ICEDIS – An Introduction

Overview for the ICEDIS Meeting at NASIG
Nashville, TN, 7th June 2012
Tim Devenport, EDItEUR
In this brief overview ...

- About ICEDIS and how it fits within EDItEUR
- Who’s involved and how does it work
- Aims and objectives / benefits of participating
- Standards we support
- Some recently introduced formats ...
- ... And projects currently underway
- To join the club or find out more
About ICEDIS

• ICEDIS is the International Committee for EDI in Serials
• ICEDIS is EDItEUR’s governance group for existing and new standards in the library supply chain, particularly for serials and other subscription products:
  – Articulating and prioritizing business needs
  – Steering ongoing developments
• Any member of EDItEUR can participate in ICEDIS activities
• The ICEDIS Committee is chaired by leading nominees from the subscriptions business – currently these are Ramon Schrama (Swets) and Keith Whiter (Elsevier):
  – One position coming up for election this October!
• Participants represent a “broad church”, including leading STM publishers, major subscription agents, system vendors, e-intermediaries and others:
  – Would particularly like to deepen library representation
• Standards maintained now much broader than original EDI interchanges
• EDItEUR consultants provide management, technical support, business analysis and message development
Who’s involved in ICEDIS right now

Among organizations actively involved at present are these:

• Agents & distributors: EBSCO, Swets, Harrassowitz, LM Information Delivery, Turpin Distribution, Maruzen, Kinokuniya
• Libraries & providers of library services: EDINA, Kuali OLE, Highwire Press, Stanford University Libraries, Portico/JSTOR, the British Library, Ringgold
• System vendors: Publishing Technology, Serials Solutions, Advantage
• And we actively cooperate/liaise with other standards organizations like NISO!

It’s important to note that our agenda and priorities are set by our members

And our activities are governed via simple & clear Terms of Reference for both the ICEDIS Committee and its Working Groups
How it works in practice

• The full ICEDIS Committee provides both business guidance and governance
  – The Committee meets in person three times a year, with lots of interim communications
  – Currently the North American meeting plus others at UKSG (Spring) and Frankfurt (Fall)

• Specialist Working Groups are set up to progress priority topics
  – Working group members are interested volunteers, supported by EDItEUR consultants
  – Working groups are international and typically have representation from across the library supply chain – incl. librarians, publishers, agents, hosting agencies & vendors
  – Working groups are virtual and progress tasks via phone conferences, email lists etc.

• We actively cooperate with other interested parties

• In particular, we have a formal framework for interaction with NISO
  – NISO’s interest is solicited for each of our working groups
  – NISO and EDItEUR representatives can choose to join each other’s groups
  – EDItEUR and NISO actively liaise to share ideas and avoid duplicated effort
ICEDIS objectives & benefits to implementers

ICEDIS seeks to:

• Proactively specify, develop, test & implement EDI and other standards for subscription resources
• Encourage the exploitation of EDI and metadata exchange standards in the library supply chain
• Act as an independent and international body for the formulation and dissemination of such standards

Key benefits to implementers of ICEDIS standards include:

• Reductions in manual processing, and the attendant risk of errors
• Increased speed of communication and processing, improving customer service
• Reduced costs
• Opportunities for networking and collaborative initiatives with important business partners
EDItEUR standards for subscriptions and library supply – 1

Two families of standards are currently being actively developed

ONIX for Subscription Products (for informational/metadata exchanges):
• Original work was on ONIX for Serials, originally developed together with NISO:
  – SPS format for subscription products and subscriptions themselves
  – SOH format for detailed statements of online holdings
  – SRN format for serial release notifications, both advance schedules and issue-by-issue
• Subsequently joined by a newer generation of ONIX messages, including:
  – ONIX for Price Catalog (ONIX=PC)
  – ONIX for Preservation Holdings (ONIX-PH)
  – Ongoing work on structured addresses

EDItX for subscriptions & library supply (for EDI transactional exchanges):
• Established and growing range of standards in book trade and library supply
• Recent addition was the Claim & Response messages for print journals, developed via an ICEDIS Working Group
• Next in line will be a message to convey New Orders for subscription products
EDItEUR standards for subscriptions and library supply – 2

Two other families of legacy standards are not actively developed but are maintained since they are in such widespread use

EDIFACT:
- Formats in widespread use for invoicing, claiming, status enquiries, etc.
- Still being implemented, even by recent adopters such as Kuali OLE and OCLC

Original ICEDIS formats:
- Fixed-length EDI formats to help automate communications between publishers and subscription agents
- Renewals standard most well-known, plus others for subscription-level pricing and for synchronizing agent and publisher records
- Recognized need eventually to re-engineer these formats: profound changes in products and business models since they were devised
Some initiatives recently concluded

Later today we’ll hear more about these three:
• ONIX for Price Catalog (ONIX-PC)
• ONIX for Preservation Holdings (ONIX-PH)
• An EDItX subscriptions standard for Claims & Claims Responses

We continue to develop and maintain existing ONIX standards:
• Generalizing the ONIX for Serials standards to reflect the diversity of product types now available on subscription
• Promoting the ONIX for Serials SRN and Coverage Statement formats to official 1.0 releases on completion of pilot

And ongoing updates of resources on the EDItEUR website www.editeur.org
Projects underway now

Again, we’ll hear a little later about four initiatives running currently

- A Structured Name & Address model
- Improvements to the Price/Payment Reconciliation process
- A new standard to convey New Orders for subscription products
- Extending the rollout of existing standards, within and beyond the ICEDIS group
Looking ahead: 2013 and beyond

- Consolidation of the formats introduced over the last three years
- Improved assistance for training and implementation support
- Eventual phased replacement of the ICEDIS legacy standards
- Investigations of direct web service applications for information lookup and exchange between business partners
- Greater engagement direct with library systems, their owners and the system vendors involved
To get involved or learn more

• Check out our websites:
  – www.editeur.org
  – www.icedis.org

• Email us for more information:
  – info@editeur.org
  – Ramon Schrama (Swets, co-chair of ICEDIS) rschrama@nl.swets.com
  – Keith Whiter (Elsevier, co-chair of ICEDIS) K.Whiter@elsevier.com

• Become a member of EDItEUR: email tim@editeur.org or graham@editeur.org
  – Ensure that your organization’s voice and priorities are heard
  – Help shape the direction of new standards formulation
  – Get hands-on implementation advice & team up with knowledgeable business partners
  – Profit from the benefits of wider automated communication & processing