NISO STS (Standards Tag Suite) Technical Working Group Minutes for STS Draft Version 0.9

For NISO STS Technical Working Group
March 2017

March 01, 2017, 10:00 am - 11:00 pm EDT
1 Introduction.................................................................................................................. 1
1.1 Attendees for March 01, 2017................................................................................. 1
1.2 Administrative decisions....................................................................................... 1
1.3 The next call........................................................................................................... 1
2 Action Items.............................................................................................................. 1
2.1 New Action Items.................................................................................................. 1
2.2 Action Items Resolved in This Meeting............................................................... 1
3 Comments Requiring Technical Recommendations............................................ 2
3.1 Resolved: ASTM-15: <location-id>...................................................................... 2
3.2 Resolved: ASTM-26: Expanding where <proj-id> may be used.............................. 2
3.3 Resolved: #00667: Footnote type values.............................................................. 2
3.4 Resolved: #00669/#00685: Citation to a Standard (<std>).................................... 2
3.5 Resolved: #00668/#00685/ASTM-19: <glyph-data>/ <private-char>.................... 3
3.6 Resolved: From #00685: Amend model of <std-ref>............................................ 3
3.7 Resolved: #00682: <adoption> with no interior document.................................... 3
3.8 Resolved: #00689: Rationalize Table of Contents models................................... 3
3.9 Resolved: #00690: Keywords and Subjects......................................................... 3
3.9.1 Resolved: Keywords and Subjects defined....................................................... 3
3.9.2 Resolved: #00690-b: Keywords and Subjects attributes................................... 3
3.9.3 Resolved: #00690-c: Keywords and Subjects best practice examples............... 3
3.9.4 Resolved: #00690-d: Additional Keywords and Subjects attributes................ 3
3.9.5 Resolved: ICS Codes........................................................................................ 3
3.10 Denied: #00694: Grouping lists............................................................................ 4
3.11 Withdrawn: #00698: Super sections..................................................................... 4
3.12 Resolved: #00708: Front matter notes.................................................................. 4
3.13 Resolved: #00707 Standards Authority plus other issues.................................... 4
3.13.1 Resolved: #00707-a Standards Authority element........................................ 4
3.13.2 Resolved: #00707-b <release-version>............................................................ 5
3.13.3 Resolved: #00707-c <doc-type> content......................................................... 6
3.14 Open: Relax order of STD/ISO/REG/NAT Meta in <adoption>.......................... 6
3.14.2 Open: Relax order of STD/ISO/REG/NAT Meta in <front>................................. 7
4 Better Exposition in Tag Library.............................................................................. 7
4.1 Open: #00677, ASTM-13: <doc-ref> versus <std-ref>........................................ 7
4.2 Open: ASTM-18: Related to <glossary>.............................................................. 7
4.3 Resolved: Clarify <version>.................................................................................. 7
4.4 Resolved: Clarify <release-version-id>................................................................. 7
4.5 Resolved Clarify <wi-number>............................................................................. 8
4.6 Resolved: #00676: <table-wrap-foot> documentation........................................ 8
5 Request Has Policy Implications........................................................................... 8
5.1 Open: ASTM-1: Handling JATS-specific Elements in Tag Library...................... 8
5.2 Open: #00709: Adoption and Origination........................................................... 8
5.2.1 Tabled: #00709-a Only <std-meta> in <adoption-front>..................................... 8
5.2.2 Open: #00709-b Consolidation instead of <std-doc-meta>............................... 9
5.2.3 Open: #00709-c Where to place @originator.................................................... 10
5.3 Open: #00691: Adoption metadata...................................................................... 11
5.3.1 Open: #00691-a: <std-doc-meta> only once in an adoption............................ 11
5.3.2 Open: #00691-b: Levels of adoption metadata................................................. 11
5.4 Open: #00692: STD-meta versus ISO-meta, REG-meta, NAT-meta.................... 13
5.4.1 Open: #00692-a <std-meta> not for ISO and ISO-based Use............................. 13
5.4.2 Open: #00692-b Everybody uses <std-meta>.................................................... 13
5.5 Open: #00695: Schema looseness versus recommended practice...................... 13
6 Resolved: Comments Resolved by Doodle Poll.................................................... 13
6.1 Resolved: #00682: Remove <xi:include> from more elements......................... 13
6.1.1 Resolved: #00682-a: <xi:include> Inside <adoption> ................................. 13
6.1.2 Denied: #00682-b: <xi:include> as Alternative to <back> .............................. 14
6.1.3 Resolved: Mul-1: Remove <xi:include> context clutter .................................. 14
6.2 Resolved: #00686: Unrestricted values for @position on <fig> .......................... 14
6.3 Resolved: #00687: Classing/usage attributes for notes/examples .......................... 14
6.4 Resolved: #00688: Add ISSN to standards metadata ........................................ 14
6.5 Resolved: #00693 and off-list request: <ref-list> inside sections .......................... 14
6.6 Denied: 00699: Change <content-language> to @content-language ........................ 14
6.7 Denied: #00701 Remove legacy elements ........................................................... 14
6.8 Resolved: #00705: Allow @term-type attribute on <term> .................................... 14
6.9 Resolved: ASTM-17: Footnote @placement ....................................................... 14

7 Doodle Poll Comments Requiring Technical Discussion ........................................ 14
7.1 Resolved: from #00682: Remove <xi:include> from more elements ...................... 14
7.1.1 Withdrawn: Mul-2: Remove <xi:include> from <boxed-text> ............................. 14
7.1.2 Withdrawn: Mul-3: Remove <xi:include> from <notes> ..................................... 14
7.1.3 Withdrawn: Mul-4: Remove <xi:include> from <sec> ........................................ 15
7.2 Open: #00703 @sec-type values ............................................................. 15

8 TBX Requests ............................................................................................................. 15
8.1 Resolved: #00683: Allow Index terms in <tbx:term> ........................................... 15
8.2 Denied: #00673/#00700: Multiple paragraphs inside TBX elements ....................... 15
8.3 Resolved: #00674: &term-sec-link.class; ............................................................ 15
8.4 Resolved: #00675/#00704: ISO STS TBX implementation ...................................... 15
8.5 Open: #00704: Make Part of Speech Optional ..................................................... 15
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 March 01, 2017.

1.1 Attendees for March 01, 2017

- Dreyfuss, Bob (ASTM: observer)
- Hollowell, Bob (ASME)
- Imsieke, Gerrit (le-tex Publishing Services)
- Lagace, Nettie (NISO)
- Lapeyre, Debbie (Mulberry Technologies)
- McRae, Mary (IQ Solutions)
- Rawson, Ken (IEEE)
- Rosenblum, Bruce (Co-chair, Inera)
- Saari, Antii (BSI)
- Juillerat, Serge (ISO)
- Usdin, Tommie (Mulberry Technologies)
- Wheeler, Robert (Co-chair, ASME)
- Winchell, David (XSB)

1.2 Administrative decisions

- The minutes of February 8, 2017 were accepted as posted

1.3 The next call

The next meeting of the NISO STS Steering Committee will be held by conference call on Wednesday March 8, 2017 at 10:00 am EDT. At that time, 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 Action Items

2.1 New Action Items

For Bruce Rosenblum: Only <std-meta> in <adoption-front>

Describe the current discussion of Section 5.2.1 #00709-a Only <std-meta> in <adoption-front> to Ivan Salcedo, Hong Xu, Frans Gooskens, and Laurent Galichet. Solicit their opinions on using <iso-meta>, <reg-meta> or <nat-meta> for encoding an ordinary standard and <std-meta> (instead of <iso-meta>, <reg-meta> or <nat-meta>) when encoding an <adoption>.
For Antii Saari: ICS Descriptions/Names

- Provide some examples of ICS codes and their descriptions/names in Finnish.
- Provide some examples of <doc-type> content in Finnish.

For Gerrit Imsieke ICS Descriptions/Names

- Provide some examples of ICS codes and their descriptions/names in German.
- Provide some examples of <doc-type> content in German.

2.2 Action Items Resolved in This Meeting

For Bruce Rosenblum: TBX Alterations

Since Ivan Salcedo was not on the February 8th call, make sure that he also agrees with the resolution of #00673/#00700: Allow multiple paragraphs inside TBX elements. Ivan agreed with the Working Groups recommendation.

For Bruce Rosenblum and Robert Wheeler: ICS Codes

This item was resolved. See Section 3.9.5.5 Resolved: ICS Codes.

For Robert Wheeler: Standards Authority

This item was resolved. See Section 3.13 Resolved: #00707-a Standards Authority (all sections)

3 Comments Requiring Technical Recommendations

Many of the Comments submitted through the NISO website comment form, were trivial changes or typos and could be fixed without discussion. Some Comments could be resolved by the editor (Mulberry) or by the editor in consultation with the original requestor. Other Comments require discussion by the NISO STS Technical Working Group plus invited experts. Those Comments requiring technical discussion are described in this section. Comments as shown in the following section may have been combined, divided into multiple sub-comments, rearranged, and/or edited to facilitate discussion and voting. Background material and recommendations have been added to some Comments.

3.1 Resolved: ASTM-15: <elocation-id>

See Comment Resolution document.

3.2 Resolved: ASTM-26: Expanding where <proj-id> may be used

See Comment Resolution document.

3.3 Resolved: #00667: Footnote type values

See Comment Resolution document.

3.4 Resolved: #00669/#00685: Citation to a Standard (<std>)

See Comment Resolution document.
3.5 **Resolved: #00668/#00685/ASTM-19: <glyph-data>/<private-char>**  
See Comment Resolution document.

3.6 **Resolved: From #00685: Amend model of <std-ref>**  
See Comment Resolution document.

3.7 **Resolved: #00682: <adoption> with no interior document**  
See Comment Resolution document.

3.8 **Resolved: #00689: Rationalize Table of Contents models**  
See Comment Resolution document.

3.9 **Resolved: #00690: Keywords and Subjects**

3.9.1 **Resolved: Keywords and Subjects defined**  
See Comment Resolution document.

3.9.2 **Resolved: #00690-b: Keywords and Subjects attributes**  
See Comment Resolution document.

3.9.3 **Resolved: #00690-c: Keywords and Subjects best practice examples**  
See Comment Resolution document.

3.9.4 **Resolved: #00690-d: Additional Keywords and Subjects attributes**  
See Comment Resolution document.

3.9.5 **Resolved: ICS Codes**

- Retain the current `<ics>` element and add it to `<std-meta>` and `<std-doc-meta>`.
- Do not change the #PCDATA content model of `<ics>`.
- Add a new element `<ics-wrap>` as a container element to hold both an ICS code (<ics>) and that code’s description/name/title (<ics-desc>).
- In the `<std-meta>` and `<std-doc-meta>` elements where `<ics>` may be used currently, we would allow the grouping:
  
  ```xml
  (ics | ics-wrap)*
  ```
- Model `<ics-wrap>` in a way that allows ICS Codes, their descriptions, and a hierarchy of codes to be represented, but that is fully backwards compatible with the current ISO STS use of `<ics>`. The `<ics-wrap>` model will be recursive, to allow a full hierarchy to be represented:
  
  ```xml
  ics-wrap ((ics, ics-desc?), ics-wrap*)
  ```
- The `<ics-desc>` element will take at least the attribute `@xml:lang`. 
**Documentation Recommendation**

- The Tag Library will document that, while ICS Codes do describe subjects, they are a *special* kind of subject type in the realm of standards. For Best Practice, ICS Codes should be tagged using `<ics>` elements and *not* be tagged as:
  
  `<subj-group type="ics">`

- Since ICS descriptions/names may be given in a variety of languages, the Tag Library will illustrate at least English, German (Action Item Gerrit Imsieke), and Finnish (Action Item Antii Saari).

**Roads Not Taken for ICS Code**

- Although a vocal minority felt that the ICS descriptions should not be part of the XML and only the codes be preserved, several Working Group members are already tagging the ICS descriptions/names/titles and others intend to tag them in the near future. Thus, the model will accommodate the descriptions/names.

- The ISO schema for the ICS code also includes more material about the codes, such as relationships between the codes. None of this information will be added to NISO STS at this time.

- It was suggested and rejected that such ICS descriptions (names/titles) might be preserved in attributes, since attributes could not be used to make a hierarchy.

**3.10 Denied: #00694 : Grouping lists**

See Comment Resolution document.

**3.11 Withdrawn: #00698 : Super sections**

See Comment Resolution document.

**3.12 Resolved: #00708 : Front matter notes**

See Comment Resolution document.

**3.13 Resolved: #00707 Standards Authority plus other issues**

**3.13.1 Resolved: #00707-a Standards Authority element**

[Editor’s Note: This seems to be a uniquely American issue. American SDOs can be formally “accredited” to publish standards by ANSI. Part of that accreditation is that an SDO must follow ANSI rules, and there are regular audits to ensure compliance. Not all organizations that publish standards in America are accredited. Not all documents published by ANSI accredited organizations are authorized to be “An American National Standard”. Thus accredited American SDOs need a way to record *in the XML metadata* that they are accredited and that their standards document has been authorized.]

Two new elements will be added to NISO STS to handle authorization material:

- Add a new element Accrediting Organization ( `<accrediting-organization>`) to
  `<std-meta>` and `<std-doc-meta>`.
• The element’s content would be a text phrase that may be, but need not be, displayed as part of the standards document, such as

“Accredited by the American National Standards Institute”

• Give the element an attribute of “@accredit-acronym” so that US SDOs can add ‘ANSI’, with the usage shown below. This allows a) the text of the element to be rendered if desired, and b) an attribute can be given so it’s easy to search an archive for ANSI-accredited standards. There should be a Best Practice list of attribute values starting with "ANSI". Because the attribute name includes “acronym”, the recommended Best Practice is that values should always be ALL CAPS.

  <accrediting-organization accredit-acronym="ANSI">Under the authority of the American National Standards Institute</accrediting-organization>

• Add a new element Standard Authorization (<authorization>) to <std-meta> and <std-doc-meta> to capture the authorization that the agency named in <accrediting-organization>) has authorized for this standards document.

  • The element’s content would be a text phrase that may be, but need not be, displayed as part of the standards document, such as “An American National Standard”.

  • Give the element an attribute of “authorize-acronym” to hold the short form of this authorization, mostly used for searching, with the usage shown below. This allows a) the text of the element to be rendered if desired, and b) an attribute can be given so it’s easy to search an archive for ANS-authorized standards documents. There should be a Best Practice list of attribute values starting with "ANS". Because the attribute name includes “acronym”, the recommended Best Practice is that values should always be ALL CAPS.

  <authorization authorize-acronym="ANS">An American National Standard</authorization>

3.13.2 Resolved: #00707-b <release-version>

• Add <release-version> to <std-meta>. It will still be available inside <doc-ident> in <iso-meta>, <reg-meta>, and <nat-meta>.

Documentation Recommendation

• Define <release-version> as being text that describes an organization’s specific draft version status or lifecycle stage.

• Describe the 5 values below as the ISO and ISO-related specific content:
  • CD (for Committee Draft)
  • WD (for Working Draft)
  • DIS (for Draft International Standard)
  • FDIS (for Final Draft International Standard)
  • IS (for International Standard)

• Provide non-ISO content examples including:

  <release-version>Draft for Formal Vote</release-version>
  <release-version>Draft for Public Comment</release-version>
3.13.3  **Resolved: #00707-c <doc-type> content**

*Documentation Recommendation*

- The element `<doc-type>` (used inside `<std-ident>` and `<std-ref>`) is described in the Tag Library as:

  This Tag Set may be used to describe many kinds of standards documents and adoption documents; this `<doc-type>` element indicates the type of standards document or adoption document, for example, a "standard" or a "technical report".

*Remarks*

The `<doc-type>` element may contain any content that is appropriate and describes the standards document type, but typical types include:

- standard (Standard from a standards-producing organization)
- is (International Standard)
- isp (International Standardized Profile)
- wa (Workshop Agreement)
- iwa (International Workshop Agreement)
- guide (Guide to a Standard)
- pas (Publicly Available Specification)
- r (Recommendation [obsolete for ISO-related standards documents])
- tr (Technical Report or Technical Recommendation)
- ts (Technical Specification)
- tta (Technology Trends Assessment)

- Expand the list of doc-type suggested content in the tag library to include:
  - adv (Advisory)
  - hb (Handbook)
  - mp (Miscellaneous Publication)
  - rec (Recommendations)
  - safety guide (Safety Guide)
  - ssg (Specific Safety Guide)
  - sp (Special Publication)
  - spec (Specification)
  - stp (Standard Test Procedure)
  - test method (Test Method)
  - tir (Technical Information Report)
  - tn (Technical Note)
  - trf (Test Report Form)

- The Tag Library will indicate that these are typical values for an English-language standards document and provide additional examples in German and Finnish.

3.14  **Open: Relax order of STD/ISO/REG/NAT Meta in <adoption>**

This item is linked to the discussion of *Section #00709-a Only <std-meta> in <adoption-front>*, and the items need to be resolved together.


By its very nature, an `<adoption>` is something *one* standards organization does to a standards document of a second standards organization. No one on the Working Group knew of an adoption where more than one *-meta would be needed to describe the adopting organization. Even joint adoptions seem to use a single *-meta.
The model for <adoption-front> will contain only one *-meta inside <adoption-front>.

• <std-doc-meta> Standards Document Metadata, zero or one, followed by:
  • One of the following:
    • <std-meta> Standards Metadata
    • <iso-meta> ISO Metadata
    • <reg-meta> Regional-body Metadata
    • <nat-meta> National-body Metadata

3.14.2 Open: Relax order of STD/ISO/REG/NAT Meta in <front>

It seems to Mulberry that the model for <front> should also contain an OR group of equals, or, if not, it would also be possible to allow only one *-meta inside <front>.

• <std-doc-meta> Standards Document Metadata, zero or one
  • Any combination of /or/ only one of
    • <std-meta> Standards Metadata
    • <iso-meta> ISO Metadata
    • <reg-meta> Regional-body Metadata
    • <nat-meta> National-body Metadata

4 Better Exposition in Tag Library

Several requests asked for differentiation among similar elements, or better definitions, or more explanation. Mulberry, as authors of the Tag Library, completely concur with these requests, but are unable to comply. We wrote what we know, and our knowledge is limited. We need help on these requests from committee members.

4.1 Open: #00677, ASTM-13: <doc-ref> versus <std-ref>

Still open, see future agenda.

4.2 Open: ASTM-18: Related to <glossary>

Still open, see future agenda.

4.3 Resolved: Clarify <version>

• Retain the semantics of <version> as the ‘standards document version number’, for those standards that have version numbers (e.g., “1-amd1.v1-cor3”).

• Do not use <version> to hold text such as ‘DIS’, ‘IS’, or similar.

• Do not use the ISO STS Tag Library <reg-meta> as a sample of <version>.

4.4 Resolved: Clarify <release-version-id>

• The element <release-version-id> is used in ISO STS only inside the element <reg-meta>, not within <iso-meta>, <nat-meta>, <std-meta> or <std-doc-meta>.

• CEN has provided a definition and example.
4.5 Resolved Clarify <wi-number>

- The element <wi-number> is used in ISO STS only inside the element <reg-meta>, not within <iso-meta>, <nat-meta>, <std-meta> or <std-doc-meta>.

- CEN has provided a definition and example.

4.6 Resolved: #00676 : <table-wrap-foot> documentation

**Documentation Recommendation**

In existing ISO STS usage at ISO and CEN, the <table-wrap-foot> element is meant to be displayed as the last row of the table, i.e. it has been used for what <tfoot> is meant for. This usage stems from the coding instructions used to outsource the conversion of thousands of pre 2014 ISO standards to XML, which considered <tfoot> and <table-wrap-foot> as equivalent alternatives for housing table footnotes. That coding instruction has since been shared in similar effort by CEN and ongoing effort by individual CEN members to convert CEN standards.

We will add an ISO Note to the Tag Library explaining the “legacy” usage. The Tag Library will also recommend that Best Practice (going forward) is to distinguish between <table-wrap-foot> and <tfoot> as the table models intend.

5 Request Has Policy Implications

These are questions may be beyond the mere technical. They may involve policy decisions; they may involve spending additional money; they may involve major rewrites of the NISO STS draft.

5.1 Open: ASTM-1: Handling JATS-specific Elements in Tag Library

Still open, see future agenda.

5.2 Open: #00709: Adoption and Origination

**Requester:** Gerrit Imsieke (le-tex Publishing Services)

This request impacts several others and the items will be decided together.

5.2.1 Tabled: #00709-a Only <std-meta> in <adoption-front>

**Comment/Request**

I cannot imagine a situation where, when adopting a CEN adoption for DIN, I need to fill in <reg-meta> alongside <nat-meta>. I don't want to fill in <nat-meta>, either. I just want to fill in <std-meta>. The organization and the documents that these metadata pertain to is clear from the context. This is one of the advantages of the adoption model.

**Discussion**

Time ran out as this item was being discussed.

- Gerrit Imsieke has stated that DIN will use only <std-meta> for adoptions (and never <iso-meta>, <reg-meta>, or <nat-meta>). In DIN’s view <iso-meta>, <reg-meta>, and <nat-meta> should be used only for standards, not for adoptions. That is one organization’s opinion.
An implication of this position is that if (admitted rare occurrence) ISO adopted a CEN or DIN standard, ISO could not use <iso-meta> for the <adoption>, they would need to use <std-meta> instead. Similarly, if a current <reg-meta> or <nat-meta> organization made an <adoption>, they too would not be able to use <reg-meta> or <nat-meta> but only <std-meta> in the adoption. Thus CEN, for example, would have two different ways to tag their metadata, the element <reg-meta> for a regular standard and the element <std-meta> for an <adoption>. Naturally, some people on the call opposed this idea, a position in direct contradiction to DIN.

Bruce Rosenblum took an Action Item to talk to people who were not on the call today and solicit their opinions. Discussion will resume next week.

- Concerning CEN, we also learned:
  - When CEN adopts an ISO standard, they use <reg-meta> but do not include <iso-meta>, only the narrative standard.
  - The element <std-meta> does not contain everything in <reg-meta>, the elements <wi-number> and <release-version-id> are not included. These elements would need to be included in an <adoption>.

*Recommendation*

The single *-meta model allowed in <adoption> should be any one of the four <std-meta>, <iso-meta>, <reg-meta>, or <nat-meta>. No NISO STS user will be forced to use <iso-meta>, <reg-meta>, or <nat-meta> in an <adoption>, but all (including current ISO STS users) will be allowed to use them. This will mean that, for example, CEN can use <reg-meta> for both standards and adoptions.

Since only one *-meta element is allowed inside <adoption-front>, then the element <std-meta> could be used for all levels of an adoption, and the elements <iso-meta>, <reg-meta>, and <nat-meta> need never be used. But we should not require this. The one-*-meta rule makes it possible for those organizations using ISO STS now (such as CEN) to keep their current *-meta elements even in an <adoption>. (Reviewer’s Note: It will also be possible just to use <std-doc-meta> for all the metadata since this contains metadata values that are valid “across the board”.)

5.2.2 Open: #00709-b Consolidation instead of <std-doc-meta>

Although not discussed in the March 1, 2017 meeting, this item is tied to #00709-a.

*Comment*

Common metadata need not be put into a <std-doc-meta> element. Rather, they will be added to <std-meta> on whatever layer they apply to. They can be overwritten or enhanced on each level. An enhancement would be the addition of a <title-wrap> or an <abstract> in another language.

In my view, <std-meta> is enabling enough. Permitting all combinations of <std-meta>, <iso-meta>, <std-doc-meta>, <reg-meta>, and <nat-meta> only imposes cognitive burdens on encoders and processors of metadata alike. We will see any combination thereof and we will need to make sense of it. It is better to limit choice here for the sake of improved exchangeability.

There should be metadata consolidation rules for each type of metadata element that may occur:
• `<std-org>` and `<meta-notes>` will be needed at each adoption level

• `<title-wrap>` will replace any inner-layer `<title-wrap>` with the same `@xml:lang`. Otherwise, each `<title-wrap>` will be added to the inner `<title-wrap>`s. Same for `<abstract>`.

• `<kwd-group>` will be consolidated by `@xml:lang` and `@kwd-group-type`

• `<custom-meta>` will be consolidated by `@xml:lang` and meta-name

Consolidation means that when processing an outer layer, the metadata of the inner layers should be taken into account as if they were also present in the outer layer.

If the adopting layer includes inner layers by reference, it might be recommended practice to repeat the inner layer’s metadata. They should be marked as redundant in this case by using the @originator attribute (which then must be permitted on `<kwd-group>`, `<custom-meta-group>`, `<custom-meta> et al.) that corresponds to std-xref/std-id-group/std-id/@originator of the referenced standard.

Of course it is possible to redundantly quote metadata from inner layers even when these layers are included verbatim. The quoted, duplicated metadata should then also have originator attributes. It should be documented that if metadata is included redundantly and if it has an originator attribute, its content should match the corresponding quoted metadata. Comparison can be done by Schematron after whitespace normalization of the elements, but these details are out of scope for this specification.

For backwards compatibility reasons, `<reg-meta>`, `<nat-meta>`, etc. should still be allowed in standard/front, but simultaneous occurrence of `<std-meta>` and another `*-meta` element may be flagged and disapproved by additional checks (Schematron).

Elements that only occur in `<reg-meta>` etc., for ex. wi-number, should be deprecated in the future. They should be expressed as `<custom-meta>`.

**Request Open: 709-b-1 Content of `<adoption-front>`**

Don't allow `<std-doc-meta>`, `<iso-meta>`, `<reg-meta>`, and `<nat-meta>` in `<adoption-front>`.

**Recommendation:** Deny this request.

**709-b-2 Rules for cascading elements (inheritance)**

Document the cascading rules for `<title-wrap>`, `<custom-meta>`, etc.

**Documentation Recommendation**

Absolutely! Whichever way the group decides, as long as EITHER `<std-doc-meta>` exists OR there is a nested adoption model, some form of cascading practice will need to be documented.

**709-b-3 @originator documentation**

Document the use of the `@originator` attribute for metadata that stems from referenced or included-verbatim adopted standards.

**Documentation Recommendation**

Absolutely! Whichever way the group decides, the `@originator` attribute and how it interacts with nested adoptions will need to be documented with examples.

**5.2.3 Open: #00709-c Where to place @originator**
Still open, see future agenda.

5.3 **Open: #00691: Adoption metadata**

Although not discussed in the March 1, 2017 meeting, this item is tied to #00709-a.

5.3.1 **Open: #00691-a: <std-doc-meta> only once in an adoption**

*Requester: Ivan Salcedo (BSI)*

**Background**

The Standards Metadata Sub-committee was very concerned that information not be repeated at all the possible levels of metadata containers. Therefore they made a single container (<std-doc-meta>) to hold the information that is true across all the other metadata containers (<std-meta>, <iso-meta>, <reg-meta>, and <doc-meta>). The adoption model further complicates this, as an adoption may hold data for 2, 3, or more standards documents, each of which might have its own <std-doc-meta>.

**Comment/Request**

In order to make <std-doc-meta> appear only *once* in the document for every <standard> contained within, and so a single source of truth applying to all document instantiations of that <standard> by adopting SDOs: if it were to be allowed *only* in <front> of <standard>, not <adoption-front>, we believe this would be ensured.

**Recommendation**

Deny this request. An adopting agency may want to wrap an existing standard in an <adoption> without having permission to alter the enclosed <standard> *in any way*, and an adoption by a group of standards organizations may want to use <std-doc-meta>.

5.3.2 **Open: #00691-b: Levels of adoption metadata**

*Comment*

One concern around the proposed use of the <adoption> model is that in use it suggests that metadata for a document (in most cases, a physical instantiation of a single standard) occurs in multiple places, and now levels even, within the XML (in the previous ISO STS, multiple iso-, reg-, nat-meta blocks occurred, but necessarily as immediate siblings at the same level).

This will make it harder for any automated processing of the XML, as relevant metadata has to be searched at different depths within a document, and may well repeat. We would prefer a single source of truth for metadata.

Consequently <std-doc-meta> is proposed to appear in <adoption-front> at multiple levels of adoption *and* then in <front>. The model is virtually the same as any iso-, reg- or nat-meta block, which (alongside now a fourth option, std-meta) can also occur in all the same places as <std-doc-meta>, as siblings. So in reality we just have more multiplication of metadata by SDOs without any restrictions around the use of <std-doc-meta> vs. (<iso/reg/nat-meta> vs. <std-meta>), although the rationale separating their respective uses is notionally there.
Request

We would advise that the modeling of <std-doc-meta> vs. the four meta-block options be developed and made more distinct. Any metadata element that is a common one across all participating SDOs for that standard should only be allowed in <std-doc-meta>, and any metadata element that is unique or uniquely valued according to a participating SDO should be housed in <iso-meta>, <reg-meta>, or <nat-meta>. For example:

<std-doc-meta> elements:
- <title-wrap>
- <std-ident> (Assuming a Standard ID should be consistent through all adoptive incarnations)*
- <ics> (Assuming these should be consistent through all adoptive incarnations)
- <subj-group>
- <abstract>
- <kwd-group>

<iiso-meta>, <reg-meta>, <nat-meta>, and <std-meta> elements:
- <doc-ident> (if in <iso-meta>)
- <std-org>
- <std-org-group>
- <content-language>
- <std-ref> (This value will lengthen for every participating SDO, i.e. adoption)*
- <doc-ref> (This value will lengthen for every participating SDO, i.e. adoption)*
- <release-date>
- <meta-date>
- <comm-ref>
- <comm-ref-group>
- <secretariat>
- <page-count>
- <counts>
- <is-proof>
- <std-xref>
- <permissions>
- <self-uri>
- <custom-meta-group>

Recommendation

Deny this request.

The request that “Any metadata element that is a common one across all participating SDOs for that standard should only be allowed in <std-doc-meta>, and any metadata element that is unique or uniquely valued according to a participating SDO should be housed in iso-/reg-/nat-meta.” is indeed the desiderata for these elements. However, it cannot be grammatically enforced.

It is not possible to allow even the selected metadata under <std-doc-meta> in the list on the previous page only at one level of an adoption. The problem with the above list of only-in-the-std-doc-meta elements is that they may not always be the same for all organizations involved with a standard and thus it may be necessary to provide it for each organization that has a different value.

As Gerrit Imsieke responded on the list:

[One element] that cannot be centralized in all circumstances is <title-wrap>. Suppose /standard/front/std-doc-meta/title-wrap is given in English, French, and German. Then if there is a Czech adoption, they need to add /adoption/adoption-front/std-meta/title-wrap[@xml:language="cz"].
So you cannot have a single std-doc-meta/title-wrap for all layers of adoptions. The same holds for abstracts and also for kwd-groups. They may be extended language-wise (and maybe even replaced) in adoptions.

I think it should be allowed to enhance even the std-doc-meta element at every level. There should be the natural processing rule that the outermost element has precedence if metadata elements of the same name appear. Certain language-dependent elements like <title-wrap> and <abstract> will just be aggregated when processing the whole adoption cascade. Also custom-meta-group/custom-meta elements should be consolidated by meta-name, the outermost custom-meta with the same meta-name being regarded as the most specific.

5.4 Open: #00692: STD-meta versus ISO-meta, REG-meta, NAT-meta

Requester: Ivan Salcedo (BSI)

5.4.1 Open: #00692-a <std-meta> not for ISO and ISO-based Use

Comment/Request

The introduction of <std-meta> is understood to allow inclusivity of SDOs with no structural relation to ISO, however governance stating that those within the ISO infrastructure ONLY use <iso-/reg-/nat-meta>, and those outside of it ONLY use <std-meta>, should be clear and in place.

Recommendation

We suggest that the request be denied; the request is not enforceable by a DTD or Schema While it could be enforced in a rule-based language, we wonder if enforcement might limit legitimate uses.

5.4.2 Open: #00692-b Everybody uses <std-meta>

We believe other members will propose that we move from the ISO specific model to generic <std-meta>, which also would address the issue.

Gerrit Imsieke, in a comment to Request #00691, added:

I am going to submit another suggestion that aims, in the long run, at deprecating <iso-meta>, <reg-meta>, <nat-meta>, and <std-doc-meta>, in favor of a single <std-meta> element on all levels.

Recommendation

In the long run, perhaps, this might be a good idea. But for NISO STS 1.0, the request should be denied because of the commitment to backwards compatibility with ISO STS. ISO-related standards organizations must be able to tag standards documents as they do now.

5.5 Open: #00695 : Schema looseness versus recommended practice

Still open, see future agenda.

6 Resolved: Comments Resolved by Doodle Poll

Some Comments as submitted through the NISO STS website comment form were considered to be simple enough for their resolution to be handled by Doodle Poll.

6.1 Resolved: #00682: Remove <xi:include> from more elements

6.1.1 Resolved: #00682-a: <xi:include> Inside <adoption>

See Change Request Resolution document.
6.1.2 Denied: #00682-b: <xi:include> as Alternative to <back>
See Change Request Resolution document.

6.1.3 Resolved: Mul-1: Remove <xi:include> context clutter
See Change Request Resolution document.

6.2 Resolved: #00686: Unrestricted values for @position on <fig>
See Change Request Resolution document.

6.3 Resolved: #00687: Classing/usage attributes for notes/examples
See Change Request Resolution document.

6.4 Resolved: #00688: Add ISSN to standards metadata
See Change Request Resolution document.

6.5 Resolved: #00693 and off-list request: <ref-list> inside sections
See Change Request Resolution document.

6.6 Denied: 00699: Change <content-language> to @content-language
See Change Request Resolution document.

6.7 Denied: #00701 Remove legacy elements
See Change Request Resolution document.

6.8 Resolved: #00705: Allow @term-type attribute on <term>
See Change Request Resolution document.

6.9 Resolved: ASTM-17: Footnote @placement
See Change Request Resolution document.

7 Doodle Poll Comments Requiring Technical Discussion

Some Comments as submitted through the NISO STS website comment form were considered to be simple enough for their resolution to be handled by Doodle Poll. A negative vote for an item on that poll required that the item be added to the NISO STS Technical Working Group Agenda. This section contains the Doodle Poll items that received at least one request for discussion.

7.1 Resolved: from #00682: Remove <xi:include> from more elements

7.1.1 Withdrawn: Mul-2: Remove <xi:include> from <boxed-text>
Make the requested change; do not allow <xi:include> inside <boxed-text>.

7.1.2 Withdrawn: Mul-3: Remove <xi:include> from <notes>
Make the requested change; do not allow <xi:include> inside <notes>. 

7.1.3 Withdrawn: Mul-4: Remove <xi:include> from <sec>

Make the requested change; do not allow <xi:include> inside <sec>.

7.2 Open: #00703 @sec-type values

Still open, see future agenda.

8 TBX Requests

8.1Resolved: #00683: Allow Index terms in <tbx:term>

See Change Request Resolution document.

8.2Denied: #00673/#00700: Multiple paragraphs inside TBX elements

See Change Request Resolution document.

8.3Resolved: #00674: &term-sec-link.class;

The original request was withdrawn, and decisions were made to reduce the complexity of the <pronunciation> model, allowing only:

- character data
- bold and italic

with examples such as:

<pronunciation>transkrpʃen</pronunciation>
<pronunciation>"äb-`ars</pronunciation>
<pronunciation>//di`stibens/</pronunciation>

8.4Resolved: #00675/#00704: ISO STS TBX implementation

- For this round of NISO STS, the documentation for TBX terms will remain a separate document in the care of ISO. That documentation will be changed by ISO to reflect any of the items in the TBX section where changes are recommended by the Working Group. Thus TBX element usages will be documented in ISO/STS TBX pages, which NISO STS documentation will point to, with ISO’s full permission.

- After NISO STS 1.0, if funding is available, we can add the ISO STS dialect of TBX to the NISO STS Tag Library non-normative documentation as a convenience to the users.

- The TBX vocabulary will not be included as part of the text of the NISO STS standard, because NISO STS does not own the TBX elements (as it does not own MathML, for example.)

8.5 Open: #00704: Make Part of Speech Optional

Still open, see future agenda.