



BIC JISC PALS2 Project: ONIX expression of Wiley EAL Academic License

Mapping a sample license to the ONIX Publisher License format

31 May 2006

The tables in this document, starting on page 5, reproduce the main text of a sample Wiley license and its appendices, excluding (a) those parts of the appendices that deal with fees and payment, and (b) parts of Appendix F, dealing with the detailed options available under the Wiley InterScience ArticleSelect (pay-per-view) service. The Wiley license used for the JISC project was a past version of the "Enhanced Access License for Wiley InterScience academic customers", and is referred to here as the "Wiley License" or simply "the License".

The introductory text below outlines the approach that was taken in mapping the License to the ONIX Publisher License format ("ONIX-PL").

1. AIMS OF THE JISC PROJECT

The aims of the JISC project were to create an ONIX-PL expression of a complete sample License, ensuring that any questions of interpretation of the semantics of the License were as far as possible resolved with the participation both of the publisher (Wiley) and of library representatives (from Cranfield University Library).

At the same time, the terms found necessary to express the License would be added to the ONIX Licensing Terms (OLT) Dictionary, which supports the ONIX-PL format and will support other future OLT formats. The OLT Dictionary is part of a formal ontology, although at this stage the terms used are being published only as flat lists of controlled values for the relevant ONIX-PL elements

2. PROJECT DELIVERABLES

Accordingly, the deliverables from the project that are now available on the [EDItEUR website](#) are:

- The full text of the Wiley License (PDF)
- The ONIX-PL representation of the Wiley License, partly annotated (PDF)
- The ONIX-PL representation of the Wiley License as an XML file
- Lists of the controlled values from the OLT Dictionary used in the Wiley License (PDF)

In addition, although not strictly a project deliverable, one other document is also available:

- A specification of the ONIX-PL format as at the end of the project (PDF)

An XML schema consistent with the specification is also available on request from [EDItEUR](#).

It should be noted that all of these deliverables represent a snapshot of the state of the ONIX-PL development at the end of the JISC project. Development is continuing, and further drafts of the specification, controlled values, and schema will appear from time to time. At this stage all are regarded as part of a pre-release "Version 0.9" of ONIX-PL. A first full release will be numbered Version 1.0 in due course.

3. METHODOLOGY

Before the start of the project, the principle had been established that ONIX-PL would support two forms of expression of license terms: “structured expressions”, and “term citations”.

A “structured expression” is used for license terms that may be actionable in a licensee’s resource management system. A “term citation” is used for license terms that require human agency for their interpretation and activation. However, each “term citation” includes the relevant text from the license, and is accompanied by a controlled categorization of the term type. This makes it possible for a system that receives XML expressions of different licenses to enter the content into a database that is searchable by category, so that the terms can be easily located when required by a license administrator.

The first stage in the project was to review the License, making a provisional assessment of the terms that should be handled as structured expressions and those that should be handled as term citations, and identifying any issues that required clarification or the resolution of apparent inconsistencies in the text.

A workshop session then took place, with representation from Wiley and Cranfield University Library. From this workshop, and subsequent follow-up, we were able to confirm decisions on the proposed handling of the various parts of the License and to get advice from Wiley on the interpretation of a small number of points that were unclear in the text.

A major issue at this stage was the possible handling of fees and payments as part of the license expression. The Wiley License covers a large number of different categories of electronic resources, and each category has its own pricing rules, which are sometimes complex. The project participants agreed that for the purposes of the project we would not include pricing rules in the license expression. However, Cranfield University Library representatives emphasized that it would in the longer term be important that key aspects of pricing could be represented in the ONIX-PL format; and this was subsequently underlined by comments from members of the NISO/DLF/EDItEUR/PLS License Expression Working Group. More work has to be done in this area.

Following these consultations, the BIC project team and Rightscom consultants have worked over several months to extend and refine the draft ONIX-PL format specification, to develop the OLT Dictionary, and to produce by hand the draft XML expression of the Wiley License, which now amounts to some 70 pages and over 2000 lines of XML.

4. NOTES ON THE MAPPING

The following notes are intended to draw attention to aspects of the mapping that require explanation or that deserve particular consideration:

- 4.1 The process of mapping to the XML format is not so much one of “translating” the paper license into XML as one of creating an autonomous XML document that follows the structure and rules of the ONIX-PL format and can be accepted as a valid expression in that format of what the paper license expresses in a very different form. At the beginning of the project, the work was driven by our reading of the Wiley License and its structure. As the project continued, it became more and more driven by the structure of the ONIX-PL format, and this is how we would expect mapping to be undertaken in future, and how the mapping tools to which we refer in 4.6 below would work. The logic of this is fairly clear: paper licenses may use a whole variety of different structures and wording to say very similar things, but the ONIX-PL format is aiming to express them in a single consistent structure, so it is natural that the target structure should drive the mapping process.
- 4.2 The XML format is quite unforgiving, in the sense that it requires statements to be made in an exact way¹. This can make it necessary to introduce concepts into the XML expression that are implicit

¹ This doesn’t mean that a term cannot be expressed in a way that leaves the definition open to interpretation. For example, in the Wiley License permission is given for licensed content to be used in a particular way “for interlibrary loan”, but what “interlibrary loan” means is left open to interpretation; and this can be expressed, just as we could express a different licensor’s view of “interlibrary loan” that has

but not explicit in the license text. For example, in the Wiley License, the term “Electronic Products” is used to mean both the services that deliver content and the content itself. In the XML expression, we need to define the content separately from the services.

- 4.3 There are a number of ways in which an ONIX-PL license expression can identify the resource(s) to which it applies. In the simple case of, say, a license for a single electronic journal, it can carry the identity of the journal in a Resource Definition. Where a single license covers many different resources, which may change during the term of the license, it is more convenient to specify those resources in one or more separate documents, and to link the license expression to the latest version. One option is for the referenced document(s) to be in the form of an ONIX file, but the ONIX-PL format makes no assumptions about their form, or about the nature of the reference, which could be anything from an identifier of a paper document to a set of URIs giving access to dynamically maintained files.

The Wiley License covers no less than twelve distinct types of subscribed content (see Lines 229 to 240 of the license expression), plus – potentially – pay-per-view content, all of which are subject to the terms and conditions of use specified in the License. Most of these are assumed for the purposes of this project to be defined by lists that are accessible at a series of simulated URIs maintained by the licensor but specific to the licensee, and referenced in Resource Definitions. It is necessary to differentiate each of the distinct types of content because at some point each may have specific terms attached, eg for access rights after termination or for fee calculation.

So in the Wiley example, Licensed Content is made up of Subscribed Content and PayPerView Content; Subscribed Content is made up of the items in each of the twelve categories to which the Licensee is entitled by virtue of the subscriptions paid; and all of this is part of the universe of Licensor Service Content.

- 4.4 It is interesting that the effect of working in detail through a rather complex license has been to cause us to generalize, and, structurally speaking, to simplify the underlying format specification. Almost all specialization has now been removed from the various entity definitions, to be supplied instead by different relator values that will be defined in the OLT Dictionary. (For example, the “Specific DateTime” element in earlier versions of the DateTime Definition has been removed in favour of the generic “TimePoint Identifier” in what is now called TimePoint Definition.) Some entities turned out not to be needed at all for the Wiley License (eg Event and State), but remain as part of the format definition.
- 4.5 During the course of the project it became apparent that some license terms that fell into a category to be represented as “term citations” might also require additional structured content. One case in point in the Wiley License was the terms relating to the availability or otherwise of an archival access right after termination, where it was clearly desirable to include a structured link to the category of licensed content to which the respective terms applied. Another was in terms relating to termination processes, where the notice periods needed to be identified in a structured way. The “General Term Citation” composite was therefore extended to allow a term citation to be linked explicitly to other entities that were defined in a structured form in the license expression.
- 4.6 The clearest possible lesson from the work is that no licensor can reasonably be expected to perform the kind of mapping that has been tackled in this project, or (probably) to undertake the development of bespoke software to support it. We believe that the development (commercially or otherwise) and general availability of software tools to enable license templates and individual licenses to be expressed as ONIX-PL documents is an essential precondition for any practical application. The specification of such tools will be addressed in a second JISC-funded project.
- 4.7 Overall, the project has given us a high level of confidence that the underlying structures of the ONIX-PL format and the associated OLT Dictionary will be able to handle any demands made by different licensing approaches. However, a great deal of further work is still required; and we believe that the next phase of work on tools for creating, editing and maintaining license

some specified constraints.

expressions will almost certainly lead to further revision of the format in order to facilitate its use. Input from the designers of electronic resource management systems that would ingest and use ONIX-PL license expressions can also be expected to lead to further refinements.

5. ACKNOWLEDGEMENTS

This document is based on work undertaken as part of a JISC project in which the participants were BIC, John Wiley & Sons, and Cranfield University Library, with consultancy support from Rightscom Ltd. We acknowledge in particular the assistance of John Wiley & Sons in providing the sample License and in responding to queries on its interpretation. However, we should make it clear that it was not considered either necessary or practical for the purposes of this project for Wiley to verify the accuracy of every detail of the XML expression, and any errors and omissions in the draft expression are the sole responsibility of the ONIX team.

Mapping a Wiley License to the ONIX Publisher License format

In the mapping notes in this table, words in blue represent entities that are defined in the XML license expression in a way that is specific to the Wiley License or to an individual Licensee. Words in red represent entities that are defined in the ONIX Licensing Terms Dictionary, in a way that we expect to be generally applicable to publishers' licenses.

Where the "Mapping notes" column is empty, it means that the corresponding Wiley License text is not mapped, usually because it is unnecessary in the context of an XML expression.

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Clause	Wiley License text	Mapping notes
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A.4(b).2	<p><i>MobileEditions</i> – enables Authorized Users to download complete tables of contents and abstracts of select journals directly into their handheld Personal Digital Assistant (PDAs).</p>	<p>Defined as an onixL:HandHeldDeviceService at Line 622. MobileEditionsContent is also defined at Line 480 and is treated as part of SubscribedContent.</p>
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Clause	Wiley License text	Mapping notes
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Mapping a Wiley License to the ONIX Publisher License format

Clause	Wiley License text	Mapping notes
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Clause	Wiley License text	Mapping notes
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Clause	Wiley License text	Mapping notes
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