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Recommendations ISO/IEC JTC1 SWG ARM meeting

1. ISO/IEC JTC1 SWG-ARM recommends that the EDPDA (Electronic Document Preparation, Distribution and Archiving) document includes a guidance section on the preparation of documents which are both suitable for archiving and interact well with accessibility tools.

2. ISO/IEC JTC1 SWG-ARM recommends that JTC1 consider developing templates, with the provision for recording metadata, for SC and WG input documents, and mandating their use in SCs and WGs to simplify the creation of archivable and accessible versions of the documents. These templates could then become a standing document so that all SCs can introduce variants that support their particular requirements while maintaining greater consistency across JTC1 subgroup documents.

3. ISO/IEC JTC1 SWG-ARM recommends that JTC1 agree a minimum set of metadata to be included in, or with, all JTC1 and subgroup documents to assist in archiving and in particular in the indexing, searching and transfer of archives. This should cover such aspects as:
    * Document provenance: editor, upload source and date, creation date
    * Mandatory metadata: title, source, document number, location
    * Dynamically-maintained metadata: contact information, project status, document information (such as replaces, supersedes, replaced by etc), copyright, DRM information
    * Descriptive metadata: project number, relevant JTC1 entity, short description/abstract, keywords, meeting at which presented/prepared, document distribution intent (eg public, defined access, open source, web content), document type (contribution, for information, presentation etc), versioning information
    * Technical metadata: version of application under which document was prepared, file extension, mime type
    * Other information: e.g. a free text field

4. ISO/IEC JTC1 SWG-ARM recommends that JTC1 allows metadata to be embedded in a document. Nevertheless it should also be readily available in a machine-readable and processable form separately from (but possibly extracted from) the document and ISO/IEC JTC1 SWG-ARM further recommends that JTC1 include an additional section in the EDPDA document to cover this requirement.

5. ISO/IEC JTC1 SWG-ARM recommends that JTC1 SWG-Directives should consider allowing the use of document registries in a database format instead of the single view of the register prescribed in clause 10 of current document on electronic document preparation, distribution and archiving.

6. ISO/IEC JTC1 SWG-ARM recommends that JTC1 consider appropriate policies for handling the withdrawal of documents that have been posted on a web site or made otherwise available since data exposed even for a brief period has been published and a record of this needs to be maintained in case any dispute arises out of the provenance of the technical content of the publications.

7. ISO/IEC JTC1 SWG-ARM notes that there is considerable inconsistency in the handling of supporting audio-visual material used during presentations of circulated documents in JTC1 and its subgroups; in some cases these are issued with a separate document number, but sometimes they are zipped with the original input and sometimes they are not retained. Since these presentations often provide additional information or relevant context to the standardisation process it is important that a mechanism for the preservation of such information is agreed.

8. ISO/IEC JTC1 SWG-ARM encourages those SCs and other JTC1 entities which did not respond to their survey to provide the relevant information for both the SC and any WGs for which they have information.

9. ISO/IEC JTC1 SWG-ARM notes that JTC1 and JTC1 subgroup liaison SDOs ECMA and AES have both emphasised the advisability of retaining paper copies of key documents and notes that ISO and IEC have different practices in this regard.

10. ISO/IEC JTC1 SWG-ARM, noting that collaboration tools (e.g. wikis, blogs) and the use of Software As A Service (SAAS) for collaborative working (e.g. Google Docs, Yahoo groups) are being used increasingly in the development of standards in many bodies, recommends that JTC1 develop a strategy for ensuring important contributions/data, that led to various decisions in the standards making process, are retained. Additionally given the potential difficulty in archiving the output of some of these processes ISO/IEC JTC1 SWG-ARM recommends that JTC1 subgroups provide input on their use of these tools so that guidance and advice on best practice can be provided to all JTC1 entities before the use of such tools becomes widespread in the standardisation process.

Note: It is not always possible to determine the ultimate significance of information at the time it is created and therefore it is better to retain everything.

11. ISO/IEC JTC1 SWG-ARM notes that ISO has recently introduced the NMC service for redistribution of documents to National Mirror Committees and where documents of an SC are not hosted on the ISO servers ISO/IEC JTC1 SWG-ARM recommends that all N-numbered documents are regularly transferred to ISO for redistribution. This has the added benefit that the documents will be automatically archived through the ISO process.

12. ISO/IEC JTC1 SWG-ARM recommends that ITSIG requests for participation in project teams are circulated through the JTC1 secretariat as a JTC1 N-numbered document so that relevant JTC1 expertise can be made available to assist and advise ITSIG in its work.

13. ISO/IEC JTC1 SWG-ARM recommends that the guidance on archiving in the proposed EDPDA (see SWG-ARM N033) should be followed by all entities, not just SCs, because otherwise there will be incomplete records. This does not imply that it should be applied retrospectively but ISO/IEC JTC1 SWG-ARM encourages its early consideration and implementation where practicable.

14. ISO/IEC JTC1 SWG-ARM approves the circulation of the following documents:
- ISO/IEC JTC 1 SWG-ARM N 0029 ITSIG 2009 meeting recommendations
- ISO/IEC JTC 1 SWG-ARM N 0030 Presentation on the use of Livelink in ISO
- ISO/IEC JTC 1 SWG-ARM N 0031 Presentation on Standards Development and Publication — Applications and Formats
- ISO/IEC JTC 1 SWG-ARM N 0032 Final recommendations of second SWG-ARM meeting
- ISO/IEC JTC 1 SWG-ARM N 0033 Draft section on archiving for incorporation in proposed standing document
- ISO/IEC JTC 1 SWG-ARM N 0034 Comments on text of EDPDA for consideration by SWG-Directives
- ISO/IEC JTC 1 SWG-ARM N 0035 Meeting report and attendance list

Appreciations:

a)   SWG-ARM thanks ISO staff for providing the meeting venue and facilities to support the work of the SWG.

b)   SWG-ARM thanks the secretariats of SC2, SC6, SC24, SC25, SC34, SC36, SC37, and SGSN for responding to the survey and providing valuable background information on the number and variety of documents handled in their SCs, WGs and SGs.

c)   SWG-ARM thanks JTC1 SC29 for the liaison input on the Professional Archival Application Format.

d)   SWG-ARM thanks the following presenters:
- Azar Tahbazian of IEC for her introduction to the IEC document management system and the facilities available to SCs, WGs for document handling, the IEC collaboration tools and the different services provided to experts with specific roles.

- Charlie Pike of TPG (Europe) Ltd for his introduction to the creation of accessible PDF documents highlighting issues that can arise in the

conversion of files from other formats (eg WORD) into PDFs and techniques to address the problems.

Note: this presentation is available in various formats from http://www.paciellogroup.com/blog/ (Adobe PDF & WCAG 2.0 Webinar)

- Captioned streaming media recording
- Presentation transcript (MS Word 89 kb)
- Presentation slides (PDF 220 kb)

- Daniele Gerundino of ISO for his introduction to the role of ITSIG and report of the recent meeting

- Istvan Sebestyen of ECMA for his presentation on the archival policy and practice of ECMA and the recent efforts to make an inventory of paper documents and provide scanned versions in the repository

- Laurent Tettoni for his presentation on the use of Livelink in ISO

- Joanna Goodwin for her presentation on Standards development and publication — Applications and formats