EDItX International Steering Committee Minutes

Wednesday 19th October 2016, 9:15-10:15 CEST (UTC+2),
Room Consens, Halle 4.C, Messe Frankfurt

Attendees:

Luc Audrain (Hachette Livre)

Graham Bell (EDItEUR, chair)

Francis Cave (Consultant)

Tim Devenport (EDItEUR)

Suzanne Rozario (EDItEUR, minutes)

Chris Saynor (EDItEUR)

Ketil Stadskleiv (Bokbasen)

1. Welcome and introductions

GB opened the meeting and explained that the aim of the meeting was to establish an EDItX Steering Committee. There had not been one before, and to some degree the development of the EDItX family of standards had been a little *ad hoc* – implementers have asked for revisions as and when needed. The aim of a Steering Committee is to introduce order into that process. It works with our other standards ONIX and *Thema*. EDItEUR obviously has some ideas about which parts of EDItX should be advanced, which parts merit some extra work, which issues EDItX could potentially help solve, but views from the users of EDItX are important. The steering committee will be small and would not attract more than 10 people at first, but that is how Thema and ONIX Steering Committees started out too.

GB invited FC to outline a history of EDItX, the main use cases and current status of the message family.

FC provided a summary. "EDItX has its origins in a joint activity of EDItEUR plus BIC and BISG, starting in around 2002, to develop a suite of XML message formats that could provide an alternative to traditional EDI standards such as Tradacoms, ANSI X.12 and possibly even EDIFACT. At the time it seemed that traditional EDI, widely perceived to be expensive to develop and relying on costly private networks, would be replaced by XML, which appeared to be much cheaper to implement. Various general-purpose XML/EDI solutions were considered, including xCBL (later replaced by UBL) and ebXML, but these were rejected as they did not precisely meet the needs of the book trade.

"Having considered and rejected other options, it was decided to develop a new suite of XML/EDI message formats that would be precisely tailored to the needs of book supply. The initial set developed for BISG and EDItEUR covered the standard messages exchanged in trade book supply. This initial set was subsequently extended to include consumer direct fulfilment (CDF – known in North America as "drop ship"), and work on a second set for library book supply was started.

"The development work was done by FC in collaboration with David Martin, who has an extensive knowledge of the traditional EDI formats used in the book trade. The principal trade book supply message formats developed between 2002 and 2008 are:

- Order
- Order Response / Status Report
- Order Cancellation
- Order Status Enquiry
- Advance Ship Notice (ASN)
- Stock Enquiry

- Stock Report
- Invoice
- Credit Note
- Returns Request
- Returns Response
- CDF Order
- CDF Order Response
- CDF Shipment Report
- CDF Returns Report

"Most of this list of formats are more or less equivalent to traditional EDI counterparts, and herein lies the problem for EDItX. Major players in the book supply chain both in North America and in Europe have already invested heavily in traditional EDI, so are understandably unwilling to invest in a different way of doing the same thing. Consequently, the uptake of EDItX has been slow. Major players in North America stuck with X.12, while major players in Europe stuck with TRADACOMS and EDIFACT. There are some exceptions, especially in businesses which had not already invested heavily in traditional EDI, and this has led to some isolated EDItX implementations in Europe and in Australia, but these are in the minority.

"There are a few EDItX message formats designed for use in library supply, and it is understood that these were implemented in Denmark, although the details are not known. The formats published to date by EDItEUR for use in library supply are:

- Library Order
- Library Ship Notice

"Drafts were produced for other library message formats, but there have never been fully developed. They include:

- Library Quotes
- Library Order Response
- Library Order Status Enquiry
- Library Order Status Report
- Library Invoice

"An example of where EDItX has been influential is in the BIC Realtime set of web service messaging APIs. The payload message formats used in BIC Realtime have been based upon their EDItX equivalents, and in a few cases the EDItX format has been adopted without any alterations. The correspondence isn't exact, because BIC Realtime was developed specifically to take advantage of the near-synchronous response achieved using web services, whereas EDItX was developed for asynchronous messaging in which a significant time delay may be incurred between a message and its response.

"In 2009 BISG again approached EDItEUR about development of a new message format that would address a new and urgent need, at first specifically in north America, to address one of the consequences of the adoption of the 'agency' model by publishers: the need to submit sales tax returns to US state tax authorities. A new message was needed to enable retailers and intermediaries to inform publishers of book sales and, in particular, what sales tax needed to be returned as a consequence of each sale. EDItEUR already had an EDItX Sales Report format that had been specifically developed in around 2002 with the Open eBook Forum (which later became IDPF) for reporting e-book sales. This format was adapted and extended to enable reporting of conventional book sales as well as e-book sales, whether on wholesale or agency terms, with a variant of this format being developed specifically for sales tax reporting. A request from the German book trade led to the develop of a further variant on the same format for sales inventory reporting for books being sold on consignment or similar.

"The EDItX Sales Report standard was issued in North America in two format variants: XML and CSV. It is believed that most implementations in North America use CSV, though it is significantly less flexible. There have been a small but growing number of implementations elsewhere, particularly in Europe, where it is the XML variant that has been implemented."

FC completed his summary – EDItX is a suite of XML messages that to a large extent mirror the widely-used EDI business messages (order, invoice, ASN, GRN, *etc*), plus three additional messages (sales and inventory report, CDF order). In terms of implementation, there is clearly significant use, but the exact level of use in each country is unclear.

KS reported that in Norway, Bokbasen and others are using the sales report and the order message. FC noted that the library variants of the EDItX messages are used in Denmark, and in Germany the order and CDF messages are seemingly widely used.

GB noted that EDItX may be more important in the future: use is concentrated in the e-book and POD sectors. Hitherto, publishers and retailers have concentrated on growing e-book sales volume and market share, but with the market reaching a plateau, overall profitability can still increase even if revenue is static. There is likely to be an increased emphasis on efficiency in the e-book supply chain, and EDItX can help. Sales and Inventory messages are ripe for greater use. GB and KS noted that the documentation is basic – and EDItEUR would need to produce improved documentation if more widespread use was expected.

2.   Discussion of the aims of the committee

GB asked KS, LA to suggest areas of EDItX development that would be most valuable.

KS noted that orders and sales report message are in use, but the trade order message has had to be supplemented by a JSON API. He hoped to be able to use the sales report message more widely in future. LA reported he had focused work on adoption of the sales report. He noted two requirements: firstly, more flexibility on reporting currencies. The second requirement is about the 'business model' – there is a need to be more explicit in pricing for different groups of customers and different constraints and restrictions (similar to price constraints that can now be supported in ONIX 3.0.3).

GB agreed that currency flexibility should be added to the sales report. On pricing, would the addition of the price identifier from ONIX 3.0 be suitable? LA replied that a simple addition of price identifier is not sufficient – the full set of price type / qualifier / constraint / condition / currency / territory dimensions should be explicit in EDItX as well as in ONIX. This is necessary to allow full checking of the sales report.

FC agreed: a key general requirement for sales reporting is that a sales report should contain the data you need to analyse your sales. Price identifier alone is not enough – it requires reference to some other system. LA noted that full details plus the identifier would be best. KS agreed. GB noted that this does imply a significant addition of complexity to EDItX, as has been the case in ONIX.

FC moved the discussion on by asking how these revisions should be handled and introduced into the standard? GB said that first, we have established this communication and this EDItX Steering Committee, (albeit attendance is somewhat limited).

3.   Adoption of terms of reference of the committee

The Draft Terms of Reference for the Committee were agreed to be reasonable, but attendees should provide comments on those over the next two or three weeks. They are closely based on those for ONIX and *Thema*. They establish that there is a committee and how the committee will work. The group should aim to recruit other EDItX stakeholders to a larger meeting in London in March 2017.

In meantime, EDItEUR should continue the work with FC, LA, KS and others – and we should find the right people in the German group to participate too.

4. Selection of first chair of the committee

GB, chairing this meeting, noted that the next meeting should select a non-EDItEUR chair in line with the terms of reference for the committee.

5. Proposals for development priorities

GB summarised the next steps: first, EDItEUR should work to provide improved documentation on the Sales Report, based on the format used for the ONIX specification. In parallel with that, do the work on currency and business model (price constraints *etc*) and incorporate it into EDItX as well. Ensure that the stakeholders see drafts as they develop.

FC reminded the group that there is also an EDItX implement list – we could use that as a standard method of communication that might draw in a few more people. GB agreed: we can expand the use of that list in order to encourage stakeholders to get involved. But we should also try to ensure BISG is included – that involvement may be limited to saying 'this is what we are doing' – but they must be informed.

At the same time – dependent on EDItEUR resources - GB has some ideas on the Inventory Report – at present it's about how many copies of books you've got. One big issue with e-book is the question of whether and why it's not on sale? Is the retailer waiting for content or metadata files, or has one or other failed QA, for example? Alex Ingram and GB designed a potential reporting solution that could fit in with the inventory report structure with just two extra code lists.

If this group is happy with this plan, it will take us very close to a London meeting in March. EDItX will have taken a big step forward.

TD added that it may be possible to include a half page description of the position on transactional messages from serials perspective, to be attached to the minutes of this meeting.

6. Updates on key adoptions

FC reported that BIC in UK has done a lot of work on EDItX-like messages / web services under the BIC Realtime brand. BIC should be reminded to attend the next meeting, and to contribute some kind of explanation of the relationship between Realtime and EDItX – which may bring forth some business requirements from the UK context. The advantage for BIC doing this is that the Realtime additions may get wider engagement. GB noted that it is not in anyone's interest to fork the standard, and that Realtime and 'plain' EDItX should be as similar as possible (consistent with the necessary differences for authentication *etc*).

7. Any other business and 8. Next meeting

GB asked whether there were any other final comments? There were none.

GB noted that the meeting should take place every six months, on the same model as ONIX and *Thema*, and ideally limited to one hour. The next meeting would be during the London Book Fair, exact time and location TBA. With this, the meeting was closed.

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Suzanne Rosario / Graham Bell
EDItEUR
19th October 2016

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