



Jisc



Jisc APC and Jisc Monitor
UKSG Managing Open Access Seminar, May 2014

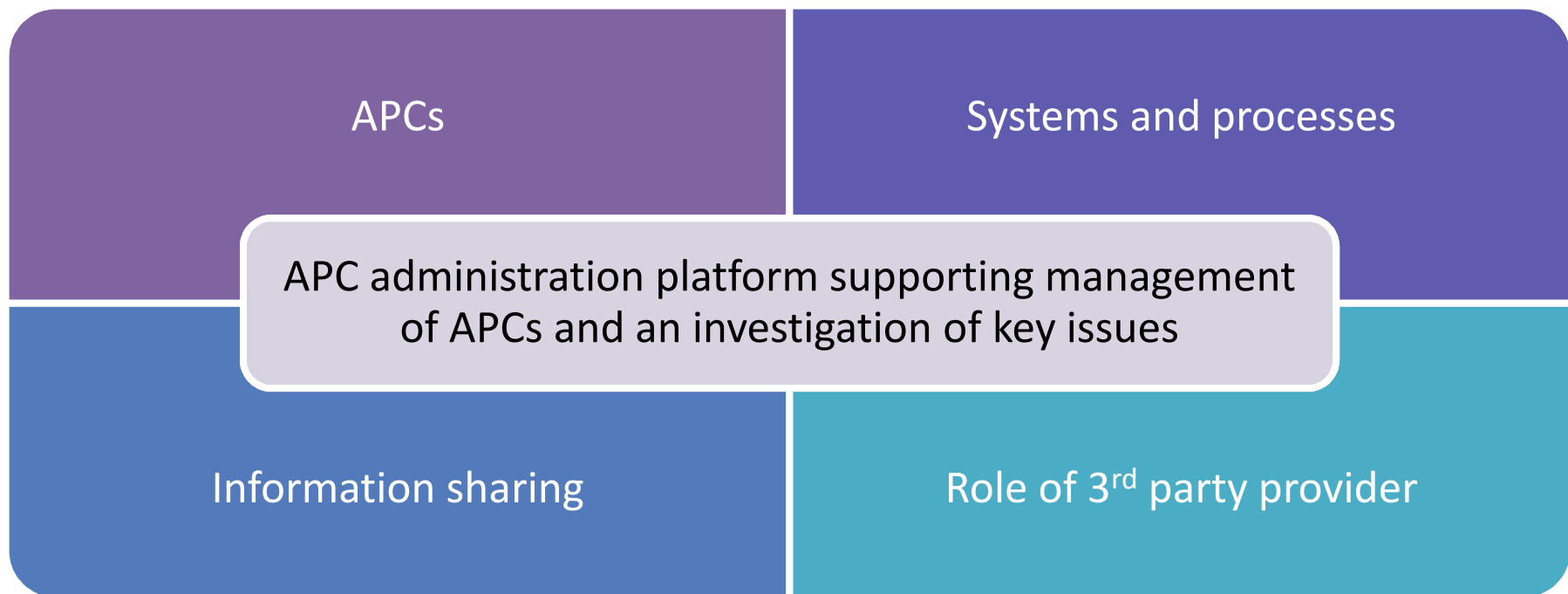
Jo Lambert

- » Jisc APC
 - > Context to Jisc APC
 - > introduction and aims
 - > reflections on the pilot
- » Jisc Monitor
 - > Aims
- » Questions and comments



- **Open Access in the UK**
 - Finch Report and recommendations
<http://www.researchinfonet.org/publish/finch/>
 - Government /Research Councils UK (RCUK) mandate
 - <http://www.rcuk.ac.uk/research/outputs/>
- **Research Information Network (RIN) report**
 - <http://www.researchinfonet.org/wp-content/uploads/2012/11/APC-report-as-published.pdf>
- **Jisc Collections**
 - Trialling a solution for the management of APCs and researching key issues

Jisc APC Pilot: research aims



Managing APCs: reflections

- › Compliance and reporting requirements
- › Workflows and processes still being established
- › Managing communications
- › Infrastructures not yet in place
- › Standards - lack of/not fully adopted



Jisc APC platform: reflections

- » Level of APCs
- » Publisher engagement
- » Financial transactions
- » Data flow and exchange with other key systems
- » Value of an intermediary service



Jisc APC preliminary findings

- › Institutional support requirements and role for Jisc
 - Monitoring Gold and Green publications
 - Compliance
 - Standards development and implementation and best practice

- › Intermediary services and APC management
 - Limited appetite for a Jisc managed solution at this point in time
 - BUT need to support development of standards and best practice in this area

Jisc APC pilot outputs

- › Due by August 2014
- › Case studies and analysis
- › Best practice guidelines
- › Data on APCs
- › Pilot evaluation and report
- › <https://www.jisc-collections.ac.uk/Jisc-APC-project/>





Jisc Monitor context

- » Jisc APC identified key challenges in management of OA
- » Reflecting and building on research outputs of Jisc APC
- » HEFCE policy will mandate open access availability for outputs accepted for publication after 1 April 2016 and submitted to the post -2014 REF
- » 1 year project starting May 2014 to scope and explore how a Jisc managed shared service might support institutions in meeting this requirement

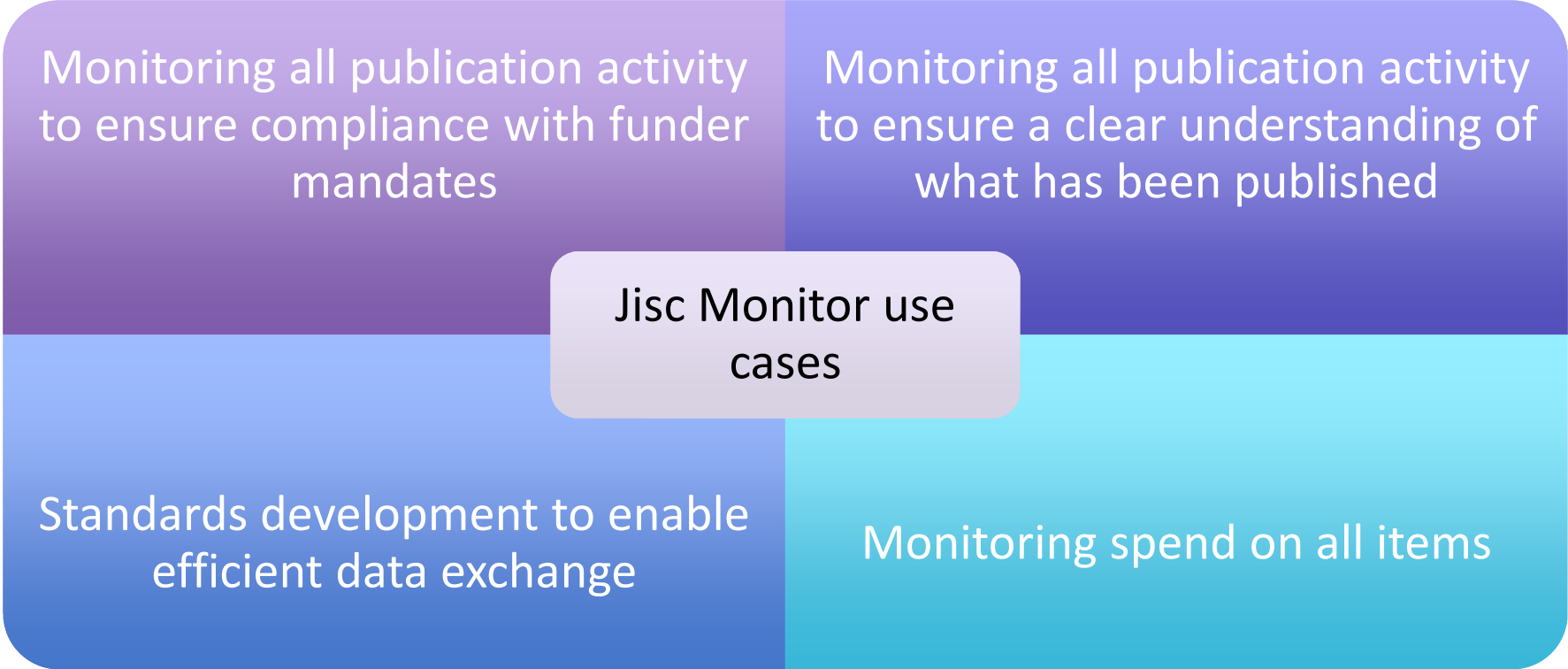


Jisc Monitor outputs

- › Functioning prototypes mapped to 4 use cases and released as free and open source software by April 2015
- › Supported by robust user feedback and an assessment of the opportunities, challenges and dependencies that are likely to impact development
- › Recommendations for further development of components



Jisc Monitor use cases





Jisc Monitor development



Managed by Jisc Collections, developed by Mimas utilising skills and expertise of Sero Consulting, Cottage Labs and Knowledge Integration

Jisc Monitor principles

- » Collaboration is key
- » User-centred development
- » Agile approach
- » Open-source



Use case 1: compliance

- » Institutions need:
 - » Clarity around funder reporting requirements
 - » Confirmation that research outputs meet funder compliance requirements

Monitoring all publication activity to ensure compliance with funder mandates

Use case 2: monitoring publication activity

- » Institutions need:
 - > To capture all publication activity but data can be in multiple places

 - > An understanding of all publication output to support compliance

Monitoring all publication activity to ensure a clear understanding of what has been published

Use case 3: monitoring spend

- » Institutions need:
 - > To monitor spend on both OA charges and subscriptions
 - > Invoices and payment details provided in a standardised and consistent way for accurate capture and recording of information

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Monitoring spend on all items

Use case 4: standards development

- » Institutions, publishers and funders need:
 - > Standards and protocols to enable efficient data exchange and re-use, avoiding duplication of effort
 - > Solutions that support a global rather than UK specific audience

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Standards development to enable efficient data exchange



Next steps

- » Jisc Monitor starts May 2014
- » User consultation and requirements gathering
- » Funder compliance and publication activity prototypes available from September 2014
- » Systems interoperability and publication charge prototypes due 2014



