

# EDItEUR & ICEDIS Briefing at Charleston 2016

Courtyard Marriott Hotel, Charleston, SC  
Wednesday 2<sup>nd</sup> November 2016

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## Minutes

### 1. Welcome and introductions

- a. Tim Devenport started the meeting, and informed everyone that he has been named the executive director of ISNI. This is in addition to his work at EDItEUR/ICEDIS. Laurie Kaplan (ProQuest) was introduced as the co-chair attending this meeting.
- b. Each attendee then introduced him or herself: attendees are listed at the end of these minutes.

### 2. About EDItEUR and ICEDIS

Tim briefly explained EDItEUR's role and the place of ICEDIS within it:

- a. EDItEUR is a member funded/driven international organization focused on standards, identifiers and projects; all standards from EDItEUR are free to use
- b. ICEDIS – special interest group regarding serials and library supply chain (started as International Committee in EDI for Serials); is also used as the name of the legacy renewals standard
- c. Transactional (original ICEDIS – ordering & renewals; ICEDIS XML formats, EDIFACT, EDItX – selected EDIFACT in XML) and descriptive standards (ONIX – ONIX-PC, ONIX-PH, ONIX-PL, structured name & address, previous ONIX for Serials) are supported

### 3. Communicating serials product information using ONIX-PC

ONIX-PC, a standardized format for communicating rich product and pricing metadata, has been the main focus of ICEDIS attention for the past several years. Tim briefed the meeting and led the discussion about possible future directions:

- a. Recent activity – extensions to ONIX-PC to include support for open access alongside paid-for subscriptions
- b. ICEDIS OA working group amassed business cases regarding OA licenses, APCs, hybrid issues, change of status of publication, “white-listed” sources, packages with subscription and OA content (hybrid packages), free v. OA, etc.
- c. Collaboration with JISC; DOAJ; some funding agencies – need to talk with librarians
- d. Modeling exercise – composite elements <OpenAccessDetails> with controlled vocabulary terms, and prices as optional; now all included in V. 1.2
- e. Designed to incorporate OA features as well as subscription pricing in ONIX-PC; could use to send a separate “price” list for OA titles (Bob Boissy question/comment) if required

- f. Implemented by Springer-Nature, Wiley, T&F, LM Info, Cambridge University Press (initial testing), Elsevier (re-implementation); pilots or upgrading – Wiley, Springer, Harrassowitz, LM Info, CUP, Elsevier; expressed interest – GOKB, KBPlus, PQ, OCLC, ISSN International Centre, EBSCO; software vendor support from Ingenta/Vista. ICEDIS would welcome further vendor involvement, for example from Advantage, Klopotek and others
- g. Anthony, Iris – need librarians involved as well as organizations such as AAUP. This prompted various suggestions, including these:
  - i. Heather: CoreSource, Firebrand could help (but aren't they books – LK?)
  - ii. Rich C – rates sent to EBSCO – not used; at EBSCO they are converted into EBSCO format; EBSCO service will consume any format; tiered pricing; current and full-run (70 journals with 3000 rates)
  - iii. University Presses – upheaval by Mellon Foundation not-for-profit funding; investigate potential for Mellon to pilot ONIX-PC trials
  - iv. Change of platforms is a problem; libraries aren't necessarily adding the OA titles to their catalogs; discovery services can also have issues with platform changes. Would be good to get lead-time info to discovery services, librarians, etc.
- h. In the UK, Jisc is sponsoring work on journal-level policy expressions related to OA; EDItEUR is part of that discussion and ONIX-PC-style concepts could be useful
- i. Look for a venue to have more of a brainstorming session – good constituency at Charleston – need a description to give to Anthony to pitch to Katina for the next time
- j. Other ONIX-PC work is under consideration – better support for EU tax requirements, an Acknowledgement message, additional elements and/or a specific ONIX-PC profile to help populate DOAJ
- k. A question was raised by University of Chicago Press concerning the legacy ICEDIS standard: will there be any changes to it – UChicago Press, and perhaps others, want to send tiered pricing? Tim responded that there are no current plans to amend or add to the legacy standard, for two reasons: (1) it's very rigid and unforgiving of structure changes (no proper field delimiters so any changes in position of information in the file can break it); (2) there's a long tail of users beyond those directly known to EDItEUR. Our preference would definitely be to migrate to a more modern and maintainable standard, although there has so far been reluctance to pilot the prototype replacements we've built. But tiered pricing arrangements can already be handled within ONIX-PC, thus at a product rather than individual subscription level

#### **4. “Fast Five: Prepare Yourself for the Upcoming COUNTER Release”**

Heather Staines, ProQuest and Board Member of Project COUNTER, gave a lively and quick-fire preview of the upcoming release 5 of the COUNTER standard:

- a. Heather introduced herself; she works with the Global Content Alliance group for ProQuest, after the acquisition of SIPX; she joined the board of COUNTER in December 2015
- b. 2002 Original COUNTER, then SUSHI, SUSHI Lite (not published yet?), and USUS – community website in 2015, Rel. 5
- c. [www.usus.org.uk](http://www.usus.org.uk) – good info regarding COUNTER – links, news & opinions, usage report issues, hints & tips
- d. Rel. 5 is designed to get more publishers on board; addressed issues with XML and HTML reports in Rel. 4; greater SUSHI compliance; simplification of reporting
- e. Goals are consistency (XML and Excel SUSHI reports), clarity (implementation of COUNTER reports and SUSHI), simplification (filters instead of separate reports), continuous maintenance (introducing updates between releases)
- f. Almost complete draft of COUNTER 5; community comment EOY into spring; analysis of comments, updates, and release in June with 18 months to comply

#### **5. Revisiting the scope of ICEDIS**

Laurie led a quick discussion around the most effective scope of ICEDIS and ways for keeping it relevant in a rapidly changing serials landscape:

- a. Surveys – may want to find out which parts of ICEDIS are used by various entities; difficult to figure out if a survey has been answered in a large organization; could be from various individuals as long as it says it is a personal statement; or do you need an appointed contact?
- b. Assessment of utility – want to figure out a way to make sure we are focused on the right things, and that we are addressing the needs of our members
- c. Laurie asked for any info or ideas to be sent to her and/or Tim

#### **6. Related standards initiatives – NISO and elsewhere**

NISO’s Nettie Lagace presented a useful survey of various standards initiatives currently active, primarily under the auspices of NISO or ISO:

- a. Newest publication – Recommended Practice from Altmetrics, funded by Sloan Foundation – assessing impact; definitions and metrics; alternative output types; code of conduct for data providers (Sept. 2016)
- b. 4 new projects underway –
  - i. Tracking link origins – publishers whose content goes into discovery systems through a link resolver; mapping referring sources; source id – CID – in the OpenURL and can pass through; see JSTOR’s syntax
  - ii. Ebook metadata – describing metadata needs – publishing, libraries, preservation services, etc. (ONIX, MARC) – formation stages
  - iii. Library APIs – RESTful – exchange of data from libraries between users and content providers – academic and public (Library simplify project;

- Overdrive transactions – inconsistent interfaces – Queens (NY) Library – want to keep user in the library interface, not send user out to another system
- iv. Automated exchange for KBART information – also may be based on SUSHI Lite structure (not published yet – JSON and RESTful; not SOAP); send info about a library’s own subscriptions to discovery
- c. TC46 – ISO Technical Committee
  - i. ISSN Revision – working group being formed; contact Todd Carpenter if interested – assignment for digital content; business model for ISSN Centre
  - ii. ISBN Revision – done; awaiting negotiation of registration authority agreement between ISBN International and ISO. Expected soon.
  - iii. ISTC Revision – about to be launched; concerns about status of standard, its application, and the current registration authority
  - iv. ISNI back on track with a formal office and a new director (Tim Devenport); ISNI for institutions – Ringgold, one of ISNI’s registration agencies, will be releasing ISNI metadata freely using an open API later this fall
  - v. ISO-690 – out for ballot – standard on bibliographic references
  - vi. Item identifier project - first draft has been circulated and its out with the community
  - vii. Proposal for new standard for rights metadata
- d. Draft proposal for provisioning text and data-mining
- e. Report on OA Discovery
- f. Authentication – working group in STM community trying to move away from IP authentication; set of principles; outreach phase; looking for partners for pilots (based on SAML (Security Assertion Markup Language) like Shibboleth); secure tokens; social identity systems); early in technology conversations; some conversations in December); perhaps a joint project with NISO for library and publisher contribution; purpose is to improve the user experience
- g. NISO survey on their publications – about 100 – gauge active use through entire community

## **7. PIDapaPrelude – persistent public identifiers for products, parties & organizations**

Tim referenced the upcoming PIDapalooza meeting in Reykjavik, Iceland, which will focus on the importance of persistent public identifiers – ISBN, ISSN, ORCID, ISTC, ISNI, DOI etc. Persistent identifiers sit alongside standards and are an essential component of well-structured metadata. The Iceland meeting will discuss various proposals for organizational identifiers – public identifiers that already exist (such as ISNI), some proprietary standards that already have significant usage/traction (such as Ringgold; Springer Grid ID) and perhaps new ideas in that area; broader usage is being encouraged for ORCID (especially for books); and a proposal from ORCID, Cross-Ref and DataCite for a new identifier is expected

## 8. Other news from EDItEUR

Tim mentioned a few highlights of recent EDItEUR work. Owing to a lack of time, he focused on two main areas:

- a. ONIX 3.03 is the latest release of the ubiquitous ONIX Books standard – further developments have been introduced, and its uptake is more worldwide; based in trade, rather than library books supply chain; more recent releases contain extensive features to support multilingual and multiscript communications as well as many aspects of eBook handling
- b. Thema is an international books subject classification scheme, which has seen rapid international adoption since its launch; the primary objective has been to minimize the additional overhead of having to conform with multiple national classification schemes; Thema can be used alongside such national schemes and in some areas is already effectively supplanting those schemes

## 9. Date and venue of next meeting

The next full meeting of ICEDIS will be at UKSG, 12<sup>th</sup> April 2017, Harrogate, UK, 13:30 - 16:30.

### List of participants:

Tim Auger	Innovative Interfaces
Bob Boissy	Springer Nature
Anne Campbell	EBSCO
Rich Connelly	University of Chicago Press
Tim Devenport	EDItEUR
Laurie Kaplan	ProQuest
Nettie Lagace	NISO
Kathy Law	Maverick
Richard Martin	University of Chicago Press
Iris Nord	Springer Nature
Anthony Watkinson	CIBER Research
Sebastian Weigel	Harrassowitz