

License Expression Working Group Conference Call, 12 June 2006

After some technical difficulty, the call got underway (with no-doubt diminished attendance) at about 12:30 PM ET.

1. Welcome (Alicia)

Alicia opened by reminding the Working Group of the group's charge:

- Monitor and make recommendations regarding the further development of the standards landscape relating to electronic resources and license expression.
- Actively engage with EDItEUR to guide and advise the development of the ONIX license message.

2. EDItEUR update (Brian)

Brian Green provided an update on the EDItEUR work so far:

EDItEUR has been working on two JISC-funded projects.

- 1) An expression of a standard Wiley Academic license as a proof-of-concept for the format
- 2) Specification for tools to help publishers produce license messages.

In the course of discussions for the item 2--the message production tools--it was discovered that such tools would be useful not only to publishers but also to libraries who will need to convert paper licenses into the message format for ingestion into their systems.

Following a British Library/JISC workshop on digital policies, ONIX for Licensing Terms (OLT) received good press and a suggestion that additional project funding should be considered; areas of interest include the JISC site license model and funding to promote OLT to library system vendors.

There has been interest in the use of the OLT message to direct search engines on what permissions they have in crawling or indexing publisher repositories.

Finally, a set of related message formats are being developed for Reproduction Rights Organizations. These are provisionally titled ONIX for Repertoire (i.e. description of resources and delegation of the rights to use them) and ONIX for Distribution Data (i.e. supporting data for rights payments).

3. ERMI 2 update (Nathan)

Nathan Robertson provided a brief update on ERMI 2:

The project has a blog with provides updates and news:

<http://dlfermi.blogspot.com>

Support for SUSHI is progressing; SUSHI is going "great guns" with lots of interest.

There is substantial interest in our license mapping work and workshops; another pre-conference workshop scheduled for ALA.

The group is looking forward to being able to take an active role in LEWG

Data Dictionary plans under consideration, with conversations planned for ALA.

4. ONIX Publisher License format overview (David)

David Martin discussed the outputs of the first of the JISC-funded projects (available on the EDItEUR website at http://www.editeur.org/onix_licensing_JISC.html)

The exercise has proven extremely demanding. The outputs as released are complete in terms of what was undertaken for JISC but are still incomplete with more work to be done in developing the message.

Over the course of the project, the EDItEUR consultants have gone into extremely fine detail into the data structures and ontology concepts. It has been a beneficial exercise to test and enrich the model; however, for practical applications the underlying complexity should be largely hidden, allowing users to work at a higher level.

The work has borne out the previous decision to segregate concepts into those requiring a fully developed structure vs. those requiring only a citation; however, an additional "hybrid" approach was added to allow citation terms to be linked to structured terms when necessary.

Finally, the developers have returned to the idea of the expression allowing rather large general statements if that is what is present in the actual license, rather than requiring that such statements be broken down into multiple and more granular structures.

5. Initial thoughts on specification of editing tool (Francis)

Francis Cave discussed the work on "publisher tools"

The idea of the tools is to answer the question: "how do you create this expression in reference to the existing license it has to correspond to?" The funded project is to develop specifications for tools to assist with the process.

They hope that most licenses will map to a small set of "template licenses"--rather than having to create each license expression from scratch.

A chief objective is to hide the complexity of the expression from "regular users." Regular users include both license-savvy users who are familiar with the complexities of licenses as well as more casual users who need to view license terms. In neither case should they need to see or understand the underlying XML structure.

It may seem early to be developing tools to build expressions for this yet-to-be fully agreed upon structure; however, part of what the tools will be helpful for is to enable the creation of expressions for pilot testing and evaluation, as well as to enable users and stakeholders to view and interpret the proposed expressed licenses in a meaningful way without requiring in-depth reading of complex XML.

6. Proposals for further feedback

The group discussed ways to provide feedback and guidance on the EDItEUR work.

The existing outputs

(http://www.editeur.org/onix_licensing_JISC.html) are ready for careful review and comment. Please review them to the best of your technical and/or licensing ability.

- Look for things that are missing;
- identify terminology or constructs that are confusing;
- ask "is there a way to express X?"

Any contributions would be helpful for clarifying structure and/or clarifying the documentation. Please post all feedback and questions to the list. Contributions are welcome any time, but would be especially helpful by July 7th.

(An example of a useful question came up on the call: Bob Boissy of Springer asked "how do we distinguish between licenses under development and 'final' valid licenses?" David pointed out that there is a status flag within the message that is intended for that use. Bob is concerned that because the 'finality' of the expression will happen outside of the automated environment--with a signature on a piece of paper--ensuring the appropriate flagging of the correct message version of the license at the correct time may be challenging. Suggestions on handling this issue may warrant inclusion in documentation).

Additional exploration and development of a structure for fee and payment rules is needed. A small group will be formed to begin that work--volunteers with expertise in the different ways payment rules can be formulated in licenses are solicited.

EDItEUR plans to release a more definitive version of the ontology definitions in July, and will want careful review and feedback at that time: specifically reading for bias in the definitions or gaps in the conceptual structure.

7. Presentations at ALA etc.

The following presentations and programs at ALA in New Orleans (June 22-26) may be of interest to working group members:

Thursday 22 June 2006

Association of Research Libraries - Interpreting Licensing
Terms For Electronic Resource Management Systems
1:30 PM - 4:30 PM
Hilton New Orleans Riverside room: Eglinton Winton
(requires pre-registration)

Friday 23 June 2006

Contracting for Content in a Digital World
8:30 AM - 2:30 PM
Wyndham room: Azalea I
(requires pre-registration)

Electronic Resource Management Interest Group
7:30 PM - 9:00 PM
Morial Convention Center Room: Rm. 298-299

Saturday 24 June 2006

ALCTS Electronic Resources Interest Group "Current Developments in E-Resource Licensing and Rights: What You and Your Institution Need to Know"
10:30 AM - 12:00 PM
New Orleans Marriott room: Mardi Gras D

Digital Rights Management and Institutional Repositories:
Achieving Balance in a Complex Environment
1:30 PM - 5:30 PM
Morial Convention Center room: Rm. 298-99

Standards Interest Group
4:00 PM - 6:00 PM
Morial Convention Center room: Rm. 333-334

Sunday 25 June 2006

Copyrights and Licensing Wrongs: When Two Worlds Collide
10:30 AM - 12:00 PM
Morial Convention Center room: Rm. 344

Serials Standards Update Forum
10:30 AM - 12:00 PM
Sheraton New Orleans Hotel room: Napoleon BR B1/B2

8. Questions and comments

The following questions and suggestions were raised in the course of the call:

What are the business cases that will be supported by the message? For those less familiar with the work of the group it would be useful to have a basic document to describe the anticipated functionality and uses of the OLT messages. The group agreed, and Nathan, Brian and others agreed to work on an introductory document.

If the ERMI group is working on a revised data dictionary, how can we ensure compatibility with the OLT definitions? Nathan and several other Working Group members are on both groups and can help ensure that any discussions are brought to the attention of the other group as necessary. However, since any further ERMI data dictionary work is pending strategic conversations with DLF and NISO at ALA, we should wait before exploring further.

Has there been any thought about or work toward expression of Creative Commons licenses in OLT? There has been such thought, but no actual work to date. It is believed that the Creative Commons RDF that associates objects with their appropriate Creative Commons licenses is not incompatible with an OLT expression of the terms of the actual license--the two functions do not overlap; that will be further explored and confirmed. Chris Conley will work to identify Creative Commons members who can help work on the mapping project.

What role will publisher intermediaries like Highwire have with the OLT messaging? Nathan speculated that end users will probably receive their usage rights and information from their library's systems rather than from publisher or service provider systems; although there may be other models. Intermediaries may be interested in being a service provider to publishers in terms of license mapping and message creation using the proposed "publisher tools."

9. ILS Vendors needed for pilot

ILS vendors are needed to provide feedback on the work so far, discuss how the messages will be ingested into ERM systems and how they will be used once there. A sub-group might be set up for these discussions, which would lead up to a workshop in the US in the fall and pilot testing of the message. Contact Brian (brian@bic.org.uk)

The call concluded at about 13:40 ET.