Elsevier Open Access Platform

Fixed Quantity agreements

Overview guide
Welcome
Welcome to Elsevier’s Open Access Platform (EOAP). This guide is intended as a quick walkthrough of our platform.

You can find an FAQ page on our website at service.elsevier.com/app/home/supporthub/oeap/

In this guide

Requests 6-20
Managing pending requests
Approved requests tab
Rejected requests tab
All requests tab
Reporting

Agreement dashboard 21-25
Overall view
Institution view
Notification of a new APC request

When the author completes their journey, an email is sent to the librarian responsible for approving requests for the institute the author has said they are affiliated to.

The email provides information on the request

Librarians click on button to manage the request on the Elsevier Open Access Platform
The welcome screen
Sign in to the Elsevier Open Access Platform.

Managing APC Requests made easy!
Welcome to Elsevier Open Access Platform. Here's how it works:

1. When there are new requests you'll receive a notification in your mailbox.

2. On the platform you'll be provided with all relevant data (such as DOI link, author credentials, journal and more) to effectively validate requests.

3. You can then approve or reject the request. You can also notify the author on decisions made.

Sign in using the credentials provided as part of agreement on-boarding
The homepage
Click on the tiles to have access different areas of the platform.

- [Pending] Requests contains all Article Publishing Charges (APCs) that need to be actioned
- Your and your institutions’ personal settings
- Details of the APC uptake and usage under the agreement
Requests
Managing your Article Publishing Charges
Pending requests tab
Contains latest Article Publishing Charges (APCs) that need to be actioned.

A pill will alert you to the existence of older APCs that need your attention.

Each tile contains key information of the APC:
- Article title
- Authors name and email
- Affiliated institute
- Link to the article on ScienceDirect

Based on this information you can chose to approve or reject the request.
Pending (older) requests tab
Contains all Article Publishing Charges (APCs) older than 14 days that need to be actioned.

A coloured bar will make older APCs more visible and a number appears which counts the days an APC has been left overdue.
Searching / Filtering
You can filter down a list of APCs to look for a particular one.

If you are responsible for multiple institutions you can search by institution name

Additionally, you have the option to search by author name
APC detail window
Displays full details of the APC request which allow you to approve or reject it.

Click on the article title or the approve / reject buttons to bring up a window with more information on the request, including author’s name and contact details.

*Show more* expands the section with additional information...

...showing details of the journal and article type, license selected, any funder & grant IDs, accepted and open access ordered dates.
APC detail window
Approving an APC.

An email notification can be sent to the author to advise request has been approved.

If you are happy to approve simply click the Confirm button.
APC detail window

Approving an APC.

You have approved the charges for this article

- The author will be notified by email
- The status of this request has been changed to 'approved'
- This article will be published under CC BY 4.0

A confirmation of the approval is shown on screen, and the APC moves onto the approved list.
If you decide to reject the request, you will need to select a reason from the drop-down list.

Choose most appropriate reason for the rejection:
- Author not/no longer affiliated
- Funding request received too late
- Grant number not supplied/recognized
- Invited/Conference article not eligible
- Research grant held elsewhere
- Not all of the article’s authors conform to criteria
Emails to authors - approval

You can choose to notify an author of your decision, when you reject or approve an APC.

This is an example of the email template that will be sent if you selected to notify author of approval of the APC.

Using this feature is optional.
Emails to authors - rejection

You can choose to notify an author of your decision, when you reject or approve an APC.

This is an example of the email template that will be sent if you selected to notify author of rejection of the APC.

Using this feature is optional
Approved requests tab
Shows a full history of all approved APCs overtime.

All approved APCs, ordered by approval date from most recent to oldest

Click on the article title for further details of the APC
Rejected requests tab
Shows a full history of all rejected APCs overtime.

All rejected APCs, ordered by rejection date from most recent to oldest

If you reject the APC in error or subsequently decide to approve it, you can reverse a rejection

Click on the article title for further details of the APC, including reason for rejection
All requests tab
Shows a full history of all pending, approved and rejected APCs overtime.

This tab is primarily used to generate the .CSV report (see next page)
**Reporting**

You can choose to view a .CSV report on screen or export / download it.

<table>
<thead>
<tr>
<th>INSTITUTION NAME</th>
<th>ARTICLE TITLE</th>
<th>AUTHOR NAME</th>
<th>ARTICLE TYPE</th>
<th>JOURNAL NAME</th>
<th>JOURNAL ISSN</th>
<th>VOL</th>
<th>ISSUE</th>
<th>PAGE</th>
<th>DISSERGATION STATE</th>
<th>STATUS</th>
<th>TOTAL</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-Intl. Inst. of Genres</td>
<td>Article Title</td>
<td>Author Name</td>
<td>Article Type</td>
<td>Journal Name</td>
<td>Journal ISSN</td>
<td>Vol</td>
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</table>

**Clicking on the Generate report (.CSV) button in the “all requests” tab will generate/display the report on screen.**

**Clicking on Export will give you various download options.**
Reporting
You can choose to view a .csv report on screen or export / download it.

The downloaded report should appear at the bottom of screen. Click to open in Excel.
Agreement dashboard

Visibility of the Article Publishing Charge uptake and usage under the agreement
Agreement dashboard
Manage APC uptake and usage.

From the homepage, navigate to the agreement dashboard.
Overall view
View overall APC uptake and usage.

Fixed Quantity APC agreements show the allocation of APCs, number of approved APCs and current balance.

Periods will be determined by agreement (normally years).

A list of participating institutions under the agreement will be shown. Clicking on the institute’s name will take you the institution view (next page).

The number of approved APCs at each participating institution will be shown.
Institution view
View the APC uptake and usage per institution.

There is also the option to generate a .CSV report of the data at the institution.

Number of approved APCs for the institution

You can see the details of the approved APCs at the individual institute.
Institution view
View the APC uptake and usage per institution.

Clicking on the article title will provide the full details of the APC.
Thank you