# R&D Workgroup Agenda

ACCELERATING
THE REACH
OF DATA STANDARDS

*Chair*

# Greg Moore

RMLS

R&D Workgroup Chair

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#RESO16

# Antitrust

RESO strives to increase competition in the marketplace and will not be a forum for anti-competitive conduct. The RESO Antitrust Policy governs the activities of RESO and its members, including this meeting. A link to the policy was emailed to you with the meeting agenda. Please consult RESO's counsel if you have any questions about the policy.

# Welcome

The RESO Research and Development workgroup (a.k.a. the R&D workgroup) is a collaborative collective of Real Estate technologists, Association and MLS staff and Brokers who review suggestions from the Real Estate industry at large and vet them for inclusion in the standard. The group helps prioritize these suggestions and is the top of the funnel for substantial new efforts at RESO.  We have a Go-To-Meeting web and phone meeting every month to discuss issues being worked on. But even if you can't make every monthly call, call agendas and minutes are maintained online, and we often solicit input on the current issues in the online discussion group, so you can participate whenever you have time. A desire to improve the standard and an hour or two a month is all that is required to be a R&D workgroup member, we strive to maintain a diverse group of professionals to contribute to the online discussions to ensure we focus on issues and pain points as well as improvements and efficiencies to the RETS standard and RESO.

# Agenda

- R&D / CMLS Priorities
  - SSO Account Linking – User Federation Proposal – Paul Hethmon
  - Lockbox activity payload
  - Standardize showing data
  - Metadata change history
  - Best Practices with CMLS
    - Basic RETS Usage
    - Discuss developing an Image (Media Standards) best practice
- Review Other Business Cases
- Business Rules presentation and discussion – Matt Cohen and Susie Cass
- Open discussion – recommendations for R&D workgroup items

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# SSO Account Linking
# User Federation Proposal

- Paul Hethmon

- Clareity Security

- Chief Software Architect

- [paul.hethmon@clareitysecurity.com](mailto:paul.hethmon@clareitysecurity.com)

# Lockbox Activity Payload

**Summary:** Work with RESO member lockbox vendors, MLSs and Brokerages to define a standardized data feed (payload) for lockbox data.

**Value Proposition:** Having current standardized lockbox activity data available to brokerage and MLS systems would facilitate brokerage and MLS statistics; i.e.: listing detail views to lockbox openings, number of lockbox openings to pending status.

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# Lockbox Activity Payload

**Detailed Synopsis:** RESO member lockbox system providers collaborate with the Broker community and MLSs to define a standard (Data Dictionary) field set and definition for a lockbox data feed.

**Actors:** Lockbox system providers to supply the data and Brokerages and MLSs who consume the data.

# Standardized Showing Data

**Summary:** Work with RESO member showing system providers, MLSs, Brokerages and vendors to define a standardized data feed (payload) for showing data.

**Value Proposition:** Having current standardized showing activity, appointment and confirmed showings, data available to brokerage and MLS systems would facilitate updates to brokerage calendaring systems.  The confirmed showing data would also facilitate brokerage and MLS statistics; i.e.: listing detail views to showings, number of showings to pending status and in-house showings verses co-op.

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# Standardized Showing Data

**Detailed Synopsis:** RESO member showing system providers collaborate with the Broker community and MLSs to define a standard (Data Dictionary) field set and definition for a showing data feed.

**Actors:** Showing system / data providers to supply the data and Brokerages and MLSs who consume the data.

# Metadata Change History

**Summary:** When changes are made to the structure or format of the RETS data and Metadata changes are made, it can be difficult for a vendor to easily compare Metadata versions to detect exactly what changed and why, for example, data is missing or wrong on a website or not properly coming through in a way that can be consumed in an MLS data share.

What is proposed is a GetMetadataChangeHistory transaction. What would be returned is XML data that provides a change history, in descending order by date-time, of RETS metadata. It is equivalent to being able to get a property history report in an MLS system, easily seeing what fields or values were added, changed, or removed at a particular date-time.

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# Metadata Change History

**Value Proposition:** Being able to tell exactly what metadata changed and when would allow developers to more quickly diagnose issues relating to a changed RETS feed and to make adjustments as needed. While it is a best practice for RETS data providers to let data recipients know in advance when changes are going to be made, this doesn't always happen reliably, and the description of what actually is going to change is not always accurate. This transaction would allow developers to see the differences described with precision, in advance if there is a staging server they have access to where this transaction is available.

**Actors:** RETS server providers (primarily MLS Vendors) and technology vendors that consume RETS data feeds.

# RETS Usage – Best Practices

**Data providers:**

- Ensure data provided is current and accessible via a RETS server that is certified RESO compliant and provides certified Data Dictionary resources and data feeds.

- Ensure Brokerages can access and retrieve their complete content; listings (including in-progress and coming soon), media, roster, open house and tours, saved searches, ... via certified RETS as outlined above.

- Ensure all data consumers of RETS are aware of the certified resources available.  Note: all certified resources must be made available to data consumers to maintain RESO certification.

# RETS Usage – Best Practices

**Data providers (continued):**

- Ensure each resource has a record modification date specific to the data available in the resource; i.e.: an image modification date indicating when the image was last updated.

- Provide clear documentation outlining available resources provided by the RETS server, the version of compliance for the server and data dictionary as well as any special use or restrictions on data use and/or display.

- Deleted listings, media and other content available via the RETS server is provided to data consumers and clearly documented.

# RETS Usage – Best Practices

**Data providers (continued):**

- Provide a minimum of 4-weeks written notice of significant data changes to data consumers with documentation outlining the changes being made.

- Provide access to a test platform for data consumers (staging server access) with all data changes for significant changes minimally 2-weeks prior to release.

- Encourage RETS data consumers and service vendors to be RESO members.

- Monitor data consumer RETS data usage to ensure they're using efficient data and image selects.

- Provide in-house or RETS server vendor contact information (email address) to data consumers for assistance with access

# RETS Usage – Best Practices

**Data Consumers**

- Know the RESO certifications the data provider has achieved and utilized the certified resources and data feeds.

- Ensure data pulls from the RETS server are as efficient as possible. Utilize the specific resource modification date available when replicating data to a local server.

- Comply with the data access and display rules

- Pull the payload specific to the data use case

- Join RESO and monitor and contribute to the workgroups. As a RETS data consumer your experiences and expertise will assist with the creation and improvement of the RETS standards.

# Images/Media – Best Practices

Discuss developing an Image (Media Standards) best practice

- URL access

- Incremental image retrieval

- Modification date for image

- Deleted image log

- Image sizes/quality

- Aspect ratio

- Captions

- Copyright

# Review Business Case Center

## Confluence R&D Home Page

# Business Rules

Business Rules presentation and discussion:

Matt Cohen – Clareity

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Susie Cass – RPR

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# Thank you for Attending

## Next R&D meeting

Thursday December 1$^{st}$ 2pm eastern-time

To join the R&D workgroup

Click the Join R&D Workgroup link

members.reso.org/pages/viewpage.action?pageId=983942