OpenAthens

The user journey to discovery: Tips for content providers

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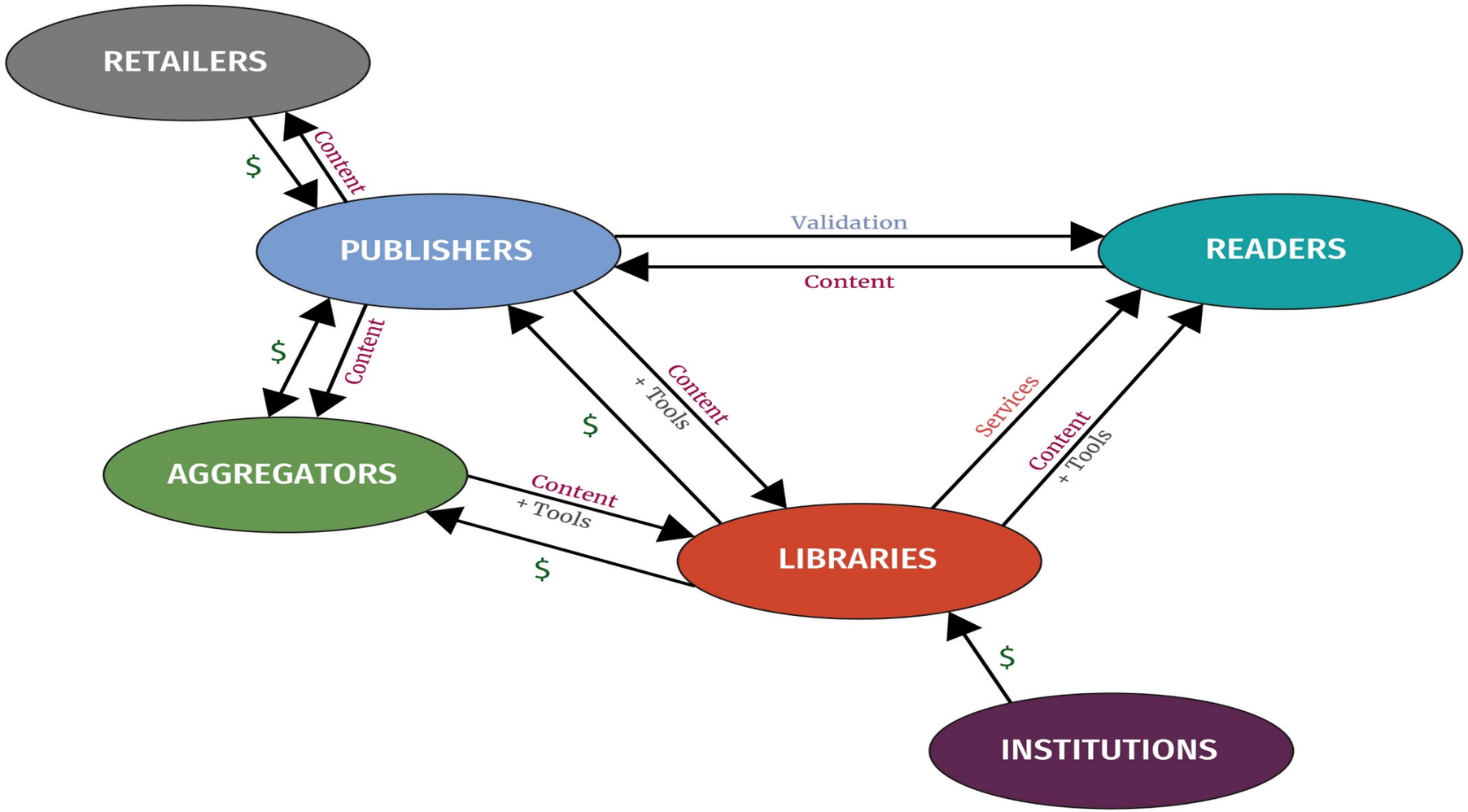
Kieran Prince (OpenAthens - Jisc)

February 2022

Setting the scene: content providers



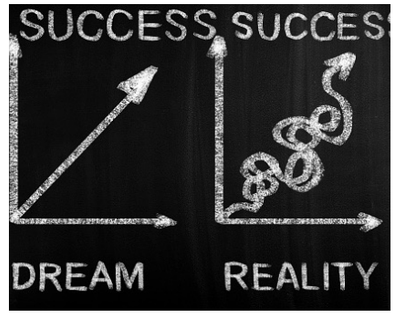
The Scholarly Publishing Ecosystem, in: An Open Approach to Scholarly Reading and Knowledge Management by The Rebus Foundation, McGuire, H.

Setting the scene: user journey

“The customer journey is formed by the service provider’s explicit action as well as by the customer’s choices”

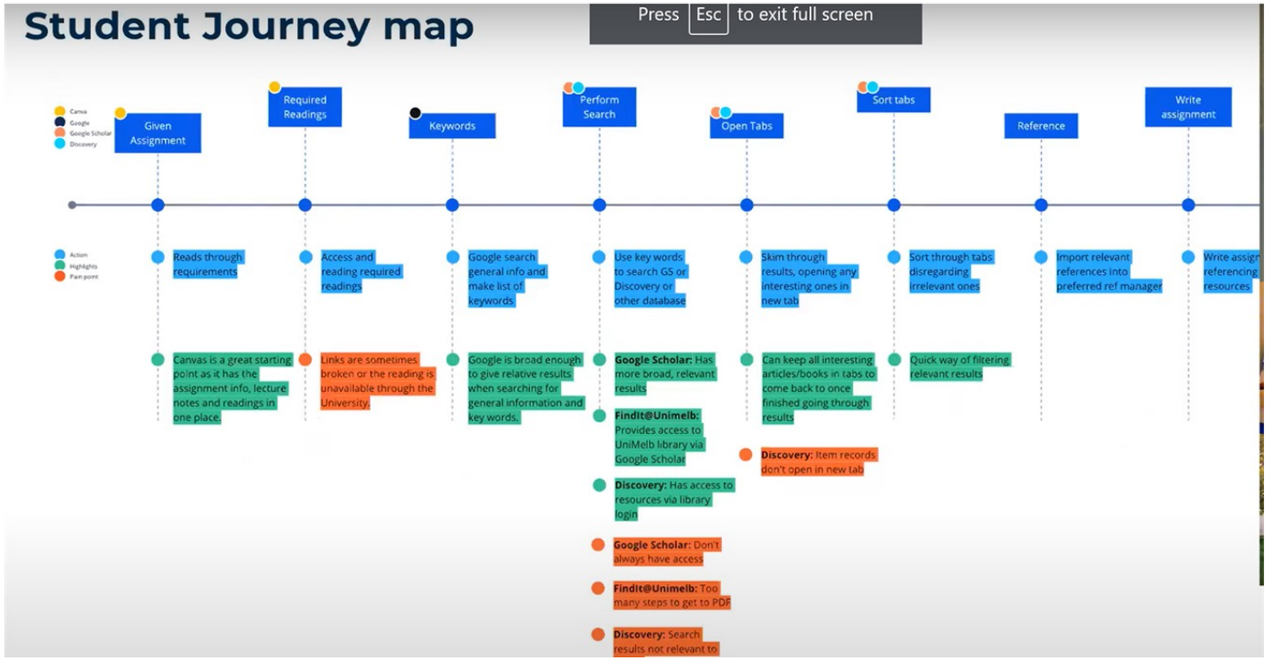
Frameworks for structuring services and customer experiences in: Designing Services with Innovative Methods, M. Koivisto,

Setting the scene: user journey



✓ ***Journey Mapping the User Experience***
Samson, S. et al., in: College & Research Libraries,

✓ ***User Experience in Durick Library: Journey Mapping Student Experience***
Dietrich, B.



Caroline Gauld (University of Melbourne)
https://www.youtube.com/watch?v=SXCi515julE

Distribution +

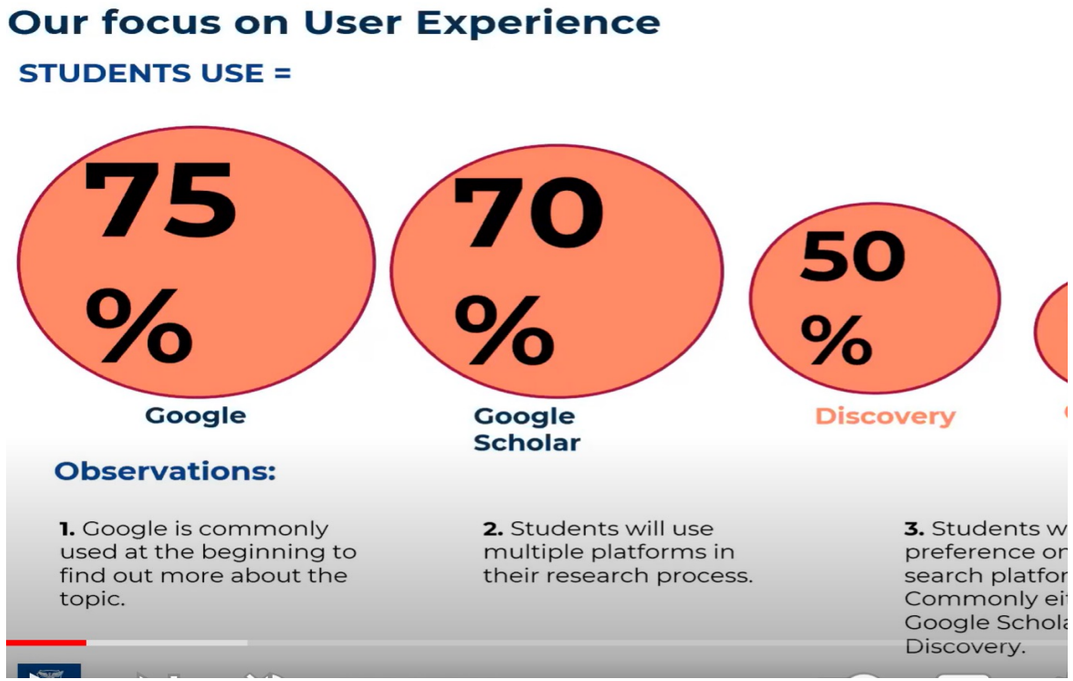
Metadata +

Navigation +

Tip 1: Be where the users are

Where the discovery journey starts?

- ✓ A&Is
- ✓ Google Scholar
- ✓ Social and Professional networking sites
- ✓ Library catalogues and services
- ✓ top resources per subject field



"Users have kind of pattern…they start in Google to get an idea of the keywords they will need and the scale of the queries they may want to do and then, they go to more refine resources like discovery tools, library catalogues, google scholar or specific disciplines databases"

Caroline Gauld from the University of Melbourne (https://www.youtube.com/watch?v=SXCi515julE)

"People discover articles through search around 45% of the time. 55% of the time they are doing something else. However, discovery via search has increased over time"

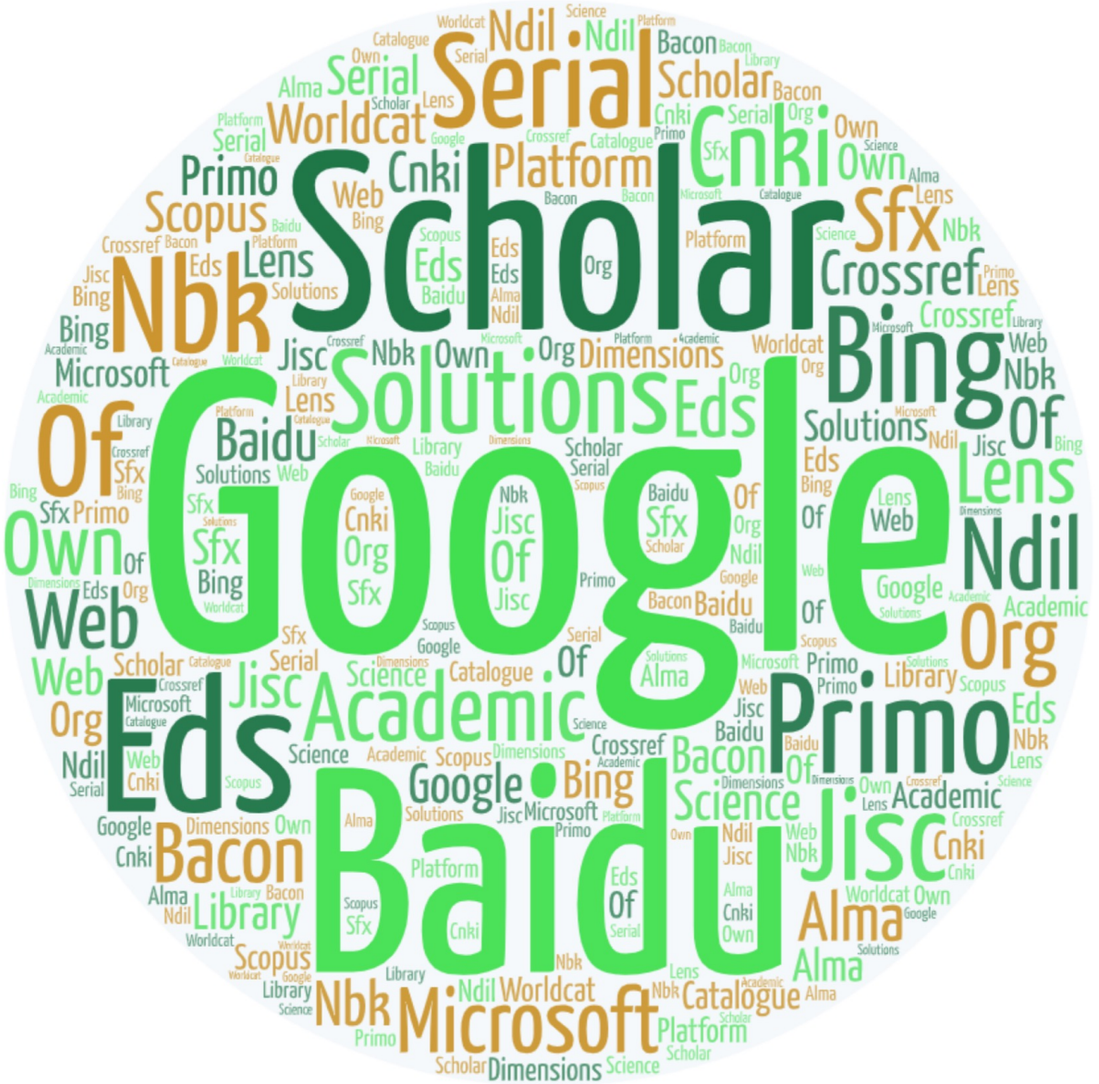
How Readers Discover Content in Scholarly Publications 2021,, Gardner, T. & al. Renew Consultants

«Discovery is not as simple as 'novice' vs. 'expert'(…) A professor in one discipline may, for example, use Wikipedia or basic Google searches to familiarize themselves with a new topic just as a new student might»

Resource Discovery@ The University of Oxford, Madsen, C. & al., Athenaeum21 Consulting Research

Distribution

- Agreements
- Workflows
- Quality assurance
- Communicate
- Resources



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Thank you

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SOLENT UNIVERSITY

QS STARS RATED FOR EXCELLENCE 2017
INCLUSIVENESS
TEACHING

THE ROLE OF METADATA FOR DISCOVERY:

Tips for content providers

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Solent University, UK

FEBRUARY 17TH 2022

NISO+PLUS 2022

Why metadata?

"METADATA *plays a critical role in the function of any* DISCOVERY *service.* SEARCH*, relevancy* RANKING*,* *faceted* REFINEMENT*, and recording* GROUPING *function (FRBR) all respond to the metadata present.*"

Source: (Han & Weathers, 2016, p, 275 in Varnum, 2016)

"*Without the bibliographic control that cataloguing brings, the ever-increasing mass of information is mere chaos*" (Barbara B. Tillett, 2000)

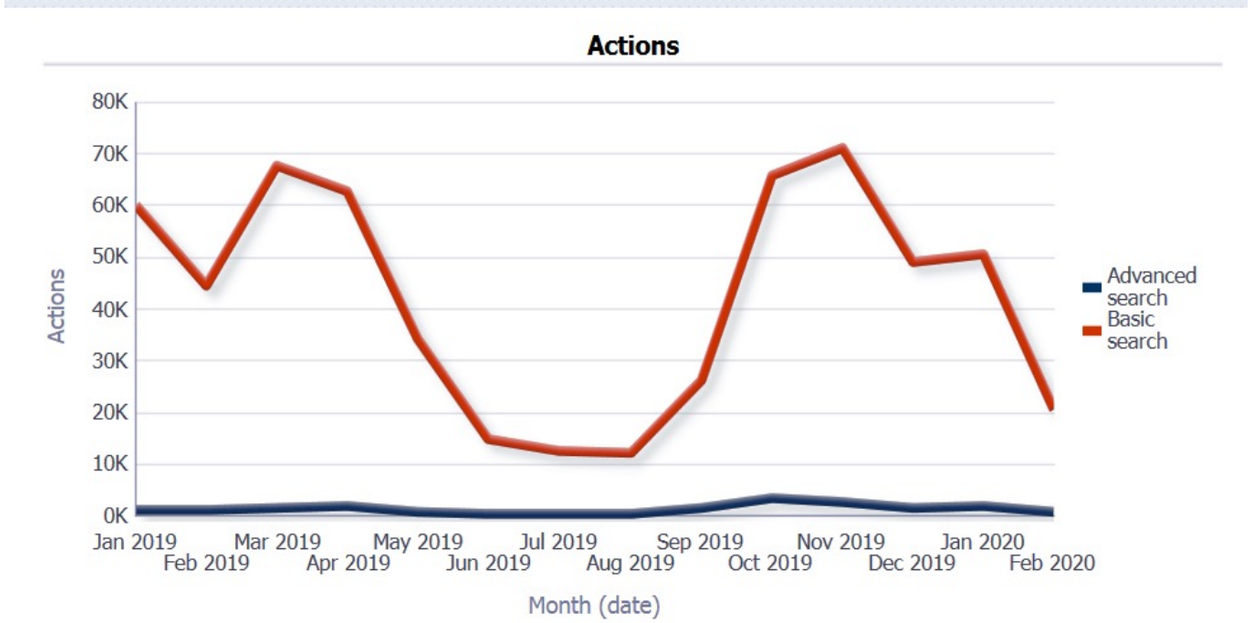
Metadata –tip: *Create user-centred (usable) metadata*

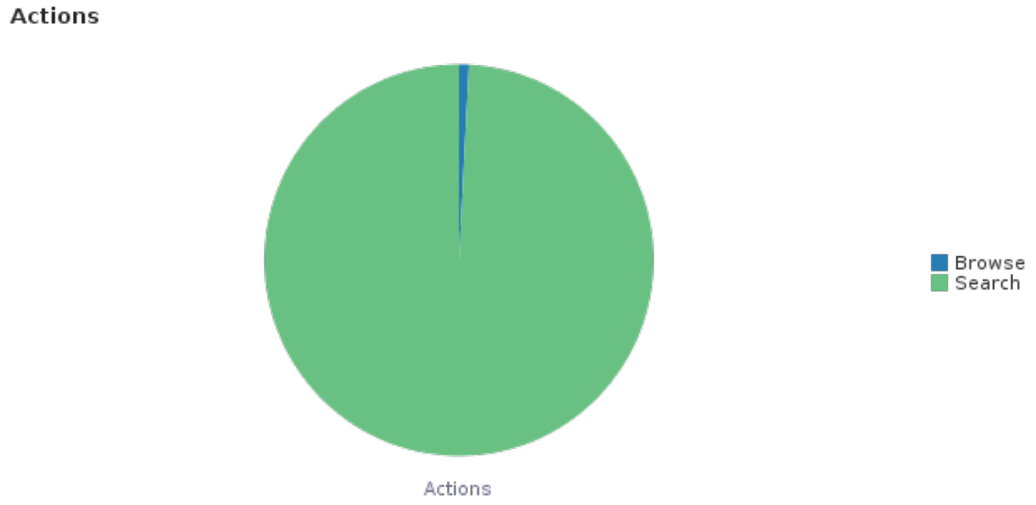
IFLA's Library Reference Model's (LRM, FRBR) user tasks:

- **Find:** allows users to search and find information resources for their queries.
- **Identify:** enables users to distinguish relevant resources.
- **Select:** enables users to choose appropriate resources that meet their requirements.
- **Obtain:** helps users to access and utilise information resources.
- **Explore:** helps users discover information resources (see Riva, Le Boeuf & Žumer, 2017).

Metadata key for better DISTRIBUTION, VISIBILITY, DISCOVERABILITY, ACCESSIBILITY, SALES and USAGE

TIP: FOCUS SUPPORTING SIMPLE SEARCH





SIMPLE **search** is the predominantly preferred method which accounts for **95%** of the searches, followed remotely by *ADVANCED* **search** only **4%.** And a very small fraction of *VOICE* searches (a new feature).

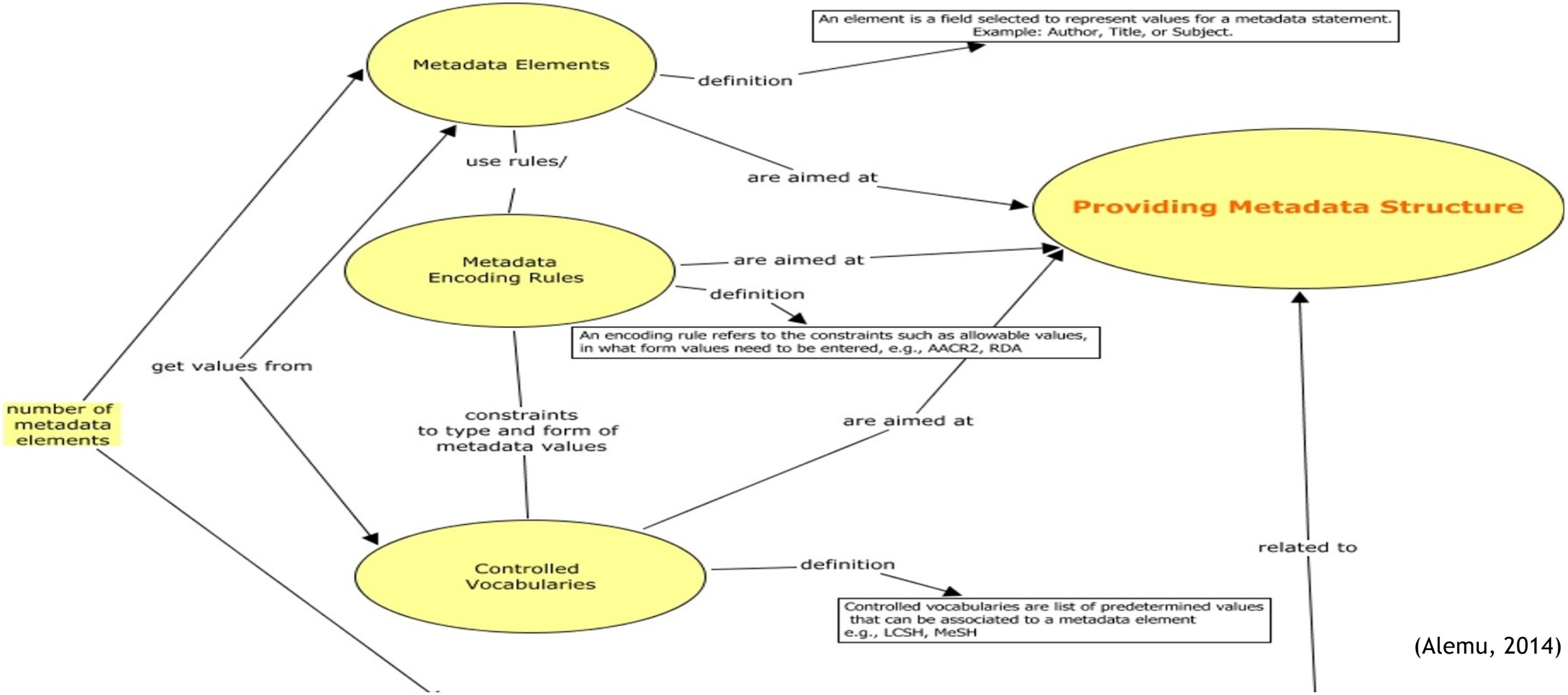
Source: Solent University Primo Discovery

TIP: # OF WORDS IN SEARCH

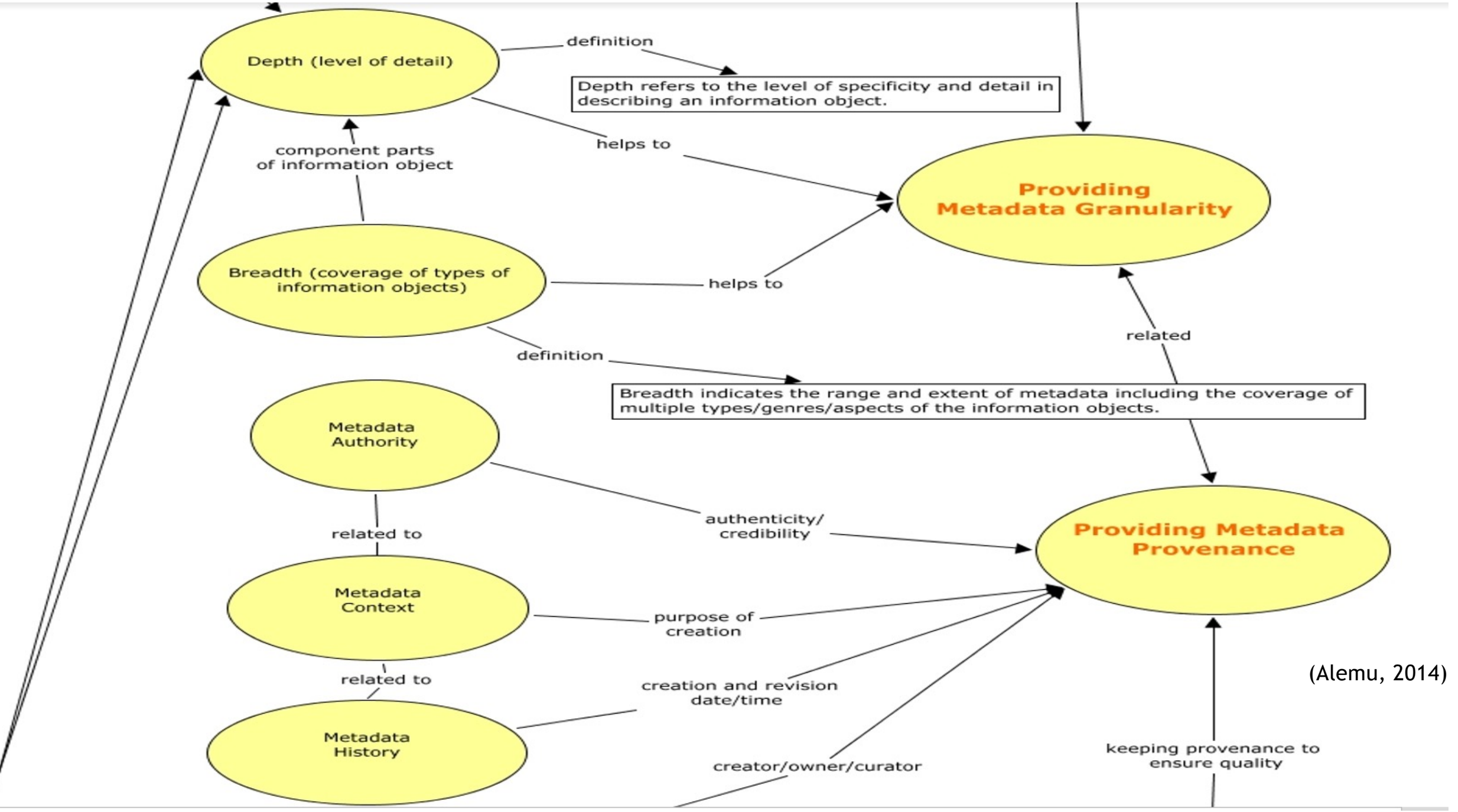
#words	%
1	29.47%
2	38.38%
3	16.80%
4	6.97%
5	3.86%
6	1.26%
7	0.93%
8	0.65%
9	0.31%
10	0.12%
11	0.23%
12	0.21%
13	0.13%
14	0.15%
15	0.29%
16	0.08%
18	0.03%
20	0.06%
21	0.03%
26	0.05%

Source: Solent University Primo Discovery

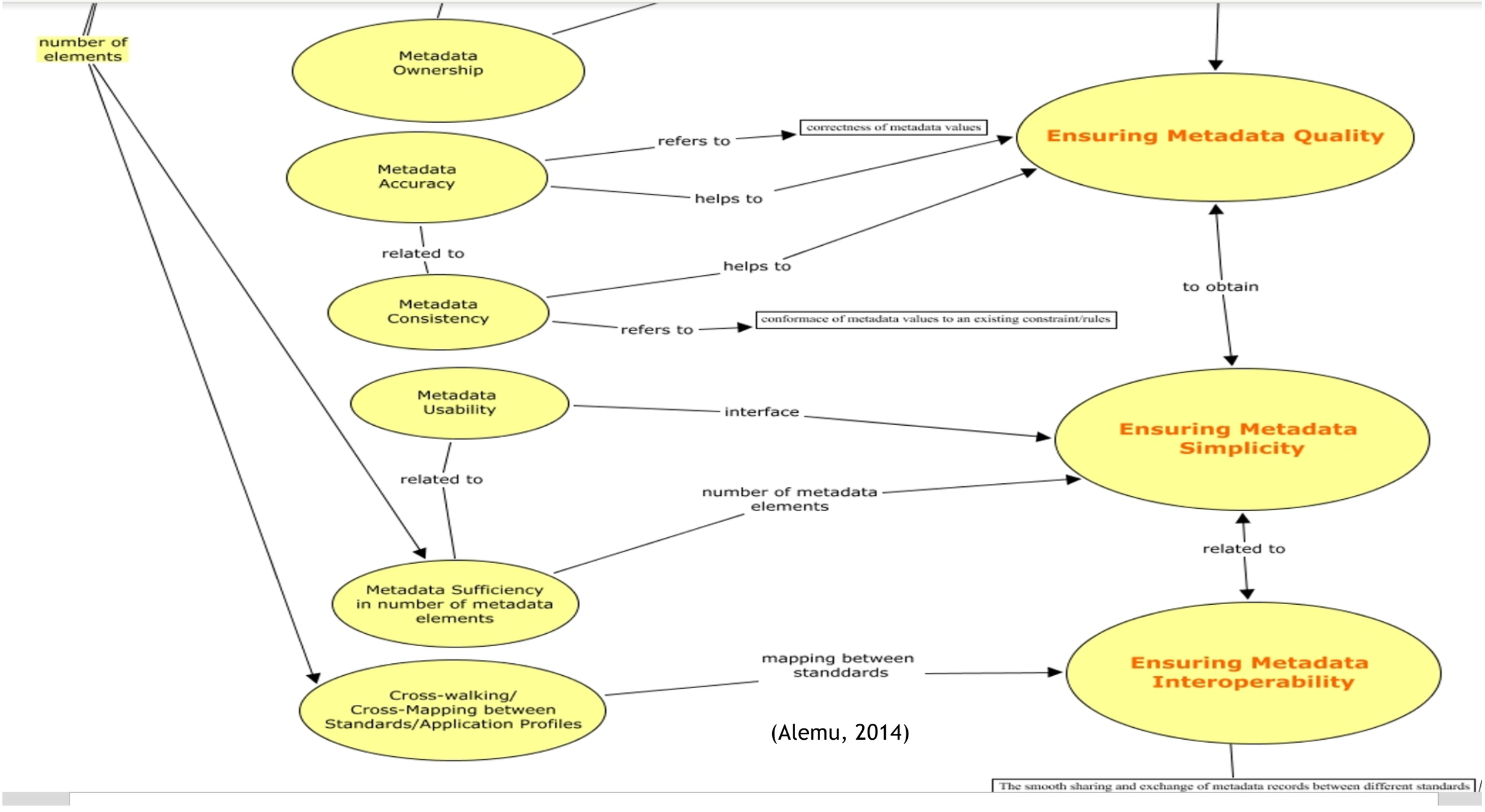
Metadata – tip: *create standardised metadata*



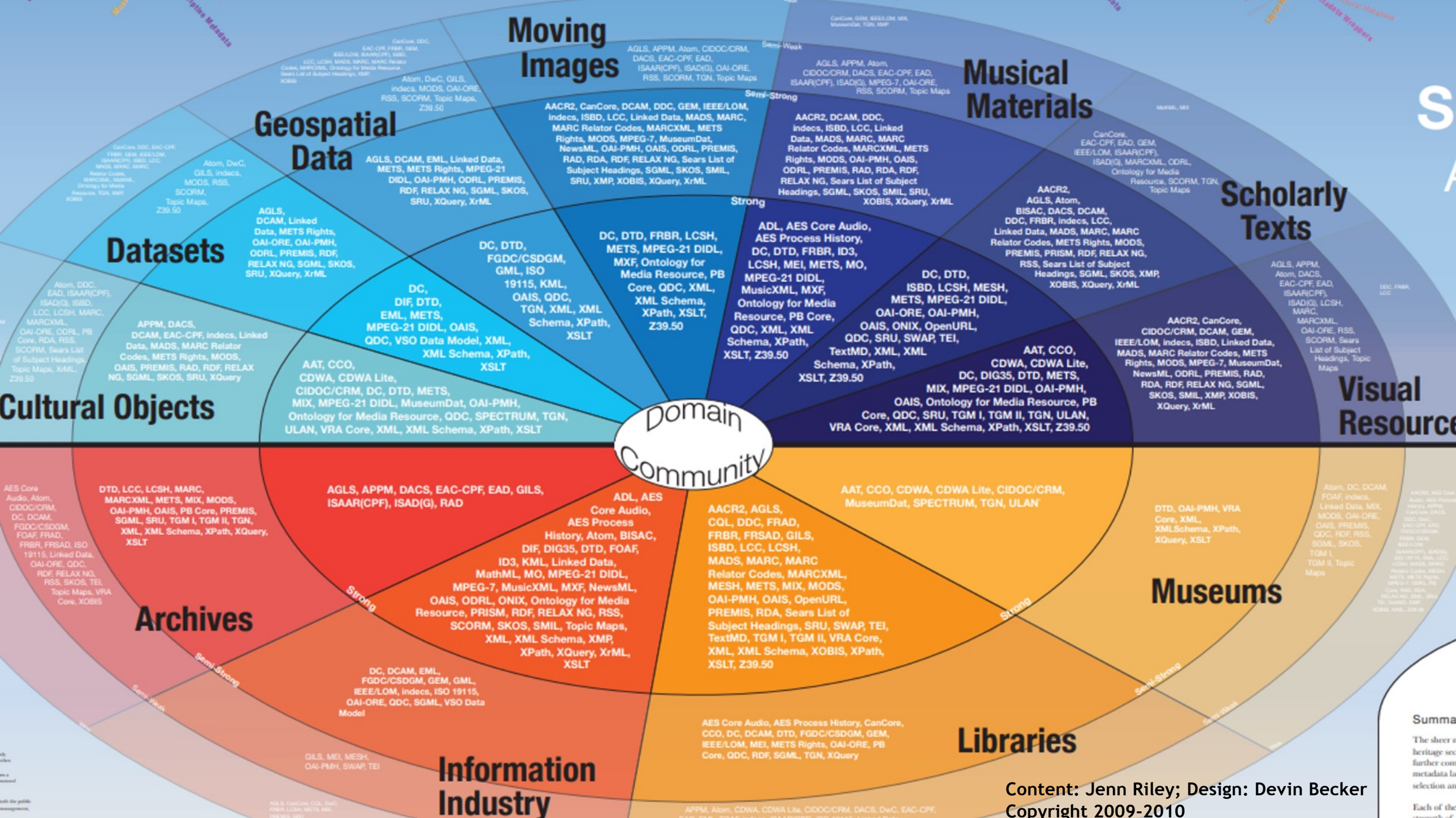
(Alemu, 2014)


Depth (level of detail)
definition
Depth refers to the level of specificity and detail in describing an information object.
helps to
component parts of information object
Providing Metadata Granularity
Breadth (coverage of types of information objects)
helps to
related
definition
Breadth indicates the range and extent of metadata including the coverage of multiple types/genres/aspects of the information objects.
Metadata Authority
authenticity/ credibility
Providing Metadata Provenance
related to
Metadata Context
purpose of creation
related to
creation and revision date/time
Metadata History
creator/owner/curator
keeping provenance to ensure quality

(Alemu, 2014)


number of elements
Metadata Ownership
Metadata Accuracy
refers to
correctness of metadata values
helps to
Ensuring Metadata Quality
related to
Metadata Consistency
helps to
refers to
conformace of metadata values to an existing constraint/rules
to obtain
Metadata Usability
interface
Ensuring Metadata Simplicity
related to
number of metadata elements
related to
Metadata Sufficiency in number of metadata elements
Cross-walking/ Cross-Mapping between Standards/Application Profiles
mapping between standdards
Ensuring Metadata Interoperability
The smooth sharing and exchange of metadata records between different standards

(Alemu, 2014)


Moving Images
AGLS, APPM, Atom, CIDOC/CRM, DACS, EAC-CPF, EAD, ISAAR(CPF), ISAD(G), OAI-ORE, RSS, SCORM, TGN, Topic Maps
Semi-Weak
Musical Materials
AGLS, APPM, Atom, CIDOC/CRM, DACS, EAC-CPF, EAD, ISAAR(CPF), ISAD(G), MPEG-7, OAI-ORE, RSS, SCORM, Topic Maps
Geospatial Data
Atom, DwC, GILS, indecs, MODS, OAI-ORE, RSS, SCORM, Topic Maps, Z39.50
Semi-Strong
AACR2, CanCore, DCAM, DDC, GEM, IEEE/LOM, indecs, ISBD, LCC, Linked Data, MADS, MARC, MARC Relator Codes, MARCXML, METS Rights, MODS, MPEG-7, MuseumDat, NewsML, OAI-PMH, OAIS, ODRL, PREMIS, RAD, RDA, RDF, RELAX NG, Sears List of Subject Headings, SGML, SKOS, SMIL, SRU, XMP, XOBIS, XQuery, XrML
AACR2, DCAM, DDC, indecs, ISBD, LCC, Linked Data, MADS, MARC, MARC Relator Codes, MARCXML, METS Rights, MODS, OAI-PMH, OAIS, ODRL, PREMIS, RAD, RDA, RDF, RELAX NG, Sears List of Subject Headings, SGML, SKOS, SMIL, SRU, XOBIS, XQuery, XrML
AGLS, DCAM, EML, Linked Data, METS, METS Rights, MPEG-21 DIDL, ODRL, OAI-PMH, PREMIS, RDF, RELAX NG, SGML, SKOS, SRU, XQuery, XrML
Strong
Datasets
AGLS, DCAM, Linked Data, METS Rights, OAI-ORE, OAI-PMH, ODRL, PREMIS, RDF, RELAX NG, SGML, SKOS, SRU, XQuery, XrML
DC, DTD, FGDC/CSDGM, GML, ISO 19115, KML, OAIS, QDC, TGN, XML, XML Schema, XPath, XSLT
DC, DTD, FRBR, LCSH, METS, MPEG-21 DIDL, MXF, Ontology for Media Resource, PB Core, QDC, XML, XML Schema, XPath, XSLT, Z39.50
ADL, AES Core Audio, AES Process History, DC, DTD, FRBR, ID3, LCSH, MEI, METS, MO, MPEG-21 DIDL, MusicXML, MXF, Ontology for Media Resource, PB Core, QDC, XML, XML Schema, XPath, XSLT, Z39.50
DC, DTD, ISBD, LCSH, MESH, METS, MPEG-21 DIDL, OAI-ORE, OAI-PMH, OAIS, ONIX, OpenURL, QDC, SRU, SWAP, TEI, TextMD, XML, XML Schema, XPath, XSLT, Z39.50
AACR2, AGLS, Atom, BISAC, DACS, DCAM, DDC, FRBR, indecs, LCC, Linked Data, MADS, MARC, MARC Relator Codes, METS Rights, MODS, PREMIS, PRISM, RDF, RELAX NG, RSS, Sears List of Subject Headings, SGML, SKOS, XMP, XOBIS, XQuery, XrML
Scholarly Texts
CanCore, EAC-CPF, EAD, GEM, IEEE/LOM, ISAAR(CPF), ISAD(G), MARCXML, ODRL, Ontology for Media Resource, SCORM, TGN, Topic Maps
Atom, DDC, EAD, ISAAR(CPF), ISAD(G), ISBD, LCC, LCSH, MARC, MARCXML, OAI-ORE, ODRL, PB Core, RDA, RSS, SCORM, Sears List of Subject Headings, Topic Maps, XrML, Z39.50
APPM, DACS, DCAM, EAC-CPF, indecs, Linked Data, MADS, MARC Relator Codes, METS Rights, MODS, OAIS, PREMIS, RAD, RDF, RELAX NG, SGML, SKOS, SRU, XQuery
DC, DIF, DTD, EML, METS, MPEG-21 DIDL, OAIS, QDC, VSO Data Model, XML, XML Schema, XPath, XSLT
AAT, CCO, CDWA, CDWA Lite, CIDOC/CRM, DC, DTD, METS, MIX, MPEG-21 DIDL, MuseumDat, OAI-PMH, Ontology for Media Resource, QDC, SPECTRUM, TGN, ULAN, VRA Core, XML, XML Schema, XPath, XSLT
Cultural Objects
AAT, CCO, CDWA, CDWA Lite, DC, DIG35, DTD, METS, MIX, MPEG-21 DIDL, OAI-PMH, OAIS, Ontology for Media Resource, PB Core, QDC, SRU, TGM I, TGM II, TGN, ULAN, VRA Core, XML, XML Schema, XPath, XSLT, Z39.50
AACR2, CanCore, CIDOC/CRM, DCAM, GEM, IEEE/LOM, indecs, ISBD, Linked Data, MADS, MARC Relator Codes, METS Rights, MODS, MPEG-7, MuseumDat, NewsML, ODRL, PREMIS, RAD, RDA, RDF, RELAX NG, SGML, SKOS, SMIL, XMP, XOBIS, XQuery, XrML
AGLS, APPM, Atom, DACS, EAC-CPF, EAD, ISAAR(CPF), ISAD(G), LCSH, MARC, MARCXML, OAI-ORE, RSS, SCORM, Sears List of Subject Headings, Topic Maps
Visual Resource
Domain Community
AES Core Audio, Atom, CIDOC/CRM, DC, DCAM, FGDC/CSDGM, FOAF, FRAD, FRBR, FRSAD, ISO 19115, Linked Data, OAI-ORE, QDC, RDF, RELAX NG, RSS, SKOS, TEI, Topic Maps, VRA Core, XOBIS
DTD, LCC, LCSH, MARC, MARCXML, METS, MIX, MODS, OAI-PMH, OAIS, PB Core, PREMIS, SGML, SRU, TGM I, TGM II, TGN, XML, XML Schema, XPath, XQuery, XSLT
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Strong
AAT, CCO, CDWA, CDWA Lite, CIDOC/CRM, MuseumDat, SPECTRUM, TGN, ULAN
AACR2, AGLS, CQL, DDC, FRAD, FRBR, FRSAD, GILS, ISBD, LCC, LCSH, MADS, MARC, MARC Relator Codes, MARCXML, MESH, METS, MIX, MODS, OAI-PMH, OAIS, OpenURL, PREMIS, RDA, Sears List of Subject Headings, SRU, SWAP, TEI, TextMD, TGM I, TGM II, VRA Core, XML, XML Schema, XOBIS, XPath, XSLT, Z39.50
DTD, OAI-PMH, VRA Core, XML, XMLSchema, XPath, XQuery, XSLT
Museums
Atom, DC, DCAM, FOAF, indecs, Linked Data, MIX, MODS, OAI-ORE, OAIS, PREMIS, QDC, RDF, RSS, SGML, SKOS, TGM I, TGM II, Topic Maps
Archives
Strong
Semi-Strong
Semi-Weak
DC, DCAM, EML, FGDC/CSDGM, GEM, GML, IEEE/LOM, indecs, ISO 19115, OAI-ORE, QDC, SGML, VSO Data Model
GILS, MEI, MESH, OAI-PMH, SWAP, TEI
Information Industry
AES Core Audio, AES Process History, CanCore, CCO, DC, DCAM, DTD, FGDC/CSDGM, GEM, IEEE/LOM, MEI, METS Rights, OAI-ORE, PB Core, QDC, RDF, SGML, TGN, XQuery
Libraries
APPM, Atom, CDWA, CDWA Lite, CIDOC/CRM, DACS, DwC, EAC-CPF,
Content: Jenn Riley; Design: Devin Becker
Copyright 2009-2010

TIP: USE RDA - RESOURCE DESCRIPTION & ACCESS

- RDA enables the creation of metadata that better caters for ***finding, discovering, identifying, selecting, obtaining and exploring*** information resources (access & usage)

- RDA is intuitive for cataloguers and helps to generate **user-friendly bibliographic metadata**. For example, it avoids the use of abbreviations (usability and accessibility)

- RDA helps to describe resources so that users can **differentiate one work, edition, or format from another**

- RDA provides sufficient descriptive data to **create links between related works**. For example, in IFLA LRM terms, the various abstractions include Work, Expression, Manifestation, and Item

(El-Sherbini, 2013)

Metadata - tip: *create quality metadata*

- Compatibility
- Completeness
- Up-to-date-ness
- Consistency
- Usefulness
- User Centredness
- Credibility
- Modularity
- Extensibility
- Refinement
- Multilingualism
- Interoperability

(Duval et al., 2002; Haynes, 2018; Meadows, 2019; Zeng & Qin, 2016)

- **Common issues include:**
  - **Invalid fields, undefined sub-fields and missing indicators**
  - **Issues with non-repeatable fields**
  - **Non-well-formatted values**
  - **Incomplete or brief records with missing MARC fields**
  - **Incorrect or inaccurate data in MARC fields**
  - **Data recorded incorrectly in MARC fields (spelling, capitalisation, punctuation etc.)**
  - **Missing subject headings**

(Kiraly, 2019; NAG, 2020)

Recommended/essential metadata elements

NISO (2020) recommendation – essential metadata elements

- Titles
- Names
- Dates
- Book identifiers
- Subjects

NISO (2020) recommendation

- Use clear, consistent titles and sub-titles (do not add extraneous information in the title)
- Use name authorities (LCAF, Virtual International Authority File (VIAF), International Standard Name Identifier (ISNI), ORCID or Wikidata)
- Dates (creation, publication, copyright, package, version, update dates; use ISO 8601)
- Book identifiers (ISBN, ISSN, DOI, LCCN, OCN)
- Subjects (LCSH, THEMA, BISAC, FAST, GND, etc)

NISO (2020). E-book Bibliographic Metadata Requirements in the Sale, Publication, Discovery, Delivery, and Preservation Supply Chain A Recommended Practice of the National Information Standards Organization. Retrieved fromhttps://groups.niso.org/apps/group_public/download.php/23850/NISO_RP-29-202X_E-Book_Metadata_Draft_for_Public_Comment.pdf

Recommended/essential metadata elements

NAG (2020) also showed that respondents consider the following metadata elements essential:

- Title information
- Creators from authorised lists
- Resource type and format
- Identifiers (such as ISBN)
- Edition statement
- Publication information
- Physical description (including page numbers)
- Series, if applicable
- Electronic access URL for e-books
- Item class mark
- Order information

(NAG,

Recommendations: Shelf-Ready MARC Record – E-Book or E-Textbook

MRC	Ind	**Key:** Essential / Desirable / As specified by library / * system-generated data
LDR		*****nam##22*****#i#4500
001*		on1104910376
003*		OCoLC
005*		20200318123925.0
006		m#####o##d########
007		cr#cn|||||||
008		******t20202020enka####ob####001#0#eng##
010	##	$a ##2019023989
015	##	$a GBC007900 $2 bnb
020	##	$a 9781509530168 $q (ebook)
020	##	$z 9781509530137 $q (hardcover)
020	##	$z 9781509530144 $q (paperback)
035	##	$a (OCoLC)on1104910376
040	##	$a DLC $b eng $e rda $d OCLCO
050	00	$a ML3790 $b .W52 2020
082	00	$a 338.4/778 $2 23
100	1#	$a Wilkström, Patrik, $e author. $0 http://id.loc.gov/authorities/names/nb2010000653
245	14	$a The music industry : $b music in the cloud / $c Patrik Wikström.
250	##	$a Third edition.
264	#1	$a Cambridge, UK ; $a Medford, MA : $b Polity Press, $c 2020.
264	#4	$c ©2020
300	##	$a 1 online resource (x, 230 pages) : $b illustrations.
336	##	$a text $b txt $2 rdacontent
337	##	$a computer $b c $2 rdamedia
338	##	$a online resource $b cr $2 rdacarrier
347	##	$a text file $2 rdaft
347	##	$b HTML/PDF
490	1#	$a Digital media and society series
504	##	$a Includes bibliographical references (pages 199-223) and index.
505	0	$a Intro -- Front Matter -- Introduction: Music in the Cloud – 1. A Copyright Industry – 2. Inside the Music Industry – 3. Music and the Media – 4. Making Music – 5. The Social and Creative Music Fan – 6. Future Sounds -- References -- Index.
520	##	$a Since the first edition was published in 2009, Patrik Wikström's book has become a go-to text for students and scholars. This thoroughly updated third edition provides an international overview of the music industry and its future prospects in the world of global entertainment.
533	##	$a Electronic reproduction. $b Ann Arbor, MI : $c ProQuest, $d 2019. $e Available via World Wide Web. Access may be limited to ProQuest affiliated libraries.
588	##	$a Description based on print version record.
650	#0	$a Music trade. $0 http://id.loc.gov/authorities/subjects/sh85088944
650	#0	$a Sound recording industry. $0 http://id.loc.gov/authorities/subjects/sh85125388
650	#0	$a Music and the Internet. $0 http://id.loc.gov/authorities/subjects/sh2004002303
650	#0	$a Music $x Social aspects. $0 http://id.loc.gov/authorities/subjects/sh85088891
650	#7	$a Music and the Internet. $2 fast $0 (OCoLC)fst01200152
650	#7	$a Music $x Social aspects. $2 fast $0 (OCoLC)fst01030444
650	#7	$a Music trade. $2 fast $0 (OCoLC)fst01030641
650	#7	$a Sound recording industry. $2 fast $0 (OCoLC)fst01127019
655	#7	$a History. $2 fast $0 (OCoLC)fst01411628
776	08	$i Print version: $a Wikström, Patrik, $t The music industry $b Third edition. $d Cambridge ; Medford : Polity, 2020. $z 9781509530137 $w (DLC) 2019023989
830	#0	$a Digital media and society series. $0 http://id.loc.gov/authorities/names/no2007139966
856	40	$u https://ebookcentral.proquest.com/lib/*[institution]*/detail.action?docID=6011629
9XX	##	$a *EOD and item data*

TIP: BE CONSISTENT ON YOUR TITLES & SUB-TITLES

Mind the articles, conjunctions, & the Oxford comma!

1

BOOK

Terrorism and counterterrorism : understanding the new security environment : readings and interpretations

Howard, Russell D.; Sawyer, Reid L.

2002

Conneticut, CT : McGraw-Hill / Dushkin

Available at Mountbatten Library Floor 1A, Society (303.6255 HOW) >

2

BOOK

Terrorism and counterterrorism : understanding the new security environment : readings & interpretations

Howard, Russell D.; Hoffman, Bruce, 1954-

Fourth edition.; 2012

New York : McGraw-Hill

Available at Mountbatten Library Floor 1A, Society (303.6255 HOW) >

1

MULTIPLE VERSIONS

Visual methodologies : an introduction to researching with visual materials

Rose, Gillian, 1962-,

2 versions found. See all versions >

2

BOOK

Visual methodologies : an introduction to the interpretation of visual materials

Rose, Gillian, 1962-

2nd ed.; 2007

London : Sage

Available at Mountbatten Library Floor 1A, Communications (302.22 ROS) >

BOOK

Communication and interpersonal skills for nurses

Bach, Shirley.; Grant, Alec.

2009

Exeter England : Learning Matters

Available Online >

BOOK

Communication and interpersonal skills in nursing

Bach, Shirley (Shirley A.); Grant, Alec

Third edition.; 2015

London : Learning Matters

Available at Mountbatten Library Floor 2B, Health and the body (610.730699 BAC) >

Source: Solent University Primo Discovery

Metadata-tip: ***Enrich thy metadata (be specific, granular, structured in your description)***

- Specificity of subjects
  - Individual/concrete subjects [persons, events, places] (e.g. Churchill; D-Day, Normandy) vs General/abstract subjects (e.g. Leadership)

Cutter, 1904 cited by Dousa, 2015)

THE MORE METADATA (ACCESS POINTS) THE BETTER

Active ageing and solidarity between generations in Europe : First results from SHARE after the economic crisis / Martina Brandt, Howard Litwin, Guglielmo Weber, Axel Börsch-Supan.

Edit R

Book {Book - Electronic} text; computer; online resource By Van den Heede, Aaron, (Berlin ; Boston : De Gruyter, [2013])

Subject: SOCIAL SCIENCE / Demography.

Language: English
ISBN: 9783110295467 and others
ISBN (13): 9783110295467 and others
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Creation Date: 03/11/2021 15:57:46 GMT
Modification Date: 03/11/2021 15:57:45 GMT
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4 editors
66 authors

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Linked Data

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metadata tips

- ✓ Create USER-CENTRED (USABLE), SPECIFIC, CONSISTENT, ACCURATE & COMPLETE METADATA
- ✓ Apply metadata STANDARDS (structured, in-depth & granular)
- ✓ Keep the metadata ENRICHED & USER-CENTRED
- ✓ Save the TIME of users and keep them happy through metadata ☺
- ✓ Enhance DISCOVERY through metadata
- ✓ Keep maximising USAGE & IMPACT (ROI) through metadata

THANK YOU

OpenAthens

Authentication and Discovery

Kieran Prince – Business Development Manager, OpenAthens

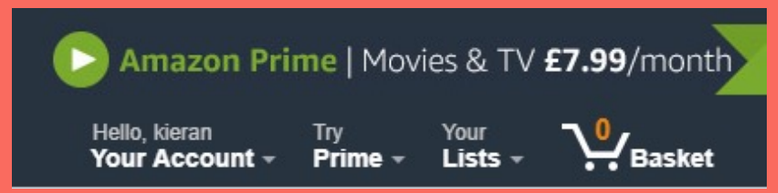
February 2022

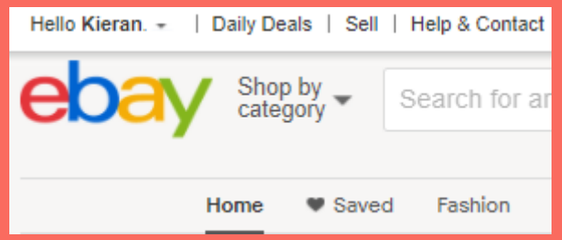
OpenAthens is a Jisc enterprise

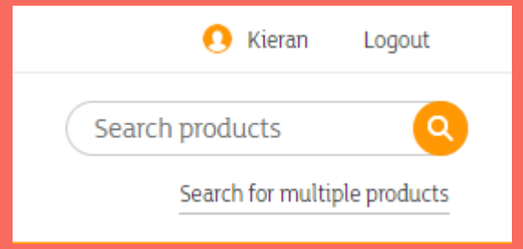
OpenAthens

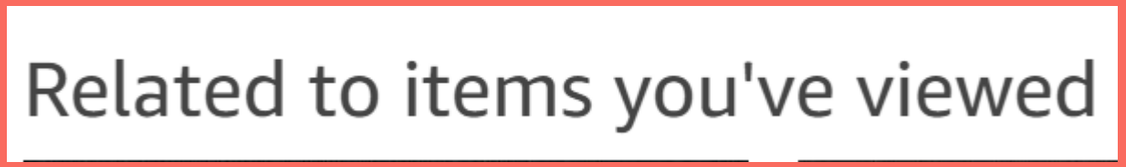
With over 25 years of experience, we’re the leading experts in federated single sign-on services worldwide.

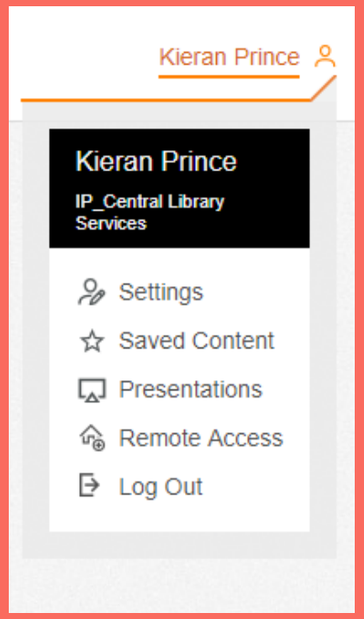
Growing user needs

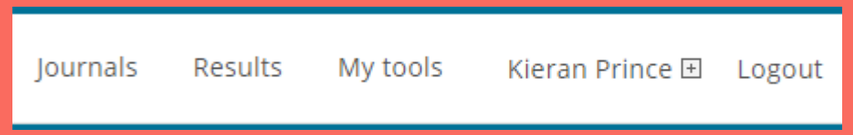


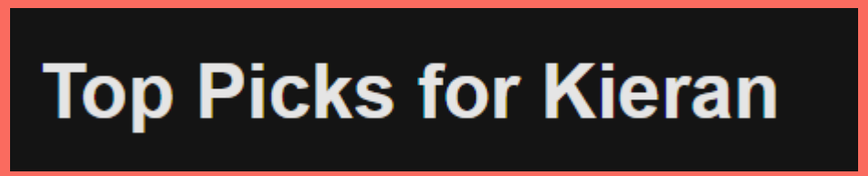


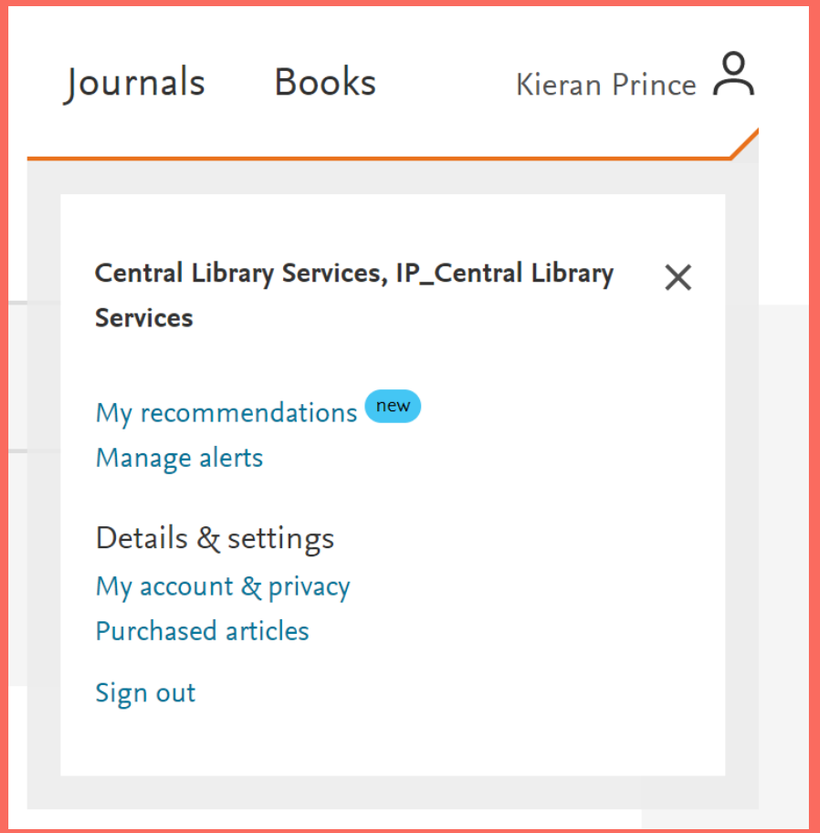










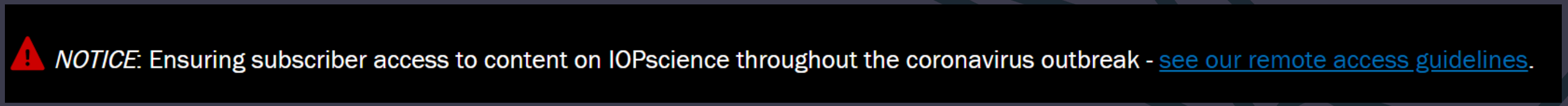


Mobile is king

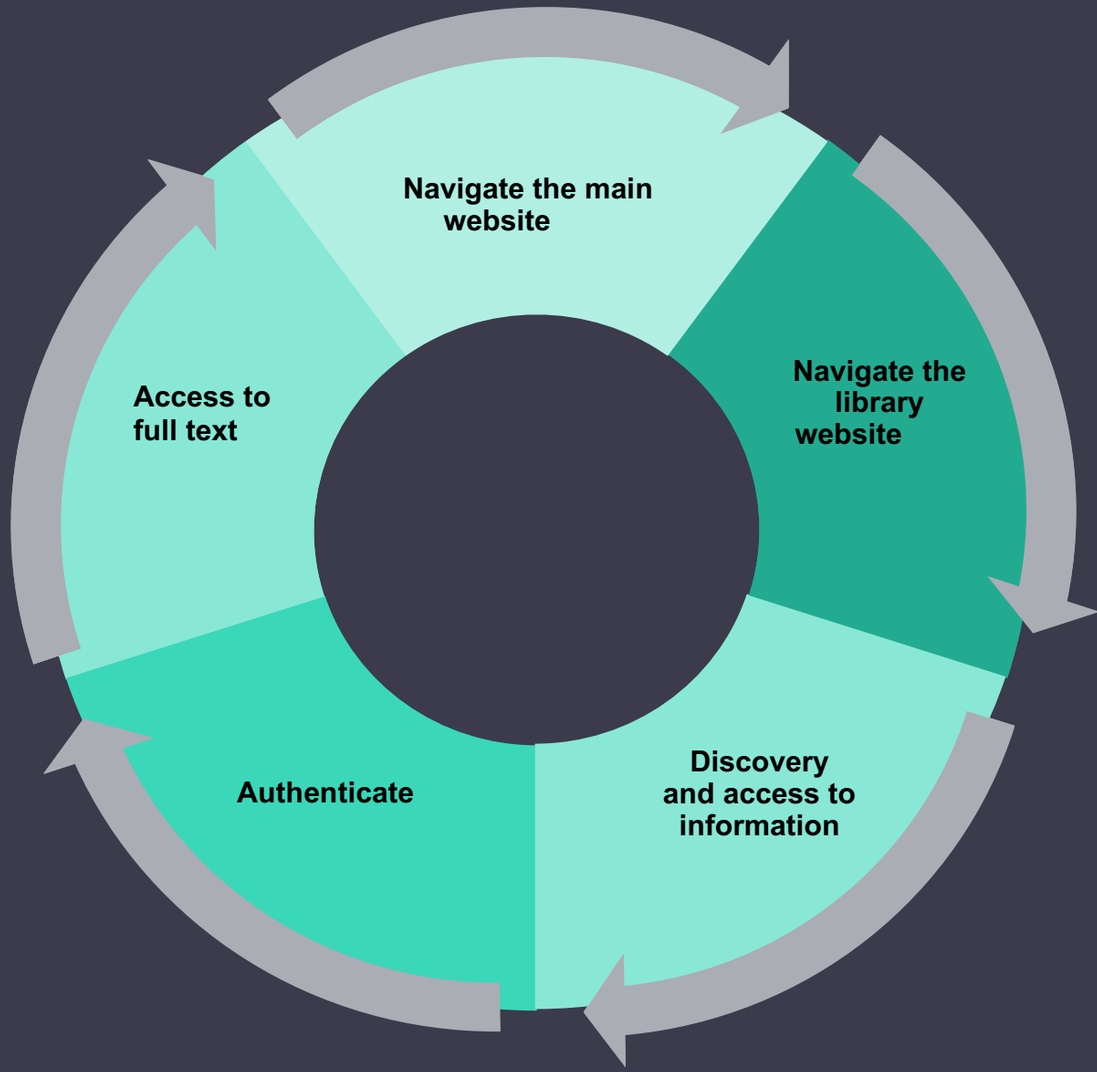
“91.69% of students have used smartphones to login to their academic portal”

Source: H.M. Alfawareh, S. Jusoh. Smartphones usage among university students: Najran University case. International Journal of Academic Research Part B; 2014; 6(2), 321-326. DOI: 10.7813/2075-4124.2014/6-2/B.48

Demand for remote access is here to stay

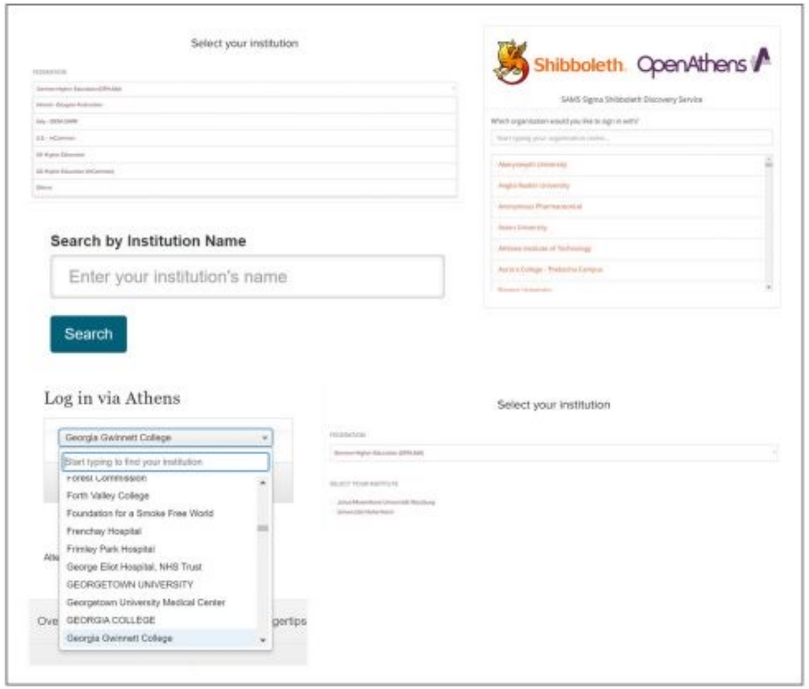


The end user journey

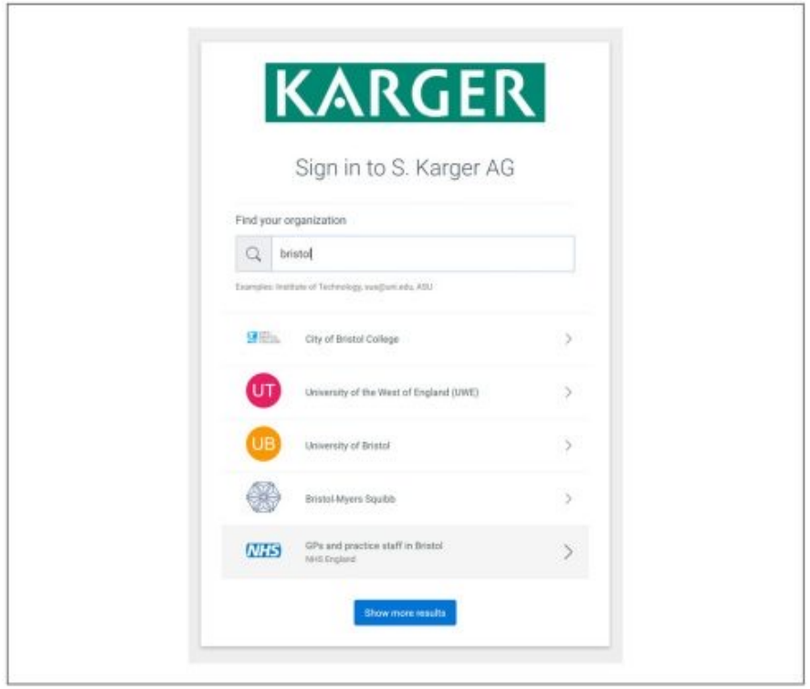


Where are you from (WAYF)?

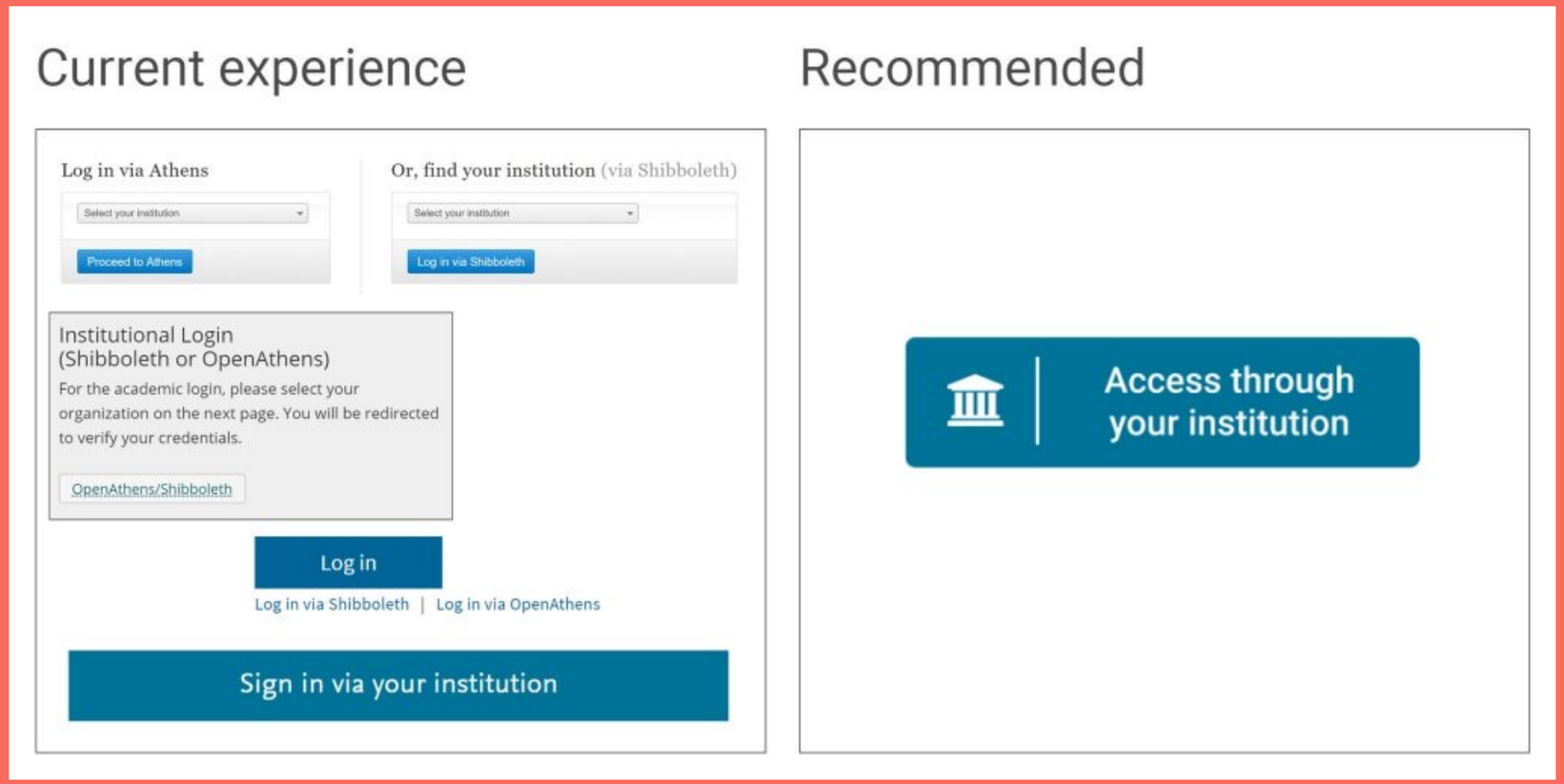
Current experience



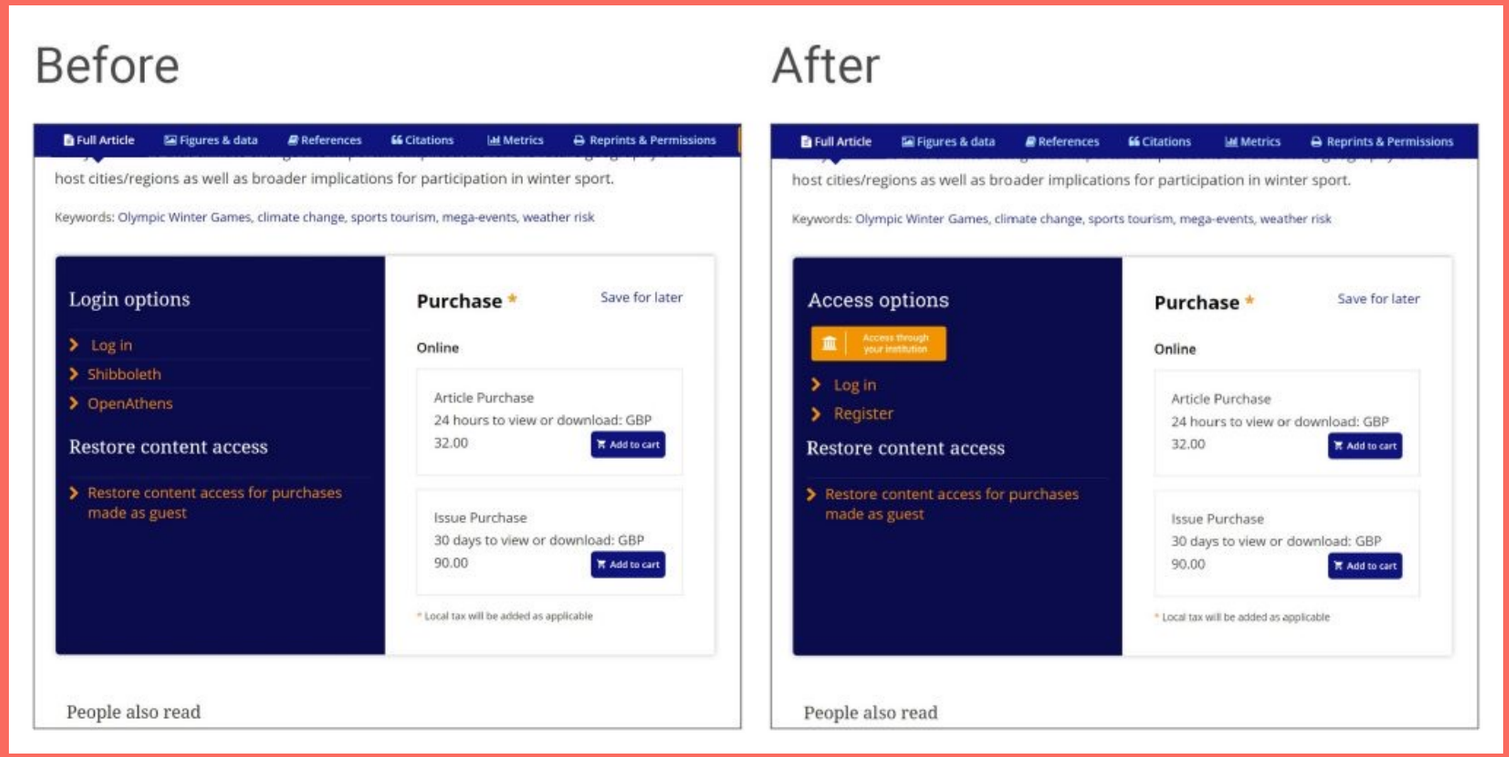
Recommended



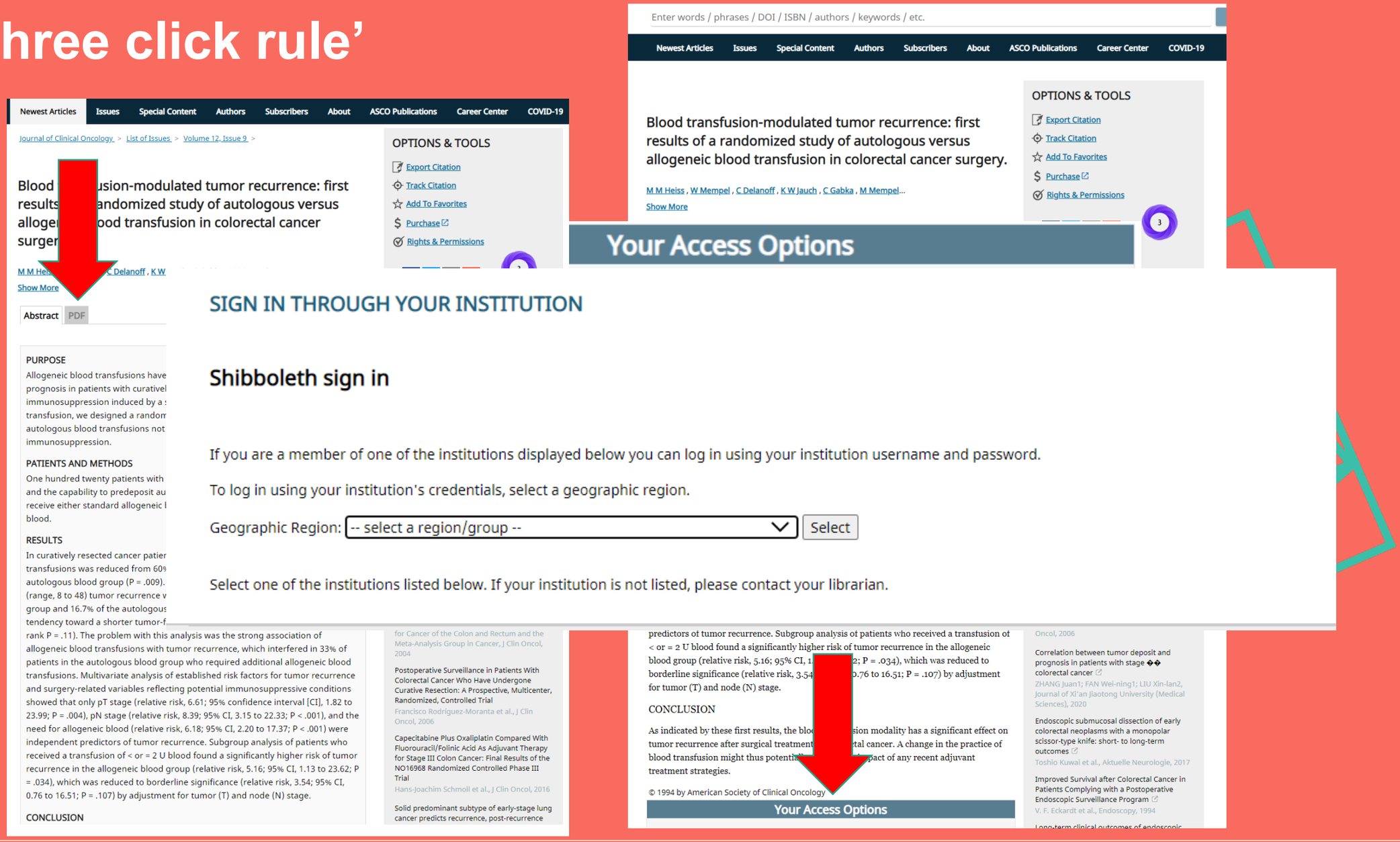
Standardisation is key



Group access options

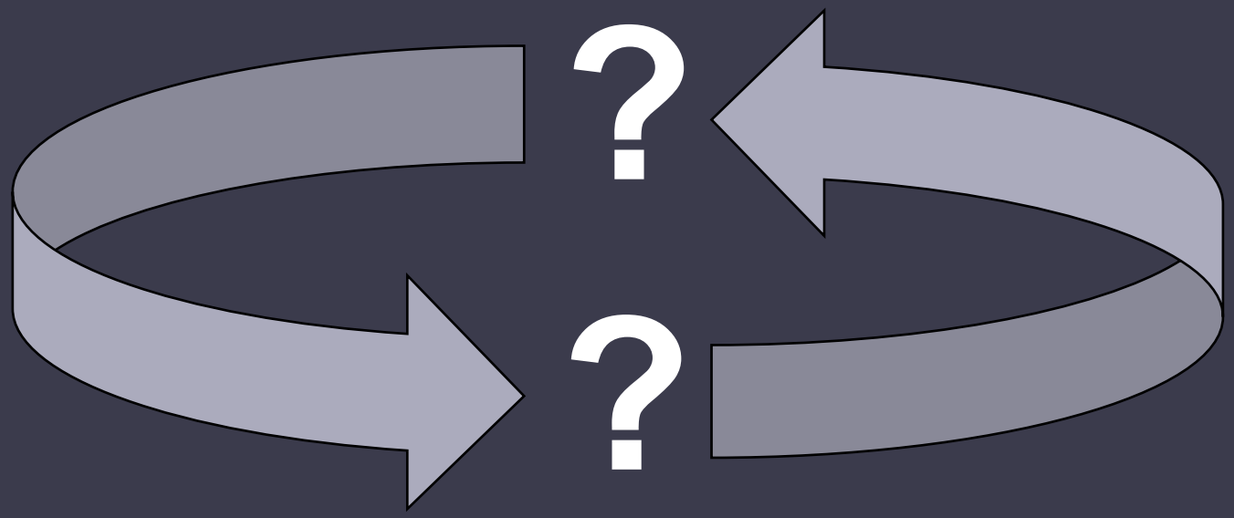


‘Three click rule’

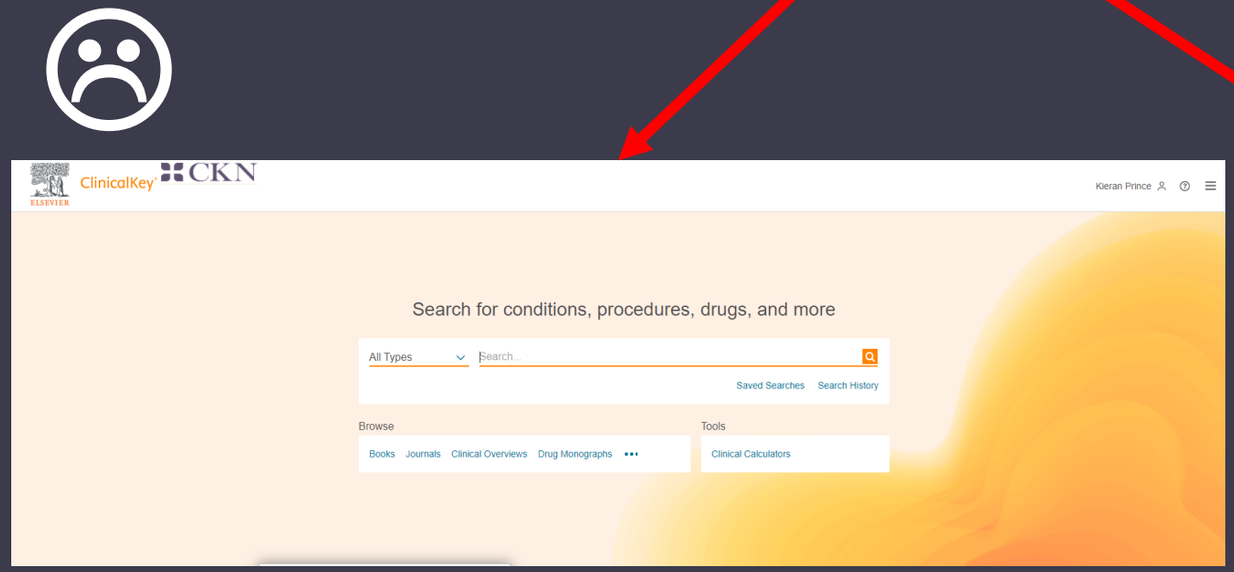


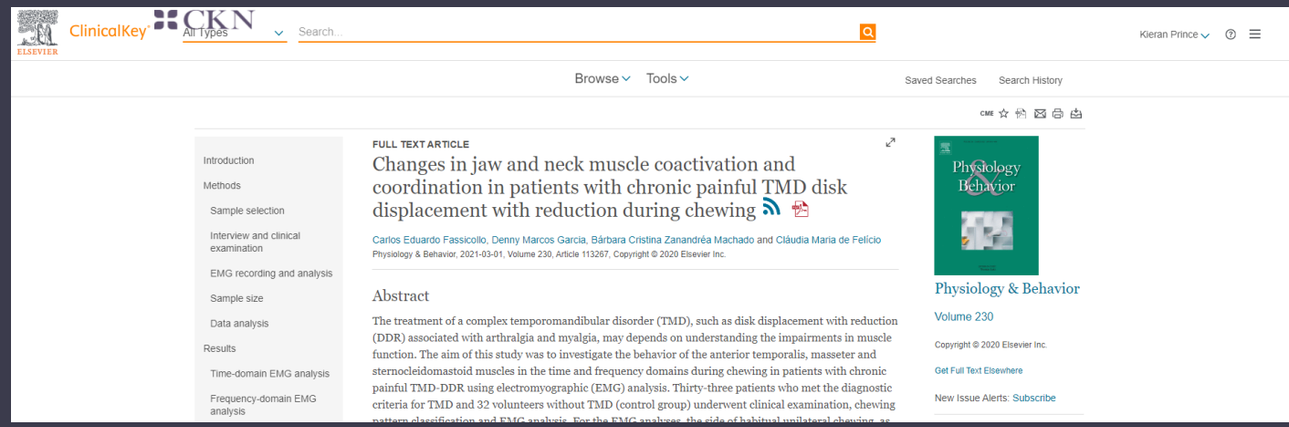
Deep-linking and Wayfless

It’s well worth the investment



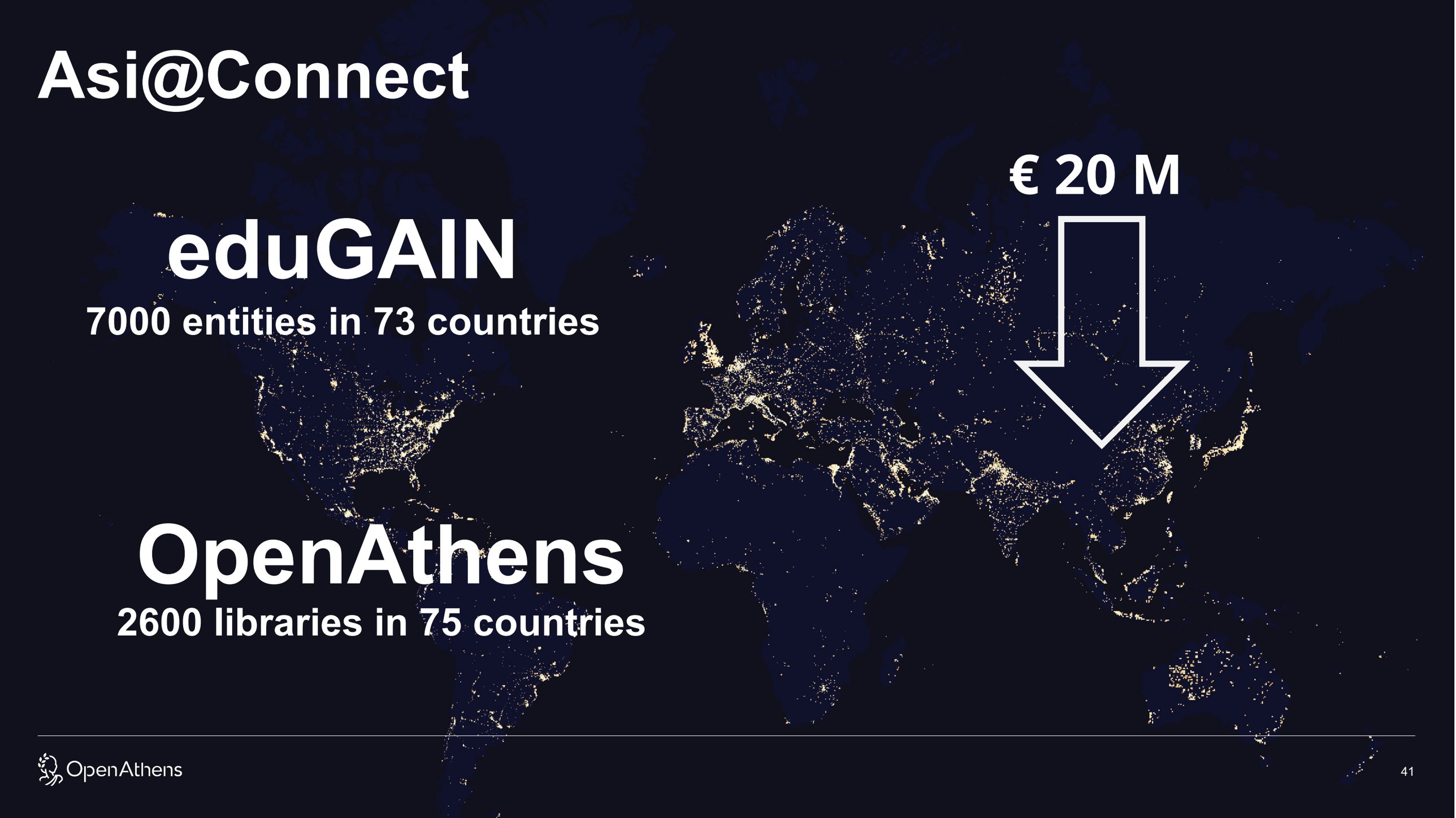
Deep-linking





What next?

Asi@Connect



eduGAIN

7000 entities in 73 countries

€ 20 M

OpenAthens

2600 libraries in 75 countries

Summary

- User needs have changed

- Remote access is here to stay - mobile accessibility is essential
- WAYF – avoid lists and consider Wayfinder

- UX – an industry-wide challenge, standards are the answer!

- Group access options, think about the 3-click rule.

- Deep-linking and Wayfless support essential.

- Take part in industry initiatives, SA and GetFTR.

- Federated authentication is growing, there are real opportunities to be found.

OpenAthens

Thank you

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