Migrating from ONIX 2 to ONIX 3

Many publishers and intermediaries have implemented ONIX, mostly version 2.1. From as far back as 2010, they have been urged to update to or adopt ONIX 3.0. This BIC Bite addresses the question, “Why?”

Background

ONIX (ONline Information eXchange) is the book industry’s primary metadata standard for the supply of information about books and e-books, and is developed and supported by EDItEUR, the trade standards body for the global book, e-book and serials supply chain. ONIX for Books is strongly supported by BIC, and BIC’s Metadata Sub-Committee. In addition, the UK ONIX national group, hosted by BIC, provides input to the international development of the standard. For basic information on ONIX, see “BIC Bites: Introduction to ONIX”. ONIX 1.0 (2000), ONIX 2.0 (2001) and 2.1 (2003) were excellent ways to inform trading partners of product metadata. But since then there have been some major changes in the book industry, most notably the rise and development of global digital sales. An ONIX standard which reflects the new products and channels is now needed, and ONIX 3.0 has been specifically designed for these requirements. The other main reason is the ongoing cost of continuing with old parts of ONIX which are no longer used (or are deprecated) but which still have to be supported by ONIX recipients. Organisations that use ONIX 2.1 should migrate to ONIX 3.0, and those adopting ONIX for the first time should specify version 3.0 from the outset, as version 2.1 will no longer be supported after December 2014.

What’s New in ONIX 3.0?

ONIX 3.0 has a range of improvements reflecting the new requirements of the industry.

1. There are now improvements in how you can specify sales rights, territories, markets and price validity and an improved framework to cope with new ways of trading e-books, including permissions and constraints (whether enforced by DRM technology or not).

2. Creation of a new ‘Product Supply’ group to enable the status of a product in different markets to be more clearly and accurately described.

3. Most textual metadata can now be provided in multiple languages ‘in parallel’, within a single record.

4. With the introduction of the ISTC (International Standard Textual Code), ONIX 3.0 improves the way that products can be related to ‘parent and child works’ to identify groups of different editions of the same and related text.

5. Replacing Sets and Series with a more logical “Collections” hierarchy.

6. New data element groups have been introduced to cover the much greater variety of marketing ‘collateral’ that publishers are now making available over the Internet, or that publishers and aggregators are citing in order to support more effective online selling.

7. The use of Unicode characters to supersede the old ‘named character entities’, for example using “...” in place of “&hellip;” to represent an ellipsis (though you can still use the numerical equivalent, “&#x2026;”).

8. Part of the change comprises a tidying up exercise to remove previously deprecated tags and replace them with more flexible composite tags.

9. Block Updates – A small change no longer necessitates sending the whole record. With the new “Block” updates you can send only the block that needs changing.
10. ONIX 3.0 has improved documentation and supporting software tools including the XSD and RNG Schemas and a Schematron, all of which should help developers and implementers. There is also an extensive Implementation and Best Practice Guide (see http://www.editeur.org/93/Release-3.0-Downloads/#Best%20practice) which aims to improve the international interoperability of ONIX implementations.

Many of these changes are complete re-thinks and definite improvements on ONIX 2.1 and are highly recommended for organisations involved in these areas.

The Implementation Problem
ONIX 3.0 will be much better for everyone involved in the book metadata supply chain. To send ONIX 3.0 you need a trading partner who is capable of receiving ONIX 3.0, and to receive an ONIX 3.0 file you need a trading partner who is capable of supplying ONIX 3.0. This could lead to inertia and the temptation to stay on ONIX 2.1 as many of your trading partners may not yet have upgraded to ONIX 3.0. There is the added problem of accommodating both ONIX 2.1 and 3.0 simultaneously until your last trading partner has switched to ONIX 3 when you can then switch off ONIX 2.1.

With the sunset date for ONIX 2.1 set for the end of 2014, it means that ONX 2.1 will no longer be supported as it currently is. EDItEUR and the ONIX International Steering Committee gave three years notice of this sunset, with the aim to minimising the period when publishers and retailers would have to support both 2.1 and 3.0. BIC members are strongly advised to upgrade to ONIX 3.0 as soon as possible, and contact their systems suppliers and trading partners to discover their plans to upgrade or to discuss sending or receiving ONIX 3.0 test files.

What effort is needed to switch to ONIX 3.0
ONIX 3.0 is approximately 60% the same as ONIX 2.1, so it represents a fairly significant development rather than just a simple new release. However, with a well designed product database, you should not need to implement any disruptive database changes – so in this case, ONIX 3.0 would be more like implementing a new report format. Most of those who have added ONIX 3.0 to an existing system have reported it to require less work than they originally expected. Many leading systems vendors have already implemented ONIX 3.0 or are in the later stages of development, and if you use their system then it should be fairly straightforward to work with them and with your trading partners.

BIC will be monitoring the roll-out to ONIX 3.0 and highlighting the names of ONIX 3.0 capable organisations on the BIC website so that you can identify trading partners who are already able to proceed to implementation.

BIC members can raise questions about ONIX 3.0 with the BIC Metadata Sub-Committee and information is available on our website at www.bic.org.uk. Alternatively, you can contact EDItEUR via its website at www.editeur.org.

Training
BIC runs a range of metadata training courses including, Metadata for Beginners, an Introduction to ONIX and an Advanced ONIX course. BIC has also run briefing sessions (BIC Breakfasts) on the specific challenges and details of migrating from ONIX 2.1 to 3.0. Large organisations might want specific ONIX 3.0 training in-house, and they should contact BIC (Karina@bic.org.uk) to arrange this.

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