

NISO / EDItEUR ONIX for Serials Steering Group meeting

13 July 2004

On the call:

Priscilla Caplan
Christie Burke
Tim Devenport
Richard Gedye
Brian Green
Pat Harris
Katherina Klemperer
David Martin
Margaret Morgan
Nathan Robertson
Pat Stevens

1. Terms of reference

The following terms of reference for the ONIX for Serials Steering Group were agreed:

1. Agree scope and work items for development and maintenance of ONIX for Serials and assign to JWP or other appropriate group
2. Agree and find resources required to carry out those work items
3. Monitor and review execution of work items
4. Recommend policies to NISO and EDItEUR for the promotion and support of ONIX for Serials, and monitor their execution
5. Recommend policies to NISO and EDItEUR for collaboration with other parties (eg **DLF ERMI**, etc) and monitor their execution.

It was agreed that the ONIX for Serials Steering Committee should take ongoing responsibility for the maintenance of the ONIX for Serials formats, guided by the consultants.

2. Report on ONIX for Serials Formats

The Serials Online Holdings (SOH) format is the most advanced and is being piloted by Serials Solutions via Innovative to Library of Congress. The version being used for the pilots is available on the NISO site. Some changes have been made in the light of subsequent work on the SPS format (see below) and the revised version 0.9 of the format is now available on the EDItEUR ONIX for Serials Web Site, www.editeur.org/onixserials.html to which the NISO site will soon link.

The Serial Product and Subscription (SPS) format is also available on the ONIX for Serials page in version 0.9. OUP is ready to start piloting with Harrassowitz, LC and University of Chicago. Margaret will check on Wiley's readiness.

The Serial Release Notification (SRN) format, for which a new subgroup has been formed, chaired by Christie Burke, is also making good progress. Weekly conference calls are generating the business cases and it is hoped that these will be completed early August at which point work will commence on the details of the transactions.

The issue of Serial Coverage is being discussed by a separate work group chaired by Nathan Robertson. It is expected that this will result in some recommendations to be included in other existing transaction formats.

3. Publication of formats

As previously reported, the formats available for public review and trial use are now available on an ONIX for Serials page hosted on the EDItEUR site but to be transparently linked to from the NISO site. The logos of both organisations are on each page.

The JWP pages hosted by Priscilla will continue to act as a repository for JWP minutes and papers and early versions of the formats.

The option of putting the formats through the review and voting process to become NISO "Standards for Trial Use" was discussed. It was agreed that there was insufficient benefit to warrant this at the moment but that the situation would be reviewed at future meetings if it appeared that NISO members considered that the benefits justified the use of resources. One of the benefits of more formal standards was seen to be the naming of a maintenance agency, but EDItEUR and NISO, through this Steering Group, were happy to commit to continuing maintenance.

4. Promotion of ONIX for Serials

Although there has been considerable interest shown in ONIX for Serials by publishers, intermediaries, ILS vendors and libraries, there have been rather limited offers to pilot the current messages. There has also been hardly any participation from libraries outside the US. It was felt that potential users were hanging back to see the results of the initial pilots, in which case maximum publicity must be given to these results and the potential benefits for users. It was also noted that there would be value in involving the vendors of publisher systems (as distinct from ILS) so as to assist publishers in generating the relevant messages.

Presentations at ALA and NASIG had been well received and Richard had arranged for Tim to run a series of workshop briefings on ONIX for Serials at the next UKSG meeting. In addition, there would be opportunities at the Frankfurt Book Fair where EDItEUR and the German Electronic Publishers Group had invited Tim to speak.

The Steering Group members were invited to consider other possible opportunities and to advise the JWP, EDItEUR and/or NISO.

A flyer (attached) had been produced by Tim for ALA and this would be posted on the web site and become the first in a series of ONIX for Serials Newsletters. Future editions would carry reports of the pilots as well as progress on new formats.

It was suggested that once the standards had reached version 1.0 an ONIX for Serials listserv should be set up and open subscription made available via the website.

5. Scope of JWP

Since DLF regarded their contribution to the Electronic Resource Management Initiative (ERMI) to be complete on publication of the reports and schemas later this month, a new home would be needed if review and further work was required on the standards. Nathan reported that ERMI colleagues regarded NISO and EDItEUR as an appropriate home for this work. There was some discussion of whether this should come under the JWP or be a separate NISO / EDItEUR initiative and it was agreed that a decision on this could not be made until the ERMI work was available for review and the need for further work scoped.

NISO and EDItEUR were in a position to continue funding consultant support for the current JWP work program but had no extra resources budgeted for ERMI work, which would have to be separately funded.

The membership of the JWP was discussed and it was agreed that the current system of relatively open membership and volunteers for working groups should be continued, although it might be worth sending a note to members who had not participated for some time asking if they wished to resign.

6. Any other business

Since there had been several mentions of the need for continued maintenance of the ONIX for Serials formats and the establishment of procedures for change requests and new functionality, David suggested that he, Tim and Francis Cave should draft a paper on principles and procedures for maintenance and development, to be considered and approved by the time that the first format was published as Release 1.0. This proposal was enthusiastically accepted.