord links. At least one source_id or source_instance_id is required across the two link fields. Direct source-only linkage is permitted only where §5.3 is fully satisfied without a mandatory instance.
source_instance_id	0..*	Resolvable SourceInstance links; one or more are required for oral/performed/interview or audiovisual evidence, and when the edition, witness, recording, event or dataset version cannot be uniquely bounded by SourceRecord plus exact_locator. Each link resolves source_ids, instance_scope and the record version used.
evidence_role	1	One claim-specific qualified role.
exact_locator	1	Human-verifiable locator under §5.3.
quotation_or_excerpt_pointer	0..1	Pointer sufficient for human verification; quotations remain sparing.
confidence	1	Qualified confidence with reason.
notes	0..*	Source-fit, rights, counterevidence or interpretive notes.

Each direct source_id and every source_ids entry reached through source_instance_id must resolve. Where both link fields identify the same evidence chain, they must agree on source context. exact_locator identifies the cited evidence scope and version; artifact references resolve to the same SourceInstance. Multiple links do not permit an unbounded aggregate locator or conceal distinct event/witness chains.

B2.7 ComparisonEvent and ComparativeRelation

Governing — ComparisonEvent minimum schema

Field	Cardinality	Minimum constraint
comparison_id	1	Persistent identifier.
research_question_or_tertium	1	Declared comparison question or tertium.
comparand_position_ids	2..*	Bounded Position IDs at an explicit normalized scale.
left_claim_ids / right_claim_ids	1..* each	Exact propositions compared; no free-text summary substitute.
mode_and_scale	1	Declared comparison mode and analytical scale.
relation_dimension	1	Qualified dimension.
temporal_and_position_scope	1	Bounded time, corpus, subposition and Atlas question.
granularity_check	1	Result and documented asymmetry where cross-level normalization is used.
cross_level_normalization	0..1	How unlike source levels were made analytically commensurate.
source_adequacy_both_sides	1	Evidence adequacy for every relation proposed.
tertium_validity	1	VALID, REVISED or DISTORTING.

Field	Cardinality	Minimum constraint
replacement_comparison_id	0..1	Required when comparison continues after revision.
unresolved_issues	0..*	Open category, source, translation, scope or coherence issues.
review_version	1	Reviewer, date, version and supersession.

Governing — *ComparativeRelation* minimum schema

Field	Cardinality	Minimum constraint
relation_id	1	Persistent identifier.
comparison_id	1	Parent ComparisonEvent.
relation_type	1	Exactly one qualified relation type. Multi-label coding uses multiple records.
logical_coherence_key	1	Comparison ID + Claim pair + relation dimension + temporal/Position scope.
relation_scope	1	Exact proposition and dimensional respect in which the relation holds.
directionality	1	SYMMETRIC, ASYMMETRIC or DIRECTIONAL.
supporting_claim_ids	1..*	Canonical evidence for the relation.
disanalogy_links_and_prose	1..* where required	Canonical links plus explanation.
genealogy_status / subtype / evidence	0..* as applicable	Historical status, documented subtype and exact evidence.
independence_status	1	Qualified independence state.
equivalence_dimensions / failure_conditions	0..*	Required for OEQ.
relation_confidence	1	HIGH, MODERATE or LOW with reason.
atlas_inference_note	1	Comparison is an Atlas inference with explicit rationale.

B2.8 SynthesisRecord

Governing — *SynthesisRecord* minimum schema

Field	Constraint
synthesis_id	Persistent identifier.
synthesis_type	Motif / Functional family / Structural architecture / Fault line / Genealogical family / Independent convergence candidate / Category challenge.
level	One L0-L5 value; L0-L4 may be database-supported, while L5 is outside database inference.
maturity_status	One synthesis_maturity value independent of level and planning confidence.
supporting_relations	Relation IDs; L2+ registration requires at least three adequately described Positions.
support_position_count	Raw count of bounded supporting Positions.
effective_genealogy_cluster_count	Count of materially independent or separately explained support clusters.
selection_basis	Candidate universe and inclusion/exclusion rule used for the pattern search.
coverage	Regions, periods, languages and evidence types represented and omitted.
negative_case_search	Search procedure, candidates examined and omissions.
genealogy_independence	Required for L3+ and independent-convergence claims.
counterexample_links	Required for L2+; canonical IDs and whether each falsifies, delimits or refines.
sensitivity_tests	Leave-one-out, alternate coding, Position-boundary and category sensitivity.
translation_dependency	Terms or readings on which the pattern materially depends.
publication_scope	Exact permitted chapter claim and prohibited stronger formulation.
robustness_notes	Category revisions, alternate codings and other sensitivity findings.
review_evidence	Level-appropriate review record IDs and CriterionResults.
review_version	Version and supersession history.

B2.9 PublicationClaimRecord

Governing — *PublicationClaimRecord* minimum schema

Field	Cardinality	Minimum constraint
publication_claim_id	1	Persistent identifier linked to chapter and section.
claim_text	1	The thesis-bearing publication formulation.
claim_class	1	One publication_claim_class value.

Field	Cardinality	Minimum constraint
premise_ids	1..*	Canonical Claim, QuestionResponse, ComparativeRelation, SynthesisRecord and relevant source/evidence IDs.
inference_rationale	1	Why premises support the claim; distinguish source attribution, deduction, classification, explanatory inference or bounded editorial synthesis where material.
scope_and_qualifiers	1	Position, time, corpus, domain, relation dimension and any release-bounded qualifier.
counterevidence_or_defeaters	0..*	Canonical negative cases, disanalogies, unresolved issues and disposition.
synthesis_level	0..1	Required for synthesis claims and for comparative claims that generalize beyond L1.
synthesis_record_id	0..1	Required when the claim depends on a registered synthesis.
prohibited_stronger_reading	1	Stronger interpretation that the evidence does not authorize.
review_release_id	1	Review role, CriterionResults, unresolved defects, release state and version.
supersedes	0..1	Prior PublicationClaim when replaced.

B2.10 RepresentationReadinessRecord

Governing — *RepresentationReadinessRecord minimum schema*

Field	Cardinality	Minimum constraint
readiness_id	1	Persistent identifier.
object_ids	1..*	Positions, Claims, SourceInstances or publication units covered.
source_grounding	1	readiness:SATISFIED/PENDING/FAILED/NOT_APPLICABLE.
specialist_review	1	readiness:SATISFIED/PENDING/FAILED/NOT_APPLICABLE.
community_governance	1	readiness:SATISFIED/PENDING/FAILED/NOT_APPLICABLE.
rights_access	1	readiness:SATISFIED/PENDING/FAILED/RESTRICTED/NOT_APPLICABLE.
release_eligibility	1	readiness:ELIGIBLE/INELIGIBLE/PENDING; computed from applicable conditions.
evidence_review_links	0..*	Evidence, review, authority or rights records supporting each component state.
derived_display_summary	0..1	INT/SRC/REV/COM/REL display only; cannot weaken component states.
review_version	1	Reviewer, date, version and supersession.

B2.11 SourceCommunityCoverageRecord

Governing — *SourceCommunityCoverageRecord minimum schema*

Field	Cardinality	Minimum constraint
applicability	1	Exactly one Required / Desirable / Not applicable value and rationale for the declared Position or narrower represented scope. The scope is stated here; a not-applicable rationale explains why coverage does not arise, not why evidence is unavailable. Desirable does not waive an independently applicable rights or governance requirement.
coverage_basis	0..*	Repeatable entries identifying actual source-community scholarship, direct voice, project review or governance/authorization and their evidence links and scope. Required (1..*) for Partial, Adequate or Restricted coverage; zero is permitted for Absent coverage only with the missing basis explained in limitations. No engagement or authorization is inferred from scholarship alone.
coverage_level	0..1	Exactly one Absent / Partial / Adequate / Restricted value when applicability is Required or Desirable; omitted only when applicability is Not applicable. This is one judgment for the declared scope, independent of readiness components and release authorization.
authority_notes	0..1	Required (1) when applicability is Required or Desirable. State who may speak or review, for which scope, and the evidence or unresolved authority limits. One individual is not presumed to represent a whole community. Missing authority is recorded as missing, not waived.
rights_protocols	0..*	For applicable coverage, at least one scoped rights/protocol assessment entry is required; add each known access, quotation, reproduction, seasonal, gender, sacred or other restriction and supporting record. Where information is unavailable, identify the unresolved requirement. A supported finding of no additional identified protocol is not consent or release authorization.
limitations	0..*	For applicable coverage, record every material gap, disagreement, mediation, translation, historical-distance or authority limitation; if none is identified, retain one scoped assessment stating that finding and its review basis. Uncertainty affecting a mandatory condition blocks release until resolved or the affected treatment is excluded.

Field	Cardinality	Minimum constraint
engagement_record	0..*	For applicable coverage, record the actual contacts, meetings and review exchanges with scope and provenance; where direct engagement did not occur, retain one documented reason instead. No contact, review or consent record may be manufactured to fill the list.
community_feedback_actions	0..*	When feedback has been received, retain at least one action/rationale entry for each substantive feedback issue, including acceptance, refusal, dispute, restriction or deferment. With no feedback, the list is empty; do not invent actions.
local_contexts_metadata	0..*	Preserve community-supplied Labels only when authorized for the represented scope; retain researcher/institution Notices only where appropriate. Required supplied protocol metadata must not be discarded. With none appropriately supplied or authorized, the list may be empty; community Labels are never self-assigned.
release_basis	0..1	Required (1) for applicable coverage. State why each relevant community/rights and release-eligibility condition is or is not satisfied for the intended use, with evidence/review links and unresolved consequences. Not-applicable coverage relies on the applicability rationale, not an invented clearance. A coverage judgment or G5 capability PASS is not GO.

B2.12 ReviewReleaseRecord

Governing — *ReviewReleaseRecord* minimum schema

Field	Cardinality	Minimum constraint
review_id	1	Persistent ID.
object_ids	1..*	Records covered by review.
review_type	1	Source / category / translation / specialist / community-rights / comparison / synthesis / publication-claim / release.
reviewer_id_role	1..*	Traceable reviewer and role; public pseudonymization permitted where needed.
review_date	1	ISO date.
criterion_result_ids	1..*	Separate CriterionResult records for every applicable R1-R9 or other criterion.
unresolved_flags	0..*	Defects, dissent, restricted content or missing evidence.
authorization_decision	0..1	authorization_decision:GO/HOLD only for project-scale authorization or release decisions.
representation_readiness_after	0..1	Link to updated RepresentationReadiness record when readiness changes.
supersedes	0..1	Prior review record if replaced.
notes	0..*	Rationale and remediation references.

B2.13 CriterionResultRecord

Governing — *CriterionResultRecord* minimum schema

Field	Cardinality	Minimum constraint
criterion_result_id	1	Persistent identifier.
criterion_id	1	R1-R9, G1-G8 or another governed criterion.
parent_review_id	1	ReviewRelease record containing the criterion result.
status	1	criterion_status:PASS/FAIL/PENDING/NOT_APPLICABLE.
evidence_references	0..*	Canonical evidence, review artifacts or gate proof records.
reviewer_id_role	1	Reviewer and role responsible for the criterion judgment.
date	1	ISO date.
rationale	1	Reason for the outcome, including any limiting scope.
supersedes	0..1	Prior CriterionResult when rerun or corrected.

B2.14 GateRunRecord

Governing — *GateRunRecord* minimum schema

Field	Cardinality	Minimum constraint
gate_run_id	1	Persistent identifier.
gate_id	1	Exactly one G1-G8 gate.
verdict	1	gate_verdict:PASS/FAIL/PENDING/NOT_APPLICABLE.

Field	Cardinality	Minimum constraint
evidence_maturity	1	evidence_maturity:NONE/PARTIAL/PROTOTYPE/COMPLETE; independent of verdict.
evidence_references	0..*	Gate-specific proof artifacts and CriterionResults.
run_date	0..1	Required when an actual run occurred; absent for a pending state in which no actual run occurred.
owner_role	1..*	Accountable owner and any required independent roles.
retest_trigger	1	Conditions requiring a new run.
supersedes	0..1	Prior GateRun record.
notes	0..*	Scope, limitations and remediation references.

B2.15 AIProvenanceRecord

Governing — AIProvenanceRecord minimum schema

Field	Cardinality	Minimum constraint
ai_provenance_id	1	Persistent opaque ID.
object_id	1	Canonical object affected.
affected_fields	1..*	Exact fields or generated components touched.
assistance_type	1	SOURCE_DISCOVERY / EXTRACTION / RECORD_DRAFTING / TRANSLATION_DRAFT / CITATION_SUGGESTION / CONSENSUS_CLASSIFICATION / QA / VIEW_GENERATION / OTHER.
human_verification_status	1	UNVERIFIED / VERIFIED / NOT_REQUIRED; substantive release material requires VERIFIED.
verifier_id_role	0..1	Required when VERIFIED.
verification_date	0..1	Required when VERIFIED.
verification_notes	0..*	Checks, corrections, scope limitations.

B3. Conditional cardinality rules

Conditional requirements identify the triggering evidence form, represented scope or intended use. Missing required evidence remains an unresolved requirement. A not-applicable determination records why the requirement does not arise; it cannot substitute for unavailable evidence, consent, authorization or review.

The SourceInstance and SourceCommunityCoverage field conditions in §§B2.6 and B2.11 are binding at the declared scope. Provisional records may identify missing values, but cannot be represented as structurally complete or release-eligible while a triggered requirement is unmet. Permitted uncertainty must be explicit, source-supported and adequate for the intended attribution and authorized review; it cannot replace a mandatory evidence or rights chain.

Governing — Conditional record and cardinality rules

Condition	Mandatory consequence
primary_status = ANS/DEN/REF/VAR	At least one source-grounded claim link, except a documented edge case.
primary_status = VAR	boundary_assessment + variation_basis + subposition_links or claim links required.
primary_status = UND	Evidence package must be adequate enough to establish that the Position leaves the issue open.
primary_status = IND	Record competing interpretations/evidence and why no stable reading is available.
primary_status = INS	Record missing evidence and what could plausibly settle the question.
CAT present	Record exact category/translation distortion and handling instruction; comparison and publication must not silently strip the warning.
attachment = DER	derived_from_claims + inference_rationale required.
claim_origin = SOURCE_GROUNDED	Fit-for-purpose EvidenceLink(s) with exact locator(s) required for release.
claim_origin = ATLAS_INFERENCE	derived_from_claims + inference_rationale required; no synthetic SourceRecord.
SourceRecord	source_proximity + one or more source_form values + authority_relation required; no exclusive source-category.
relation = OEQ	Equivalence dimensions + failure conditions + linked disanalogy + specialist review.
relation = GEN	Genealogy subtype, status and evidence required.
tertium_validity = DISTORTING	relation:MIS reason required; no positive relation under that event; replacement event required if comparison continues.
same coherence key contains OCO+INC or OEQ+INC	Semantic validation failure.

Condition	Mandatory consequence
same coherence key contains OEQ+OCO	Redundant relation set; retain OEQ and remove same-scope OCO.
oral/performed/interview claim at release eligibility	Resolvable EvidenceLink.source_instance_id and complete SourceInstance identity/version contract, plus every triggered event field under §B2.6, are required irrespective of project-level G4.
community-applicable unit at release eligibility	Adequate source-community coverage and rights/protocol review are required under §B2.11, irrespective of project-level G5; missing mandatory evidence cannot be coded not applicable.
synthesis level >= L2	Counterexample links and active negative-case search required.
reader-facing L2 recurrence	Selection basis, effective genealogy clusters, negative cases, linked counterexamples, translation/boundary dependencies, sensitivity tests and level-appropriate review required.
independent-recurrence language	At least two adequately argued independent support clusters required.
PublicationClaim in release scope	Canonical premise IDs, inference rationale, scope/qualifiers, defeaters, prohibited stronger reading and review record required.
GateRun verdict = PASS	Gate-specific acceptance rule and evidence_maturity:COMPLETE required; evidence maturity alone never sets PASS.

Annex C — Validation and gate tests

Governing — Section front door

Purpose	Provide the sole complete validation matrix, review criteria, gate evidence specifications, reliability packet designs and authorization templates.
Primary users	Validation leads, independent coders, governance and provenance leads, data engineers and release officers.
Authority status	Governing
Decision or rule	Schema completeness alone cannot satisfy human review, reliability, rights, representation or production evidence.
Required output	Recorded CriterionResults, GateRuns, evidence artifacts and a defensible GO or HOLD decision.
Go to	Historical snapshot at the end for the dated handover state.

C1. Validation rules V-01–V-20

Governing — Validation rules and primary tests

Rule	Canonical constraint	Primary test
V-01	claim_origin:SOURCE GROUNDED release claims require fit-for-purpose EvidenceLink(s) with exact locator(s) and resolvable source/instance links under Annex B §B2.6. claim_origin:ATLAS_INFERENCE requires source-grounded input claims plus inference rationale; no synthetic SourceRecord.	Structural/semantic validator + G6 traceability audit.
V-02	Every QuestionResponse has exactly one response_state value; response_modifier:CAT is orthogonal.	Schema enumeration/cardinality + response_modifier:CAT field test.
V-03	claim_attachment:DER requires derived-from claims and rationale. claim_origin:ATLAS_INFERENCE independently requires derivation and rationale. claim_attachment:CTX cannot silently become a bounded-Position commitment.	Conditional semantic validator.
V-04	response_state:NSA, response_state:UND, response_state:IND and response_state:INS require explicit rationale distinguishing adjacent states.	Conditional validator + G2 human review.
V-05	response_state:VAR requires boundary assessment, variation basis and linked subpositions or claims; boundary failure is not a valid VAR record.	Conditional validator + G2 boundary diagnostics.
V-06	SourceRecord stores source proximity, form and authority relation separately; evidence role is stored on EvidenceLink.	Schema validator + source migration audit.
V-07	Each ComparativeRelation has one relation type; multi-label stacking is multiple relation records within one ComparisonEvent.	Schema + referential validator.
V-08	relation:SEM, relation:FUN, relation:STR, relation:PHE, relation:OCO and relation:OEQ require at least one material disanalogy linked to canonical records.	Conditional validator + G3 disanalogy audit.
V-09	Same-key relation:OCO + relation:INC and relation:OEQ + relation:INC are prohibited; same-key relation:OEQ + relation:OCO is redundant; relation:GEN is orthogonal; relation:LEX entails no stronger relation.	Relation-set coherence validator.
V-10	relation:OEQ requires equivalence dimensions, scope, failure conditions, linked disanalogy and specialist review before release eligibility.	Conditional validator + CriterionResult evidence.
V-11	relation:GEN requires subtype, evidence basis and genealogy status; genealogy_status:NO_EVIDENCE_FOUND is not a relation:GEN record.	Conditional validator.
V-12	relation:MIS marks a tertium as tertium_validity:DISTORTING; no positive relation may remain under that event without a revised or replacement ComparisonEvent.	Tertium-validity and referential validator.
V-13	Oral/performed/interview release claims require the SourceInstance identity and version contract and every triggered event, language, artifact, transcription/translation and rights/authorization field in Annex B §B2.6 at unit level.	Referential/conditional validator + G4 capability evidence and per-unit review.
V-14	Community-applicable release units require determinate applicability, scope-level coverage, evidence and conditional fields under Annex B §B2.11, with adequate source-community coverage and rights/access review.	Conditional validator + G5.
V-15	RepresentationReadiness component fields are authoritative; a compact readiness summary is derived only.	Readiness computation test.
V-16	Synthesis level and maturity are independent; reader-facing L2 recurrence satisfies the full publication burden.	Synthesis conditional validator + R7 review.
V-17	Every release-candidate thesis-bearing PublicationClaim has resolvable premises, rationale, scope, defeaters, prohibited stronger reading and review.	Referential/semantic validator + G6.
V-18	Generated Evidence Views identify schema version, vocabulary version, canonical_build_id, generation version and output hash.	G7 manifest and regeneration test.

Rule	Canonical constraint	Primary test
V-19	Released records are versioned; superseded records remain addressable; persistent IDs are opaque and stable.	Version/referential validator + ID lint.
V-20	AI-generated claim, translation, citation or consensus judgment cannot satisfy evidence requirements without independent human/source verification.	AI Provenance audit + human verification evidence.

C2. Release review criteria R1–R9

Governing — Release review criteria

Review gate	Pass question
R1 Source adequacy	Every substantive claim resolves to fit-for-purpose evidence and locator.
R2 Category neutrality	CAT/REF issues remain visible; no forced answer or illegitimate VAR is created.
R3 Translation	Central terms are controlled; disputed translations are recorded.
R4 Internal diversity	Relevant dissent, periodization and lived/doctrinal variation are checked.
R5 Comparison	Exact claim pairs, relation types, dimensions, scopes, disanalogy links, tertium validity and coherence are explicit; OEQ burden is met.
R6 Community/rights	Where applicable, source-community coverage, authority scope, rights/access and release basis are reviewed.
R7 Synthesis	Level and maturity are separate; genealogy, selection basis, negative cases, counterexamples, sensitivity, translation dependencies and publication scope satisfy the declared level.
R8 Publication/query regeneration	Factual views are regenerated from a named canonical build, and thesis-bearing PublicationClaims resolve to canonical premise chains without factual or inferential re-authoring.
R9 Versioning	Reviewers, CriterionResults, unresolved flags, readiness components, status and supersession history are recorded.

C3. Gate acceptance evidence

C3.1 G1 — Schema stability

G1 passes only when a governed run confirms that current research reveals no repeated core structural failure that cannot be represented without changing a domain boundary, controlled-vocabulary meaning or mandatory cardinality. Ordinary field defects, difficult cases, low-confidence evidence or a single category challenge do not by themselves establish structural failure. Document completion cannot pass G1.

C3.2 G2 — Status-discrimination reliability

Governing — G2 blind-packet specification

Element	Specification
Recommended packet	64 blind items; at least 8 for each primary response state.
Minimum packet	48 blind items; at least 4 each for ANS, DEN, REF and VAR, and 8 each for NSA, UND, IND and INS.
Source mix	At least 80% real current-research questions/source excerpts; up to 20% boundary vignettes derived from known failure modes.
CAT coverage	At least 12 balanced present/absent cases; coders record warning scope and handling instruction separately from the primary state.
Coders	Minimum 2 independent human coders; target 3. A primary researcher who authored vignettes is excluded from the reliability calculation for those items.
Coder output	Exactly one primary state; CAT present/absent plus scope/handling; 1-3 sentence rationale; missing-evidence note if INS; openness-entailment note if UND; boundary assessment note if VAR.
Blindness	No access to prior labels, adjudication key or other coder decisions.
Metrics	Nominal Krippendorff alpha for the eight-state label [S8]; nominal binary alpha for CAT present/absent, computed separately. Retain raw confusion matrices, class frequencies, pairwise agreement, missing judgments and a confidence interval with its calculation method. The interval is diagnostic, not an additional acceptance cut-point. Use the calculation and diagnostic procedure below.
PASS	Eight-state alpha ≥ 0.80 on the unrounded coefficient, complete qualifying evidence and all required diagnostic CriterionResults PASS. No class-imbalance artifact, systematic unresolved state confusion or systematic CAT/scope/boundary failure may remain. A high aggregate coefficient cannot compensate for a failed diagnostic.
Intermediate remediation band	$0.67 \leq \alpha < 0.80$, using the unrounded coefficient: a completed evaluable run records FAIL. Identify confusion pairs, refine examples without changing controlled meanings, retrain and use a new held-out packet. A rounded display value never determines the verdict.
FAIL	A completed evaluable run records FAIL whenever alpha < 0.80 or any mandatory diagnostic fails, including results below 0.67 and systematic CAT/boundary failure. Release remains HOLD where G2 is required. Do not average coder labels or substitute adjudicated agreement for raw blind reliability.

Element	Specification
PENDING	Use PENDING when qualifying evidence or required evaluation is incomplete, including a missing required judgment, unevaluable coefficient or incomplete diagnostic review. Record known defects separately. PENDING is not FAIL and does not authorize release.

Mandatory edge-case diagnostics: DEN vs REF; REF vs CAT; VAR vs boundary failure; NSA vs INS; UND vs INS; IND vs INS; and NSA vs UND. REF+CAT and DEN+CAT must be representable, and CAT is scored as an orthogonal task.

Governing — Nominal reliability calculation for G2 and G3

Use nominal Krippendorff alpha [S8] on the immutable pre-adjudication labels. Before coding, freeze the packet, source excerpts, codebook version, intended state/relation and boundary coverage, coder-assignment exclusions and diagnostic rubric. At least two independent eligible human coders must be assigned to each item; a vignette author's labels do not enter that item's reliability calculation. Reviewers retain the packet design and coverage basis without exposing prior labels or the adjudication key to coders.

For unit u , let $m(u)$ be its number of eligible non-missing judgments and $n(u,c)$ the count in category c . Include only $m(u) \geq 2$ in the coefficient. For categories c and k , define $o(c,k) = \sum_u n(u,c) \times [n(u,k) - I(c=k)] / [m(u) - 1]$, where $I(c=k)$ is 1 when $c=k$ and 0 otherwise. Let $N = \sum_c \sum_k o(c,k)$ and $n(c) = \sum_k o(c,k)$. Then $D_o = \sum_c \sum_k o(c,k) / N$; $D_e = \sum_c \sum_k n(c)n(k) / [N(N-1)]$; $\alpha = 1 - D_o/D_e$. Nominal disagreement is 0 for identical categories and 1 otherwise.

The coefficient is undefined when there are insufficient pairable judgments or $D_e = 0$. Report it as unevaluable, never as 1.000. Preserve every planned item, exclusion and missing judgment in the report, even where it cannot contribute to the calculation. Do not impute, relabel, remove difficult items or substitute another coefficient to obtain PASS. Missing required judgments or an unevaluable required coefficient leave qualifying evidence incomplete and the gate PENDING; existing diagnostic defects remain recorded independently.

The same nominal calculation applies separately to G2's eight-state labels and CAT binary judgments and to each of G3's eleven presence/absence tasks. Pairwise agreement, class frequencies, confusion tables and uncertainty estimates remain visible diagnostics. No ancillary statistic, pooled prevalence or rounded value replaces the stated primary acceptance threshold.

Governing — G2 diagnostic decision procedure

After blind submission, the reliability lead and a qualified independent human reviewer who did not supply the evaluated labels inspect the raw outputs, confusion tables, frequencies, CAT scope/handling and all named edge cases. They review every disagreement or missing rationale, the planned positive and negative CAT cases, and concordant cases at each mandatory boundary. For each required distinction, record the item IDs, source/codebook basis, finding, rationale and CriterionResult; a general assertion that diagnostics are acceptable is insufficient.

A diagnostic fails if the same erroneous distinction recurs across distinct items, a governed category or required distinction is consistently omitted, the codebook licenses a prohibited conflation, or a material category/boundary ambiguity remains unresolved. In particular, test whether dominant classes conceal failure to discriminate a less frequent state; whether CAT is improperly used as a primary state; and whether legitimate VAR is distinguishable from inadequate bounding. A material ambiguity is one capable of changing the state, scope or evidential meaning.

An isolated error may be explained in the diagnostic record only where source-grounded review establishes that it is not a continuing rule failure; its raw label remains in the coefficient. PASS requires all diagnostic reviews complete with no failure finding. Reviewer disagreement or insufficient diagnostic evidence remains PENDING; a completed adverse finding is FAIL. A failed coefficient or diagnostic requires remediation and a new held-out run; adjudication cannot retrospectively turn that run into PASS. These diagnostic judgments add no numeric CAT or boundary sub-threshold.

C3.3 G3 — Comparative-relation reliability

Governing — G3 blind-packet specification

Element	Specification
Units	60 blind bounded events recommended; minimum 42. The packet covers all eleven relation types, includes zero-label and multi-label cases, and oversamples OEQ, OCO, INC, MIS and GEN boundary cases.
Material	Bounded source-grounded claim pairs from current Canonical Evidence Store records; each item states the proposed tertium, relation dimension and normalized temporal/Position scope.
Coder output	Select zero or more applicable relation types; for each selected type record relation scope, directionality and confidence; record at least one primary material disanalogy dimension plus prose and canonical link targets; record tertium validity and genealogy/independence status where relevant.

Element	Specification
Metrics	Per-type nominal binary Krippendorff alpha, using the G2/G3 calculation above; the unweighted arithmetic mean across all eleven relation types is the primary macro coefficient. Also report relation-set agreement, scope and tertium agreement, separate disanalogy reliability/diagnostics, per-type frequencies and missingness. Retain all raw outputs and confusion tables. The detailed rules below fix the denominator and unevaluable-component handling.
Disanalogy dimensions	Ontology/entity type; grounding/causation; personhood/subject structure; epistemic authority; praxis/telos; semantic range; genealogy/history; scope/granularity; other.
Semantic validation	A relation set fails when it violates the coherence matrix even if coders agree.
PASS	Unrounded macro alpha ≥ 0.80 across all eleven evaluable relation types, complete qualifying evidence and all required diagnostic CriterionResults PASS: no systematic omission of mandatory disanalogy, no unacceptable scope/tertium finding and no unresolved coherence failure. Agreement never waives source adequacy or independent OEQ review.
OEQ safeguard	Reliability agreement never proves equivalence. OEQ still requires dimensions, failure conditions, explicit linked disanalogy and specialist review.

A dedicated GEN evidence-sufficiency subset MAY be used, but it remains part of the full-taxonomy gate. Reliability agreement never proves OEQ; equivalence dimensions, failure conditions, linked disanalogy and specialist review remain mandatory.

Governing — G3 evaluation population and macro coefficient

Use the independent-coder and immutable-packet rules in §9.2 and the nominal calculation in §C3.2. Each complete submitted relation set yields eleven binary judgments: 1 for a selected type and 0 for an explicitly completed decision not selecting it. An explicit zero-label set is eleven zeros; an unanswered or incomplete selection task is missing, not eleven zeros. Do not infer absence from an unsubmitted judgment. Scope, tertium, directionality and disanalogy outputs remain separate from these binary labels.

Freeze the full-taxonomy packet and diagnostic key before coding. The design must include source-supported positive and negative decision opportunities for every relation type, zero-label and multi-label events and the prescribed boundary oversampling. Apply the same predeclared eligible-coder assignment to every type within an event. Report planned and observed positive/negative counts, eligible judgments, pairable events and missing judgments for each of the eleven types; rare types remain in the evaluation.

Compute alpha separately for LEX, SEM, FUN, STR, PHE, EPI, GEN, OCO, OEQ, INC and MIS. The macro is $(\alpha_{\text{LEX}} + \alpha_{\text{SEM}} + \alpha_{\text{FUN}} + \alpha_{\text{STR}} + \alpha_{\text{PHE}} + \alpha_{\text{EPI}} + \alpha_{\text{GEN}} + \alpha_{\text{OCO}} + \alpha_{\text{OEQ}} + \alpha_{\text{INC}} + \alpha_{\text{MIS}}) / 11$. Weights are equal; do not micro-pool judgments, weight by prevalence, clamp negative values, round before comparison, or choose a subset of types. No separate numeric per-type acceptance cut-point is imposed.

If any required type is unevaluable, including constant observed judgments with $D_e = 0$, the eleven-type macro is unevaluable and G3 remains PENDING. Report the component and its counts explicitly; never drop it, assign perfect reliability, pool it with another type or substitute a metric. A rare but evaluable component remains included with its actual coefficient and frequencies. Inadequate coverage or missing judgments requires a new qualifying held-out packet, not retrospective selection of favorable items.

Governing — G3 diagnostic and verdict procedure

For relation-set agreement, report exact-set matches divided by the number of eligible coder-pair comparisons with two complete sets. For scope agreement, report matches and opportunities among co-selected relation-type decisions: a match requires the same exact Claim pair, dimension, temporal/Position boundaries and directionality, not identical prose. Report tertium-validity nominal alpha and its confusion table. For primary disanalogy dimensions, report nominal alpha and counts on the applicable pairable judgments, together with link and materiality review. Undefined auxiliary statistics are identified with their denominators and are not described as perfect agreement.

The reliability/comparison lead and a qualified independent human reviewer who did not supply the evaluated labels inspect every event for coherence, every selected mandatory-disanalogy relation for a material canonical link, and every disagreement or flagged scope, tertium, directionality, genealogy or disanalogy judgment. They also inspect concordant OEQ/OCO/INC/MIS/GEN boundary cases and the zero-label/multi-label cases. Record the exact item/Claim IDs, source and codebook basis, diagnostic finding and rationale as separate CriterionResults.

Scope and tertium diagnostics pass only when review is complete, required distinctions remain reproducible without systematic mis-scoping or category distortion, and no unresolved material ambiguity or coherence failure remains. Repeated use of the same erroneous rule, consistent omission of a relation type or required disanalogy,

acceptance of a positive relation under a DISTORTING tertium, or an unbounded Claim pair fails the applicable diagnostic. An isolated raw error cannot be erased; it may be explained only where the review shows no continuing rule failure. Undefined auxiliary statistics require an explicit source-grounded diagnostic finding from the complete relevant cases; absent required cases or incomplete review leaves the diagnostic PENDING.

Disanalogy review must establish that the recorded dimension, prose and canonical link identify a material difference rather than a formulaic disclaimer. The disanalogy criterion fails for systematic omission or unresolved material insufficiency. Same-key coherence failure is disqualifying even with coder agreement. GEN requires its independent historical evidence burden; OEQ still requires exact equivalence dimensions, failure conditions, linked disanalogy and specialist review. Reliability agreement does not establish the truth of either relation.

G3 records PASS only when the complete evaluable run meets the macro threshold and every required diagnostic passes. A complete evaluable run below 0.80 or with any failed diagnostic records FAIL. Incomplete qualifying evidence, any unevaluable required component or incomplete required evaluation records PENDING, with known defects recorded separately. Neither FAIL nor PENDING authorizes release. Failed runs require targeted remediation and a new held-out packet; post-adjudication outputs remain reference/training material, not replacement reliability evidence.

C3.4 G4 — Oral/performance provenance

PASS requires at least one substantive release-candidate oral or performed Claim with an auditable Claim -> EvidenceLink -> SourceInstance -> artifact chain.

The chain resolves source_instance_id, source_ids, instance_scope and the version/review envelope in Annex B §B2.6. It includes performer or interviewee identity or ethical restriction rationale, role and affiliation, event context, place/date with supported uncertainty, recorder or collector, native oral-unit identifier where provided, language or dialect, required transcription and translation with their versions, artifact timestamp or segment, consent or authorization, allowed uses, access restrictions and editorial history.

Each field's trigger and permitted uncertainty are fixed in Annex B §B2.6; missing required evidence is not not-applicable. An authorized reviewer must be able to verify the source-language or performance basis and authorization. Publication Architecture Specification identifies source-bounded Ifá as the preferred decisive capability case; the gate itself remains general.

C3.5 G5 — Source-community representation

PASS requires one applicable Position with the complete SourceCommunityCoverage contract in Annex B §B2.11: one applicability decision and rationale, one scope-level coverage judgment, actual coverage evidence, authority scope, rights/protocol assessments, limitations, actual engagement or its documented absence, feedback actions only where feedback exists, authorized metadata where supplied and a supported release basis.

Source-community scholarship is not mislabeled as direct authorization; no single reviewer is presumed to represent an entire community. Material disagreement keeps claims contested or restricted or triggers revision.

Governing: Capability versus unit release

A project-level G4 or G5 PASS demonstrates that the process can be executed. It does not clear every record of that class. Per-record provenance, governance, rights, readiness and review still apply.

C3.6 G6 — Claim and PublicationClaim traceability

Governing — G6 traceability report fields

Report field	Meaning
claim_id	Canonical Claim.
position_id	Bounded attribution.
claim_attachment	Display/export label for ClaimRecord.attachment; values are claim_attachment:DEF / EXP / DER / CTX.
claim_origin	claim_origin:SOURCE_GROUNDED / ATLAS_INFERENCE.
evidence_count	SOURCE_GROUNDED release claims require at least one fit-for-purpose EvidenceLink.
locator_complete	Boolean under source-form locator rules.
source_fit	Human-reviewed CriterionResult PASS/FAIL.
counterevidence_reviewed	Required where material.
derived_chain_complete	Required for DER and ATLAS_INFERENCE as applicable.
inference_rationale_complete	Required for DER and ATLAS_INFERENCE as applicable.

Report field	Meaning
publication_claim_id	Thesis-bearing publication claim, where in release scope.
premise_chain_complete	All premise IDs resolve and are release-eligible for the use made.
scope_defeaters_complete	Scope, qualifiers, disanalogies, counterexamples and prohibited stronger reading recorded.
review_status	Reviewer role, date and CriterionResults.
release_eligible	Computed only when every applicable Claim and PublicationClaim constraint passes.

G6 has two required denominators. The Claim denominator is all substantive release-candidate Claims in the scoped canonical build; the numerator is those satisfying the applicable origin, evidence, locator, derivation and counterevidence rules. The PublicationClaim denominator is all thesis-bearing release-candidate publication claims; the numerator is those with complete canonical premise chains, rationale, scope and qualifiers, defeaters, applicable synthesis level and review state. Each ratio MUST equal 1.000. Held records are explicitly flagged and never silently dropped.

Governing — G6 aggregate report and empty-scope handling

Aggregate report field	Meaning
claim_candidate_count	Count of all substantive release-candidate Claims in the declared canonical build and scope.
claim_qualifying_count	Count in that population satisfying every applicable Claim traceability condition.
publication_claim_candidate_count	Count of all thesis-bearing release-candidate PublicationClaims in that same declared release scope.
publication_claim_qualifying_count	Count in that population satisfying every applicable PublicationClaim premise, rationale, scope, defeater and review condition.
population_traceability_ratios	Report each qualifying count / candidate count separately. Compute a ratio only for a positive denominator; retain numerator and denominator beside it.
audit_scope_and_completion	Identify the build, release scope, audited and unaudited candidate counts, review evidence and all held/excluded records with disposition; no silent population reduction.

These are report/export fields, not additional canonical fields. A completed qualifying G6 audit records PASS only when both required populations are non-empty, both ratios equal 1.000 and every required audit and review condition is complete. A completed evaluable audit of both non-empty required populations records FAIL if either contains an incomplete chain; the affected release remains on HOLD unless the release scope is validly changed and audited again.

A zero denominator is an empty evaluation scope, not a ratio of 1.000 or evidence of PASS. Where either required population is empty, or the required audit has not been completed, evaluation is PENDING; report the counts and known defects separately. Unavailable evidence cannot be relabeled as not applicable, and the two populations must not be merged.

NOT_APPLICABLE is permitted only when an explicit governed release-scope decision under §13 establishes that G6 itself is not required for that use. An empty population alone cannot establish that decision. The Atlas manuscript and its thesis-bearing public evidence release retain both required populations and both 1.000 requirements; neither population may be waived by a formatting, omission or scope-label shortcut. Any changed release scope identifies the excluded treatment and requires its own applicable audit; exclusion does not certify the missing chain.

C3.7 G7 — Production regeneration

Governing — Required Generated Evidence Views

View	Minimum content
GV-01 Position profile	Bounded label/scope, emic orientation, D1-D15 summaries, key concepts, sources and RepresentationReadiness components.
GV-02 D1-D15 matrix	Selected release-candidate Positions x 15 questions with one primary state and CAT modifiers.
GV-03 Claim/evidence view	Atomic claims with attachment, function, origin, evidence links, locators, confidence and review.
GV-04 Comparison matrix	Selected tertia and relation stacks with exact claim pairs, dimensions, scopes, disanalogy links, tertium validity and coherence result.
GV-05 Provenance trace	Claim -> EvidenceLink -> SourceRecord/SourceInstance -> artifact/locator -> review/version. Instance paths resolve source_instance_id, source_ids, instance_scope and the cited review_version contract in Annex B §B2.6.
GV-06 Relation output	ComparisonEvent plus all ComparativeRelation records, genealogy/independence and OEQ burden.
GV-07 Synthesis and publication-claim view	Synthesis level/maturity and every release-candidate PublicationClaim with premise chain, scope, defeaters and prohibited stronger reading.

View	Minimum content
GV-08 Gate dashboard	Evidence-derived G1-G8 GateRuns with verdict and evidence maturity separately linked to proof artifacts.

1. Freeze canonical build A and record its ID and dataset hash.
2. Generate GV-01–GV-08 using versioned queries or scripts; record schema and vocabulary versions, query or generation version and output hashes.
3. Have a human reviewer confirm that no factual content or thesis-bearing inference was manually re-authored into generated views.
4. Make one controlled canonical change and freeze build B.
5. Regenerate all affected views without editing view files; confirm expected downstream differences and unchanged unrelated views.
6. Resolve every displayed claim, status, relation, synthesis and PublicationClaim to canonical IDs and archive manifests and logs.
7. Confirm that the Public Digital Atlas exposes only release-authorized records and views.

C3.8 G8 — Novelty refresh

G8 requires a dated scoped originality and precedent review. Before any later public originality or priority language, rerun the landscape against current comparative-method, structured-database, ontology or knowledge-graph, computational-philosophy, philosophy-as-way-of-life, transformative-philosophy, epistemic or knower-transformation, contemplative or participatory knowing, embodied or situated knowing, self-cultivation and ontology–epistemology–praxis research. The review must test whether the proposed integration of bounded ontology, epistemic access, diagnosis, transformative praxis, negative states, provenance, disanalogy, genealogy and gated synthesis has a close precedent, including universalizing integrative frameworks that the Atlas expressly refuses. A stale novelty review constrains positioning language; it does not alter D1–D15 or the publication architecture.

C4. Gate evidence and authorization templates

Template — Gate evidence register

Gate	Acceptance evidence	Evidence IDs / notes	Run date / owner
G1	Current-version defect log reviewed; no repeated core structural failure under current governed semantics.		
G2	Blind all-state packet + eight-state reliability + CAT reliability + confusion tables + coder independence declarations.		
G3	Blind full-taxonomy multi-label relation packet + scope/coherence results + disanalogy audit + OEQ safeguard review.		
G4	One complete oral/performance event/artifact provenance chain.		
G5	One adequate applicable source-community coverage/release record.		
G6	Numerator and denominator for each required population, complete audit evidence, Claim ratio 1.000 and PublicationClaim ratio 1.000; empty-scope rules in §C3.6.		
G7	Production regeneration + controlled-change propagation + build/query/output manifests.		
G8	Dated novelty refresh current for public originality language.		

Template — Gate result register

Gate	Verdict	Evidence maturity	Rationale / unresolved issues
G1			
G2			
G3			
G4			
G5			
G6			
G7			
G8			

Template — Authorization record

Field	Entry
Canonical build ID	
Specification identity	The Atlas of Being and Becoming — Research, Evidence & Validation Specification
Schema / vocabulary versions	
Dataset hash	
Validation result	
Severity-1 defects	0 required for GO
G1 verdict / evidence maturity	
G2 verdict / eight-state alpha / CAT metric	
G3 verdict / macro and per-type metrics	
G4 verdict / evidence maturity	
G5 verdict / evidence maturity	
G6 Claim traceability rate	1.000 with a positive candidate count; empty scopes follow §C3.6
G6 PublicationClaim traceability rate	1.000 with a positive candidate count; empty scopes follow §C3.6
G7 verdict / evidence maturity	
G8 run date / verdict / evidence maturity	
Unresolved Severity-2/3 issues	
Decision	authorization_decision:GO / HOLD
Decision rationale	
Release officer	
Decision date	

Annex D — Failure modes and edge cases

Governing — Section front door

Purpose	Preserve distinct failure boundaries and compact examples that operators use to avoid false attribution, invalid coding, unsupported comparison, representation failure and hidden publication inference.
Primary users	Researchers, coders, reviewers and trainers.
Authority status	Example
Decision or rule	Examples illustrate governing rules; they are not source records, adjudication keys or release evidence.
Required output	Correct handling of recurrent boundary cases.
Go to	Annexes A–C for exact definitions, fields and tests.

D1. Known failure modes

Example — Known failure modes and required safeguards

Failure mode	Typical error	Required safeguard
Consciousness = personhood	Treating a theory of awareness as a theory of personal identity.	Keep D5 and D6 separate. A Position may answer one and leave the other response_state:UND or response_state:NSA.
Causal order = agency	Inferring freedom or responsibility directly from a causal/metaphysical order.	Keep D10 and D11 separate; source each independently.
Nature/culture assumed	Forcing a nature/culture binary onto a source that partitions beings differently.	Use D3 as a partitioning question; add response_modifier:CAT if the binary distorts the source.
response_state:UND = response_state:INS	Calling a Position open because evidence is missing, or calling evidence weak because the Position is genuinely open.	Apply §4.1 first. When the remaining distinction is UND versus INS, ask whether more or better evidence could plausibly settle the record without changing the bounded Position. Use INS when the present package is inadequate; use UND when adequate evidence establishes that the Position itself leaves the issue open. Keep NSA and IND distinct and give the state-specific rationale.
response_state:VAR = broad-label heterogeneity	Using response_state:VAR because a tradition-level label contains multiple schools that could be separately bounded.	Perform the boundary assessment first. Split into Positions or subpositions unless plurality is constitutive of the declared research object.
response_state:REF = response_modifier:CAT	Treating a category warning as the Position's answer, or treating reframing as only a translation warning.	Record one response_state value and response_modifier:CAT separately. response_state:REF + response_modifier:CAT, response_state:DEN + response_modifier:CAT and response_state:ANS + response_modifier:CAT are valid combinations.
Partial thesis inflated	Importing contextual commitments into a narrow philosophical thesis to fill D1-D15.	Use claim_attachment:CTX and response_state:NSA or response_state:UND; do not manufacture a complete Position.
Compatibility = equivalence	Treating two propositions as the same because they can coexist.	Use relation:OCO for compatibility. relation:OEQ requires narrow dimensions, failure conditions, linked disanalogy and specialist review.
Same-key contradiction	Assigning relation:OEQ and relation:INC or relation:OCO and relation:INC to the same claim pair, dimension and scope.	Run the coherence validator; revise propositions, dimension or scope, or remove the invalid relation.
MIS = incommensurable	Using category mismatch as a vague declaration that two traditions cannot be compared.	relation:MIS is local to the tertium that distorts. Mark the event tertium_validity:DISTORTING and create a revised event before positive comparison.
Lexical resemblance = stronger relation	Inferring semantic, functional or ontological similarity from shared English wording.	relation:LEX entails no stronger relation. Create ConceptRecords and evaluate each relation independently.
Oral evidence = book citation	Treating a published transcription as sufficient provenance for a performed/oral claim.	Require SourceInstance event/artifact, language, transcription/translation and authorization metadata at release eligibility.
Ethnography = community voice	Presenting a researcher-mediated reconstruction as authorized community self-representation.	Record mediation and readiness components; require source-community coverage where applicable.
Gate capability = unit clearance	Treating one successful G4 or G5 case as release authorization for every record of that class.	Project capability gates do not replace per-record provenance, governance, rights or review.
Family label = doctrine	Generalizing from one text or thinker to an entire religion, philosophy or community.	Bound the Position precisely; use aggregation labels and named coverage.

Failure mode	Typical error	Required safeguard
Science = metaphysical thesis	Treating empirical evidence as direct proof of a metaphysical Position.	Keep empirical evidence distinct from philosophical/metaphysical inference and record the inference chain.
Readiness summary = source of truth	Using a derived INT/SRC/REV/COM/REL display summary to waive an unmet specialist, community or rights condition.	Use the independent RepresentationReadiness fields; the compact label is display only.
Synthesis level = maturity	Calling a proposed L2 pattern robust or release-ready because it meets the three-Position registration minimum.	Store level and maturity separately and enforce the L2 publication rule.
Prose = hidden inference store	Publishing a chapter thesis whose premises, defeaters and scope cannot be inspected.	Create a PublicationClaim record with canonical premise chain and prohibited stronger reading.

D2. Minimal coding examples

Example — Minimal coding examples

Scenario	Correct handling
An adequately sourced bounded thesis establishes a physical dependence claim. Postmortem continuity is structurally salient to the bounded thesis, but the thesis itself leaves that issue open.	Use response_state:UND for D13 because the evidence is adequate and the bounded thesis leaves the issue open. Do not infer an answer from a broader secular context. If the question is instead not structurally salient to the bounded thesis, assess response_state:NSA under §4.1.
A source repeatedly transforms “What substance is ultimately real?” into a critique of the question’s reification.	Use response_state:REF; attach response_modifier:CAT if the substance framing itself imports a distortion. This is a legitimate response_state:REF + response_modifier:CAT record, not a forced response_state:ANS.
A Position explicitly denies that agency requires an uncaused choosing subject, while the imported “free will” vocabulary also distorts its account.	Use response_state:DEN as the primary state and response_modifier:CAT as the orthogonal warning. Record the denial and the category distortion separately.
A carefully bounded higher-level debate is itself the research object and contains two enduring, source-grounded answers represented by linked subpositions.	Use response_state:VAR after recording the boundary assessment, variation basis and subposition links.
A broad tradition label contains several schools with materially different answers and no reason to treat the broad label as one research object.	This is boundary failure, not response_state:VAR. Create separate Positions or a bounded contested-unit record.
Two concepts play a liberating epistemic role but commit to incompatible ontologies.	Record relation:FUN and possibly relation:STR plus relation:INC where exact propositions conflict. The stack is coherent when scope and dimension are explicit; do not promote to relation:OEQ.
One claim pair is marked relation:OEQ and relation:INC under the same relation dimension and temporal/Position scope.	Semantic validation fails. Revise the claim pair, dimension or scope, or remove the invalid relation.
The declared tertium imports a subject/property grammar that one comparand rejects, but a process comparison remains possible.	Record relation:MIS and tertium_validity:DISTORTING for the original event. Create a replacement ComparisonEvent with the revised process tertium before asserting a positive relation.
A public ethnography gives a rich relational ontology but no direct community authorization for the project’s release claim.	Record source-grounded research at the appropriate readiness states; do not call it community voice or release-eligible until the applicable governance and rights burdens are met.
A later source in a broader tradition explicitly answers a question that the bounded early text does not.	Attach the later material as claim_attachment:CTX; it cannot convert the bounded text’s response_state:UND, response_state:NSA or response_state:INS into response_state:ANS.
An L2 candidate has at least three adequately described supporting Positions, an active counterexample search and the required counterexample links. The negative-case and sensitivity work required for publication is not yet complete.	The record may remain L2 with synthesis_maturity:PROPOSED. Reader-facing recurrence and RELEASE_ELIGIBLE are prohibited until the full publication requirements are met. Three supporting Positions without an active counterexample search do not satisfy the registration minimum.

D3. Compact non-release record chain

This example demonstrates the object sequence without serving as release evidence. It uses public secondary verification routes and intentionally lacks canonical IDs, complete primary-source instances and full review.

Example — Non-release record-chain demonstration

Object	Demonstration record
Position A / Claim A	Spinoza, Ethics-centered Position; Atlas paraphrase that only one substance exists and finite things are modes. Source-grounded in intent, but a critical primary-text instance and canonical IDs remain incomplete.
Position B / Claim B	Descartes, Meditations-centered Position; Atlas paraphrase that mind and body are really distinct. Source-grounded in intent, but complete primary-text witness control and canonical IDs remain incomplete.

Object	Demonstration record
EvidenceLinks	Public reference routes identify E1p14–E1p15 and Sixth Meditation AT 7:78 / CSM 2:54. Exact canonical SourceInstance and review records are not assigned.
ComparisonEvent	A bounded substance/mind-body tertium could support a scoped incompatibility or structural contrast only after exact Claim IDs, dimensions, disanalogies, source adequacy and review are completed.
Publication consequence	The chain remains non-release because source-instance identity, primary evidence, canonical IDs, full comparison metadata and review are incomplete. It may not support a thesis-bearing PublicationClaim.

Annex E — Standards and reference basis

Governing — Section front door

Purpose	Record the dated external methodological, technical and governance basis for this specification and constrain public novelty language.
Primary users	Methods, data, governance, legal and publication reviewers.
Authority status	Historical snapshot
Decision or rule	These references justify method and infrastructure choices; they do not substitute for source-fit evidence for Atlas worldview Claims.
Required output	A dated and auditable standards and prior-art basis.
Go to	§12 for public-claims rules and G8; the historical snapshot for the last recorded run.

Reference basis: 19 August 2026. Bibliographic identity and scope for Sikri, SOPHIS, Graphilosophy, Darshana Graph and the attribution-bias manuscript were checked on 16 September 2026. This targeted check is not a comprehensive literature refresh, does not establish earlier verification, and does not change the 27 July 2026 G8 verdict.

E1. Standards and methodological references

Historical snapshot — Standards and reference basis current through 19 August 2026

Ref.	Reference
[S1]	W3C Provenance Working Group. PROV-O: The PROV Ontology. W3C Recommendation, 30 April 2013. https://www.w3.org/TR/prov-o/
[S2]	W3C Data Shapes Working Group. Shapes Constraint Language (SHACL). W3C Recommendation, 20 July 2017. https://www.w3.org/TR/shacl/
[S3]	JSON Schema. Draft 2020-12 Specification. https://json-schema.org/draft/2020-12
[S4]	Wilkinson, Mark D., et al. "The FAIR Guiding Principles for scientific data management and stewardship." <i>Scientific Data</i> 3 (2016): 160018. https://doi.org/10.1038/sdata.2016.18
[S5]	Carroll, Stephanie Russo, et al. "The CARE Principles for Indigenous Data Governance." <i>Data Science Journal</i> 19 (2020): 43; Global Indigenous Data Alliance CARE resources.
[S6]	Oral History Association. Core Principles and Oral History Best Practices. https://oralhistory.org/best-practices/
[S7]	Local Contexts. Traditional Knowledge / Biocultural Labels and Notices governance documentation. https://localcontexts.org/
[S8]	Krippendorff, Klaus. "Reliability in Content Analysis: Some Common Misconceptions and Recommendations." <i>Human Communication Research</i> 30(3) (2004): 411-433.
[S9]	Freiberger, Oliver. "Elements of a Comparative Methodology in the Study of Religion." <i>Religions</i> 9(2) (2018): 38; and <i>Considering Comparison: A Method for Religious Studies</i> . Oxford University Press, 2019.
[S10]	Burley, Mikel. "Comparative Philosophy of Religion." <i>Stanford Encyclopedia of Philosophy</i> , 2025.
[S11]	Stenmark, Mikael. <i>Contemporary Worldviews: A Comparative Study</i> . Cambridge University Press, 2026. DOI: 10.1017/9781009745079.
[S12]	Sikri, Rohan. "Philosophy by Equivocation: A Methodological Reset for Comparative Philosophy." <i>Journal of World Philosophies</i> 11(1), published 13 July 2026. Publisher record
[S13]	Sharpe, Matthew, ed. <i>Philosophy as a Way of Life: New Research Directions</i> . Brill, 2025. DOI: 10.1163/9789004739147.
[S14]	Grimm, Stephen R. "Evaluating Philosophical Ways of Life." In Matthew Sharpe, ed., <i>Philosophy as a Way of Life: New Research Directions</i> , 280–295. Brill, 2025. DOI: 10.1163/9789004739147_013.
[S15]	Amir, Lydia, ed. <i>Handbook of Transformative Philosophy</i> . Springer, 2026. DOI: 10.1007/978-3-032-00622-6.
[S16]	Jong, Abbas. "The Possibility of Cosmopolitan Philosophy: Integrating Ontologism and Phenomenological Hermeneutics Within a Post-Foundationalist Framework." <i>Philosophies</i> 10(2):45, 2025. DOI: 10.3390/philosophies10020045.
[S17]	Takayama, Keita. "An invitation to theorise East Asian pedagogy: bodymind, dark consciousness, kata, and self-cultivation." <i>Asia Pacific Education Review</i> , 2026. DOI: 10.1007/s12564-026-10113-1.

E2. Dated novelty-reference set

Historical snapshot — Novelty-reference set current through 19 August 2026

Reference family	Relevance to novelty discipline
Petrovich et al. (2026)	Petrovich, Eugenio, Selene Allevi, Edoardo Fazzini and Lorenzo Gandolfi. "SOPHIS: an open-access database for quantitative studies of contemporary philosophy of science." <i>Scientometrics</i> 131 (2026): 1947–1978. Published 19 March 2026. DOI: 10.1007/s11192-026-05591-4. The article describes a graph-based philosophy-of-science database covering eight journals in 2005–2019; it is not a global philosophy ontology. Publisher record

Reference family	Relevance to novelty discipline
Bose (2026a)	Bose, Joy. “Darshana Graph: A Parallel Commentary Corpus for Comparative Indian Philosophy, with Stylometric and Exploratory Graph Analyses.” arXiv:2606.18222v1, submitted 16 June 2026. Repository manuscript on a parallel Indian-philosophy commentary corpus, stylometry and exploratory graph analyses; its reported findings and extraction limitations remain author claims. Repository record (v1)
Bose (2026b)	Bose, Joy. “Attribution Bias in Philosophical Knowledge Graphs: Corpus Frequency versus Temporal Sourcing.” arXiv:2606.29070v1, submitted 27 June 2026. Repository manuscript examining attribution bias in a philosophical corpus; its findings do not independently establish historical priority or doctrinal equivalence. Repository record (v1)
Do et al. (2026)	Do, Minh-Thu, et al. “Graphilosophy: Graph-Based Digital Humanities Computing with The Four Books.” arXiv:2603.28755v1, submitted 30 March 2026. Repository manuscript on graph-based computing with The Four Books, not a general global philosophy ontology. Repository record (v1)
DRH / Puluotu / Seshat / philosophy ontology literature	Established prior art for structured religion/history/culture data and machine-readable conceptual representation.
Philosophy-as-way-of-life / transformative-philosophy / knower-transformation literature (2025–2026)	Established prior art for philosophy as lived practice, self-cultivation, transformation of knowing or the knower, predicament–path–goal analysis and universalizing ontology–epistemology integration. Atlas differentiation cannot rest on those themes alone; it must rest on the governed integration of bounded Positions, explicit coupling and uncoupling, negative states, concept control, provenance, disanalogy, genealogy, counterexamples and gated synthesis.

Governing: Reference rule

External references justify technical and methodological choices or constrain originality language. They do not provide evidence for worldview Claims unless separately entered as fit-for-purpose SourceRecords and EvidenceLinks for a specific Claim.

Historical snapshot — GateRun status as of 28 July 2026

Historical snapshot: Snapshot status

This historical snapshot records the project-level GateRun state at 28 July 2026. It is a dated summary, not a source of later authority. Current gate and release decisions require applicable recorded GateRuns and release records under §10; document preparation is not gate evidence.

PENDING indicates that qualifying evidence has not yet established PASS or FAIL. It is not itself FAIL and does not authorize release. In this snapshot, G1–G7 remain PENDING; G5 records PARTIAL evidence and G7 PROTOTYPE evidence. G8 records PASS with COMPLETE evidence from 27 July 2026. The recorded release authorization remains HOLD.

Historical snapshot — Project GateRun state at 28 July 2026

Gate	Owner / evidence required	Verdict	Evidence maturity / last run	Re-test trigger
G1 - Schema stability	Research methods owner + release officer. Defect log and evidence that no repeated core structural failure remains under this semantic version.	PENDING	NONE; no qualifying gate run asserted	Completion of a governed stability run, or any repeated core failure that cannot be represented without changing a governed semantic/cardinality.
G2 - Status discrimination	Reliability lead. Blind all-state coder packet, eight-state reliability, CAT reliability, confusion diagnostics and independence declarations.	PENDING	NONE; no packet result asserted	Material codebook/example revision, new population/use case or failed diagnostic threshold.
G3 - Relation reliability	Reliability/comparison lead. Blind full-taxonomy multi-label relation packet, scope agreement, coherence validation, disanalogy audit and OEQ safeguard review.	PENDING	NONE; no packet result asserted	Material relation guidance change or failed reproducibility in manuscript comparisons.
G4 - Oral/performance provenance	Provenance/governance lead. Complete Claim -> EvidenceLink -> SourceInstance -> artifact chain with language, event, transcription/translation and authorization metadata.	PENDING	NONE; no qualifying capability case asserted	New oral/performance release class or change in rights/provenance basis.
G5 - Community representation	Governance liaison + release officer. Coverage basis, authority scope, rights/protocols, limitations, feedback and release decision.	PENDING	PARTIAL; partial basis recorded, no PASS asserted	New applicable community Position, changed scope/rights or material dispute.
G6 - Claim and publication-claim traceability	Validation lead. 100% release-candidate Claim traceability plus complete premise chains for thesis-bearing PublicationClaims.	PENDING	NONE; no candidate-build audit asserted	Every candidate release build.
G7 - Production regeneration	Data/validation engineer. Production regeneration and controlled-change propagation with canonical-build, query and output manifests/hashes, including PublicationClaim-linked exhibits.	PENDING	PROTOTYPE; prototype evidence only, no production PASS asserted	Every production implementation or material query-pipeline change.
G8 - Novelty refresh	Research/publication lead. Dated scoped originality/precedent review.	PASS	COMPLETE; run date 27 July 2026	Before later public originality language when the current review is no longer contemporaneous.

Snapshot release authorization: HOLD. G8 is PASS with COMPLETE evidence dated 27 July 2026; all other gates remain PENDING. GO remains prohibited until every applicable gate is PASS with complete gate-specific evidence and no unresolved Severity-1 defect.

End of governing specification.