BIC WEB SERVICES TASK & FINISH WORKING GROUP MEETING - Minutes
CILIP Building, 7 Ridgmount Street, London WC1E 7AE
Thursday 5th February 2015, 10am

Present
Alaina-Marie Bassett, BIC
Graham Bell, EDItEUR
Gareth Bradley, Hachette
Francis Cave, Consultant
Catherine Cooke, Westminster Libraries
Matthew Dovey, Ceridwen
Simon Edwards, Consultant
Richard Elsley, Booksolve
John Garrould, Bertrams
Richard Hurrell, Bertrams
Karina Luke, BIC
Peter Morley, Publishing Technology
Barry Richardson, Nielsen
Terry Willan, Capita
Chris Wood, HarperCollins

Apologies
Andrew Coburn, Essex Libraries
Sam Langdon, Hachette
Ian Manson, Infor
Tim Wilson, Hachette
Jonathan Wraight, Hachette

1. Introductions & Apologies
The Group were welcomed to this inaugural meeting of the Web Services Task & Finish Working Group and introduced themselves for the purpose of the minutes. SE noted that all relevant documentation, including the Project Brief and Terms of Reference (ToR), were circulated to the Group prior to this meeting.

2. Confirmation of Project Leader and Deputy
It was noted that the Project Brief suggested that John Garrould of Bertrams might be the Chair of this Group, with Simon Edwards as the Deputy Chair, due to their experience with web services. The Group agreed that JG and SE should be the Chair and Deputy Chair for this project.

3. With reference to the Project Brief, purpose of this Task & Finish Working Group
a) Review of deliverables, dates and schedules of Project
SE noted that it is good practice to hold inaugural meetings in person but noted that henceforth this Group will convene via conference calls. He also noted that any additions or changes to this Project Brief must be discussed during this meeting.
SE noted that some deliverables for this Project will be easier and quicker to resolve than others. FC agreed, noting that there is a list of implemented standards on the BIC website (http://www.bic.org.uk/21/Web-Services/) which can be addressed initially. He noted that these web services are made up of ten pairs of message requests / responses for returns, despatch, etc., but commented that we do not know – and cannot know – who is implementing these web services within their organisation. JG suggested that hubs could be asked to volunteer this information. RH noted that Bertrams have implemented various web services for their customer’s systems both internal within the group and with numerous external customers including traditional retailers and internet traders. FC noted that he is not aware of any developments to the draft web services, listed on the BIC website; and questioned whether the Group has heard of any developments / pilots. RE noted that Customer Direct Fulfilment (CDF) has been implemented for one of Booksolve’s customers.

The Group went on to discuss Post-Financial Document web services, i.e. for use with invoicing. JG noted that this web service is likely to be used internationally by hubs, such as Batch, to send financial documents. He noted that the definition of “financial” in this context is, as yet, unspecified because the BIC message is designed as a request / response wrapper for standard XML financial document, therefore allowing this to be adopted easily for other use cases. GBR noted that Hachette currently send all financial documents via email and this web service would save both paper and manual efforts. CC noted that Westminster Libraries have a new financial system but commented that they are in need of a copy invoice to move information onto their library system. BR noted that booksellers are not in attendance at this meeting, or indeed represented on this Group whatsoever, and suggested that their needs / preferences should be sought out. JG noted that some potential customers, who could be approached for their feedback, may not be BIC members. The Group agreed that Simon Parker of Batch and Waterstones should be approached. He also commented that more Library Management System (LMS) users will need to be in attendance should library issues be included within this Project Brief. **ACTION: AB to contact Simon Parker of Batch and Waterstones to join this T&FWG.**

FC noted his surprise that backorder summary and release web services are not, as yet, implemented. RE agreed, noting that these web services are a high priority for Booksolve. JG also noted that a book industry standard for requesting backorder status reports automatically and retrieving these in a standard format is a priority and has been raised recently through the BIC EDI Clinics.

The Group discussed the web services messages that are listed in pages 7 and 8 of the Project Brief. It was noted that these services need to be checked to ensure they are still fit for purpose and then promoted to BIC Members. These include:
1. Get ONIX record  
2. Get MARC record  
3. Send / put financial document  
4. Get backorder summary (Get backorder detail)  
5. Request backorder release  

Requested new messages include:  
6. Order delivery address change  
7. Request authority to despatch  
8. Authority to despatch  

For example, the Group questioned whether “ONIX record” could now be more specific, noting that this web service was defined in the ONIX 2.1 era and could be more granular for its use with ONIX 3.0 where sub-sets of records / block level updates can now be requested.

The Group noted that “MARC records” are more of a concern for libraries. FC commented that there isn’t a high demand for this web service and questioned its position on the hierarchy of desired outcomes for this Project Brief. GB noted that Booknet Canada are developing this web service and suggested that they may have extended it or even set up a JSON version.  

**ACTION:** KL to follow-up with Booknet Canada to find out what they have implemented and what they are doing in this area.

GB suggested that more JSON versions of web services might be required for other services too. JG commented that this addition could duplicate the workload of this Group and suggested that the resources are too limited to support SOAP, REST and JSON versions of the messages at this time.

CW suggested that this Group should, instead, develop web services in a JSON-concerate way so that they could be developed subsequently, if required. He noted that HarperCollins Publishers have commissioned systems with this in mind before.

JG noted that SOAP / REST are more widely embedded as enterprise integration technologies at this stage than JSON. It would therefore be sensible to continue to develop for SOAP / REST while being aware that we may want to provide a JSON version in the future if there is sufficient demand. MD agreed that JSON is more favoured by web developers and SOAP is more favoured as an enterprise grade technology.

JG noted that that the BIC Web Services properly supported the Unicode character set which is especially important when trading internationally while EDI struggles with anything beyond A..Z / 0..9. This becomes especially important in the order message for delivery addresses and customer names.
JG said that there is a need for a new “Order Delivery Address Change Message”. This is because a) some customers don’t want to send consumer details until the point at which stock is ready for despatch – i.e. they don’t want to expose consumer details to a supplier on an order which is being sent on a fill or kill basis and b) because people frequently want to change the delivery address after maybe because they have moved or they want it delivered to their work address.

FC noted that points 7 (Request authority to despatch) and 8 (Authority to despatch) are a pair of web services. JG commented on the importance of these web services, noting they support the Distance Selling Regulation requirement that the consumer’s credit card wouldn’t be charged until the supplier is ready to despatch. He noted that this process requires the payment to be cleared / authenticated by the customer (website operator or retailer) to take payment at this late stage. MD questioned the reference to FTP in 3.3 of the project brief. JG informed MD that this reference to FTP needs to be deleted from the brief, it was a throwback to concerns about large payloads via http. Moving from FTP to HTTPS will greatly improve security.

SE noted that an implementation phase for this web service may not work in actuality and suggested that it may be perfected over time / with use. The Group agreed.

SE questioned the Group as to whether there are any further web services that have not been identified in the Project Brief. JG noted that some library systems (LMS vendors) are looking to create their own messages to replace the use of EDI. This is primarily being driven by the need to be able to order eBooks and provision them from suppliers such as Dawson in real-time which can’t be easily achieved using legacy EDI messages designed for the era of over-night batch processes. The Group agreed to discuss this topic in section 5 of the minutes.

GB commented that CSV files are in constant use and noted that it is ironic to build an intrinsic system only to send / receive CSV files with it. BR agreed but noted that CSV files are cheap and work well.

SE noted that “printer despatch note” web services may need to be developed. He noted that a message could be sent to the distributor to raise an invoice. The Group agreed that this should be added to the Brief; noting that this would be an acknowledgement more than a pairing. They also commented that a printer will need to be consulted to give comment on their requirements. They agreed that this additional deliverable will not be a priority.

**ACTION:** KL to add Printer Despatch Note to the Project Brief.

**ACTION:** KL to approach printers for feedback on their requirements for this web service, once it is being worked on.
KL noted that both a User’s Guide and Beginner’s Guide are deliverables of this Project. She also commented that a document listing the benefits of web services and an FAQ document might be useful.

JG commented that a web services training course is available from BIC to educate any interested delegates who want further information, though FC informed the Group that this is a technical, not a business-level course.

SE noted that it would be beneficial to be able to record which organisations download web services from the BIC website. He noted that this wouldn’t necessarily mean that the download will be implemented but suggested that BIC could follow up with the organisation about their progress at a later stage. GB agreed that this would be useful but noted that other organisations have tried to record downloads previously and failed. JG noted that it’s the nature of Web Services that customers tend to download the WSDL files and self-service – the only way to know who is using Web Services is to review server logs.

TW suggested that an online forum might be a good way of addressing web services requirements and finding out about any implementations. GB commented that a high proportion of users would use personal email addresses so that – should they leave their current employer – they will remain informed. He also expressed his concern that a forum would not be used to any large extent. The Group agreed that a mailing list or forum would be beneficial but suggested that, if the monitoring of this forum becomes too onerous or is not put to use, then it will be abandoned.

**ACTION:** AB to set up forum for web services on the new BIC website, once it has been launched.

SE informed the Group that the Library Technical Implementation Clinic (LTIC) is currently seeking a solution for eBooks that are ordered by EDI where the library want to specify the nature of the product, e.g. PDF or ePub, single user or concurrent. GB noted that the issue here is what the product is as opposed to what the library requires, i.e. if the library wants a specific eBook with different terms to those on offer, it is not the same product. In other industries each product variant such as a colour way has a different identifier. SE informed the Group that this issue had been raised by Ingram Content Group initially. CC noted that this issue is particularly poignant for academic libraries. BR noted that TRADACOMS would be unable to deal with this problem. GB commented that libraries often request a product under a different licence by ordering the advertised product but specifying in text what their licence needs to include. He suggested this this is not viable for suppliers. He suggested that a solution might be to have suppliers offer an array of different licences / rental options but noted that a separate ISBN would be required for each licence. All of which will cause additional manual labour for suppliers. KL questioned whether this issue has a place in this Project.
Brief. GBR argued that this issue stems from how the product is structured and is therefore not in the remit of this Group. KL informed SE that this issue will be passed on to the Digital Supply Chain Committee for consideration at their next meeting. SE noted that the existence of two cover images for a single title can also pose an issue in the same way; with a customer requesting a particular cover image. **ACTION:** AB to add eBooks ordered by librarians with EDI to the agenda for the next Digital Supply Chain Committee meeting.

SE informed the Group that the progress of this T&FWG will be reported back to the Physical Supply Chain Committee on a monthly basis since KL will receive a monthly update from the Chair / Lead which will in turn be submitted to the Committee. He noted that the Project’s end date will be September 2015, by which time all the deliverables in the Project Brief (including User’s Guides and other documents) will need to have been completed. He noted that these will then form the basis of a pilot scheme which will be communicated to a number of organisations for live testing; though draft versions of new/amended pairs of web services will be circulated periodically throughout the Project’s lifetime. The Group agreed that this would be the best way to ensure progress is achieved and all requirements are piloted appropriately. They agreed that any issues regarding maintenance and any further developments will be dealt with after the project’s end date and the Group may reconvene to resolve these subsequent issues then. SE noted that calls will be structured to check on the progress of the Project; these will take place in March, May, July and September. JG noted that further calls can be set up during the lifetime of the project, should they be required.

b) **Reminder of Terms of Reference for BIC Task & Finish Working Groups**
KL drew the attention of the Group to the Terms of Reference (ToR) for Task & Finish Working Groups. She noted that members of this Group need to be in attendance for all meetings, and noted that, if a member of the Group cannot attend a meeting, they should send a delegate in their place. The Group agreed, and noted that the Project Brief should be updated to incorporate libraries’ needs.

**ACTION:** JG to approach Heather Sherman to encourage her involvement in this Group. **ACTION:** KL to amend the Project Brief to include libraries’ requirements for web services.

4. **Libraries’ requirements for web services**
A discussion surrounding the requirements for libraries’ use of web services was raised at the most recent Libraries Committee meeting. It was suggested that the Web Services T&FWG should incorporate libraries into the proposed Project Brief. After a short discussion on this, the Group agreed there is a need for this inclusion. JG volunteered to approach Heather Sherman to ask her to take part in this Group. KL suggested that organisations should not be asked to attend any meetings that focus on web services that their sector will not use (i.e. libraries should only be asked to attend meetings that directly involve their requirements). The Group agreed, and noted that the Project Brief should be updated to incorporate libraries’ needs.

**ACTION:** JG to approach Heather Sherman to encourage her involvement in this Group. **ACTION:** KL to amend the Project Brief to include libraries’ requirements for web services.
JG suggested that the best way to gain feedback from the library community might be to hold a targeted workshop for this purpose.  
**ACTION:** JG to liaise with KL regarding a libraries workshop for web services, ASAP.

5. **Agree first actions and owners, with reference to Project brief**

KL suggested that a status grid for progress should be set up initially, including a column for the level of implementation for each web service. She suggested that the priorities for this Group should be ascertained from this grid. SE agreed, noting that this should be set up as quickly as possible to get the project moving. FC noted that issues which require the least amount of work should be resolved first, and suggested that the level of changes anticipated for each web service should be taken into account also. GB suggested that FC should look at the web services initially, to provide a forecast of what needs to be done. He noted that the intention should be to ensure that the services are as up-to-date as possible, regardless of whether changes have been requested or not. The Group agreed this task should be completed in advance of the next meeting.

**ACTION:** FC to review the web services on the BIC website and put together a status grid for this Project by 6th March 2015.

**ACTION:** AB to forward the grid to this Group, once it is written.

PM suggested that a survey should be written to ascertain which organisations use each web service. This will facilitate the Group in getting feedback / requirements for each web service and simultaneously help members to discuss web services and their experiences of them amongst themselves.

**ACTION:** KL to write survey and forward to this Group for their comments before circulating. The Group suggested that a LinkedIn Group or Google Group should be set up to record this Group’s discussions. KL noted that this could be done on the new BIC website as a T&FWG forum, once the site has launched.

**ACTION:** AB to set up a forum for this T&FWG once the new BIC website has launched.

6. **A.O.B.**

None.

7. **Date of the next meeting**

Conference Call: Wednesday 25th March 2015.