

## DOE STI Meeting

November 3-4, 1998



**Waterfront Plaza Hotel in Jack London Square**

**Oakland, California**

[Minutes](#), [Discussions and Agreements](#)

### Overall Meeting Minutes

**Tribute** - The meeting was opened by Bill Buchanan with a tribute to Jeanne Sellers, STI Manager for Westinghouse Savannah River who died in October. Her work in the STI Program was recognized and sorrows expressed over her loss. Doug Hintze from Savannah River Operations Office thanked the STIP community for the expression of sympathy. As requested by Jeanne's family, memorial contributions to Jeanne's church, Saxe Gotha Presbyterian, were accepted throughout the meeting.

**Welcome** - Chuck Morgan welcomed everyone to the STIP Meeting, did a quick review of the [agenda](#), and led an introduction session of all participants.

**Accomplishments and Challenges** - Walt Warnick reviewed a summary of sixteen specific STIP accomplishments for the year. They included:

- Agreement on the new metadata structure
- Agreement on best business practices
- Agreement on OSTI role of common user interface/availability and site role for review and release
- Collaboratively issued new Order and Guide

- Initiated changes outlined in Order & Guide for decentralized STI
- Developed E-Link (new processing system)
- Numerous STIP working group accomplishments (to be presented by leaders later in the meeting)
- STICG meetings brought Headquarters perspective to STIP
- Shared new technologies and innovations at InForum 98
- DOE Information Bridge content increased by over 11,000 items, reaching the 2 millionth full-text page
- Public DOE Information Bridge released via interagency agreement with GPO
- Commendation received in April from GPO Depository Library Council for DOE Information Bridge
- Received the IM Council Technical Excellence Award for the DOE Information Bridge in October
- Three STI systems featured in inaugural issue of Vice President Gore's Access America Online Magazine: Energy Files, the DOE Information Bridge, and DOE R&D Project Summaries
- DOE R&D Accomplishments Database is just being developed and to be unveiled soon: OSTI committed to discuss the R&D Accomplishments Database with STICG and need for such reports to be generated.
- Progress made on electronic journals project for consortium pricing.

Walt pointed out that raising the visibility of R&D and increasing the standing of STI go hand-in-hand. Our responsibilities for this effort require a strengthened collaboration. The concept of a National Library of Energy Science and Technology has been evolving over the past year. Our focus is on an orderly progress. Participation should be open to those who see it's benefits, and it should be clear that no one will be asked to provide related services without funding.

In summary, STIP participants have collaborated on visions, systems, policies, and a range of accomplishments. Walt closed the session with a challenge for continued collaboration and progress.

**R&D Visibility** - Dennis Hall reported on the efforts of the R&D Visibility Working Group. The session was opened by a general report that captured the primary efforts of the group. This information can be found at <http://131.243.36.241/osti/viewgraphs> (vuVisibility.ppt). More detailed information is described in the preliminary findings included as Attachment 2.

Discussion points raised:

- Relationship of STI community to Public Affairs - disconnect between information producers and the Public Affairs role.
- One of the difficulties the Department faces is how to interpret scientific information in a way that the general public can understand it.
- Reviewed the focus of the electronic journals project and its potential impacts on making

more STI electronically accessible at reduced costs.

- Suggestion that field work proposals include an indication of how public information will be announced, similar to NASA's process.

Kathy Macal then moderated a panel discussion related to the visibility working group.

- Walt Warnick presented a paper about the National Library Concept (Attachment 3) and requested support from the STIP community
- Pat Kreitz presented the Library Operations Working Group's response to the National Library concept, i.e. LOWG not supportive of the National Library concept as currently defined. Primary concerns expressed:

- no plan/study/data to work from (definition, purpose, and value-added)
- some suggestions duplicate commercial efforts
- several suggestions have the potential to be costly

She challenged OSTI to:

- identify, index and provide access to "hidden" literature
- study the DOE STI available in published literature

Pat sees NLEST as a solution without a clear problem. Detailed information is provided as [Attachment 4](#).

- Dennis Hall discussed the NLEST proposal from a systems perspective (identifying what problems appeared to be reflected in the mission and function statements). Information presented can be found at <http://131.243.36.241/osti/viewgraphs> (vuSystem1.ppt and vuSystem2.ppt).

The group identified several questions/topics where consensus would be desirable. (Listed below)

#### Topics/Questions for Consensus

- More Public Recognition of DOE R&D: Desirable....But it's P.R.
- Need to improve DOE HQ Public Affairs effectiveness...(But How?)
- Program Offices/P.I.'s include P.R. in FWPs (NASA Model)
- Is NLEST feasible? Where are we in the dialog?
- Do you need a "package" to move forward?
- Who is customer?
- Right Vision....But How? (Look at existing models)
- Indexing and metadata essential in self-service mode as well
- Funding: Does library "packaging" increase probability of getting \$?

- Early congressional feedback is positive
- Funding: Need explicit statements of what \$ will be used for
- If we don't do NLEST, still need to improve. Same need if we pursue NLEST
- Should we pursue the initiative?
- Is one-stop shopping needed?
- Are we selling before we know we can do it?
- Is NLEST the most value-added thing DOE could do to increase visibility w/public? Cost vs. Benefit
- Are there other ways NLEST would add value?
  - What are the problems?
  - What is the customer demand?
  - Cost vs. Benefit
- Multipronged approach?
- "Branding" - - B.P.A. -- National TV
  - What we do for you
- Need to focus more on content of message -- "What have we done for you lately" -- Less on medium.
  - Pocketbook, health, environment
- Can OSTI take on an education role?
- National Library technically feasible...But is it affordable?
- If it's not wee-defined, how do you know if you like it or not?
  - Don't have a business case
  - Do the reasons for the other Nat'l Libs apply to NLEST
- Two purposes? Should we separate?
  - Access to STI for R&D staff (Lib'y)
  - DOE visibility as a Science Agency
- Third purpose? Education?
  - Dept. does have a mandate, but not much \$\$\$.

Follow-up discussion included the following points:

- General consensus on the vision of improving the visibility of DOE R&D, but not on the NLEST concept as the tool for achieving this vision.
- Focus should be on continuing to improve access to information by focusing on business practices, regardless of whether or not the NLEST concept is pursued.
- Need to investigate the interface of STI and Public Affairs.
- OSTI committed to establish a visibility group listserv.

Next steps were identified and actions were primarily assigned to the Visibility Working Group and/or to OSTI:

- (1) Investigate interface between OSTI & Public Affairs (**OSTI Action Item**)
- (2) Include public-targeted info in OSTI's WWW collection (**OSTI & Lab Action Item**)
- (3) Investigate a role in public education/science education (repackaging information); enable education cross-office communication. (**OSTI Action Item**)
- (4) Seek Headquarters Program support to include paragraph in Field Work Proposals on making the resulting STI available to public. (**OSTI Action Item**)
- (5) Escalate (each contractor) STI Managers involvement in developing Public Affairs strategies/ initiatives. Share experiences or Lessons Learned within the STIP community. Try things on a local level. (**Dennis Hall and Chris Forbes Action Item**)
- (6) Analyze gaps in commercial coverage of DOE STI and suggest improvements. (**Pat Kreitz Action Item**)
- (7) Develop workscope for paying a person with library and business experience to analyze NLEST concept and develop proposal (STIP hires consultant) (**Bruce Style Action Item**)
- (8) BPA Branding Idea (**Visibility Group Action Item: Think about who could carry forward the concept of branding**)
  - What is it that DOE wants to be known for?
  - What is the message?
- (9) This group (STIP) should revisit what STI we contribute to OSTI's virtual collection, especially public-targeted, and the relation to the Pulse site. (STIP Action Item)
- (10) Develop a marketing plan to more effectively promote our web info. Look at non-web ways to get message out. (**Visibility Group Action Item**)

**NOTE:** DECISION: The STIP community feels that the NLEST concept is currently not well enough defined to determine whether or not STIP should pursue it.

**STI Software** - Karen Spence presented the new approaches to STI software management. The following are changes that OSTI proposes to focus on:

- Managing software the same way report literature is managed (e.g., site submission of metadata records for inclusion in the DOE Information Bridge)

- Blend ESTSC and Request Services staff and functions
- Work toward decentralized management of STI software where sites host software and OSTI simply links to it
- Minimize software screening/testing and do only on an as-needed basis

**STI Assessment** - Barbara Ashdown, Sharon Jordan, and Manny Ontiveros presented several perspectives on STI Assessment: Program or BMOP-Based (see Attachment [6](#), [6a](#), [6b](#), and [6c](#)). It was recommended that the performance objectives in the Guide be closely aligned with the CRD in the Order. The group agreed that STIP Goal Group 1 will look at Performance Measurement and initiate changes to the Guide as determined to be appropriate.

**STIP Goal Team Updates** - Updates on activities of each of the four STIP Goal Teams were presented. Kathy Waldrop reported on the results of Goal 1 (See Attachment [7](#)). Bruce Style reported on the efforts of Goal 2 (see Attachment [7A](#)). Carol Duncan reported on Goal 3 activities (see Attachments [7b](#) and [7c](#) and [checklist](#) ). Goal 4 activities were presented by Susan Tackett (see Attachment [7d](#)). Based on the number and types of accomplishments, the goal team approach for collaboration has been successful. OSTI committed to facilitate a discussion with the STIP Goal Team leaders to select a new leader for Goal Team 4.

**STI Training Proposal** - Kathy Waldrop presented a proposal for STI Training (see [Attachment 8](#)). Discussion points included:

Would your site participate in the STI Training?

- Majority of Sites expressed interest in participation.

ORNL and SRS volunteered to help in training development.

(2) What topics should be included?

- Training sessions may need to be customized or put in tracks depending on participants.
- Need to be sure to address the breadth of life-cycle information management across multiple functions, e.g., include interface with records management.
- Emphasis should be on best business practices not compliance.

(3) Who should attend the training?

- Attendance should be broader than STI points of contact.
- TIO's would be candidates.
- Need to determine if participants need any type of prerequisites; participation will be up to the sites.

#### (4) How should the training be structured?

- Class would be taught by a combination of OSTI staff and others to be identified.
- To the extent possible, use distributed training. e.g., some of the training could be done as computer based modules on the web.
- Look for opportunities to use other media, e.g., videoconferencing is an excellent tool
- Modules could be developed and identified as appropriate for different types of participants, e.g., TIO's do Modules X, Y, and Z and STI Managers do Modules B, C and D.
- While web-based training is valuable, the opportunity to network with peers face-to-face is also valuable.
- Regional groupings of user types could minimize travel costs.
- Strategy will be developed; also will attempt to determine which topics can be done as computer modules. Recommendations will be presented to the full STIP group.

#### (5) When and where should the face-to-face training take place?

- Piggyback on existing STI events (such as STIP and InForum) as well as other meetings of common interest to numerous STI POCs, such as the DOE Records Management Conference.

**STI Order and Guide** - A review of the Order and Guide issued in August was led by Bill Buchanan. The discussion topics and responses/agreements are included in [Attachment 9](#).

**E-Link** - Sharon Jordan and Earl Smith presented the new processing system for DOE STI at OSTI (called the DOE Energy Link or E-Link) (see [View Graphs](#) and [9a](#)). A preliminary E-Link User Manual was provided; comments were requested, due by the end of November. [Attachment 9](#) provides agreements recorded on the discussion topics.

**Meeting Summary** - The November 1998 STIP Meeting was concluded with accolades and appreciation given to the full STIP group. Chuck Morgan gave the [concluding remarks](#). The collaborative nature of this group had helped us to be successful and will help us face the upcoming challenges that we have to come. A summary of the results of the meeting was provided. Meeting minutes will be made available off the STIP Home Page.

## Discussions and Agreements

Discussion of Order and GuideDiscussion of New ProcessingSystemORDER AND GUIDE

1. Agreement on what the "non-mandatory" nature of the Guide really means as well as what "agreed upon best business practices" means.

The best business practices were and continue to be collaboratively developed. The Guide represents a consensus standard and the intentions of the STIP community, but is non-binding. To the extent that a site does not use the business practices outlined in the Guide, an awareness of the reasoning is needed. The reasons can then be used to identify potential changes to the Guide or to determine how far along the site is in meeting the STIP community intentions.

2. Agreement on how the Order and Guide apply to classified and sensitive information.

Classified and sensitive STI is clearly included in the Order and Guide

3. Clarification on the two sets of performance objectives contained in paragraphs I.6.1 and I.6.2 of the Guide.

Field Management concluded that the management of STI is appropriately included in the BMOP process. The BMOP process is the only avenue for assessing performance of the Field Offices. Field Offices have two choices for incorporating the STI review into contractor assessments: (1) technical program reviews and (2) the BMOP process. It is recommended that the Field Office and Contractor negotiate performance measures and expectations. Goal Team 1 was asked to review and possibly suggest measures based on the Order requirements in the CRD.

4. Clarification on journal article announcements, preprints, and postprints being included in the scope of what should be made available to OSTI.

Journal articles, preprints, and postprints are included in the Guide as types of STI that OSTI would like access to. The sites have the option of whether or not to make them available. Access can be limited as necessary based on appropriate limitation markings applied by the submitting site. Announcement records are needed for more comprehensive coverage of DOE research, even when the source of availability is the journal publisher.

5. Decision on whether Goal 1 will consider changes on how STI computer software will be managed including any needed changes to Part III of the Guide.

Goal 3, having the recent experience of the Order and Guide revision process, will coordinate modifications to the Guide for decentralized STI software management.

6. Agreement on the process and approvals for identifying needed changes to the Order and Guide.

The Order will not likely be changed soon. The Guide will be changed as needed and the latest version made available on the STIP Homepage. Proposed Guide changes can come from any member of the STIP community. Potential changes are to be submitted to OSTI, and OSTI will notify the STIP community of suggested changes. Notifications of changes will also be made during monthly meet-me calls. After receiving initial comments from the STIP community, the need for a Goal group to staff the issue will be determined.

7. Clarification of the 30-day notice period before making site-hosted STI unavailable to OSTI and others.

Sites choosing to host their own STI should give OSTI notice if the STI is permanently taken down. As described in the Guide, it was recognized that the 30-day period is not always appropriate, and procedures can be negotiated with OSTI. OSTI is the ultimate repository for records management purposes and will manage the information when sites decide to take the information down.

8. Clarification that the public version of the DOE Information Bridge is not an accountability system (or the "locator" for all unclassified unlimited STI), but a means to display only the STI that has a potential benefit of further dissemination.

Any useful STI submitted without limitations will be included in both the public and the DOE versions of the Information Bridge. Unclassified items submitted with limitations will only be available through the DOE version of the Information Bridge.

9. Agreement that OSTI maintains the central comprehensive STI announcement mechanism for the Department which includes announcement records for STI computer software made available at sites other than ESTSC.

OSTI maintains the centralized comprehensive STI announcement mechanism for STI, including announcement records for STI software even when the source of availability is another site. STI Managers need to help facilitate these types of responsibilities with their software points-of-contact.

10. Agreement that improved communication of STIP requirements and operational changes at DOE and contractor sites is needed to let others know of the changes that are taking place, e.g. TIOs to procurement offices, STI Managers to staffs, OSTI to Headquarters.

Better communication of our STIP policies and operational procedures, is needed to keep everyone informed from contractors, to field offices, to Headquarters, and beyond.

11. Agreement on whether Conference Papers, even if to be published in formal third party proceedings, should be made available as individual papers to OSTI and others (due to the questionable availability of conference proceedings, cost, scope, time, etc).

Conference papers, even if published in formal third party proceedings, should be included in the scope of STI submitted for announcement. In cases where copyright limitations are imposed, announcement will be made only in the DOE version of the Information Bridge. It was suggested that OSTI further pursue any complications related to this issue with the guidance of DOE's Intellectual Property Counsel with specific issues identified by sites.

12. Agreement on whether articles rejected for journal publication should be made available to OSTI as technical reports -- it is recognized that the test of "usefulness", as determined by the originating site, will be applied to the **individual papers** in making the decision.

Journal articles rejected for journal publication that are still deemed to be useful should be considered for announcement through OSTI. If there is intent to re-submit to the journal or another one, it should not be submitted for announcement or should be submitted with limitations . Realistically, STI Managers are not necessarily included in the notification process to determine if articles are rejected. Therefore, any that are identified without overwhelming use of resources should be submitted for announcement. STI Managers were encouraged to remind their authors that useful information can be published as a report if not accepted as a journal article.

### NEW PROCESSING SYSTEM (E-LINK)

1. HTML entities or Math Markup Language, consistent with the web and DTD formats of DOE F 241.1, are the preferred special character sets for announcement record input; however, there is no validation within the workflow process.

Agreed.

2. Missing data elements, unreadable formats, and significant data errors (mismatched data, incongruous data, etc.) will result in the system rejection of site-submitted records.

Agreed; sites will get e-mail notifications with error messages.

3. Electronic STI will be maintained in its original format and will be converted to either HTML, PDF Normal, or PDF Image for user access on the Information Bridge.

Agreed; the Guide contains specific formats in Part II, sections 6 & 7.

4. Sites will be e-mailed on a daily basis regarding the receipt of records at OSTI. Receipts will be acknowledged for (1) number of announcement records received and rejected and (2) number of full-text files received and rejected. A count by types of electronic format will also be provided.

Agreed.

5. Soon, originating sites will be able to access their own input statistics based on input codes and login ID via the web-application user interface screen. DOE Operations Offices may choose among the sites for which they have cognizance. The following information will be available:

-total announcement records received, rejected, completed.

- current status of records in process awaiting site release, in-process, awaiting full-text matching, awaiting site correction, awaiting OSTI action, as well as statements of any errors.

The information will have OSTI ID#, report number, title, and author. Also, searches for specific records will be available.

Agreed.

6. Discussion of the functionality of the new web version of F 241.1.

Functionality discussed as part of the system demonstration.

7. Status of testing the DTD for F 241.1.

Lessons learned will be shared. Test records will be accepted.

8. Status of the full-text STI DTD

An SGML DTD is available for full text reports. Goal 4 will be evaluating for changes needed.

9. Status and review of the new gisting software for creating abstracts.

OSTI indexers are still reviewing; have not yet moved to full machine-aided indexing; still want review help from sites and OSTI will notify sites when ready.

10. Each STI product and associated announcement record must have a unique URL.

Agreed. Site-hosted information posted with a unique URL must be in one of the formats identified in the Guide in order to support search and retrieval on-line.

NOTE: Attendees were asked to indicate their plans for the announcement record and full-text formats (see attached chart).

11. Originating sites are responsible for indicating any applicable access limitations; in the case of "Copyright" restrictions, they are also responsible to affix the appropriate copyright statement as described in paragraph II.5.3.5. of the Guide.

Agreed.

12. Due to risk of a digitized signature being extracted and misused, no signatures are required in the content of the STI product.

Agreed.

13. Text fields in the announcement records are not being checked for quality at OSTI, i.e., OSTI staff are not reading the record to verify content, correct spelling, etc. Only validations that can be automatically checked using software are being done.

Agreed.

14. Subject categories will be based on 2-digit number level categories as of October 1, 1998 (select from 38 categories; multiples accepted; list primary one first).

Agreed. As the R&D Tracking Database is migrated to Oracle, the new 38 subject categories should be used there instead of the older list.

15. Conference numbers are no longer assigned by OSTI to DOE STI as of October 1, 1998 (i.e., the conference authority will not be used for new data as of 10/1/98). However, sites may create conference numbers for their own papers.

Agreed. Conference information will be accessible in the future on DOE Information Bridge by doing a search for STI product type "Conference."

16. DOE STI products received from sites will not be divided into sub-units or "analytics", and will be processed as received (if a book, processed as a book; if a paper, processed as a paper).

Agreed. The "book" category may be used for other types of monographs as well.

17. Site contacts will be able to access previous submissions through the Web form and make changes to their own site ID records using the unique OSTI ID number.

Agreed. Specific procedures are still in development, and STIP will be notified later.

18. If the DOE F 241.1 indicates "Revised Data" or "Revised STI Product", the data or product will be replaced in the repositories and re-announced.

Agreed.

19. Certain revisions (such as to the access limitation) will have **high priority** processing at OSTI.

Agreed.

20. The "STI Product Type" value is to be maintained throughout processing and output systems (e. g., conferences will be kept as conferences rather than being referred to as reports).

Agreed.

21. Technical Reports submitted by DOE Operations or Field Offices should include valid contract numbers and reporting type/periods in order to properly track for TIMS deliverables.

Agreed.

22. For Journal Article announcement citations, additional journal information should be provided in order for users to locate the article. (OSTI maintains a Serial Authority to look up names if the ISSN or CODEN is provided).

Agreed.

23. "Originating Research Organization" is filled in on the Web form based on the Site Code. It may be edited to change or add information (e.g., to indicate multiple organizations).

Agreed. Lab or facility names are used in lieu of contractor names.

24. "Date of Publication" is defined as the date published or issued; it is to be in the standard date format of mm/dd/yyyy, with values for month and year required (the Goal 3 Working Group agreed that the submitters of the DOE STI products should be familiar enough with the product to indicate the month and year).

Agreed. If month and year are supplied without an actual day, 01 will be the default for date range searching purposes.

25. "Sponsoring Organization" is not required, but OSTI will generate "DOE" if left blank. Sites

may use the pick list of DOE sponsoring organizations to aid input, but may edit or add information to those (e.g., to indicate multiple sponsors or to give more specific offices such as Division).

Agreed.

26. "Keywords" are optional from the site, but any provided will be kept in the record to enhance searching/retrieval. OSTI will add to the record at least three valid keywords from the Energy Thesaurus if the keywords are not from the Thesaurus.

Agreed. Sites requested access to the OSTI Thesaurus to determine which keywords may appear as valid Thesaurus terms.

27. "Description/Abstract" is also optional. If blank, OSTI will create a "gist", which will be reviewed by OSTI information scientists until approved for fully automated use.

Agreed.

Other Suggestions:

Recommend that OSTI expand the length of time on the E-Link system time out feature and add a log-off option.

Sites desired capability to use a site-customized template offered previously with the web 1332.15.

Hours of operation need to be posted at login screen.

Technical instructions have wrong port number; at one site, it should be 88, not 80. This may be site-specific.

**Discussion of Order and Guide/New Processing System  
Scientific and Technical Information Program Meeting  
November 4, 1998**

**ORDER AND GUIDE**

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27. "Keywords" are optional from the site, but any provided will be kept in the record to enhance

searching/retrieval. OSTI will add to the record at least three valid keywords from the Energy Thesaurus if the keywords are not from the Thesaurus.

28. "Description/Abstract" is also optional. If blank, OSTI will create a "gist", which will be reviewed by OSTI information scientists until approved for fully automated use.

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