

Sherpa Romeo

User Guide

Contents

Background	2
Introducing the new Sherpa Romeo	3
Background	3
Summary of changes	4
Searching and browsing	5
Introduction	5
Options for searching and browsing	5
How to read a publisher policy	6
Introduction	6
Understanding pathways	6
Layout	7
Publisher policy icons	8
Icon key	8
Further information	9
Registering an open access policy	9
Updating an open access policy on Romeo	9
Inclusion criteria	9
Linking to a specific record	10
Re-using Sherpa Romeo data	10
API access	10
User accounts	10
Metadata schema	10
Object retrieval API	10
Glossary	11
User support	12

Background

Sherpa Romeo is an online service that aggregates and presents publisher and journal open access policies from around the world. The service is used by researchers, repository staff and research support teams across the world, to help users understand complex publisher and journal open access policies.

Every registered publisher or journal held in Romeo is carefully reviewed and analysed by our specialist team who provide summaries of self-archiving permissions and conditions of rights given to authors on a journal-by-journal basis. The policy information provided through this service primarily aims to serve the academic research community. Since the service launched over 15 years ago, publisher policies and the open access sector have changed a lot, making it difficult for us to accurately represent the full range of open access options that publisher policies permit, in a way that is clear to service users.

We needed to ensure Sherpa Romeo evolved to meet the changing needs of the sector and continues to provide a service that helps users to overcome the challenge of understanding publisher and journal policies. We carried out an extensive re-design project across all of our Sherpa services which has involved specialist input from our open access team here at Jisc, and market research with users from across the sector and around the world.

This guide gives an overview of the changes to the services implemented in June 2020. For further support on how to use the new service, please refer to our range of tutorial videos on our [Help page](#). Please direct any feedback or queries to help@jisc.ac.uk.

Introducing the new Sherpa Romeo

Background

When we created Sherpa Romeo fifteen years ago, the open access sector looked very different, and posed different challenges for researchers and library staff.

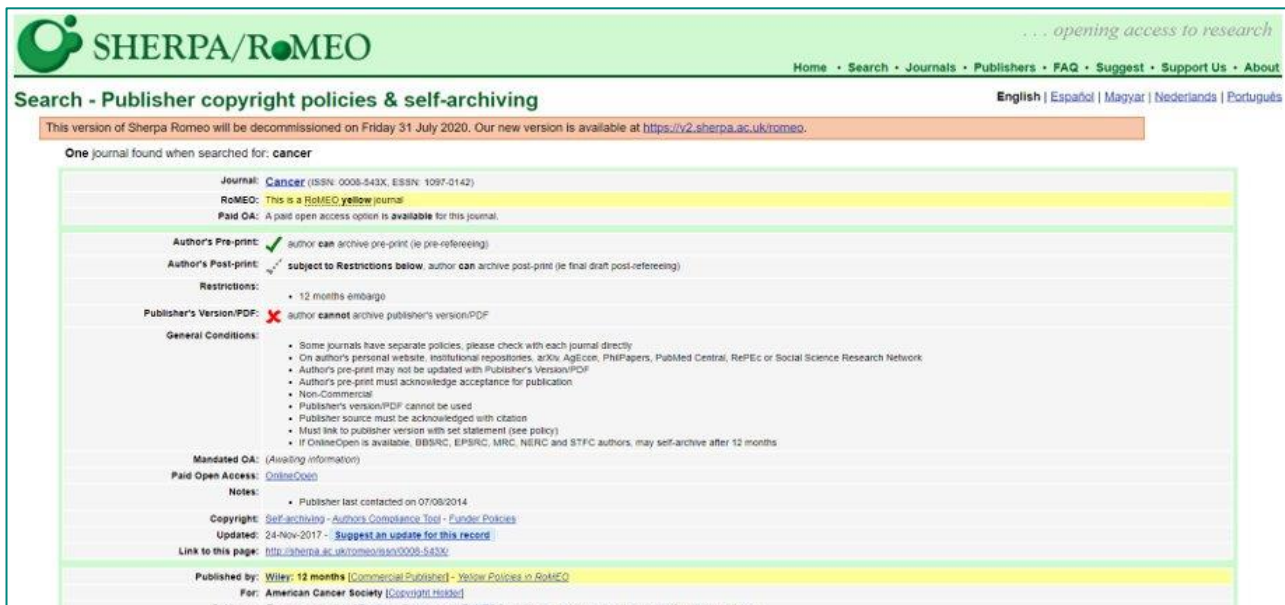


Figure 1 Original Sherpa Romeo





As the sector has evolved, we have seen increasing complexity in publishers' open access policies that was difficult to represent in the previous version of Romeo. The new version of Romeo was built to meet this challenge and ensure that Romeo continues to be a trusted tool for researchers and repository staff.

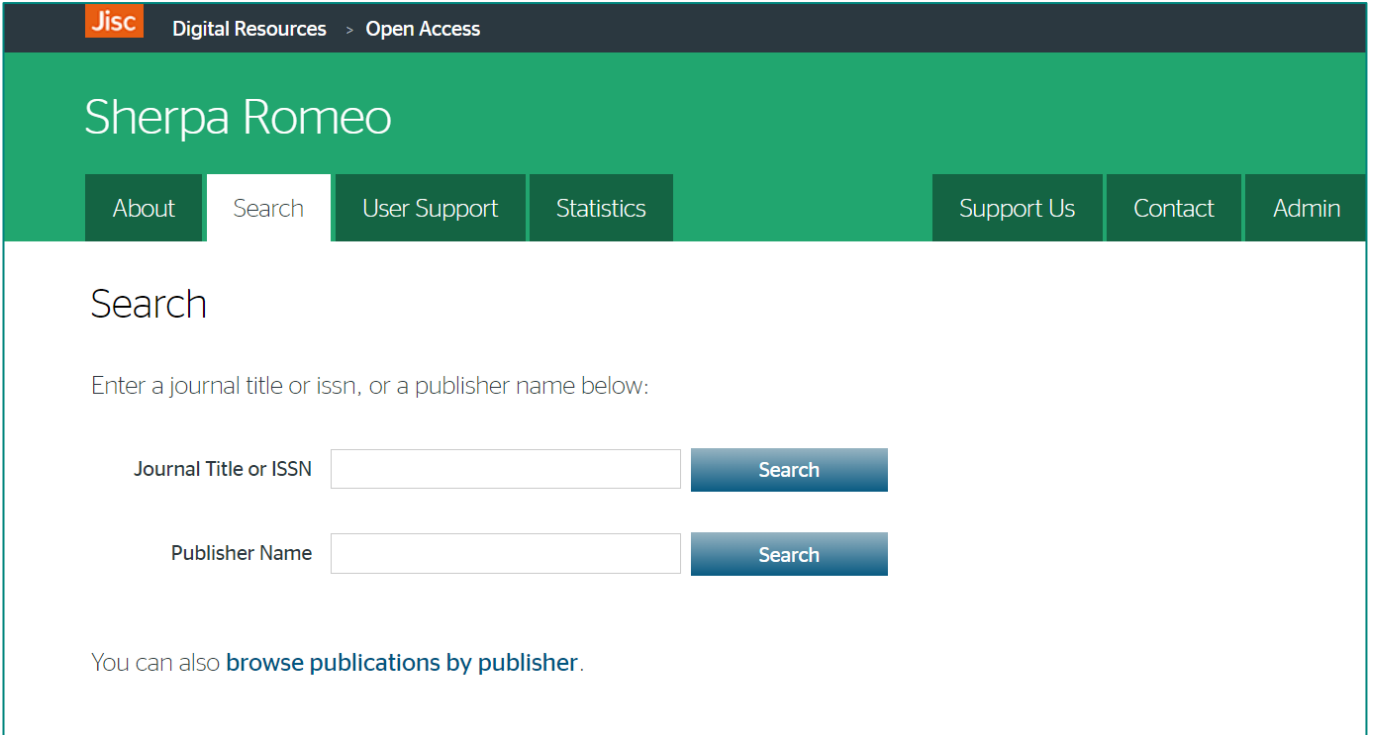
Jisc's open access team recognised that a better solution was needed to help users understand complex policy information, so we began an extensive redesign project, utilising the expertise of our open access team in collaboration with sector professionals across the community.

Our aim was to provide a platform with a modernised interface to enable us to meet the ongoing needs of the sector. This will help us to continue to support users with navigating the changing landscape of open access policies.

Summary of changes

Important changes to the user experience of the updated Sherpa Romeo include:

-  Modernised interface with better support for mobile devices
-  Improved search and browse that makes it faster to find the information you need
-  New publisher policy layout that makes it easier to understand the different open access options that publisher policies allow
-  Iconography scheme to represent properties of publisher policies



Jisc Digital Resources > Open Access

Sherpa Romeo

About Search User Support Statistics Support Us Contact Admin

Search

Enter a journal title or issn, or a publisher name below:

Journal Title or ISSN Search

Publisher Name Search

You can also [browse publications by publisher](#).

Figure 2 Updated Sherpa Romeo

For a demonstration of these changes, please refer to our range of tutorial videos on our [Help page](#).

Searching and browsing

Introduction

Sherpa Romeo now contains more options for searching and browsing than the previous version, to help you find the information you need more quickly and reflecting the requirements of different users of the service.

Options for searching and browsing

You can search for the information you need from the Sherpa Romeo landing page, and the Sherpa Romeo search page.

The new options for searching and browsing now include:

- Search by:
 - Journal title
 - ISSN
 - Publisher
- Browse publications by publisher



Search

Enter a journal title or issn, or a publisher name below:

Journal Title or ISSN

Publisher Name

You can also [browse publications by publisher](#).

Figure 3 Example of search bars

For more a demonstration of searching and browsing, please refer to our range of tutorial videos on our [Help page](#).

How to read a publisher policy

Introduction



Policy records contain information on how articles can be made open access for the published, submitted and accepted versions of an article



Policies are stored on Sherpa Romeo as a set of pathways, each pathway presenting a way in which a document can become open access



Authors can refer to these pathways to understand how to make their article open access



Properties within pathways are represented by icons to give users a condensed summary of publisher policies

Understanding pathways

Each version of an article contains one or more **pathways** through which the article can be made open access, which can depend on factors such as funders, publisher requirements, or the availability of the article. In the example below, there are **two pathways available for the accepted version** of an article, through which the article can be made open access. The author may follow **Pathway a** or **Pathway b**, depending on who the article is funded by.

Pathway a requires the article to be funded by the Arts and Humanities Research Council and Economic and Social Research Council. This pathway will then include a 2 year embargo, and a CC BY-NC licence will apply to the article. The article will be available on any repository, or non-commercial website. Two conditions also apply to this pathway.

Pathway b requires the article to be funded by HEFCE, HEFCW, Department for the Economy, Northern Ireland, Scottish Funding Council, or the Economic and Social Research Council. With this pathway, there is a 2 year embargo. A CC BY-NC licence will be applied, and the article can be available in any repository or a non-commercial website, and there are two conditions that apply to the pathway.

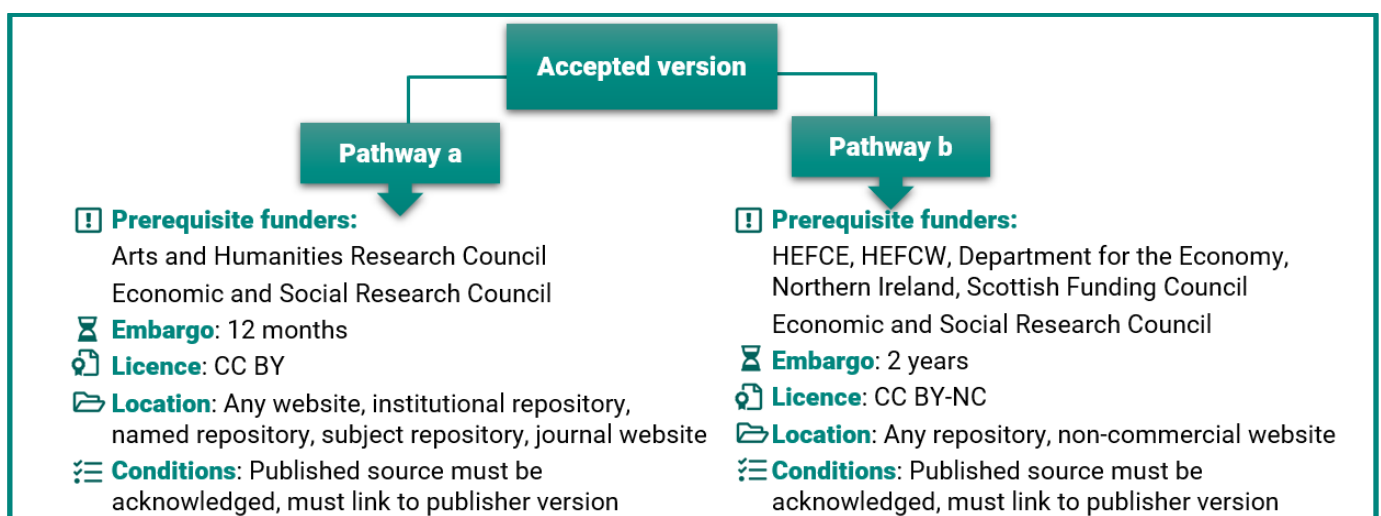


Figure 4 Example of pathways from Child and Family Law Quarterly

Layout

The publisher policy section displays the **published, accepted** and **submitted** versions of an article in a clear, linear design

Hover over the icon to see what it represents

Expand and collapse sections using the plus symbol

For more detail on publisher policies, click the links below the policy

Icons give the user a condensed summary of the policy

Figure 5: Example of publisher policy layout

The screenshot shows a 'Publisher Policy' section with a title and a brief introduction. Below this is a table of article versions. Each row represents a version (Published, Accepted, Submitted) and includes icons for various policies and a plus sign for expansion. A tooltip is shown for the 'CC BY' icon, indicating it represents a Creative Commons Attribution license. Below the table, there are links for more information on publisher policies.

Version	Policy Summary	Expand
Published Version [pathway a]	£, Any Website, Journal Website, CC BY, PMC	+
Published Version [pathway b]	£, Any Website, Journal Website, +3, CC BY-NC-ND, PMC	+
Accepted Version	12m, Non-Commercial Institutional Repository, PMC, arXiv, +	+
Submitted Version	None, Non-Commercial Institutional Repository, PMC, arXiv, +	+












- Wiley's Self-Archiving Policy
- Understand your funder's agreement with Wiley
- How to comply with open access policies
- Publish open access with OnlineOpen

For a demonstration of how read a publisher policy, please refer to our range of tutorial videos on our [Help page](#).

Publisher policy icons

Sherpa Romeo now contains an iconography scheme that represents aspects of publisher policy. Publisher policies are stored in Sherpa Romeo as a set of pathways. Each pathway represents a different way in which a document can become open access. Pathways have different policies, and the icons represent the properties within the pathways. The icons were selected by Jisc's team of open access specialists and were user tested with a sample of industry professionals.

Icon key

Icon	Name	Description
	Open access publishing	The pathway includes open access publishing
	Additional open access fee	The pathway requires the payment of a fee (in addition to any normal publication fees that may be required) to make the article open access
	Not permitted	No open access pathway exists for the article version
	Copyright owner	The copyright owner that the pathway requires
	Conditions	Conditions that apply to the pathway
	Licence	The licence that the pathway requires
	Prerequisites	Requirements that must be met to allow the pathway to be used. These may include prerequisite funders, subjects, or permissions from the publisher
	Location	The websites on which the pathway allows the article version to be available. This includes self-archiving and publisher-deposit locations, including the website of the journal
	Notes	Additional notes on the policy
	Publisher deposit	The publisher will deposit on your behalf in the location specified
	Embargo	The embargo that the pathway requires. Unless stated otherwise, the embargo starts on the date of publication

For a demonstration of the icons, please refer to our range of tutorial videos on our [Help page](#).

Further information

Registering an open access policy

To register an open access policy for a publisher or a journal that is not already listed in Romeo, you will need to complete the relevant form in as much detail as possible. Remember to check our inclusion criteria to ensure the publisher or journal meets our requirements. The forms can be found on our [Contact Us page](#).

The team will review the request by visiting the publisher and policy sites and will then assess it against the Romeo inclusion criteria. If the publisher and policy meet the requirements, they will be added to the directory, along with the related journals, and we'll notify you once that's done.

Updating an open access policy on Romeo

We encourage our community to submit updates to both publisher and journal records. To update an existing record, you need to complete an 'Update Record' form which can be found via the 'Suggest an update for this record' button at the bottom of the record.

If you are a publisher who wishes to update multiple titles in your catalogue, you can submit a spreadsheet containing the necessary information to help@jisc.ac.uk.

The team confirms all update suggestions with the publisher; therefore, it may take some time for any changes to appear.

Inclusion criteria

Journals

- Journals must have a valid ISSN
Note that we also accept serial publications and conference proceedings with valid ISSNs
- Each website must clearly state its editorial board
- All licences, open access policies and copyright statements must be readily available online

Publishers

- The governing body must be clearly stated on the website
- Contact details must be readily available
- Publication ethics policies must be clearly stated on the website

We use [COPE Guidelines](#) on publication ethics as a guide to best practice when evaluating publishers for inclusion. We recommend that publishers follow these guidelines.

Linking to a specific record

All records listed in Romeo have their own persistent URI which can be used to link to a specific record. The URI can be found in each record's Record Information section.

Re-using Sherpa Romeo data

Our data is available under a CC-BY-NC-ND licence. For more information, please visit the [Jisc re-use policy page](#).

Exceptions to this can be negotiated for specific purposes. Please contact us for more information.

API access

Data stored in Romeo is available over the Sherpa APIs. The Sherpa APIs (application programming interfaces) provide access to the functionality and datasets that Sherpa Services operate across.

User accounts

You will need a user account, which comes with an API key. View your API key by clicking on the 'Admin' tab and logging in.

Metadata schema

Please see our [metadata schema documentation](#) for more information about the structure of our objects when requested as JSON.

Object retrieval API

The [object retrieval API](#) provides a machine interface for downloading object metadata.

For more information about APIs, please visit our API documentation: <http://v2.sherpa.ac.uk/api>

Glossary

Term	Definition
Academic social network	A social network where academics can deposit their publications, e.g. ResearchGate or Academia.edu
Accepted version	The final author-created version that incorporates referee comments and is the accepted for publication version. Also known as: Authors Accepted Manuscript (AAM), Authors accepted version, Final Author version, Post-print
Additional OA fee	A fee that is paid in addition to other publication fees, in order to make an article open access immediately
Associated publisher	An organisation that is associated with the journal, for example an academic society
Author's homepage	The personal home page of the author
Creative commons	A collection of open licences. For more information, see https://creativecommons.org
DOI (digital object identifier)	A persistent identifier that uniquely identifies an article
Funder designated repository	A repository required by the funding agency
Institutional repository	A repository that is associated with the Institution of the author
Institutional website	A website at the author's institution that is not the institutional repository
Journal website	The primary website on which a journal may make articles available for download
Open access journal	A journal which is free to access at point of publication
Pathway	A way in which a document can become Open Access. A policy is made up of multiple pathways that represent the permissions that the policy grants
Preprint repository	A repository that primarily contains articles prior to peer-review, e.g. arXiv.org
Published version	The publisher-created published version, that has been peer-reviewed and copy edited. Also known as: Final Published Version, Version of Record
Publisher	The organisation which holds the rights to determine the journal's open access policy, for example, a commercial publisher or an academic society
Subject repository	A repository that only contains articles within a pre-set subject field
Submitted version	The version that has been submitted to a journal for peer review. Also known as: Author's Original Manuscript (AOM), Original manuscript, Pre-print

User support

For further support on how to use the new service, please refer to our range of tutorial videos on our [Help page](#).

The [About page](#) contains more information on the service, including registering an open access policy, how to update a policy, inclusion criteria and API access.

Please direct any feedback or queries to help@jisc.ac.uk.

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