NISO STS (Standards Tag Suite) Technical Working Group Discussion for STS Draft Version 1.0

For NISO STS Technical Working Group
July 2016

*July 20, 2016, 10:00 am - 11:00 pm EDT*
1  Introduction......................................................................................................................................................... 1
  1.1.  Attendees for June 15, 2016 .......................................................................................................................... 1
  1.2.  Administrative Business ..................................................................................................................................... 1
  1.3.  The Next Call .................................................................................................................................................. 1
2  Discussion and Clarifications..................................................................................................................................... 1
  2.1  Compound (Nested) Standards Documents .................................................................................................... 1
  2.2  Attributes to Mark Forms ................................................................................................................................... 2
  2.3  Simplified Term and Definition Model ............................................................................................................ 2
3  Action Items............................................................................................................................................................. 3
  3.1  Action Items From This Meeting ...................................................................................................................... 3
  3.2  NISO STS Metadata Discussion ....................................................................................................................... 3
  3.3  Action Items from the June Minutes .................................................................................................................. 3
1 Introduction

This week, the NISO Technical Working Group call had neither a quorum nor even a simple majority. Thus no decisions were made. Minutes for this Working Group are typically “decision-only” minutes. This document will record Action Items and clarifications of discussion items from the July 20, 2016 NISO STS Technical Working Group call, so that decisions can be made in a subsequent meeting.

1.1. Attendees for June 15, 2016

- Dreyfuss, Bob (ASTM) [non-voting member]
- Gilson, Howard (ASTM)
- Gupta, Vinay (Edaptive Technologies)
- Hollowell, Bob (ASME)
- Imsieke, Gerrit (le-tex Publishing Services)
- Lapeyre, Debbie (Mulberry Technologies)
- McRae, Mary (IQ Solutions)
- Rosenblum, Bruce (Co-chair, Inera)
- Usdin, Tommie (Mulberry Technologies)
- Wheeler, Robert (Co-chair, ASME)

1.2. Administrative Business

- A Doodle poll will be emailed to all Working Group member to see if it will be possible to meet in August, 2016.

1.3. The Next Call

Until the results of the Doodle poll are known, no next call will be scheduled. When our next meeting is announced, the callin numbers will be:

US and Canada Toll free number and Passcodes are available at http://www.niso.org/apps/org/workgroup/sts-technical/ under “Upcoming events”.

Global numbers can be found via http://bit.ly/1KCHbsT For security reasons, the Passcode will be required to join the conference.

2 Discussion and Clarifications

Member of the Technical Working Group who were not on the July call are requested to read these items and consider any suggested actions the group discussed.

2.1 Compound (Nested) Standards Documents

- Gerrit Imsieke directed us to look at nested standards document (DIN EN ISO 10012 in PDF) in the email he sent concerning formal notes. This document contains 2 superseded notes associated with SDOs, the outer set is DIN, the next set in reading order is EN, and these two enclose an ISO standard. There is also SDO-specific back matter. This document could not be
tagged without rearrangement using even the proposed more liberal NISO STS model. If a standards document were to use a recursive model, this could be modeled.

- Vinay Gupta described splitting a compound standard into 2 or 3 parts to handle nested components during a conversion from PDF to XML.

- Tommie Usdin believes that a nested, but non backwards-incompatible, model for nested standards may be possible. She took an action item to work on an accommodation for these compound examples, with her current assumption that the body of the standard does not repeat, there is a core standard and one or more outer wrappers. Gerrit Imsieke has offered to explain his German language examples (which provide, in Tommie Usdin’s words, “a fabulous set of examples that were not considered when the original models were written”) and to tag these samples as a test of any proposed model.

- Robert Wheeler noted that in the NISO Steering Committee sample document collection, Antii Saari provided an example of a single translation with an outer wrapper, SFS EN ISO 65081.

2.2 Attributes to Mark Forms

- Gerrit Imsieke summarized his email concerning attributes for forms.

- Debbie Lapeyre suggested two forms attributes: 1) a “this is a form, yes or no” attribute and 2) a “form-type” attribute (data characters unrestricted for now) with the three values from Gerrit’s email as typical suggested values.

- Roads Not Taken: The opinion was expressed that two forms attributes were redundant, the presence of a “form-type” would be enough to indicate that the object was a form. The main arguments in favor of separating the I-am-a-form information from the type-of-form information were that 1) a simple yes/no simplifies searching for forms and 2) people may want to/be able to specify the form type. For example: during a large conversion there may not be the time or the knowledge to specify the type for every form. For another, people may not want to specific an active form type because it may be seen to promise to make that form operational.

2.3 Simplified Term and Definition Model

This discussion was based on the revised simplified model Tommie Usdin has emailed the group.

- Gerrit raised several issue, which were discussed:
  - He expressed the desire (echoed by many of us) to throw out the cruft in the models that is only there for backward compatibility.
  - He corrected a few minor details it the tagged examples
  - Gerrit noted that, in the current ISO STS DTD, <term-sec> is allowed as a direct child of <body>. The group agreed that best practice would not use <term-sec> anywhere but inside a terms and definitions section and that the prose documentation should discourage this practice.
  - Robert Wheeler reminded the group to allow term and definitions section in the list of section types.
• Gerrit and Vinay noted that current ISO STS allows multiple <term-display> elements inside <term-sec>, so <term-display> must (for backward compatibility) be both optional and repeatable.

• The group discussed the possibility of an even simpler model just using <def-list>, but expressed the opinion that the semantic elements (<def> and <term> particularly, but also <pronunciation>, <see-also>, etc.) were very valuable for search and extraction of terms. The looseness of <term-display> provides sufficient flexibility and the documentation should stress the importance of using the semantic elements when possible.

3 Action Items

3.1 Action Items From This Meeting

For Bruce Rosenblum

• Ask people from other NSBs who are not on the call today [Antii Saari (SFS), Hong Xu (CEN), Jo Collins (NEN), et al.] for examples of how compound (multiple levels of standards organizations) and adopted ISO standards are modeled. XML of these document will be especially welcome.

For Tommie Usdin

• Arrange a phone call with Gerrit Imsieke to clarify his nested standard examples. (Debbie Lapeyre requested to join that call.) Tommie will then sketch out some possible models and report to the group.

• Correct the minor errors Gerrit noted in the Terms and Definitions document and resend to the group.

3.2 NISO STS Metadata Discussion

The June 2016 Technical Working Group meeting was devoted to a discussion of technical Item 4.16 Add a less ISO-specific Metadata Model. The discussion was based on the report NISO STS Metadata Summary, Options, Discussion Points (2016/06/10), the summary of the considerations of the SDO-specific Metadata Subcommittee.

The following items were left unresolved in June, and were also not addressed in the July meeting.

• The final section of the report, Lifecycle Event, @pub-type, @date-type, and @publication-format on <pub-date>, and <meta-date> and <release-date>.

• Heather Flanagan and Gerrit Imsieke both brought up the possibility of the body as well as the metadata needing to repeat. Other Working Group members felt that sub-part might be adequate for this purpose. No consensus was reached.

3.3 Action Items from the June Minutes

For All Committee Members

• Standards Life Cycle — Please read the lifecycle discussion in NISO STS Metadata Summary, Options, Discussion Points (2016/06/10) to the SDO Metadata Subgroup, and be prepared to discuss the final section of the report Lifecycle Event. Is everything represented that you may need? Do you need LESS of this (not all of it)?
• **New Terms and Definitions Model** — Please read the new terms and definitions model proposed by Tommie Usdin, compare it to your organization’s terms and definition lists, and be prepared to discuss.

• **Adoption, Superseded, and Other Note in the Metadata** — Consider the requirements for the distribution of notes in the metadata as represented in the annotated standards document to be sent by Gerrit Imsieke.

• **Heather Flanagan’s** — Heather emailed a link to a standard that is an overarching standards document with two individual RFCs. Please look at that document and consider it in the light of the new metadata models. Is this document out of scope? Will the new models handle it?

• **Steering Committee May Minutes** — Read the Steering Committee’s May minutes, which spell out requirements for Amendments, Corrigenda, and Errata (ACE) documents. [http://www.niso.org/apps/group_public/download.php/16611/NISO-STS-Steer-min-2016-05-10.pdf](http://www.niso.org/apps/group_public/download.php/16611/NISO-STS-Steer-min-2016-05-10.pdf)

**For Laurent Galichet**

- Remembering the ISO backfile conversion, describe for Tommie and Debbie cases in which the `<term-display>` model would have been easier or more appropriate to use than TBX.
- Take a look at the full ISO STS model (in light of the JATS Tag Library Accessibility Essay and recent EU accessibility rulings) with an eye to accessibility. Is there any more we should do to enable users to make accessible standards?

**For Frans Gooskens**

- Write a comparison of TBX and the new term and definition model submitted by Tommie Usdin and report to the Working Group.

**For Gerrit Imsieke**

- Mark up a PDF of a standard with colored frames and remarks that designate where the individual notes sections are found.
- Report to the group concerning options for the content of the forms attribute: is it a simple `is-a` form binary or can we make it a more useful attribute by recording some other information concerning the form?
- Has reported to the group concerning possible standard or suggested attribute values for types of front matter `<notes>`, and (at this meeting) added adoption notes to the list.

**For Robert Wheeler**

- **Section Type Attributes** — Will share with Tommie, and Debbie the types already proposed and Mulberry will put together a proposal for the Technical Working Group.

**For Debbie Lapeyre**

- Report to the group the current state of the `@originator` attribute.