

BIC EBOOKS ON EDI SUB-GROUP MEETING – Minutes

Location: CILIP Building, 7 Ridgmount Street, London WC1E 7AE

Date and time: Thursday 17th November 2016, 2pm

Minutes written by: Alaina-Marie Bassett

Present

Alaina-Marie Bassett, BIC
Simon Edwards, Consultant (Chair)
Geraldine Fawcett, Capita
Keir Finnerty, Coutts (ProQuest)
Graham Jones, Askews & Holts
Fiona Petherick, Coutts (ProQuest)
Heather Sherman, Dawson Books
Ian Young, Axiell Ltd

Apologies

Mark Allcock, Axiell Ltd
Karina Luke, BIC
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 were 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

Please can members of this Group read these minutes carefully to ensure that detailed issues / solutions are recorded correctly to avoid any future misunderstandings.

SE noted that this Sub-Group was set up to discuss the ongoing eBooks in EDI issue that was raised by Fiona Petherick of Coutts Information Services during a BIC Libraries Technical Implementation Clinic (LTIC) meeting. SE commented that the organisations represented on this Sub-Group have differing requirements / opinions on what the solution to this issue should be – most notably the needs of Askews & Holts Library Services differ to those of Coutts Information Services. SE explained that this conference call will therefore allow those present to discuss the issue thoroughly and come to an agreement about a solution that works for all. He noted that this Sub-Group will need to discuss solutions for both EDIFACT and TRADACOMS.

HS confirmed that there is a genuine need within the library community for a solution to this issue however she noted that the issue applies to academic libraries rather than public libraries. FP noted that there are many variables that need to be taken into account for ordering eBooks including: ISBN, platform and licence. She noted that the proposed solution (put forward by Coutts Information Services) involves the use of 2 new GIR segments for Platform and Licence respectively. FP noted that this solution will enable the information contained in each GIR segment to be held at line level, allowing multiple licences to be ordered in one order file.

FP noted that it may not be possible to define all the available platforms in a GIR segment as there are so many possible platforms available and new platforms may appear in future. However, should organisations wish to use the GIR segment, she suggested that organisations could agree codes with their trading partners for the platforms that they do require. GJ confirmed that Askews & Holts Library Services would not need to use the GIR segment for Platform as they use only their own digital platform however he noted that the codes (and cases used within those codes) would need to be agreed, as is usual for most other GIR segments. HS agreed.

SE commented that this Group will need to document the codes to be used for the new GIR segments to ensure that nothing which is required for the ordering process to run smoothly is left out. GJ noted that – since the organisations present on this conference call have customers in common – standardisation of the licence codes used may be advantageous. HS agreed; she confirmed that Dawson Books would be happy to adopt the codes used by Askews & Holts Library Services going forwards. She noted that having a standard to refer other organisations to would be helpful in ironing out any future issues with the process. IY commented that the standard will need to stay up-to-speed with the volatile and fast-paced eBook market to ensure it is of use to the library community. He informed the Group that all of Axiell's current license codes are defined by its customers and Axiell's system copes well with the use of these individual codes.

GJ informed the Group that Askews & Holts Library Services is only concerned with Licence at this time however HS suggested that the GIR segments for both Platform and Licence should be documented in case they are needed by organisations in future / for the sake of unforeseen future needs. She noted that organisations need to be able to identify all the variables for their requirements, although not all of the organisations will use both GIR segments. FP agreed, noting that the lack of granularity at present is the cause of this ongoing issue.

SE noted that the definition of most GIR segments includes guidance on the number of characters required, whether the code is alpha-numeric or numeric, etc. He asked how this information should be documented. FP suggested that this Group should identify the maximum number of characters used for Platform and Licence codes to date to inform their decision.

- **ACTION:** FP to investigate the maximum number of characters used for Platform and Licence codes to date by Coutts Information Services and report back to the Group.

SE suggested that some examples should be included in the documentation to ensure it is accessible for new users. FP volunteered to provide some examples for the different platforms available. SE noted that this Group will need to sign off on the documentation for all eventualities, ensuring to the best of their abilities that the solution caters for all. SE agreed to amend the proposal document, incorporating FP's examples, once they have been received.

- **ACTION:** FP to produce some examples for different platforms that can be included in the forthcoming documentation for the GIR segments.
- **ACTION:** SE to amend the proposal document according to the discussion of this meeting, asap.

SE noted that a TRADACOMS solution is required for this issue by Capita. GW confirmed that Capita is

able to accept the orders it receives but cannot send confirmations for those orders.

SE noted that the forthcoming BIC Libraries Web Services Task & Finish Working Group (T&FWG) will need to be informed about the proposed solution. In addition, EDItEUR will need to approve it as it envisages a change to EDIFACT which is an international standard. He commented that FP's examples will help to show that it is not possible to specify this Group's requirements using only metadata at present, supporting the need for this Group's recommended solution. GJ suggested that, should this Group's solution be refused, an alternative should be offered. The Group agreed.

- **ACTION:** AMB to send the final proposal document to Graham Bell of EDItEUR, once it has been completed by SE, for his consideration (including whether the solution is appropriate for international use).

SE asked the Group what sort of metadata they are provided with from eBook suppliers. FP noted that Coutts receives platform and licence information plus Territorial Sales Rights codes; although the information provided can differ from one aggregator to another. SE noted that ONIX is able to express Territorial Sales Rights information but cannot express the platform or licence requirements of organisations' eBook orders to date. The Group agreed. FP noted that any order placed in a region that Coutts does not have territorial rights for, will be rejected and a response will be sent accordingly. SE noted that the BIC Technical Implementation Clinic is currently in the process of discussing a possible new response / Price & Availability code for eBook orders which could state that the eBook is not available but other manifestations of the book are available.

FP noted that there is both a short code and a long code in existence for license types at present, e.g. "IU" and/or "single user". She noted that customers often find it useful to receive information for both codes for clarification purposes. GW confirmed that Capita provides both codes in their loan feed. GJ noted however that EDI orders tend only to list one code; FP agreed that only the short code is sent to customers during the ordering process. FP and GJ agreed to send examples of both short and long codes for this Group's consideration.

- **ACTION:** FP and GJ to provide some examples of both short and long codes.

SE noted that this Group will need to think about any and all implications that this proposed change to the EDI standard could affect including: how the information is displayed in Library Management Systems, who can see the information when ordering online, which customers, etc. GJ noted that some organisations will continue to specify their orders using the notes field so this Group will need to ensure that the solution is compatible for all ordering methods / organisations.

4. Date of next meeting

Post-Meeting Update: Following correspondence which was sent after this meeting, this Sub-Group has agreed to reconvene to discuss pricing as it relates to ordering eBooks via EDI. Pricing varies with licence and platform and may not be fully covered in metadata. This will need to be taken into consideration for the proposal document.

The next meeting of this Sub-Group will take place on Monday 6th February 2017.