

BIC LIBRARIES TECHNICAL IMPLEMENTATION CLINIC MEETING – Minutes**Location:** GoToMeeting / Conference Call**Date and time:** Thursday 18th January 2018, 10am**Minutes written by:** Alaina-Marie Bassett

Present

Kate Allen, Cambridge University Press
Alaina-Marie Bassett, BIC
Catherine Cooke, Westminster Libraries
Niamh Doran, Civica
Simon Edwards, Consultant (Chair)

Graham Jones, Askews & Holts
Brian O’Leary, BISG
Fiona Petherick, ProQuest
Dominic Stanley, Bertram’s
David Thomas, SirsiDynix

1. Welcome and Apologies

SE welcomed the Group to the meeting and the apologies were delivered.

2. Competition Law - Conduct Reminder

The Group was reminded about BIC’s Competition Law Policy – please click here for more information regarding this policy: <http://www.bic.org.uk/149/BIC-Competition-Law-Policy/>

3. Review of minutes and actions from the last meeting

The minutes from the last meeting of this Group were approved. SE noted that all the actions from the last meeting will be addressed under Item 5 (in the action grid, overleaf).

- **ONGOING ACTION:** AMB to continue to send out an email to all BIC members, a month prior to the next meeting of this Clinic, to encourage further attendance of this Group.

4. Discussion and removal of old / ongoing issues

KL noted at the last meeting of this Group that the ongoing issues from 2013/14 which are still being addressed by this Clinic need to be drawn to a close ASAP or else abandoned. The Group agreed to discuss this topic under the issues listed in Item 5.

5. Current EDI issues (TRADACOMS and EDIFACT)

See the action grid, overleaf.

Title of Issue	Brief Description of Issue	Actions (if any)	Responsible for Action	Issue resolved? Yes / No
<p>5.1 eBooks in EDI Raised by FP, Coutts Information Services Date raised 11/11/13</p>	<p>FP raised this issue in November 2013, noting that Coutts receives EDI orders for eBooks via different platforms. She informed the Group that customers can order the same ISBN with various licence options (e.g. single user, multi user, etc.) and that this information needs to be provided with the order, but there is no obvious place for it in EDI standards to date. The Group subsequently agreed upon a solution (which entailed the use of GIR segments to disseminate the necessary licence information) and this solution was taken to the BIC Digital Supply Chain Committee for its review. It was decided that a BIC survey should be produced to ascertain whether EDI should be developed to accommodate eBook ordering or whether library web services / APIs should be developed instead.</p> <p>SE reported that the BIC survey indicated that 71% of libraries believe that they will be able to implement APIs over the coming 2-3 year period; and given the time it would take to develop, test and roll out a change to EDIFACT, BIC believes that it would be better to develop a library API solution instead of an EDI solution. Meanwhile the current (non-standard) solution continues to use EDI with the necessary data held in the notes field. GJ informed the Group that Askew & Holts will continue to accept the necessary data in the notes fields in EDI, in order to supply the licence(s) required by its customers. The Group agreed that this workaround is sufficient for the time being. Other organisations may adopt this approach but it was noted that the development of an API for libraries will be a better solution and better use of BIC's limited resources.</p>	<p>Remove this item from the grid and agenda for the next meeting.</p>	<p>AMB</p>	<p>Yes</p>
<p>5.2 Consolidated Invoices and Invoices for Fulfilment-only Raised by AC, Essex Libraries Date raised 11/11/13</p>	<p>Andrew Coburn (AC) of Essex Libraries raised this issue in 2013, noting that direct deliveries can result in numerous invoices being authorised by recipient organisations because their Library Management Systems (LMSs) cannot accept consolidated invoices. The librarians present at the meeting agreed that they would like to receive consolidated invoices from their suppliers; DT and GJ informed the Group that their respective organisations can provide consolidated invoices. It was suggested that a change to the EDIFACT INVOIC codes may be necessary however the Group subsequently identified an existing invoice type for consolidated invoices: Code 385.</p> <p>SE reminded the Group that although Code 385 exists for consolidated invoices, organisations are not using it at present. CC noted that the use of consolidated invoices is no longer a high priority for</p>	<p>SE to add an intro to Code 385 in the EDIFACT standard detailing best practice / how to produce consolidated invoices.</p> <p>SE to circulate the proposed text to AMB for circulation.</p>	<p>SE</p> <p>SE</p>	<p>No</p>

Title of Issue	Brief Description of Issue	Actions (if any)	Responsible for Action	Issue resolved? Yes / No
	<p>Westminster Libraries compared to when this topic was originally raised. DT and GJ informed the Group that their organisations have not been approached regarding the supply of consolidated invoices and have not implemented the code into their systems to date for this reason.</p> <p>It was suggested that a note should be added to the EDIFACT INVOIC document to ensure that any future questions on this topic are answered by that document (and to ensure that this issue is not raised for the LTIC's attention again in future). CC noted how important it is that any future implementers of Code 385 use the same process, hence the need for guidance in the documentation.</p>	<p>ALL to provide feedback on SE's introduction, with a view to this text being signed off via email prior to the next meeting.</p>	<p>ALL</p>	
<p>5.3 Invoices for Fulfilment-only Raised by AC, Essex Libraries Date raised 11/11/13</p>	<p>This topic, which is linked to this Group's discussions regarding Code 385 – Consolidated Invoices (as outlined in Item 5.2, above), was raised by AC of Essex Libraries in 2013. The Group agreed that an EDIFACT INVOIC code should be identified / allocated for Fulfilment-Only invoices.</p> <p>CC commented that suppliers often provide consolidated invoices only if an order is fulfilment-only (in an effort not to duplicate work). SE suggested that a note to this effect could be incorporated into the EDIFACT INVOIC document going forwards. DS noted that customers often like to receive against an invoice as well as being supplied with a monthly consolidated invoice. CC informed the Group that Westminster Libraries has to carry out its fulfilments via invoices due to this being a requirement for one of its suppliers – although Westminster Libraries would not choose to do so, given the choice. SE noted that there are different methods available for sending despatch advice notes.</p> <p>DT reported that SirsiDynix can support both fulfilment-only invoices and order responses. CC reported that the supplier to Westminster Libraries carries out its fulfilments using copy number assignment. ND commented that there is a potential, when discussing this topic, to be too LMS-specific. She noted that any solution that is put forward by this Group in due course must be applicable to any LMS and/or standard. CC suggested that the primary issue for Westminster Libraries is the supplier itself (rather than its system) however the Group agreed that the issue is due to a combination of the two. The Group agreed that the workarounds which are currently in place within organisations are sufficient and as such, they agreed that this issue should be removed from the agenda for this Clinic going forwards.</p>	<p>Remove this item from the grid and agenda for the next meeting.</p>	<p>AMB</p>	<p>No</p>

Title of Issue	Brief Description of Issue	Actions (if any)	Responsible for Action	Issue resolved? Yes / No
<p>5.4 Standing Orders in EDI Raised by WR, The British Library Date raised 07/06/16</p>	<p>In June 2016, Wendy Robson (WR) raised this issue regarding the British Library’s invoicing process for standing orders. WR and GJ reported that their systems cannot invoice without firstly having received an order of some sort; as such, standing orders are dealt with outside of EDI. The Group discussed whether British Library would benefit from using the EDI Quotes message to cope with standing orders. WR liaised with the British Library’s suppliers about Quotes and reported back that test files need to be exchanged to complete this process. She noted however that the solution required must show whether each order has been fulfilled or not.</p> <p>SE noted that WR was not present at this meeting. It was agreed that this item should remain on the agenda for this Clinic until the next meeting in order to receive an update from WR on the proposed solution (EDI Quotes).</p>	<p>WR to either attend the next meeting of this Group or email AMB to provide an update on this topic (i.e. whether the information provided to date is sufficient or if any further guidance is required).</p>	<p>WR</p>	<p>No</p>
<p>5.5 Potential new issues to be addressed</p>	<p>The Group did not have any new issues to raise. SE reminded the Group that any matters that do arise between now and the next meeting should be brought to the Group’s attention prior to the next meeting date. He commented that the meetings of this Group are dependent on there being issues to resolve and noted that meetings may need to be postponed in future if there are not enough issues under discussion. SE encouraged the Group to liaise with trading partners about any issues that might be addressed by this Clinic; if any issues are identified by BIC members, they should be encouraged to attend the meeting.</p>	<p>ALL to liaise with their trading partners and report any new identified issues to SE + AMB prior to the next meeting of this Group.</p>	<p>ALL</p>	

6. BIC Libraries Committee Update

CC reported that the most recent meeting of the BIC Libraries Committee took place on Thursday 14th December 2017, where the Group discussed the forthcoming launch of the BIC Technology Excellence in Libraries Award (TEiLA) Accreditation Scheme – especially in the absence of the new BIC website. SE informed the Group that work on the new BIC website has ceased indefinitely with a view to refurbishing the current BIC website instead. He reported that the TEiLA Scheme will launch in April 2018, using SurveyMonkey to provide online application forms, and that the members of the BIC TEiLA Accreditation Panel will pilot the Scheme prior to its launch both to iron out any issues with the application process and ensure that they are in a position to judge other organisations on the new Scheme.

CC reported that the BIC Libraries Committee and the BIC Library Suppliers Liaison Group continue to work with the Government's Libraries TaskForce on a number of items including the British Library's ongoing Single Digital Presence (SDP) project and the creation of a library specification for sourcing new LMSs. The Libraries TaskForce met most recently on Monday 15th January 2018; BIC was represented at this meeting.

CC informed the Group that the BIC Libraries Committee now has a watching brief on the review of the International Standard Serial Number (ISSN) which may affect standing orders going forwards. SE suggested that this watching brief should also be included on the agenda for this Clinic.

➤ **ACTION:** AMB to include a watching brief on the ISSN to the agenda for this Group.

7. Watching Briefs on BIC's Task & Finish Working Groups (T&FWGs)

- Acquisitions & Divestments

AMB reported that the eBook Acquisitions Best Practice document is almost ready for publication however the T&FWG is awaiting receipt of an appendix which needs to be incorporated into the document. The second phase of this project – print / physical product acquisitions – is now being addressed and a draft copy of the Physical Product Acquisitions Best Practice document was circulated to the T&FWG on Tuesday 19th December 2017. The next meeting of this T&FWG will take place on Wednesday 14th March 2018.

- Library Web Services

SE informed the Group that this T&FWG's top priorities for development / required functionality have now been agreed so work will commence shortly on the library web services. He noted that BIC is in the process of liaising with NISO's FASTEN Group (which is also researching existing library APIs and functionality requirements for libraries) with a view to collaborating in future, in order to ensure BIC and NISO's efforts are not duplicated unnecessarily.

SE noted that the suite of *BIC Realtime* APIs / web services which were produced for trade organisations in 2017 are based on EDItX. He suggested that some of these APIs

may be repurposed for libraries. He noted that the benefit of developing APIs is the ease and speed with which they can be implemented.

- Price & Availability (P&A)

AMB reported that the revised TRADACOMS Code List 54 document was published in December 2017; an email notification of the publication was disseminated to this Group on Monday 18th December 2017. This document can be found on the BIC website, here: http://www.bic.org.uk/files/pdfs/EDI%20Tradacoms%20Guidelines%20Code%20List%20Version%2010,%20December%202017_FINAL.pdf. AMB informed the Group that the second phase of this project – pricing – is now being addressed by this T&FWG; as such, a workshop will take place on Wednesday 14th February 2018 to help identify the gaps between existing pricing standards and industry requirements. Attendance at this forthcoming workshop is open to all BIC members

➤ **ACTION:** ALL to email AMB if they would like to attend this forthcoming workshop.

- RFID Privacy

CC reported that the BIC RFID Privacy T&FWG is in the process of discussing the relationship / differences between RFID Privacy and the General Data Protection Regulation (GDPR). SE noted that the GDPR legislation, which will come into UK law on Friday 25th May 2018, is related to holdings and use of personal data and it requires organisations to carry out a Privacy Impact Assessment (PIA) on their systems. The focus of the BIC RFID Privacy work has been on other privacy risks including hacking / tracking.

SE noted that, by keeping a close eye on RFID Privacy, BIC intends to help libraries prepare for prospective legislation in the future. A BIC RFID Privacy toolkit was produced for libraries for this purpose; a draft version of the toolkit was published in July 2017 which this Clinic was informed about on Wednesday 26th July 2017. To receive your (free) copy, please register here: <http://eepurl.com/cXhl61>. Once registered, in addition to receiving the toolkit and any subsequent versions in future, interested parties will receive updates on this topic, as / when they become available. AMB reported that 63 individuals have registered to receive the toolkit to date.

8. BIC Technology Excellence in Libraries Award (TEiLA) Accreditation Scheme

See Item 6, above. SE invited the Clinic to liaise with BIC if their organisation would be interested in joining the BIC TEiLA Accreditation Panel going forwards.

➤ **ACTION:** ALL to request further information about joining the BIC TEiLA Accreditation Panel from AMB, if interested.

9. BIC EDI Training courses (EDIFACT and TRADACOMS)

CC informed the Group that BIC's EDI training course for librarians will be made available in early 2018; this course is kindly being sponsored by the Bertram Group. SE reported that BIC is currently in the process of writing the outline and content for this course. He noted that, although it will be seminar-based, the course will include practical elements which will be

informed by the participation of library stock suppliers. In addition – as libraries use differing systems – he noted that the course cannot be LMS-specific in its content but will need to be aware of its delegates’ requirements in relation to the systems they use. SE and Heather Sherman of Dawson Books will provide the training on this course.

BOL noted that the Book Industry Study Group (BISG) is interested in improving the way EDI is used in the US and will be encouraging communications between trading partners going forwards in order to improve efficiency. He commented however that BISG does not want to duplicate BIC’s work in this area and may liaise with BIC for this reason going forwards.

10. Actions for the Training, Events and Communications (TEC) Committee

SE reported that a BIC Breakfast on RFID Privacy in Libraries took place on Wednesday 26th July 2017 to coincide with the launch of the BIC RFID Privacy toolkit (see Item 7, above). The Group was encouraged to inform BIC about any prospective library topics which could be used for BIC Breakfasts in 2018.

- **ONGOING ACTION:** ALL to send ideas for BIC Breakfast topics that are specifically relevant to the library community to AMB, ASAP.

AMB reported that the BIC TEC Committee is in the process of discussing a BIC Clinics Update webpage, where highlights / updates from both the BIC Technical Implementation Clinic (trade) and BIC LTIC could be listed in reverse chronological order.

- **ACTION:** AMB to provide an update on the BIC Clinics Update webpage at the next meeting.

11. Defining BIC’s policy regarding eBook harvesting platforms

AMB informed the Group that this topic was raised at the most recent meeting of the BIC Library Suppliers (Government TaskForce) Liaison Group, which took place on Wednesday 29th November 2017. CC noted that libraries each subscribe to multiple eBook platforms but would like to offer a seamless, single-sign on process to their patrons, allowing them access to the whole catalogue without the multiple sign-ons (per platform) which are currently a necessity. ND informed the Group that a single sign-on for eBook platforms is already available via APIs and that this functionality is included in at least three of Civica’s LMSs. CC noted that a single sign-on is required for all LMSs for that organisations can implement it.

DT suggested that SirsiDynix is also able to provide some functionality for eBook harvesting to date. CC agreed but noted that, using SirsiDynix’s API, patrons still have to set up an account with a third party in order to access their chosen eBook. SE suggested that this topic should be discussed further by both the BIC LCF Review Group and BIC LCF Technical Panel. CC reported that she has already written a case study for the BIC LCF Review Group / Technical Panel for this purpose.

- **ACTION:** AMB to ensure that this topic is included as an item on the agenda for both the BIC LCF Technical Panel and the BIC Library Web Services T&FWG going forwards.

12. A.O.B.

The Group did not have any further business to report.

13. Date of next meeting

The Group agreed that the next meeting of this Clinic should take place in 6 months' time, on Tuesday 17th July 2018.

The BIC Library Technical Group ListServ is at
<http://uk.groups.yahoo.com/group/librarytech/>

BIC website address: <http://www.bic.org.uk/>
BIC training courses: <http://www.bic.org.uk/93/All-Courses-2013/>

BIC is very active on twitter so if you use twitter you may want to follow BIC and keep up with BIC announcements, activities and events via twitter: @bic1UK
Library Specific tweets can be found at @e4libraries

As always any comments, corrections etc. by email please to
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