

NISO STS (Standards Tag Suite) Steering Committee Decision Minutes for STS Draft Version 1.0

For NISO STS Steering Committee May 2016

May 10, 2016, 10:00 am - 11:00 am EDT

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1 Introduction

These are the minutes for the Steering Committee meeting for the NISO activity to create a standard tag set for Standards. Details on this work item are available at:

http://www.niso.org/apps/group_public/document.php?document_id=15278

These minutes record decisions made and action items assigned during the NISO STS Steering Committee meeting May 10, 2016.

1.1. Attendees for May 10, 2016

- Bielfeld, Anja (IEC)
- Breitfelder, Kim (IEEE)
- Collins, Jo (NEN)
- Doubleday, Keith (IHS Global)
- Galichet, Laurent (ISO)
- Landesman, Betty (University of Baltimore, Langsdale Library, NISO liaison)
- Lapeyre, Debbie (Recorder, Mulberry Technologies, Recorder)
- Neylon, Eamonn (Consultant)
- Owens, Evan (CENVEO)
- Rosenblum, Bruce (Inera, Co-chair)
- Saari, Antti (SFS)
- Salcedo, Ivan (BSI)
- Saunders, Greg (Defense Logistics Agency)
- Usdin, Tommie (Mulberry Technologies)
- Visser, Mike (Thompson Reuters)
- West, Lesley (ASTM)
- Wheeler, Robert (ASME, Co-chair)
- Wischhöfer, Cord (DIN Software GmbH)
- Wolf, Elizabeth (Copyright Clearance Center)
- Xu, Hong (CEN)

1.2. Administrative Business

- Minutes from the previous meeting were accepted unchanged.

1.3. NISO STS Project Schedule

- The original timeline for this project was overly optimistic and must be revised.
- NISO STS 1.0 should be completed and voted before April 2017.
- The NISO Technical Working Group and Mulberry Technologies need to be preparing materials no later than September 2016 in order to make this April target.
- The Steering Committee recommends that after the approval of Phase I, NISO STS be moved to a continuous maintenance mode (as JATS has done), so that further requirements can be addressed.

1.1 Next Committee Call

The next meeting of the NISO STS Steering Committee will be held by conference call when needed.

1.4. Continuing Action Items

- **All Committee Members**
 - **ACE Examples** - Please provide examples of Amendments, Corrigenda, and Errata that may be used in the documentation. Tommie will resend the Doodle poll.
 - **Element/Attribute Examples** — Please provide examples of elements and attributes (for which Mulberry lacks examples) that may be used in the documentation. Examples need not be in XML or written in English. Tommie will resend the Doodle poll.
- **Nettie/Bruce/Robert:** Determine to what extent, given that NISO STS will not yet be a standard during the completion and voting of Phase I, can this Committee continue to work or launch new work efforts? Is a new Work Proposal required?
- **Mulberry Technologies and the Technical Working Group**
 - Make sure that there is an explicit XML mechanism to point from a portion of an ACE document to the specific location in the standard that is being changed.
 - Determine the location(s) of the editing instructions in ACE documents.
 - Make sure there is sufficient metadata to name (explicitly) the stage in the lifecycle of a document: standard, amendment, corrigendum, or erratum. If the supplement-type attribute is involved, more thorough documentation will be required.

1.5. Resolved Action Items

- **Resolved: Model for ACE Documents** — ACE documents will be modeled using the NISO STS model, they will not take a separate tag set.

1.2 Resolved: Lifecycle Stage for Scope

Amendments, Corrigenda, and Errata Support — Three styles of ACE change document were discussed. For example, to insert a paragraph into a 3rd-level section might be expressed in one of several styles:

- **Format style** — An amendment-only document with amendment-specific metadata and (for example) two paragraphs: one that is a paragraph of instructions and another that is the paragraph to be inserted into the standard.
- **Structure style** — An amendment-only or partial document with amendment-specific metadata and a full path or other representation of the sections down to the place of insertion. It would be more difficult to make such a document structurally valid, particularly in TBX-containing sections.

- **Embedded style** — The change is marked in place in a complete standards document. Such a change document would be a valid STS document and the amended portions could be extracted to produce an amendment-only document.

Resolved: No Embedded-style/Structured Changes — The Steering Committee agreed that, since (we expect) consolidated standards to be the future, the embedded style was where we wish to go. But modeling all embedded and structural changes has significant issues:

- The current ISO STS has no structural or documented mechanism for either the Structural style or the Embedded style.
- Developing true change tracking would be an extended effort, and require more than the currently scheduled 30-day public comment period; probably 6 months for trial use and THEN a public comment period.

Therefore, for Phase I of NISO STS, the model will support format-style amendments and corrections, but not partially structured amendments or embedded changes.

1.3 Resolved: Standards in Multiple Languages

This tag set needs to support the complete text of a standard in more than one language in a single XML document at this time. Some metadata (including standard title), sections, figures, and standard references will be allowed in multiple languages.

1.4 Resolved: Standards Shared by Multiple Organizations

Standards developed jointly by two or more organizations are in scope for this effort.

1.5 Resolved: Changes to a Standard

- **Resolved: Amendments/Corrigenda/Errata (ACE):** — NISO STS must model standalone ACE documents. (Note: For some standards-defining organizations, Amendments and Corrigenda are the same type of document; for others they are not.)
- **Resolved: Revisions:** — A Revision is a complete document, a full replacement for a standard. [Editor’s Note: This note assumes that a “Revision” is an update to a standard that rolls up corrections and changes and an “Edition” is a major update to standard.] Revisions that follow the model for an ordinary standard can be handled by NISO STS. Revisions with embedded changes will *not* be handled in Phase I due to the constraints of the scheduled 30-day public review (versus a six-month trial period). NON-XML methods employed with current ISO STS can still be employed to track changes.
- **Resolved: New Document-level Metadata** — ACE documents, as well as Revisions, require new metadata to indicate (at least) which standard has been revised and give the ACE document a distinct version number. The SDO-metadata Subcommittee has taken this as part of their charter.
- **Resolved: Scoping**
 - **Amendment Size** — In addition to the small, nearly trivial documents (e.g., a paragraph of instructions followed by a paragraph to be inserted), an Amendment can be quite large, e.g., a new annex or a complicated multi-level-nested section.

- **Amendment Metadata** — An amendment needs the same metadata as a standard, plus metadata that describes the document being amending.
- **Corrigenda** — Are complete documents that may modify either a standard or an amendment.
- **Resolved: New element(s)** — For use in ACE documents, we will introduce an element that holds the instructions to a reader on how this amended text relates to the existing text of the standards document being amended or corrected, for example “insert this new paragraph as the first paragraph of section 2.3.1” or “delete the paragraph below from section 2.3.1”.
- **Resolved: Against Change Tracking** — The effort to develop XML change tracking (by means of elements and attributes), embedded changes, redlining, and similar ways to mark changes and revisions within the text of a standards document will *not* be handled in NISO STS Phase I due to the extent of the modeling effort and the constraints of the scheduled 30-day voting approval period.

1.6 Resolved: How Many Tag Sets for Tables

The OASIS Interchange CALS will be added to NISO STS, but there will also be a model version that supports only the XHTML table model. The following models will be developed:

- An “Interchange” Model with only XHTML tables and MathML 2.0
- An “Interchange” Model with only XHTML tables and MathML 3.0
- A “Production” Model with both XHTML and OASIS CALS tables and MathML 2.0
- A “Production” Model with both XHTML and OASIS CALS tables and MathML 3.0

1.7 Resolved: How Many Tag Sets for MathML

The NISO STS tag sets will be available in both MathML 2.0 and MathML 3.0 flavors.

1.8 Resolved: Roads Not Taken

A number of desiderata were discussed, which must (for various reasons) be postponed until a later phase or follow-on from NISO STS Phase I. Rejected explicitly for Phase I at this meeting include:

- XML change tracking,
- Revision documents with embedded changes, and
- Non-normative documents.