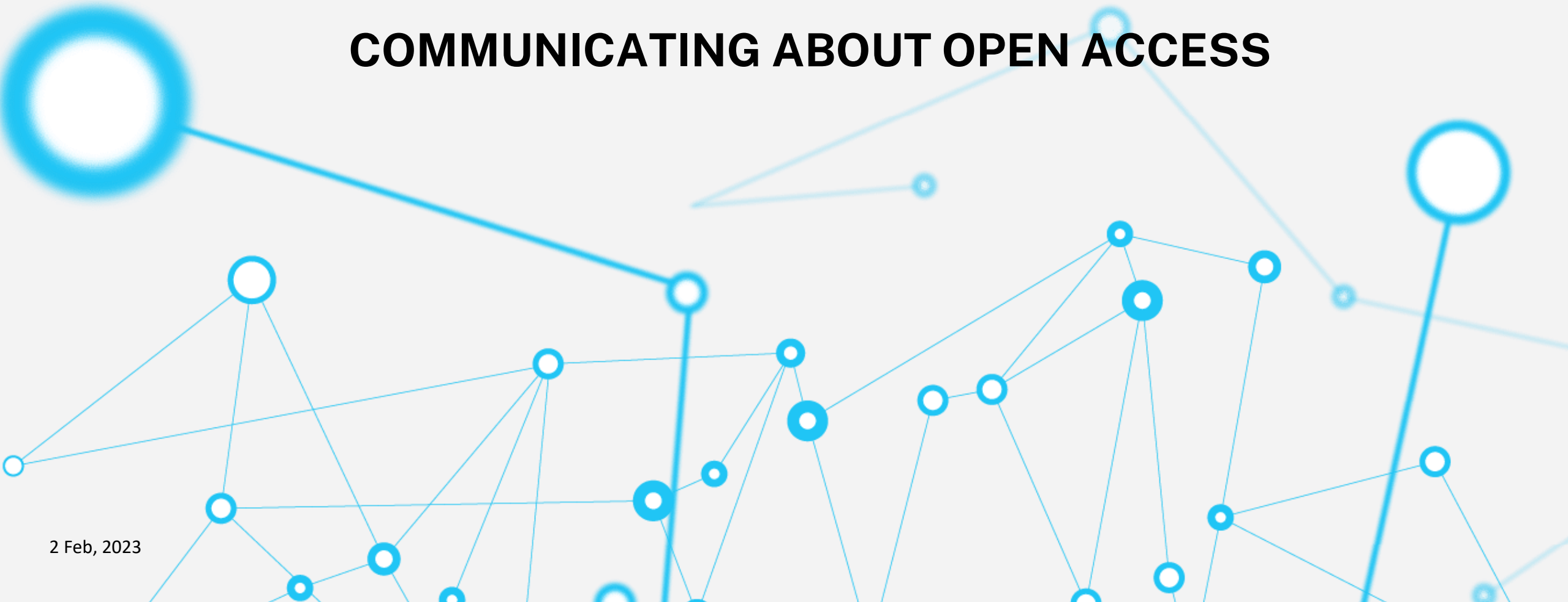WEBINAR

COMMUNICATING ABOUT OPEN ACCESS

2 Feb, 2023

PRESENTING TODAY

Romy Beard

Head of Publisher Relations

ChronosHub

Lisa Janicke Hinchliffe

Professor & Coordinator for Research and

Teaching Professional Development

University of Illinois at Urbana-Champaign

Kalyn Nowlan

MS/LIS candidate at the iSchool

University of Illinois at Urbana-Champaign

Yen Trinh

PhD, Norwegian University of Science

and Technology

ChronosHub UX designer

The agenda for today

CONTENT

1 Introduction

2 Presentations

3 Discussion incl. Q&A

4 What's Next

COMMUNICATING ABOUT OPEN ACCESS
Publishing & reading

- Confusion for authors when publishing (licenses, agreements, types of journals, funding requirements)

Reasons for confusion:
- Language (vouchers, waivers, agreements)
- Processes (automatic vs need to apply)
- Design of the user experience (visuals used, positioning of elements)
- Confusion for readers (what is free, what is accessible to read?)

BACKGROUND

Publishing platforms use indicators, or standardized text or symbols, to indicate whether articles in hybrid journals are open access.

Despite these indicators, we noted user confusion about whether they have access to certain open access articles.

OUR RESEARCH

We conducted a pilot investigation into the indicators used on a sample of platforms. We were guided by two research questions:

1. How do publishing platforms indicate which articles are open access?

2. Is there consistency in the indicators used within and across scholarly publisher platforms?

Platforms Selected

We selected five major publishers for our analysis. As some of the largest academic publishers, their platforms are likely to be used, at least at some point, by the typical faculty member or college student user.

- Elsevier

- Springer

- Wiley

- Sage

- Taylor & Francis

METHODOLOGY

Table of contents investigation: Downloaded current journal list for each publisher, selecting the first hybrid journal publishing in 2020. Went to the table of contents for the issue and noted how open access is indicated for the listed articles.

Keyword search investigation: Conducted a keyword search using the term "pandas", which brought up articles from multiple disciplines. Then we looked for open access indicators in the results to find an open access article among those listed.

We documented the results for each type of search (table of contents or keyword), the open access indicators in use, and, to differentiate as well between open, free, and subscription access, recorded whether a paywall or other indicators were used. We also captured screenshots or saved as a PDF each displayed screen used in analysis.

Pilot data: May-June 2022, revisited data: September-October 2022

WHAT WE FOUND

Mostly internally consistent open access indicators!

However, indicators varied greatly across publishing platforms.

ELSEVIER

Elsevier's indicator is a green dot with text reading "Open Access." The green dot indicator is used in the keyword search and the table of contents.

The same green dot indicator also appears with the label "Full Text Access." Whenever the green dot appears, so did a PDF icon and the text "Download PDF."

SAGE

In the table of contents, Sage's indicator is an orange unlocked icon with the text "Open Access" and a PDF/EPUB download icon. The same indicators are used in the keyword search results display.

Another type of access is indicated by a green unlocked icon with text that says, "Free Access" and the PDF/EPUB download icon. Sage also overtly labels non-open/non-free articles with the label "Restricted Access" and a black locked icon.
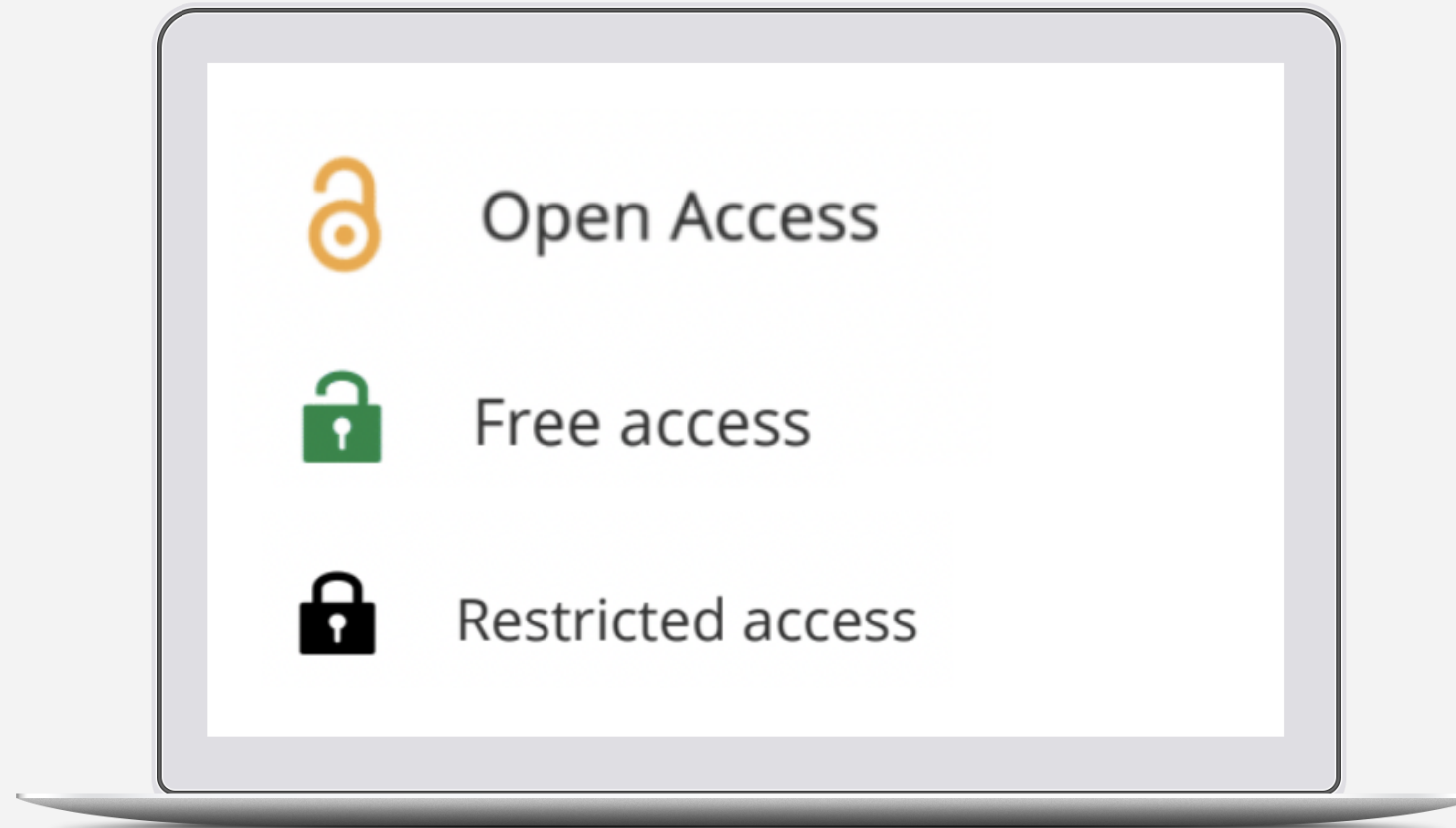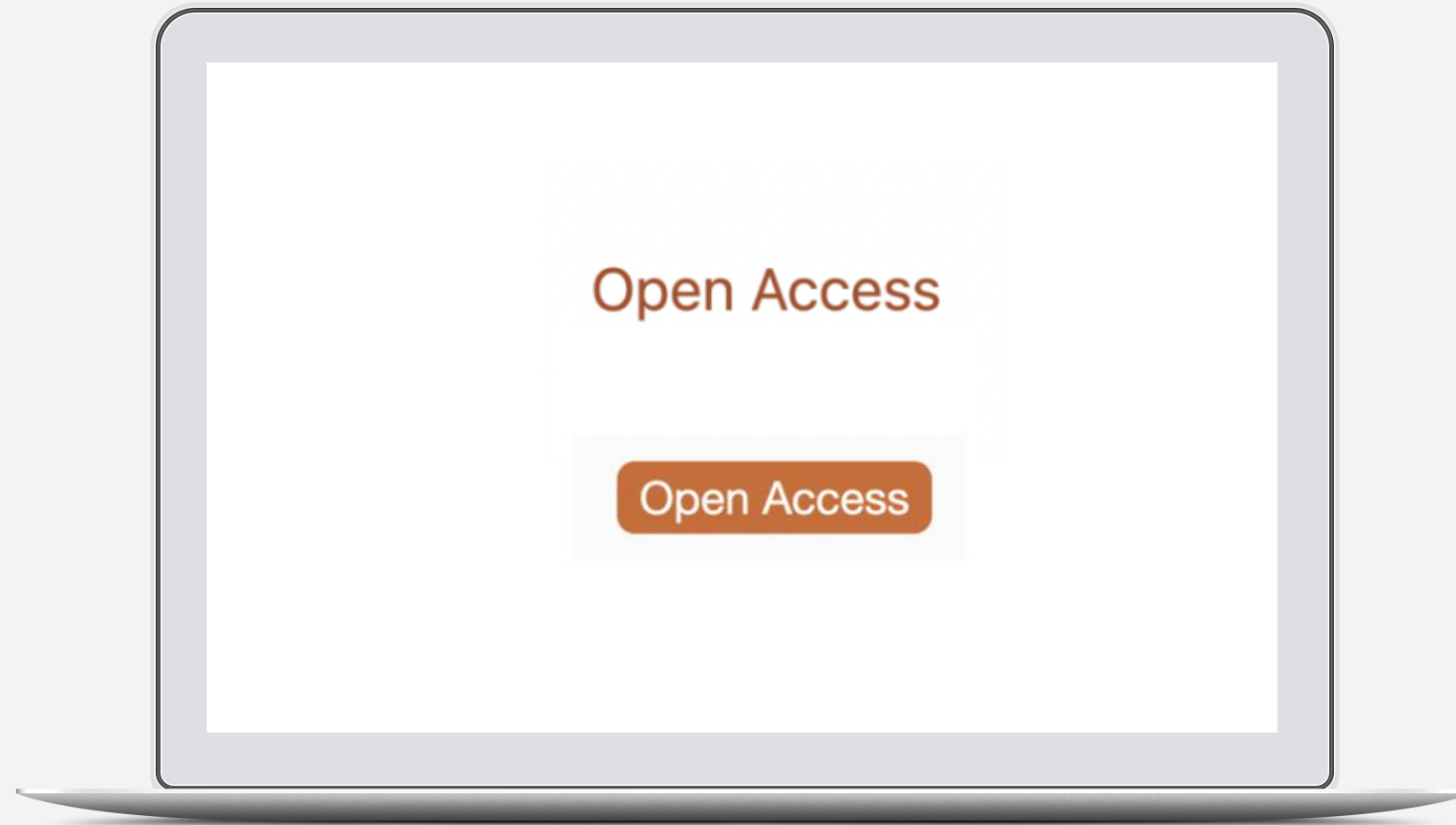
SPRINGER

In the table of contents, Springer's indicator is orange text that says, "Open Access." In the keyword search, Springer uses an orange box with white text that says, "Open Access."

Thus, Springer is consistent in use of color – always using an orange and white combination – but not consistent in which is background, and which is text color.

TAYLOR & FRANCIS

Taylor Francis & indicates open access articles using an orange triangle with an unlocked icon in both tables of contents and keyword search displays.

The term "Open Access" appears next to the triangle as a mouse-over. A green triangle with a checkmark in it also appears in the displays and the text "Free Access" shows upon mouse-over.
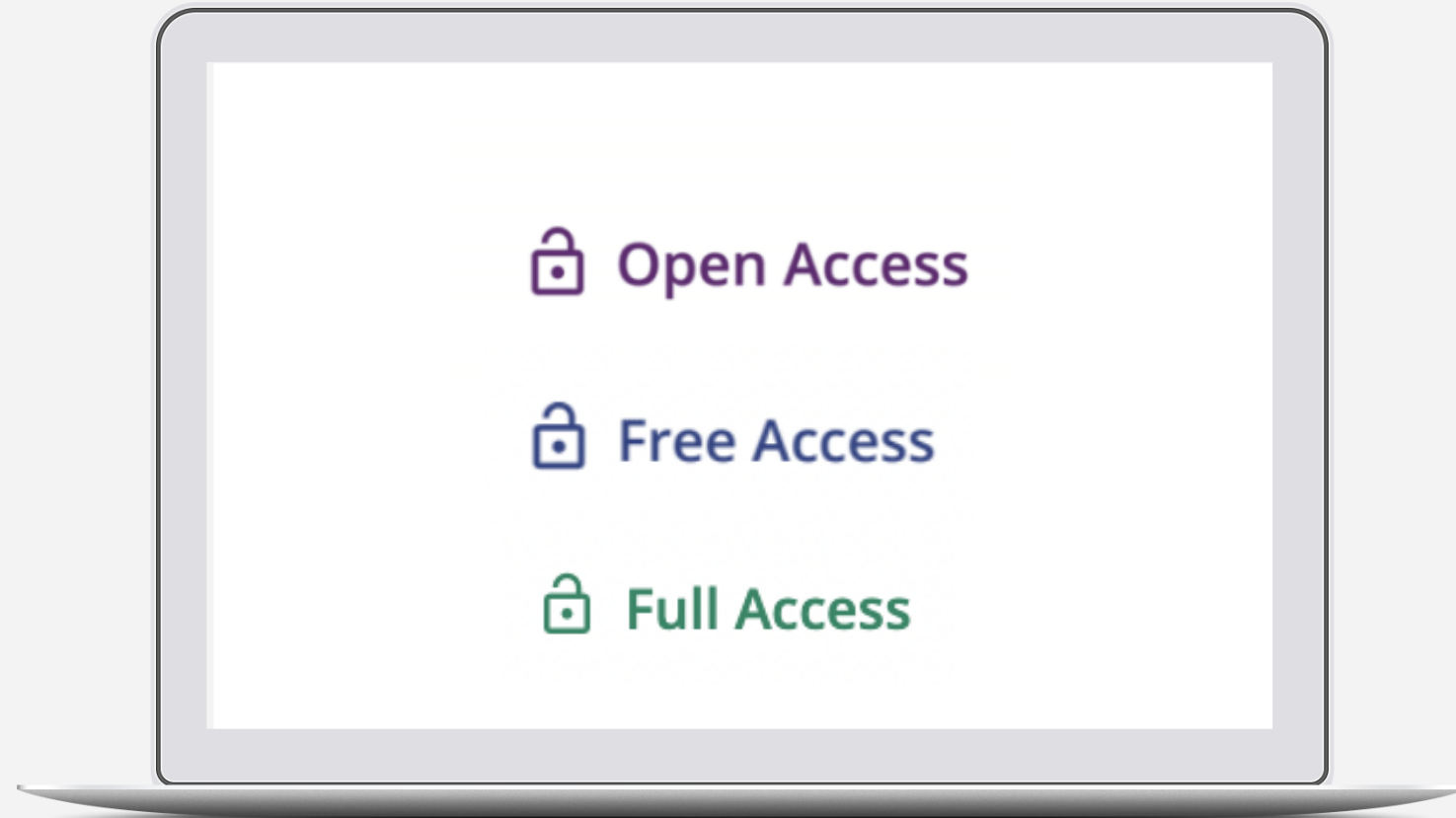
WILEY

In the table of contents, Wiley's indicator is purple text that says, "Open Access" and an unlocked icon. The same indicator is used in the keyword search.

Another kind of access is indicated by blue text that says "Free Access" accompanied by an unlocked blue icon. We observed that Wiley does use the unlocked green icon seen on other platforms. However, Wiley does so accompanied by the green label "Full Access" and this is when the user has subscription-based access to content.

🔓 Open Access

🔓 Free Access

🔓 Full Access

IMPLICATIONS

All platforms had consistency internally but differed significantly from one another.

There were some similarities, such as the locked/unlocked imagery and download icons in Sage, Taylor & Francis, and Wiley, but differences in colors and shapes as well as placement were notable.

When users are navigating through multiple platforms during their research process not having universal symbolism for open access has the potential to slow them down and create confusion.

WHAT KIND OF ACCESS?

Another confusion is an absence of information to help a user distinguish among open/free/full/available/etc. access.

Sometimes it is not clear whether the user has "free access" or "full access" to an article because they are affiliated with an institution with a subscription or because the article is open for reading for everyone.

And, indeed, open access is a kind of free access; however, the inconsistency in terminology is likely to cause confusion.

WHAT KIND OF ACCESS? EXAMPLES OF CONFUSION

If logged in through institution on Sage, "Available Access"
appears accompanied by the green unlocked icon. Collaborating scholars
who are accessing the platform in different ways – unauthenticated
or authenticated/unentitled vs authenticated/entitled – will see
different indicators for the same article.

Elsevier's green dot associated with both "open access" and "free access"
terminology as well as the "full-text access" that reflects a subscription-based
entitlement.

WHY CARE?

- **Users:** May not know if they can access articles without hitting a paywall or a per-article fee.

- **Publishers:** Communicating what type of access a user has to an article may influence the article's reach.

- **Librarians:** Reliance on these indicators to properly assist those who are using these publishing platforms.

BUILDING ON THESE FINDINGS

Outside of librarianship and publishing, terms like "open access," "full text access," "available access" and "free access" are likely unfamiliar.

Better explanations of OA indicators or a shared taxonomy of indicators across the industry would decrease user confusion and improve the user experience.

Visual consistency with respect to conceptual coherence in design

Yen M. T. Trinh

X ACCESS

OPEN ACCESS

conceptualization❓

X ACCESS
OPEN ACCESS
visual representation?

Open Access   open access   open-access

Open Access

It is important to point out that Open Access does not affect peer-review; articles are peer-reviewed and published in journals in the normal way. There is no suggestion that authors should use repositories instead of

open access

Open access is a set of principles and a range of practices through which research outputs are distributed online, free of access charges or other barriers. With open access strictly defined, or libre open access, barriers to copying or reuse are also

open-access

published journal, authors should carefully check any specific open-access policy from their funding body to ensure that their journal of choice supports publication under a model that meets their funding obligations. If authors are

Open Access

open access

open-access

It is important to point out that <mark>Open Access</mark> does not affect peer-review; articles are peer-reviewed and published in journals in the normal way. There is no suggestion that authors should use repositories instead of

Open access is a set of principles and a range of practices through which research outputs are distributed online, free of access charges or other barriers. With <mark>open access</mark> strictly defined, or libre open access, barriers to copying or reuse are also

published journal, authors should carefully check any specific <mark>open-access</mark> policy from their funding body to ensure that their journal of choice supports publication under a model that meets their funding obligations. If authors are

What is Open Access? - Open Access Publishing - Library Guides at James Cook University. (2023). https://libguides.jcu.edu.au/openaccess

Open access - Wikipedia. (2023). https://en.wikipedia.org/wiki/Open_access

Open Access Policy | Bioscientifica. (2023). https://www.bioscientifica.com/publishing/openaccesspolicy/

Open Access and open access

At it's most fundamental Open Access is when publications are freely availble online to all at no cost and with limited restrictions with regards reuse. The

There are two routes to open access

What is Open Access? | Springer — International Publisher. (2023). https://www.springer.com/gp/authors-editors/authorandreviewertutorials/open-access/what-is-open-access/10286522

How should we visually represent 'x access'?

**X
ACCESS**

How should we not visually represent 'x access'?

OPEN ACCESS

open door

open book

direct access

gain access

OPEN ACCESS

🔓 **Open Access**

Open Access

Open Access

🔓 Open Access

🟢 *Open access*

✓

"freely available information for everyone"

CONSISTENCY COHERENCE

CONSISTENCY

COHERENCE

CONSISTENCY

COHERENCE

"the expression of similar things in similar ways"

"the expression of similar things in complementary ways"

CONSISTENCY

COHERENCE

"the expression of similar things in similar ways"

"the expression of similar things in complementary ways"

◎ Open access

Title

◎ Open access

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
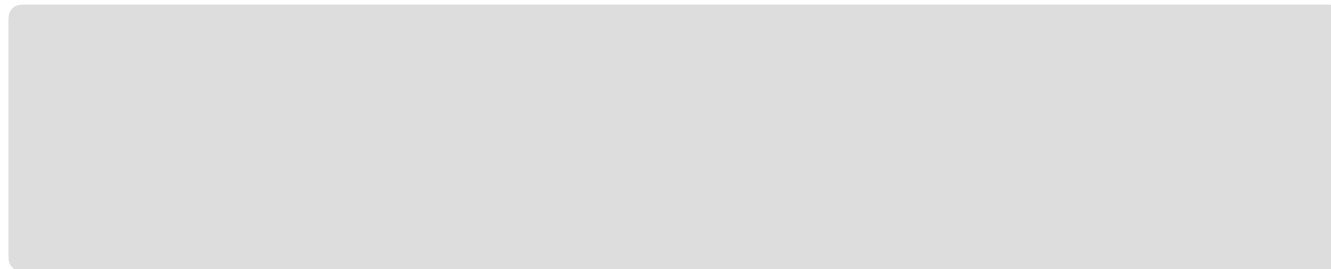
Figure 1. Duis leo. Sed fringilla mauris sit amet nibh.

A Longer Titl◎ Open access

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Figure 1. Duis leo. Sed fringilla mauris sit amet nibh.

Contents

Contents

Just a Title

Aliquam vestibulum morbi blandit cursus risus at. Mattis aliquam faucibus purus in massa tempor. Vitae proin sagittis nisl rhoncus mattis rhoncus urna. Purus gravida quis blandit turpis cursus in hac. Sit amet luctus venenatis lectus magna. Viverra ipsum nunc aliquet bibendum enim. Nulla pharetra diam sit amet nisl suscipit adipiscing bibendum. Consectetur adipiscing elit duis tristique sollicitudin nibh sit. Id aliquet risus feugiat in ante metus dictum at.

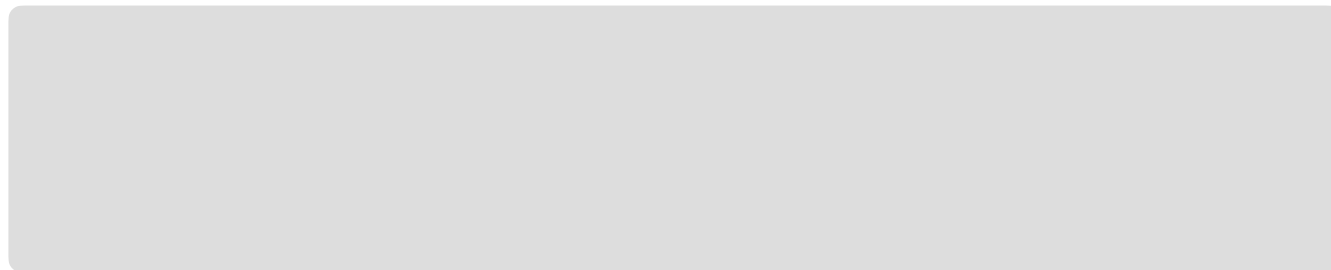◎ Open access　　⬤ Other tag　　Another tag　　Tag again

One more tag　　And tag

Just a Title

Aliquam vestibulum morbi blandit cursus risus at. Mattis aliquam faucibus purus in massa tempor. Vitae proin sagittis nisl rhoncus mattis rhoncus urna. Purus gravida quis blandit turpis cursus in hac. Sit amet luctus venenatis lectus magna. Viverra ipsum nunc aliquet bibendum enim. Nulla pharetra diam sit amet nisl suscipit adipiscing bibendum. Consectetur adipiscing elit duis tristique sollicitudin nibh sit. Id aliquet risus feugiat in ante metus dictum at.

◎ Open access   ◕ Other tag   Another tag   Tag again

One more tag   And tag

◎ Open access

A Longer Title

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Figure 1. Duis leo. Sed fringilla mauris sit amet nibh.

Contents

Just a Title

Aliquam vestibulum morbi blandit cursus risus at. Mattis aliquam faucibus purus in massa tempor. Vitae proin sagittis nisl rhoncus mattis rhoncus urna. Purus gravida quis blandit turpis cursus in hac. Sit amet luctus venenatis lectus magna. Viverra ipsum nunc aliquet bibendum enim. Nulla pharetra diam sit amet nisl suscipit adipiscing bibendum. Consectetur adipiscing elit duis tristique sollicitudin nibh sit. Id aliquet risus feugiat in ante metus dictum at. Ut aliquam purus sit amet luctus. Massa vitae tortor condimentum lacinia quis vel eros donec ac. Cursus in hac habitasse platea dictumst quisque sagittis. Scelerisque felis imperdiet proin fermentum. Tincidunt id aliquet risus feugiat.

◎ Open access   ◕ Other tag   Another tag   Tag again

One more tag   And tag

◎ Open access

Open access

◎

◎ Open access

Open access ◎

◎ Open access

Open access ◎

◎ Open access   Open access   ◎   ● Free access   Fre

◎ Open access   Open access   ◎   ● Free access   Free

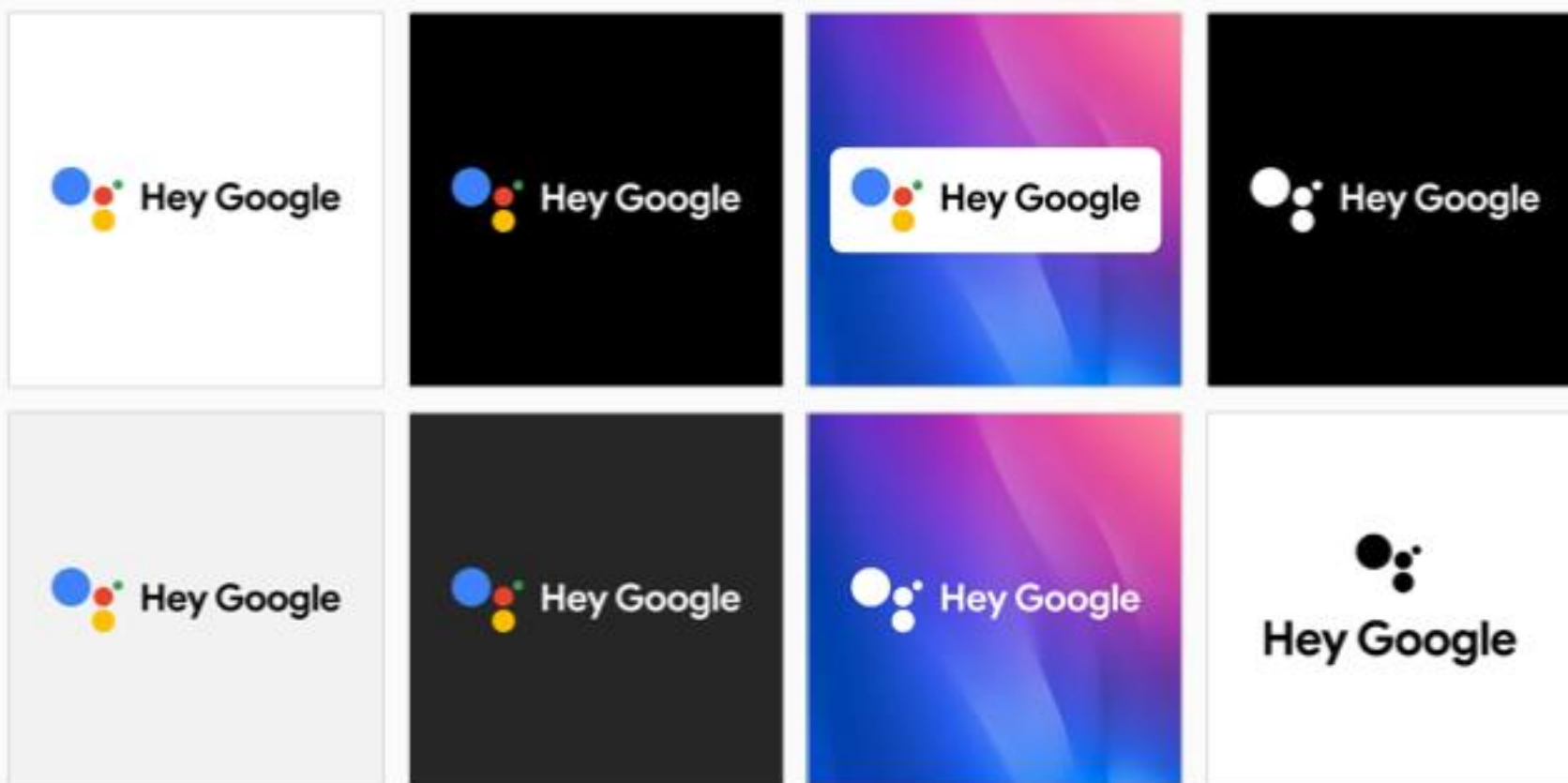Open Access

Open Access

Springer

A CONCEPT

X
ACCESS

THE CONCEPT.

Google
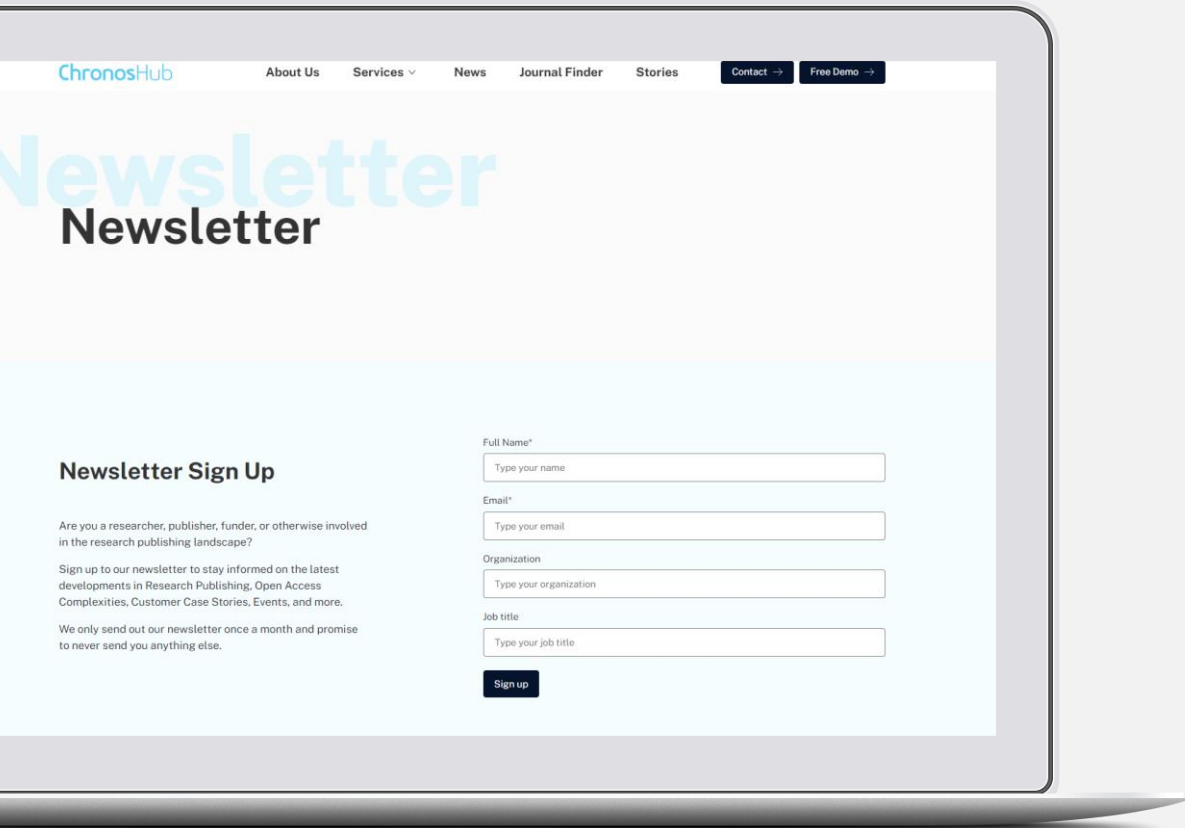
X
ACCESS

DISCUSSION & Audience Q&A

What's next?

NEWSLETTER & EVENTS LIST

Sign up for our newsletter to stay informed on the latest developments in research publishing, open access complexities, customer case stories, future webinars, events, and much more.

We only send out our newsletter once a month – less is much more.

Newsletter: https://chronoshub.io/newsletter/
Event list: https://chronoshub.io/events/

UPCOMING EVENTS

WEBINAR

February 09, 2023
3-4 p.m. CEST

How Does OA Fit with Funder Requirements?

Understanding different funder requirements and the specific terms of a grant in relation to OA publishing is certainly no cakewalk. Tune in for our third session in our webinar series where we look closer at how Open Access fit with funder requirements.

→

WEBINAR

February 23, 2023
3-4 p.m. CEST

What Do OA Agreements Entail?

Join us as we wrap up our researcher-centric webinar series with a final session where we'll look into why OA agreements are needed and how they come about in a practical sense. Because what exactly do these agreements entail? And what role do discounts, vouchers, and waivers play in this?

→

WEBINAR

March 02, 2023
3-4 p.m. CET

Author Experience

Join this webinar to learn more about the author's experience when interacting with publishers.

→