

# CREATING EFFECTIVE ONIX METADATA: FIVE KEYS TO PROMOTE DISCOVERY

## INDUSTRY KNOWLEDGE

Based on industry documents and suggestions gleaned from Bowker data feeds, this guide is aimed at assisting publishers in creating valid and relevant ONIX metadata. Our tips are organized by topic with each bullet describing an issue you will want to address prior to creating your first ONIX file or in cleaning your metadata to move to another ONIX provider. Should you wish to submit your ONIX file to Bowker, please refer to our Metadata Requirements for ONIX Submissions for further details ([http://media.bowker.com/documents/onix\\_submission\\_guidelines.pdf](http://media.bowker.com/documents/onix_submission_guidelines.pdf)).

### 1. Format Files in Sync With ONIX Standards

- **ONIX** is a standard. Your file must validate against the schema for ONIX. This means all ONIX composites must be supplied in correct order and all necessary elements within a composite must be provided.
- All data recipients will typically review your first file submission critically and provide feedback on its **format and data quality issues**. Once your file has been “tested” and is in “production” any changes you make to the format established can cause problems for data recipients.
- Always supply the same **file format** (ONIX 3.0 or 2.1) when delivering subsequent files. Any adjustments in tags where your data appears, the implementation of a new ONIX provider, or the extent of data you supply should be mentioned in advance to your data recipients to ensure that changes are read properly.
- Each trading partner may have a preference for naming an ONIX file. Follow the proper **naming conventions** for each file you drop to the FTP or your data may not be processed. Do not adjust your naming conventions without speaking with your data recipients. Any changes in naming will add confusion about the processing of your file.
- Establish a **regular timeframe** for supplying your data (e.g. weekly or monthly) before you send your file. It is worth emailing your data recipients to alert them when no file will be forthcoming.

### 2. Understand Supplier Detail Data

The supplier detail composite of ONIX has specific fields that need to be included. This is where many issues occur for data recipients. Here are some expanded definitions of these fields:

- An **imprint** is defined as a trade name used by a publisher to identify a line of books. It is sometimes used by large publishers to keep a family of products together. The imprint appears on all books produced in the line. See ONIX tag <b079>.

- The **publisher** listed in your file should match the name of the company assigned that ISBN prefix. Mismatches in this information could prevent trading partners from loading your data. See ONIX tag <b081>.
- **Price supplier (or distributor)** is the company that will take the order and deliver your products. While ONIX allows for multiple price suppliers per ISBN, it is best to check with your data recipients to see if they are able to process multiple price suppliers within one market (currency), otherwise data might be lost. See ONIX tag <j292> and its composites.
- **Price types and currencies** can vary widely. Some recipients can accept multiple currencies and price types (e.g. agency, retail, net, or library) while others prefer to receive only one type. See ONIX code <j148>.
- The **status** of your titles is critical for sales. Discuss with each data recipient their preference for receiving product availability information as there are two ways to express this information in ONIX:
  1. **Publishing status** refers to the product’s existence in the specified market. See ONIX tag <j407>.
  2. **Availability status** is slightly different, referring to the ability to obtain the item from a given supplier. See ONIX tag <j141>.
- Ensure you use ONIX to communicate **price updates** and an item’s **status update**, e.g., cancelled or out of print. See ONIX price amount tag <j151>. If you program ONIX only for active titles, you will end up creating other files to communicate with your data recipients besides sending ONIX, which will slow down these data updates.

### 3. Synchronize Related Metadata Elements

When you first create ONIX, change ONIX providers, or upgrade the amount of data fields you supply in ONIX, it is a good practice to review/provide your data across titles and within a title record to ensure completeness. Some metadata areas to focus on include:

- An **ISBN13** is required for each product form (i.e. print, digital, video or audio items). ISBNs should not be reused for additional formats as this causes confusion in the marketplace. See ONIX tag <b221>.
- When you submit an **item form** (the physical appearance of the item), whether it is a book or a digital item, be sure to be specific about the item and avoid vagueness as with “book other” as an item form. Utilize the appropriate codes to represent the item (paperback, mass market, PDF, EPUB, or CD). See ONIX tag <b012>.

- If your product contains mixed media items, you need to include the ONIX codes for **contained items** within this packaging (e.g., paperback with a CD-ROM). Avoid putting this information in the title. Use the ONIX coding instead so this title will link and be discoverable with all other forms. See ONIX tag <b333>.
- The format of your **contributor names** (ONIX tag <b036>) should not alter between editions or product formats. Sending an author name in various styles will hinder the discoverability of your titles. If the names match prior examples and are in the proper ONIX format, then all the same titles, regardless of varying item product forms, will link together. If a contributor name is a common one, it is helpful to supply the birthdate of the contributor as well.
- Do cross check **audience/subjects/age ranges** for a title. If you choose Juvenile subject codes starting with “JUV” or “JNF”, check audience codes and age/grade codes to ensure they are in sync with your BISAC code. Ages you supply in your ONIX must also match within the audience code range. See Audience ONIX code <b206> and BISAC main subject ONIX code <b064>.

#### 4. Field Data Properly

ONIX has many more fields than were previously available in some databases. Ensure you are maximizing **discoverability** for your titles by putting data in the proper field. Merging data into a single field also may cause extra work for data recipients to field the data properly.

- Always use **title text** when identifying your titles and subtitles. Also, separate your title, subtitle, and series into their proper ONIX tag. Do not include volume, edition, or binding (Item Form) data in your title or subtitle. This information should be sent in the proper fields found in specified ONIX tags. See ONIX code <b028>.
- The name of a series is often confused with the title of an item. However, it does not belong in the title or subtitle field. **Series title** (ONIX series name code <b018>) has its own ONIX code and needs to be parsed out into that field for the best discoverability of this item through a search with a specific series name. Also, do not list any volume/book numbers within the series field. (For example, *Catching Fire* is the title of a book. The series name for this book would be *The Hunger Games*. This title is book 2 in the series—ONIX series book number tag <b019>.)
- Limit each **contributor** tag to a single author. Use multiple tags to express multiple authors. Do not include additional information such as degree information, or formal titles in contributor name tag. This supplementary information can be added through additional tags in the composite. **Corporate contributors** should be sent through the appropriate tag. See ONIX tag <b047>.

#### 5. Enhance Your Metadata

When sending in metadata for **enhanced content**, you should contact data recipients to understand and comply with their submission guidelines. This will ensure that your enhanced content can be captured and displayed prior to programming anything in your system. You would not want to program for one method of delivery for this content if the majority of data recipients need the content in another format.

- Update the **descriptions** of your ONIX titles. With ONIX you may be able to expand your descriptions beyond the limits of characters used in the past. You may want to revisit some descriptions to expand the information you have provided.
- Check that the proper punctuation and **HTML styling** is used. Research these items:
  1. Some ONIX recipients may have issues processing HTML. If you include it, your data may not appear on their site as you intended.
  2. If you cut and paste descriptions from word processing software into your metadata system, you may end up with unintended format characters within your ONIX file. These issues can be resolved by speaking with your ONIX provider or by checking your metadata in your customers’ systems after your ONIX file has been processed.
- Follow **field-specific rules**, such as subject classifications and keywords. For example, supplying both a specific and a general subject code on a given product is discouraged.
- Check with industry **best practice** guidelines to help you navigate through the various details for each field. Review these items whenever creating ONIX files or migrating suppliers. Create an action plan to address issues you find with your existing metadata.
- Supply your data as early as possible (**optimal timeframe** is 180-day advance notice) prior to publication date. Do not wait to send metadata until the product is available for sale. At that point, retail and library budgets will be allocated to other products coming out.

#### RESOURCES

This document brings together some highlights of the below links along with suggestions gleaned from current data feeds.

- Bowker® Metadata Requirements for ONIX Submissions: [http://media.bowker.com/documents/onix\\_submission\\_guidelines.pdf](http://media.bowker.com/documents/onix_submission_guidelines.pdf)
- Book Industry Study Group Product Metadata Best Practices: <https://www.bisg.org/product-metadata-best-practices>
- BISAC Subject Headings: <https://www.bisg.org/complete-bisac-subject-headings-2014-edition>
- BISAC to THEMA Mapping: <https://www.bisg.org/news/updated-bisac-2014-thema-11-mapping-now-available>
- ONIX Standard: <http://www.editeur.org/12/About-Release-3.0>

