

BIC PRODUCT DATA EXCELLENCE AWARD (PDEA) ACCREDITATION SCHEME REVIEW TASK & FINISH WORKING GROUP – Minutes

Location: Bowker's Office, 5th Floor, 3 Dorset Rise, London EC4Y 8EN

Date and time: Thursday 8th February 2018, 2pm

Minutes taken by: Alaina-Marie Bassett

Present

Alaina-Marie Bassett, BIC
 Graham Bell, EDItEUR
 Andrew Henty, Virtuales Publishing Solutions
 Clive Herbert, Nielsen
 Lada Kriz, Penguin Random House (delegate)
 Karina Luke, BIC
 Alistair Mann, Hachette
 Peter Mathews, Cambridge University Press
 Cecilia Rushton, Hachette
 Chris Saynor, EDItEUR

Paul Theijs, BooksoniX
 Jack Tipping, Bowker
 Gabrielle Wallington, Waterstones
 Keith Walters, Bibliographic Data Services

Apologies

Kat Coveyduck, Virtuales Publishing Solutions
 Nabiha Evans, Amazon
 Jon Green, Bertram's
 Will Harvey, Gardners
 Laura Williams, Penguin Random House

1. Introductions and apologies

JT welcomed the Group to the meeting and the apologies were delivered. It was noted that Kieron Smith of Blackwell's has now resigned from this Group.

2. Competition Law – Conduct Reminder

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

3. Review minutes and actions from the last meeting and any matters arising

The minutes from the previous meeting were approved and the actions were discussed as follows:

- Prospective measurers / assessors for the revised PDEA Accreditation Scheme
 - **ONGOING ACTION:** KL to circulate the final Assessors Specification document to CoreSource, Vearsa and Firebrand Technologies for their consideration, once finalised.
- Measuring tools for the revised PDEA Accreditation Scheme
 - **ONGOING ACTION:** CH, KW and JT to liaise regarding the implementation of a measuring tool for BDS and Bowker's respective systems, once the specification document has been finalised.
 - **ACTION CARRIED OVER:** Once the specification document has been finalised, CH to liaise with Nielsen regarding its ability to measure all descriptions for the purpose of the revised PDEA Accreditation Scheme.
- <RelatedProduct> composite
 - **ACTION:** GW to report back on the BIC Price & Availability (P&A) Task & Finish Working Group's (T&FWG) identification of a way to state more than one relationship in a P&A feed.

- Revised ONIX data element sets – terminology
 - **ONGOING ACTION:** KL to ensure that a glossary is included in the documentation for the revised PDEA Scheme, outlining which is measured / not measured / conditional, etc.

4. Review and sign off on the revised ONIX data element sets

The document, which was circulated to the Group on Wednesday 31st January 2018, was reviewed onscreen during the meeting. The following points were made:

- Data Format
 Organisations using spreadsheets to disseminate their metadata can obtain a Bronze award only on the revised scheme. In addition, ONIX 2.1 (minimum) is required in order to obtain the Silver award and ONIX 3.0 is required for the Gold award. GB noted that the use of long tags is recommended in the ONIX data element sets (to make the file easier to read); this makes the file larger although it can be zipped to reduce the size. PT noted that not all recipients can use zipped files.
 - ❖ **DECISION:** The Group agreed that long tags should be recommended on the revised Scheme.

GB noted that guidance on the continued use of deprecated elements should be produced by this Group. He suggested that applicant organisations could be downgraded if they continue to use an element that has been deprecated for a year or more.

- **ACTION:** AMB to add this topic to the agenda for the next meeting of this Group.

- Contributor Information
 GB noted that the use of structured names could be included as a requirement for the revised scheme however proprietary identifiers cannot be a requirement as not all organisations use them. GW suggested that the use of proprietary identifiers could be recommended for the Gold award, and that structured names should be required on the Gold award and recommended for the Silver award.
- Definitions of terms used
 It was noted that the following vocabulary will be used in relation to the revised scheme:
 - Required – organisations must provide these elements to obtain the specified award
 - Conditional – organisations must provide these elements if / when applicable in order to obtain the specified award
 - Recommended – organisations are advised to use these elements as best practice however they will not be measured as part of the revised scheme.

- Title Information
 KL suggested that the assessors could spot check applicant organisations' feeds to ensure that promotional text is not included in either the Title or Subtitle fields. GB suggested that the organisations which misuse these fields should be penalised. GW and KW raised concerns about how this process will work in practice, noting that the current assessors currently check whether a field is populated rather than the validity of the information included in each field. KL, GB and PM agreed that looking at applicant organisations' data quality is a move in the right direction for the revised scheme. How this might actually work in practice needs further discussion. CH

noted that spot checking will increase PDEA Assessors' costs and manual workload (having an impact on the time it takes to carry out the assessments). KW noted that, if this practice is adopted for the revised PDEA Scheme, this Group will need to produce a clear set of guidelines for the BIC PDEA Panel to follow.

❖ **DECISION:** The Group agreed to discuss spot checking for quality at the next meeting.

➤ **ACTION:** AMB to add this topic to the agenda for the next meeting of this Group.

- Edition Information

GB noted that, where an edition is not applicable, it is a conditional requirement for applicant organisations to provide a positive <NoEdition/> tag in order to obtain a Gold award.

- Product Form

❖ **DECISION:** Use of the <ProductFormDetail> tag should be recommended, if applicable to a product, i.e. file format for eBooks.

❖ **DECISION:** Use of the <ProductFormFeature> tag (for accessibility features) and the <EpubTechnicalProtection> tag (for Digital Rights Management (DRM)) should be conditional requirements for the Gold award, i.e. for digital products only.

❖ **DECISION:** If a digital product does not have accessibility / DRM features, this should be specified positively in the metadata feed rather than leaving these fields blank.

GB noted that a component (i.e. a product which is not available for individual sale) may have a proprietary ID assigned to it instead of an ISBN; this is a requirement in Germany due to VAT.

❖ **DECISION:** The Group agreed that use of the <ProductPart> tag should be recommended.

- Product Properties

PT noted that the weights and dimensions of Print On Demand (POD) products – especially those provided by organisations outside of the UK – can occasionally exceed the agreed allowance.

❖ **DECISION:** Supply of Spine Width (03) and Weight (08) measurements should be a conditional recommendation for the Gold award, i.e. for physical products only.

- Audience

CR noted that supplying this information to retailers is useful. GW noted however that it would be difficult for the Assessors to ascertain whether the information being provided by publishers is correct or not. CS noted that content warnings may already be a requirement for those sending metadata to Apple.

❖ **DECISION:** Content warnings should be a conditional requirement for the PDEA Gold award.

➤ **ACTION:** GB to add guidance in ONIX Code List documents regarding the use of content warnings / which audience type codes content warnings are required for.

- Subject

❖ **DECISION:** *Thema* usage should be a requirement for all awards on the revised scheme as follows: Bronze – 12 months from launch of scheme; Silver – 6 months from launch of the scheme; Gold – immediately upon launch of the scheme.

- Description
 GB noted that, to gain a PDEA Gold award, applicant organisations should be able to support promotional headline, endorsement, long description, table of contents, reviews, combined contributor biography and other text content types.
 - Cover
 ❖ **DECISION:** Provision of a thumbnail image should not be recommended; retailers can create a thumbnail image from a larger image, if required.
 - Sales Rights
 GB noted that, in order to obtain a PDEA Gold award, applicant organisations are required to provide comprehensive rights information using multiple <SalesRights> composites; this is a requirement for ONIX 3.0 already.
 - Pricing
 ❖ **DECISION:** Supply of Irish prices should not be required on the revised PDEA Scheme; only Sales Rights need to be prescriptive, not pricing.
- **ACTION:** GB to send the final ONIX data element sets document to KL and AMB for circulation.

5. Review and sign off on the PDEA Assessors' Specification

- Introduction
 ➤ **ACTION:** KL to include reference to the 3 ONIX data element sets in the introduction of this spec.
- Who can be a BIC Assessor?
 KL noted that all assessors for the revised PDEA Scheme will eventually need to be accredited via what will be a new BIC scheme: Metadata Recipients Accreditation, which will be created as Phase 2 of this project.
- Metadata Set used for Each Level of Accreditation
 KL noted the level of award given (Bronze, Silver or Gold) relies on suitable combinations of the 3 metadata element sets (Basic, Intermediate and Advanced), timing and delivery mechanism. For example, if an organisation provides metadata to the Advanced data element set standard but disseminates it in a spreadsheet, the organisation would obtain a Bronze award only.
- Criteria for Publishers Applying for Accreditation
 ❖ **DECISION:** The Group agreed that "ISBNs" should be amended to "products" in this section.
 ❖ **DECISION:** For Bronze, applicants must send metadata feeds to at least one UK Data Aggregator.
 ❖ **DECISION:** New publishers will need at least 6 months' worth of data (by publication date or UK market date (whichever is later)) in order to be considered for accreditation.
 ➤ **ACTION:** KL to amend this section according to the decisions outlined above.
- Items in and out of Scope for Accreditation

- ❖ **DECISION:** The Group agreed that any ISBNs / GTINs which are indicated in metadata feeds as being Out of Print (OP), are out of scope for the revised PDEA Scheme.
 - ❖ **DECISION:** If the OP product (ISBN / GTIN) is produced again in future it won't be measured for timeliness in the first 12-month period of its reintroduction.
 - **ACTION:** KL to amend the first bullet point of this section according to PM's feedback.
 - **ACTION:** KL to add "e-audio" to the second bullet point in this section.
 - **ACTION:** ALL to consider whether to produce a checklist of items that are in / out of scope for PDEA assessors' use.
- Measuring all Active and Published ISBNs
 - **ACTION:** CS to provide KL with a definition of "publication date" and "availability date" for inclusion in this section and for clarification at the beginning of the PDEA Assessors document instead.*
 - Summary Grid: Metadata File Delivery Method
 - **ACTION:** KL to specify "ONIX 3.0" in the italic text at the bottom of the grid.
 - Scope of the Submitted Metadata File
 - ❖ **DECISION:** Applicant organisations can request for a section / distinct unit of its business to gain accreditation separately; the decision on these requests will be at the discretion of the PDEA Panel and will be based on the information provided by the applicant publisher.
 - **ACTION:** KL to add "e-audio" to the list in the first paragraph of this section.
 - Receiving and Loading the Publisher's Metadata File
 - **ACTION:** KL to reword this section to reflect that all assessors for the revised PDEA Scheme need the capacity to deal with the metadata they receive within 24 hours.
 - Metrics and Reports

CH noted that assessors need a minimum of 6-months' statistics accumulated for each applicant organisation.

 - **ACTION:** KL to add information about the requirement / minimum (above) into this section.
 - Active and Published ISBNs/GTINs
 - **ACTION:** KL to add "received" into this section.
 - Monthly Reports to Publishers
 - **ACTION:** KL to reword paragraph 3 of this section regarding the impact of the time stamp.
 - Measuring Timeliness
 - **ACTION:** KL to include a definition for "publication date" and "availability date" in this section or include this clarification at the beginning of the PDEA Assessors document instead. See above.*
 - Price and Availability (P&A) Metadata from 3rd Party Distributors

The Group discussed whether importers and sales agents will be able to apply for accreditation on the revised PDEA Scheme.

❖ **DECISION:** The Group agreed to revisit this discussion in the next meeting.

- Hierarchy

❖ **DECISION:** Information about ISBN prefixes is not appropriate for this section.

- Calculating the Accreditation Result: Worked Example of Assessor Measured Stats

➤ **ACTION:** KL to amend the first worked example, removing the highlighted “90”.

➤ **ACTION:** KL to add required percentages to the grid of worked examples.

- Checklist of Mandatory Requirements for Assessors

➤ **ACTION:** KL to amend the sixth bullet point according to GB’s feedback during the meeting.

➤ **ACTION:** KL to send the final Assessors Specification document (including all of the amendments / corrections made during this meeting) to AMB for circulation, ASAP.

➤ **ACTION:** KL to ensure that all the documentation produced to date uses the correct terminology for the requirements of the revised PDEA Scheme, i.e. required, conditional, recommended, etc.

6. Review deliverables from the Project Specification

➤ **ACTION:** AMB to add “Agreeing the go live date” to agenda for the next meeting of this Group.

7. A.O.B

KL reminded the Group that, as per the BIC Strategy Implementation Plan for 2018, this project needs to be completed by the end of December 2018. She commented however that the launch of the revised scheme is dependent on the Assessors being able to measure applicant organisation’s metadata for the purpose of this Scheme.

8. Date of next meeting

Tuesday 13th March 2018.