

NSLA OPEN BORDERS PROJECT

Background

The Advisory Committee was previously advised (paper LAAC/2008/2/11) about the Open Borders Project, which forms part of the NSLA Reimagining Libraries initiative.

This new paper provides an update on the Project. Some of the approaches being considered in this Project may be of interest to libraries beyond the NSLA sector.

The Open Borders Project aims to:

- make visible all of the collection holdings of NSLA members;
- connect this collection content through enhanced discovery services;
- establish new links to NSLA collection resources from popular online resources, such as Wikipedia;
- allow NSLA member libraries to enhance their own discovery services by leveraging off the collaborative discovery service; and
- provide seamless access to the suites of electronic resources that are subscribed to by Australia's state, territory, public and national libraries.

Several of these aims will be met by building on Trove, the national discovery service implemented by the National Library in late 2009. Another Reimagining Libraries project (Project 8: Description and Cataloguing)¹ will aim to make the collection content of NSLA member libraries as comprehensive as possible in Trove. Further, the Trove Application Programming Interface (API), to be released later in 2010, will enable NSLA member libraries to leverage off Trove, if they wish, as they build or implement their local or statewide discovery services.

A particular priority for the Open Borders Project will be to enhance access to the suites of electronic resources that are subscribed to by Australia's state, territory, public and national libraries. The Project will take a "user-centric" approach which will aim to address these questions:

- How can NSLA and public libraries ensure that the electronic resources which they license are used to the maximum extent possible?
- How can their discovery services be configured to allow users to search for and access those articles which they are entitled to access by virtue of their library memberships and their libraries' licences?

The second of these questions may require further explanation. At present it is not possible for a user who is registered with (say) the Waverley Public Library, the State Library of New South Wales and the National Library of Australia to:

¹ Refer separate LAAC paper in this set for a description of Re-imagining Libraries Project 8.

- see a comprehensive view of all the licensed e-resources that they are entitled to use; and
- use a common authentication process to access all these e-resources.

Open Borders Project

The Open Borders Project will address these questions in the context of a major extension to Trove which the National Library is planning to commence in the second half of 2010². This extension will involve:

- support for search and delivery of the full content of any journals digitised by the Library;
- inclusion of journal article indexing data and the linking of this data to library holdings; and
- the ability for Australian library users to easily discover and link to e-resources, from selected vendors, which they are entitled to access by virtue of their library memberships.

Achieving these objectives for access to e-resources will be complex in cases where the end user is off-site, and developing a satisfactory solution to these complexities will involve some investment by NSLA.

The National Library released a discussion paper in December 2009 which described a possible model for authenticating users who wish to access e-resources subscribed to by multiple libraries with which the users are affiliated.

This model relies on collaboration with e-resource vendors, whereby:

- article-level metadata including the vendor's article URL, and in some cases full-text articles for indexing, will be provided by the vendor to the National Library for inclusion in Trove;
- the vendor will also supply data about which articles are in which products and which products are licensed by which libraries;
- users of Trove will be encouraged to register with Trove and to provide information to Trove about which libraries they are affiliated with;
- Trove will index the article-level metadata (and full text where available) and would use the subscription and affiliation data to give "Available online" status to those articles which the user is entitled to click through to and read;
- Trove will facilitate the process of authenticating the user; and
- Trove will refer the user to the vendor's site, where any remaining authentication and access to the full text would be managed.

The discovery and linking process may follow the path described below:

- An article of interest is discovered by the Trove user. If the user has not registered or none of the user's libraries subscribe to the article, it will be found

² Refer to the discussion paper at <https://wiki.nla.gov.au/display/LABS/2.+Trove>.

after applying the facet “Online – Access conditions”. If the user has registered and at least one of the user’s libraries has subscribed to the article, it will be found after applying the facet “Online – Freely available”;

- The user clicks on the article details in the Trove result set;
- If the user has not yet registered, Trove informs them that if they registered with Trove and established a profile identifying their affiliated libraries, Trove may be able to offer them free access courtesy of those libraries;
- If the user has not registered or none of the user’s libraries subscribe to the article, Trove may refer the user to the vendor site’s “pay per view” page, passing the URL of the article as a parameter. Access to the PDF of the article will be provided after the user supplies valid credit card details;
- If the user has registered and at least one of the user’s libraries has subscribed to the article, Trove provides an intermediate page informing the user of which of their affiliated libraries can provide access to this article, and asks the user to select a library;
- If the user is on-site, Trove refers the user to the vendor site, where the IP address of the library will be verified, and the user will be given access to the PDF of the article without further authentication;
- If the user is off-site but the library concerned has an EZproxy server, Trove will create a link to the EZproxy server where the user will enter their credentials, and the EZproxy server will authenticate the user and redirect the user to the article URL;
- If the user is off-site but the library concerned does not have an EZproxy server, Trove will present the user with a login screen and, after the user has entered their credentials, Trove will “pretend to be a human being” and enter the credentials at the real library login page; if this is successful, Trove will connect to the vendor’s site, obtain the PDF of the article and provide it to the user.

The above processes will require the National Library to construct databases of Australian library EZproxy server addresses with appropriate configuration information, and of Australian library login web addresses with associated information. It will also be necessary to develop a mechanism to maintain these databases.

To date two vendors (Cengage Gale and RMIT Publishing) have agreed to work with the National Library to expose their e-resource content in Trove in accordance with the scenario above. Some other vendors who currently participate in Electronic Resources Australia (ERA), including Encyclopedia Britannica and Forward Learning, have expressed strong interest. The National Library has also approached ProQuest and Ebsco, who are studying the proposal.

At its meeting in March, NSLA approved funding to assist the National Library with this project, and in particular to assist the Library to construct databases of

Australian library EZproxy server addresses with appropriate configuration information.

The most difficult authentication challenge arises in the case where the user is not onsite, and the user's library does not have an EZproxy server. At this stage it is not certain that this scenario can be supported, but the Library may be able to undertake a "proof of concept" by building a small database of public library login web addresses with associated information.

Recommendation

That the Committee notes the report.

Contact: Warwick Cathro
wcathro@nla.gov.au
02 6262 1403

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