

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

For NISO STS Technical Working Group
October 2016

October 11, 2016, 10:00 am - 11:00 pm EDT

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1 Introduction

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

<http://www.niso.org/workrooms/sts/>

These minutes record decisions made and action items assigned during the NISO STS Technical Working Group call on October 11, 2016.

1.1 Attendees for October 11, 2016

- Dreyfuss, Bob (ASTM: observer)
- Flanagan, Heather (RFC)
- Galichet, Laurent (ISO)
- Gooskens, Frans (NEN)
- Hollowell, Bob (ASME)
- Insieke, Gerrit (le-tex Publishing Services)
- Juillerat, Serge (ISO)
- Lagace, Nettie (NISO)
- Lapeyre, Debbie (Mulberry Technologies)
- Markantonatos, Nikos (Atypon)
- McRae, Mary (IQ Solutions)
- Rawson, Ken (IEEE)
- Rosenblum, Bruce (Co-chair, Inera)
- Usdin, Tommie (Mulberry Technologies)
- Wheeler, Robert (Co-chair, ASME)
- Winchell, David (XSB)

1.2 Administrative Business

- The minutes from the previous meeting were accepted with editorial corrections and will be reposted.
- Technical Working Group Chairs Bruce Rosenblum and Robert Wheeler will determine whether future technical decision meetings are necessary and notify all members via email if additional meetings are needed before the first draft for committee review.

2 Citing Standards Subcommittee Proposal Summary

The Citing Standard Subcommittee was formed to 1) find a way to include external references to DOIs, URNs, etc. within a citation to a standard (<std>) and 2) determine the feasibility of harmonizing the JATS and ISO STS very divergent views on how to cite standards. The Subcommittee made recommendations based on the recommendations of the Standards Metadata Subcommittee.

Recommendations for Citing Standards

- The Working Group initially agreed that adding `<std-id>` and `<std-id-group>` to `<std-ref>` (which is typically used inside `<std>`) might solve the issues of linking standard citations to a specific source (DOI, URN, or multiple references). The element `<std-ref>` is very limited in location in the text. In the metadata, `<std-ref>` is allowed inside such meta-wrappers as `<iso-meta>` and `<std-meta>`. Within the prose of a standards document, the element `<std-ref>` is only correctly used inside `<std>` and `<std-xref>`. In contrast, the element `<std>` may be used many places within the prose, such as inside a paragraph (`<p>`) or inside a title (`<compl>`, `<full>`, `<main>`, etc.) or inside a reference list (`ref-list/ref`).
- The elements `<std-id>` and `<std-id-group>` will take a new “type-of-standard” attribute to hold values such as ‘dated’, ‘undated’, and ‘multipart’.
- The elements `<std-id>` and `<std-id-group>` will take a new “type-of-link” attribute to describe the type of link being recorded, with values such as ‘doi’ and ‘urn’.
- Deep linking, pointing to figure or a table within another standard, should be done using the `<std>` element, a `<std-ref>` is not for a deep link. (The Working Group waived on this recommendation and reversed it several times.) Documentation will need to define best practice.

Roads Not Taken

Although the above solution incorporates some information redundancy, no solution for data optimization will be added at this time. There is not time to consider the many competing optimization solutions properly for Phase I.

After the Technical Working Group Meeting

In endeavoring to implement the Working Group recommendations above, Mulberry encountered inconsistencies in the usage of several elements and attributes mentioned above. A Subgroup was formed which worked on potential solutions to these difficulties, and that group has come up with an alternative proposal, which will be incorporated into the Draft NISO STS that is due out in early November. As part of that proposal, `<std-id>` and `<std-id-group>` will be added to `<std>` rather than to `<std-ref>`.

When reviewing the draft, the Technical Working Group is asked to pay particular attention to the definitions, usage, and examples for the elements `<std>` (Standard Citation, which is used to cite a standard in the prose of a standards document), `<std-ref>` (Standard Reference *Designation*), and `<std-xref>` (Cross-Reference to a Standard within the metadata of a standards document).

Recommendations for Harmonization between <std> in JATS and NISO STS

- Between JATS and NISO STS, there is disagreement concerning the *content* of `<std>`:
 - The two do not contain exactly the same `<std>` content elements,
 - NISO STS uses `<title>` for the title of the standard being cited while JATS uses `<source>` to name the title of a standard being cited (as if it were a book),
 - In NISO STS, the element standard citation element `<std>` can be a sibling of `<element-citation>` and `<mixed-citation>` inside a `<ref>` or can be loose in text as any citation can. In contrast, in JATS, `<std>` is a child of one of the citation types (`<element-citation>` and `<mixed-citation>`).

- The Working Group decided that the requirements and practice of citing standards are significantly different in the journal and book world versus the standards world, and the best course for NISO STS is to acknowledge those differences and document how <std> should be used and tagged in side <standard> and <adoption> documents.

Documentation Recommendations

Since the standard citation element <std> now has <std-id> within it, which allows multiple identifiers to be named by repeating the element, the documentation should discourage the use of the @std-id attribute. The attribute will not be removed for backward compatibility, but the document will suggest that the <std-id> element should be used going forward.

3 Resolved Action Items

3.1 Resolved: Source of Element and Attribute Examples

Mulberry has been tasked with using only examples from standards documents in the NISO STS Tag Library. Some members of the Working Group have kindly volunteered examples, and we thank you. If any samples cannot be found, we will invent examples for the Tag Library.

3.2 Resolved: Suggested Values for @publication-format Attribute

The @publication-format attribute will be an open list (CDATA) attribute on <release-date> and <meta-date> (and other elements where JATS has placed it, such as <isbn>). Current suggested values include ‘epub’, ‘online’, ‘print’, etc. Members are free to suggest additional values during draft review.

4 Technical Decisions for NISO STS

4.1 Resolved: Bring ISO STS up to JATS 1.1

4.1.1 Resolved: Moving NISO STS from JATS 0.4 to JATS 1.1

The ISO STS was written as a superset of JATS Publishing (Blue) Version 0.4. NISO STS will be based on JATS Blue version 1.1

4.1.2 Resolved: <version> compatibility between ISO STS and JATS

NISO STS will document the inward facing usage of the <version> element for standards and explain that inward or outward-facing (as JATS <version> element is) can be determined by context. NISO STS will not modify JATS <version> or create an alternative element.

4.1.3 Resolved: Incompatibility <pub-date> and its attributes ISO STS/JATS

<pub-date> Content — The element <pub-date> contains element-only content in JATS but data character (#PCDATA) content in ISO STS. Going forward, this incompatibility could present problems. Since <pub-date> is defined as ‘the original publication date of the standard’, we can leave <pub-date> in place in NISO STS for backwards compatibility and move forward (away from <pub-date>) using <release-date> instead of <pub-date> to describe original publication or release of a standard and modifications to or extensions of that standard, e.g., reaffirmation or addenda, and <meta-date> to describe all other life-cycle dates.

<pub-date> Attributes — The element <pub-date> has many attributes in JATS that ISO STS does not contain. However, ISO STS also has two additional elements: <release-date> and <meta-date> which will be phased in over time for <pub-date>. As part of the expanded metadata discussion, some JATS attributes will be added to the NISO STS <release-date> and <meta-date>, but not to <pub-date>.

4.1.4 Resolved: Does NISO STS standardize the standards lifecycle

Life-cycle event values will be entered as character data (CDATA) attributes; there will be no set list of values, but a suggested values list will be placed in the documentation for <release-date>.

4.2 Resolved: Add (optional) CALS Tables

The OASIS Interchange CALS table model will be added to NISO STS, but there will also be a model version (intended for interchange) that supports only the XHTML table model.

The following four NISO STS 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

4.3 Resolved: Move from MathML 2.0 to MathML 3.0

Different document models will be written: one for NISO STS plus MathML 2.0 (the current ISO STS model) and a second model for NISO STS plus MathML 3.0. If there are other branching decisions by the group, each model will need to occur twice: once for each MathML.

4.4 Resolved: Add Model for Structural Index

A structural index model (optional) will be added to NISO STS (all tag sets).

4.5 Resolved: Add XInclude

The XInclude elements will be added to NISO STS, provisionally at the section <sec> level.

4.6 Resolved: Add Normative Notes

Normative notes will be added to the NISO STS model and allowed anywhere non-normative notes are currently allowed.

4.7 Resolved: Add Normative Examples

Normative examples will be added to the NISO STS model, allowed anywhere non-normative examples are allowed.

4.8 Resolved: Information Classing of Sections

- For information classing, Sections (<sec>) will use the @sec-type attribute. The list of section types should *not* be restricted by the grammar, but will be an open CDATA list. The documentation will encourage the use of this semantic attribute.

- Suggested (encouraged) values for such section types will include the following:

Value	Description
abbreviations	Abbreviations
app	Apparatus / Appareillage
applicable-documents	Applicable documents
bibl	Bibliography, Bibliographie
classif	Classification, designation and coding / Classification, désignation et codification
conditions	Conditions
correspondence	<sec> in <front> regarding how to communicate with with standards-writing committee
executive-summary	Executive summary
foreword	Foreword / Avant-propos
index	Index (not expected to occur; indices will normally be generated automatically, not given in full in the XML)
inform-annex	Informative annex / Annex informative
inspection	Inspection
interpretation-info	Information about how to request interpretation
intro	Introduction
legalese	Text on/for the copyright page (in <front>)
list-change	List of Changes (more descriptive listing of changes)
marking	Packaging and Marking
materials	Materials
methods	Methods
norm-annex	Normative annex / Annexe normative
non-norm-refs	Non-normative references
norm-refs	Normative references, Références normatives
policy-statement	Policy statement
procedure	Procedure (proper sequence of performance)
properties	Properties
purpose	Purpose
reagents	Reagents and/or materials / Réactifs et/ou matériaux
reqs	Requirements / Exigences
roster	Committee member listings
sampling	Sampling / Échantillonnage
scope	Scope / Domaine d'application
significance	Significance and use
sum-change	Summary of changes
supp-reqs	Supplementary Requirements
symbols	Symbols and abbreviated terms / Symboles et termes abrégés
terms	Terms and definitions / Termes et définitions
terms-and-symbols	Terms, definitions, symbols, units and abbreviated terms / Termes, définitions, symboles, unités et termes abrégés. Note: exact section title may vary.
tests	Test methods / Méthodes d'essai
verification	Verification
warning	Hazards and warnings

4.9 Resolved: Add Elements to Capture CrossRef History Information

- **Resolved:** The proposed new metadata model defines elements for capturing the new CrossRef history information. The Working Group will evaluate the adequacy of these elements for CrossRef deposit during the draft review period.

4.10 Resolved: Check Adequacy of Term Section Model

- The TBX model for terminology will be retained unchanged in NISO STS.
- Expand the existing <term-display> model so it can be used as an alternative to TBX tagging in simple cases. The new model should “make it easy to tag existing documents in display order and retain, but not require, semantic tagging of term components. The new model expands <term-display> to include semantic elements and loosens the <term-sec> model.
- Add an attribute to <term> to indicate ‘preferred’, ‘non-preferred’, or ‘admitted’.

Documentation Recommendations

- In current ISO STS DTD, <term-sec> is allowed as a direct child of <body>. The Working 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 its use elsewhere.
- Add a term and definitions section to the list of section types.

4.11 Resolved: Add a Structure for a Group of Notes

NISO STS will create a new block-level structure to hold a group of notes. The model will include an optional label, an optional title, followed by an OR group of normative notes and non-normative notes. The new object will be allowed anywhere normative and non-normative notes are allowed.

4.12 Resolved: Markup of Forms in Standards Content

- Add a new attribute (@is-form) to identify an object (such as a table or figure) as a form. This attribute will be needed on at least the following elements: figure, graphic, table-wrap, pre-format, and boxed-text.
- Also add a new @form-type attribute (CDATA unrestricted values) that describes the content of the form. Suggested values from Gerrit Imsieke’s email:
 - ‘blank’ (‘none’ i.e., no content, empty form)
 - ‘exemplar’ (a ‘filled-in-example’ e.g., “phone: +1 301-315-9631”)
 - ‘instruction’ (a ‘placeholder-explanation’ e.g., “insert phone number, including country prefix”), and
 - ‘unspecified’ (we don’t know or we don’t say).

4.13 Resolved: Add Markup for Structural Table of Contents

The BITS model for a structural Table of Contents will be added to all of the NISO STS tag sets.

4.14 Resolved: Add <long-desc> to <inline-graphic>

For reasons of accessibility, the element <long-desc> will be added to the model of

<inline-graphic>.

4.15 Resolved: Handle additional material for adopted standards

- Add a second top-level element to the NISO STS Tag Sets to allow both a regular <standard> document and an <adoption> document, which is a standard that adopts (and therefore contains, within one document) one or more existing standards. In this model, the “core standard(s)” will take the current <standard> model, and <adoption> will allow this core to be enclosed in one or more outer <adoption> wrappers.
- The model for <adoption> will allow adopting standard front matter (metadata, possibly followed by notes and sections) and back matter before a <standard>, and adopting back matter after the <standard>.

4.16 Resolved: Add a less ISO-specific Metadata Model

This requirement led to a number of changes, based on the following decisions concerning direction, that were first articulated by the STS Metadata Subcommittee, and reaffirmed by the Working Group.

- **Decision:** The metadata models be enabling not enforcing. (Individual standards producers may want to create a more restrictive model for internal use.)
- **Decision:** The metadata shall be (if possible) backward compatible with ISO STS metadata (by which we mean that documents tagged to current ISO STS should be valid, but the NISO STS content models may not be the same as those of ISO).
- **Decision:** The metadata should avoid recording information redundantly.
- **Decision:** As much as possible, it should be possible to tag the sections of a standard in reading order.

The details concerning the changes for this item (before amendment by this Working Group) can be found in the report *NISO STS Metadata Summary, Options, Discussion Points (2016/06/10)* in the NISO STS website.

5 Documentation Requests

5.1 Resolved: Make Standards-specific examples

The current ISO STS documentation sometimes uses element and attribute examples taken from the JATS Publishing Tag Set (Blue). Such samples will be replaced by standards-specific samples where possible.

5.2 Resolved: Extend and define the list of section types

NISO STS documentation should list recommended section types and define them, so organizations can choose to regularize their practice. A Section Type Subcommittee was formed to work on the specific values for such a list, both names and definitions.

5.3 Resolved: Document that <term-sec> is not a section

The element <term-sec> is not a section, it is a container element that surrounds TBX entries, and has specific (restricted) contexts within a standards document. This element should be documented and clearly differentiated from an ordinary section (whose type attribute has a value such as “term” or “terminology”).
