

# How to get the most out of your Elsevier Open Access Platform (EOAP) Consortia Dashboard

Empowering  
Knowledge™



# Making it easier to work with us

## Open Access: Consortia Dashboard

At Elsevier we are always looking for ways to make your work easier.

In this document, we show how the EOAP allows you to easily view your consortia institutions' APCs so you have all the information in one place.



# 3 Steps to your Elsevier Open Access Platform

1. Accessing your Open Access Platform
2. Managing your Platform
3. How we support you
4. Consortia Admin Role Description




# 3 Steps to your Elsevier Open Access Platform

1. **Accessing your Open Access Platform**
2. Managing your Platform
3. How we support you
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# Step 1: Accessing your Open Access Platform



Open Access Platform

Sign in

**The main benefits when using the platform are:**

## 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, funding ID and more) to effectively validate requests.
- 3  
You can then accept or reject the request. You can also notify the author on decisions made.


[Sign in >](#)

Trouble signing in? Please [visit our Support Center](#)

**To access your Platform, click on the "Sign In" icon**

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RELX Group™

**When an institutional agreement is set up, you are provided with a user name and login credentials**

**You log in to the Portal using that institutional email and the password provided by Elsevier**



Sign in

Enter your password to sign in to Elsevier Open Access Platform v2

Email  
sample@institution.org

Password  
••••••••

[Forgot password?](#)

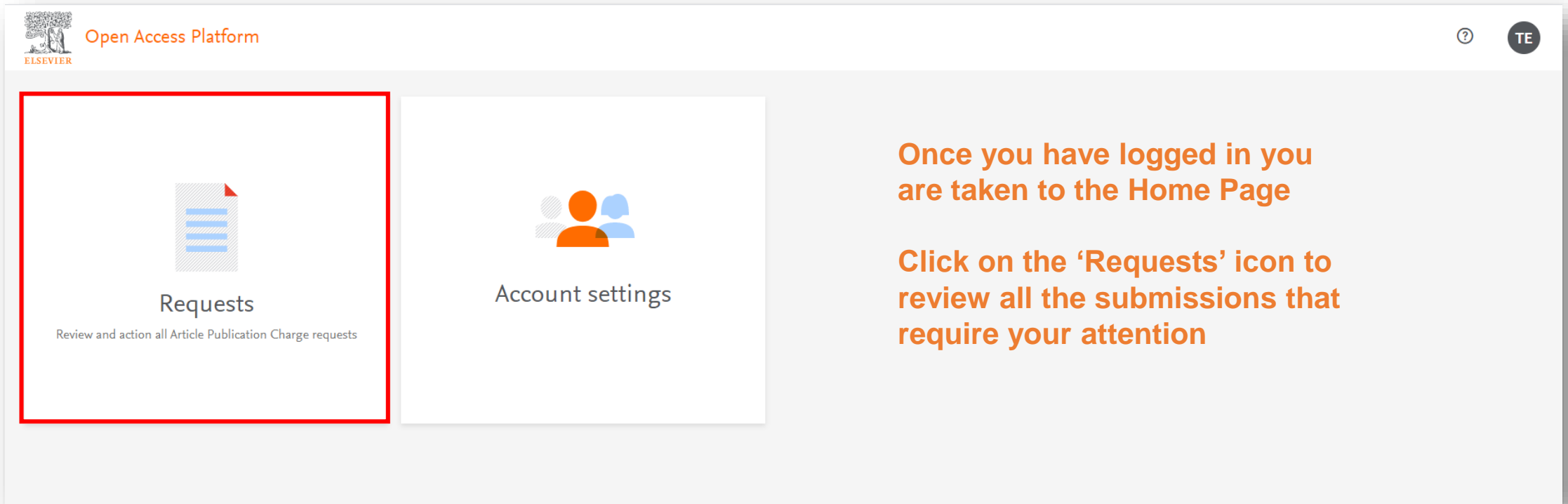
☐ Stay signed in (not recommended for shared devices)

[Sign in](#)

[Sign in with a different account](#)



# Step 1: Accessing your Open Access Platform



# 3 Steps to your Elsevier Open Access Platform

1. Accessing your Open Access Platform
2. **Managing your Platform**
  - Viewing Requests
  - Viewing Historical Requests
  - Download the Consolidated Institution Report
  - Account Settings
3. How we can support you
4. Consortia Admin Role Description



# Step 2.1: Managing your Platform - Viewing Requests

Your Open Access Platform allows you to manage any APCs

The Requests screen shows all Pending requests; these are awaiting approval or rejection

Filter by Approved or Rejected requests, or view All requests on one screen

Open Access Platform

## Requests

☒ Pending (5) ☐ Approved (2) ☐ Rejected (0) ☐ All (7)

Showing 5 of 7

All institutions  All authors  [Generate report \(.csv\)](#)

Feb 24, 2020  
Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.  
INSTITUTE 1 | Miss Bertha Mraz, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
Deserunt praesentium maiores necessitatibus officia minus deleniti ut recusandae nostrum. Et maxime ...  
INSTITUTE 1 | Mr. Shyann Wehner, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
In consequuntur eligendi est voluptas amet odit quia excepturi enim. Corporis id porro maxime nostru...  
INSTITUTE 1 | Miss Estelle Hessel, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
Magnam expedita aut veniam dignissimos harum natus excepturi tenetur dolorem. Esse nihil veritatis n...  
INSTITUTE 1 | Dr. Kale Miller, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>



# Step 2.1: Managing your Platform - Viewing Requests

To view requests for just one of your institutions, filter for specific institutions using the 'All institutions' drop-down menu

To sort by author, use the 'All authors' drop-down menu

The screenshot displays the 'Requests' section of the Elsevier Open Access Platform. At the top, the Elsevier logo and 'Open Access Platform' text are visible. The main heading is 'Requests'. Below it, there are radio buttons for filtering requests: 'Pending (5)', 'Approved (2)', 'Rejected (0)', and 'All (7)'. To the right, it says 'Showing 5 of 7'. A red box highlights two drop-down menus: 'All institutions' and 'All authors'. To the right of these menus is a button labeled 'Generate report (.csv)'. Below the filters, there is a list of four requests, each with a clock icon, a date (Feb 24, 2020), a title, and author information.

Date	Title	Author	DOI
Feb 24, 2020	Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.	INSTITUTE 1   Miss Bertha Mraz, r.fox@elsevier.com	<a href="http://dx.doi.org/10.1016/j.fuel.2018.03.063">http://dx.doi.org/10.1016/j.fuel.2018.03.063</a>
Feb 24, 2020	Deserunt praesentium maiores necessitatibus officia minus deleniti ut recusandae nostrum. Et maxime ...	INSTITUTE 1   Mr. Shyann Wehner, r.fox@elsevier.com	<a href="http://dx.doi.org/10.1016/j.fuel.2018.03.063">http://dx.doi.org/10.1016/j.fuel.2018.03.063</a>
Feb 24, 2020	In consequuntur eligendi est voluptas amet odit quia excepturi enim. Corporis id porro maxime nostru...	INSTITUTE 1   Miss Estelle Hessel, r.fox@elsevier.com	<a href="http://dx.doi.org/10.1016/j.fuel.2018.03.063">http://dx.doi.org/10.1016/j.fuel.2018.03.063</a>
Feb 24, 2020	Magnam expedita aut veniam dignissimos harum natus excepturi tenetur dolorem. Esse nihil veritatis n...	INSTITUTE 1   Dr. Kale Miller, r.fox@elsevier.com	<a href="http://dx.doi.org/10.1016/j.fuel.2018.03.063">http://dx.doi.org/10.1016/j.fuel.2018.03.063</a>

# Step 2.1: Managing your Platform - Viewing Requests

Open Access Platform

## Requests

☒ Pending (5) ☐ Approved (2) ☐ Rejected (0) ☐ All (7) Showing 5 of 7

All institutions  All authors  [Generate report \(.csv\)](#)

Feb 24, 2020  
Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.  
INSTITUTE 1 | Miss Bertha Mraz, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
Deserunt praesentium maiores necessitatibus officia minus deleniti ut recusandae nostrum. Et maxime ...  
INSTITUTE 1 | Mr. Shyann Wehner, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
In consequuntur eligendi est voluptas amet odit quia excepturi enim. Corporis id porro maxime nostru...  
INSTITUTE 1 | Miss Estelle Hessel, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
Magnam expedita aut veniam dignissimos harum natus excepturi tenetur dolorem. Esse nihil veritatis n...  
INSTITUTE 1 | Dr. Kale Miller, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

The APC request shows the detail of the APC including:

- Ordered date of the request
- Link to the full text article
- Author and institution details

To view a request, simply click on the request title

# Step 2.1: Managing your Platform – Viewing Requests

The screenshot displays the 'Requests' management interface. On the left, a sidebar shows a list of requests with filters for 'Pending (3)', 'Approved (2)', 'Rejected (2)', and 'All (7)'. The main area shows a detailed view of a selected request. The request details include the title 'Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.', the author 'Miss Bertha Mraz', the institution 'Institute 1', and the article type 'Full-length article'. The 'Show less' button is highlighted with a red box.

**Requests**

☒ Pending (3) ☐ Approved (2) ☐ Rejected (2) ☐ All (7)

All institutions  All authors

Feb 24, 2020  
Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.  
INSTITUTE 1 | Miss Bertha Mraz, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
In consequuntur eligendi est voluptas amet odit quia excepturi enim. Corporis id porro maxime nost  
INSTITUTE 1 | Miss Estelle Hessel, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020  
Magna expedita aut veniam dignissimos harum natus excepturi tenetur dolorem. Esse nihil veritati  
INSTITUTE 1 | Dr. Kale Miller, r.fox@elsevier.com  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.  
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Institution: Institute 1  
Corresponding Author: Miss Bertha Mraz  
Author Email: r.fox@elsevier.com

Article Type: Full-length article  
Journal: The Lancet Planetary Health - Article Publishing Charge  
Journal Type: Full Open Access  
User Licence: CC BY 4.0  
PIL: S3500100716677030

Article Submitted: Feb 1, 2019  
Article Accepted: May 27, 2017  
Open Access Ordered: Feb 24, 2020

[^ Show less](#)

The information panel shows further details of the APC including:

- Link to the full text article
- Author and institution details
- Article type
- Journal details
- Article Reference Number (PII)
- Article Submission Date
- Article Accepted Date
- Open Access Ordered Date

You can reduce the view by clicking on 'Show less'

## Step 2.2: Managing your Platform - Historical Approved Requests

Each request tile provides the overview of who approved and when

Requests are sorted by most recently actioned

### Requests

☐ Pending (3) ☒ Approved (2) ☐ Rejected (2) ☐ All (7)

Showing 2 of 7

All institutions

All authors

Generate report (.csv)

✓

Feb 24, 2020 approved by Postman Regression

Approved

Ab sed velit unde et ab asperiores ea. Consequatur aut atque sit quam quae nihil doloribus alias libero. E...

INSTITUTE 1 | Mrs. Catharine Shanahan, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

✓

Feb 24, 2020 approved by Postman Regression

Approved

Magnam voluptate consequuntur nam. Nostrum est distinctio occaecati non vel perferendis et. Repellen...

INSTITUTE 1 | Ms. Marty Murphy, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

All requests loaded

## Step 2.2: Managing your Platform - Archived Rejected Requests

Each request tile provides the overview of who rejected and when

Requests are sorted by most recently actioned

### Requests

☐ Pending (3) ☐ Approved (2) ☒ Rejected (2) ☐ All (7)

All institutions

All authors

Generate report (.csv)

⊗

Feb 27, 2020 *rejected by tester18@elsevier.com*

Deserunt praesentium maiores necessitatibus officia minus deleniti ut recusandae nostrum. Et maxime ...

INSTITUTE 1 | Mr. Shyann Wehner, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

⊗

Feb 26, 2020

Voluptas nesciunt ut. Qui dicta cum ut eius quaerat qui aspernatur.

INSTITUTE 1 | Miss Ansley Lubowitz, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

No requests to display

Showing 2 of 7

Archived rejected requests are shown in the Rejected request section and shows the number of requests stored

You can also view all requests – pending, approved and rejected all in one place. Click on 'All'.

## Step 2.3: Accessing a Consolidated Institution Report

To generate a report (.csv file) of pending, approved or rejected, or all – click on the appropriate filter button and then click on the ‘Generate Report (.csv)’ icon

For a report on requests for a specific institution or author, filter for the relevant institution or author from the drop-down menu before generating the report

For a report on all requests for all your institutions, filter by ‘All’ and select ‘All Institutions’ from the drop-down menu before generating the report

### Requests

☐ Pending (3) ☐ Approved (2) ☐ Rejected (2) ☒ All (7)

Showing 7 of 7

All institutions

All authors

Generate report (.csv)

Feb 24, 2020

Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.

INSTITUTE 1 | Miss Bertha Mraz, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020

In consequuntur eligendi est voluptas amet odit quia excepturi enim. Corporis id porro maxime nostru...

INSTITUTE 1 | Miss Estelle Hessel, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020

Magnam expedita aut veniam dignissimos harum natus excepturi tenetur dolorem. Esse nihil veritatis n...

INSTITUTE 1 | Dr. Kale Miller, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 27, 2020

rejected by tester18@elsevier.com

Deserunt praesentium maiores necessitatibus officia minus deleniti ut recusandae nostrum. Et maxime ...

INSTITUTE 1 | Mr. Shyann Wehner, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Rejected

Feb 26, 2020

Voluptas nesciunt ut. Qui dicta cum ut eius quaerat qui aspernatur.

INSTITUTE 1 | Miss Ansley Lubowitz, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Rejected

Feb 24, 2020

approved by Postman Regression

Ab sed velit unde et ab asperiores ea. Consequatur aut atque sit quam quae nihil doloribus alias libero. E...

INSTITUTE 1 | Mrs. Catharine Shanahan, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Approved



## Step 2.3: Accessing a Consolidated Institution Report

**A .csv file will be generated and a download button will appear in a dialogue box on the screen**

**Click on 'Download report (.csv)' to download the file to Excel**

**Requests**

☐ Pending (3)
 ☐ Approved (2)
 ☐ Rejected (2)
 ☒ All (7)

Showing 7 of 7

All institutions ▼ All authors ▼ Generate report (.csv)

Feb 24, 2020

Enim nesciunt nobis sunt laudantium quisque

INSTITUTE 1 | Miss Bertha Mraz, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

Feb 24, 2020

In consequuntur eligendi est voluptas amet

INSTITUTE 1 | Miss Estelle Hessel, r.fox@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

**Consolidated report ready**

Request status: All

Institutions: All

Authors: All


Download report (.csv)


ur dolorem. Esse nihil veritatis n...

Rejected

[illegible]


## Step 2.4: Managing your Platform - Account Settings

 Open Access Platform ? TC



### Requests

Review and action all Article Publication Charge requests



### Account settings

Manage the contacts who receive notifications of new Article Publication Charges to action


**Account Settings enables you to include additional email addresses to receive notifications of APCs that need review and action**

**Click on the 'Account Settings' icon to navigate to that section of the Platform**

Account Settings enables you to include additional email addresses to receive notifications of APCs that need review and action

Click on the 'Account Settings' icon to navigate to that section of the Platform

# Step 2.4: Managing your Platform - Account Settings

**Open Access Platform**

**You can manage the settings for individual institutions**

**Select an institution from the drop-down menu**

## Account settings

### Personal details

Name: tester15@elsevier.com  
Email: tester15@elsevier.com

### Institution settings


Choose an institution to view and update settings for this particular institution.

Choose institution

Choose institution

Institute 2

Institute 3



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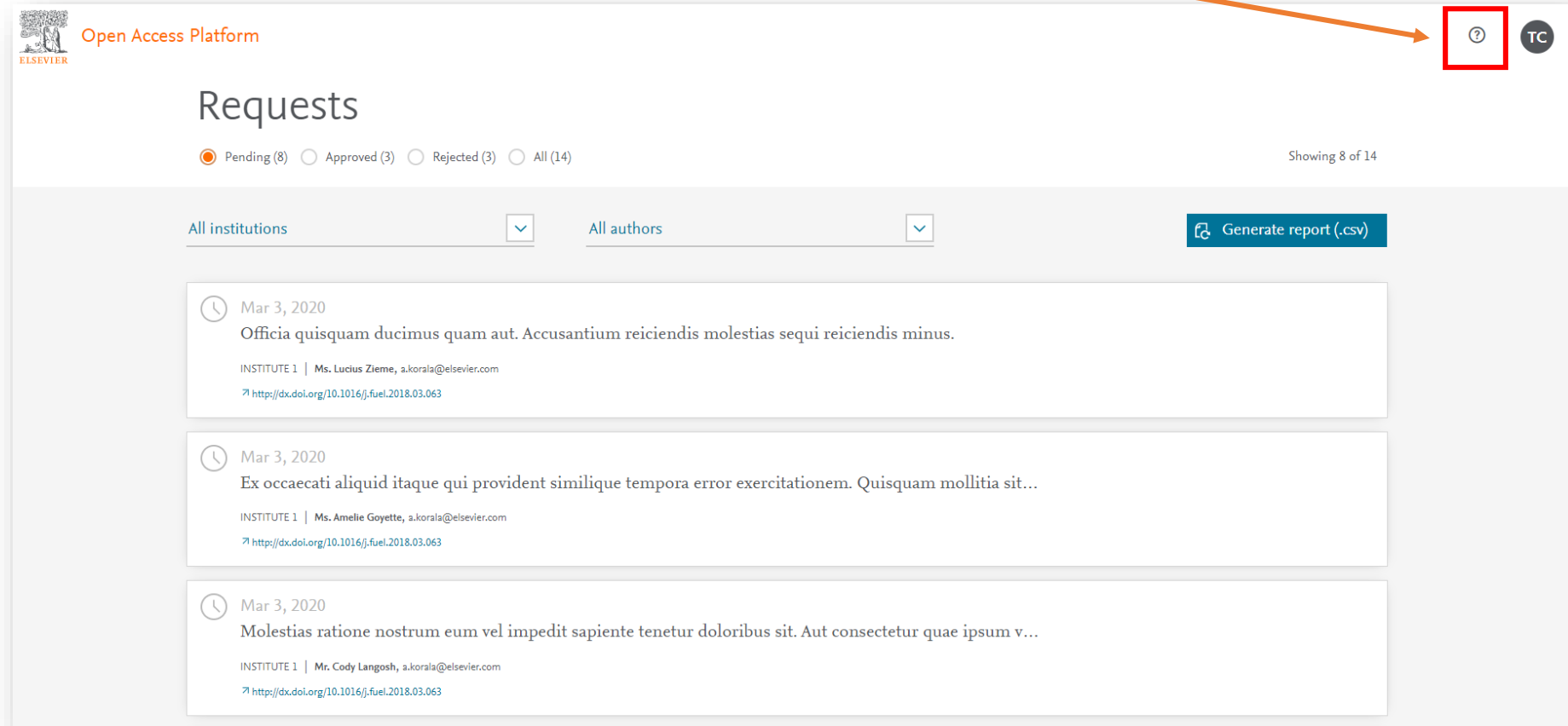
# 3 Steps to your Elsevier Open Access Platform

1. Accessing your Open Access Platform
2. Managing your Platform
- 3. How we can support you**
4. Consortia Admin Role Description



# Step 3: How we can support you

If you need a support using the Open Access Platform then we have a dedicated resource centre set up  
Click on the Help option to go to the Open Access Platform Support Centre




**Open Access Platform**

## Requests

☒ Pending (8) ☐ Approved (3) ☐ Rejected (3) ☐ All (14) Showing 8 of 14


All institutions  All authors  [Generate report \(.csv\)](#)

 Mar 3, 2020

Officia quisquam ducimus quam aut. Accusantium reiciendis molestias sequi reiciendis minus.

INSTITUTE 1 | Ms. Lucius Zieme, a.korala@elsevier.com


<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

 Mar 3, 2020

Ex occaecati aliquid itaque qui provident similique tempora error exercitationem. Quisquam mollitia sit...

INSTITUTE 1 | Ms. Amelie Goyette, a.korala@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

 Mar 3, 2020

Molestias ratione nostrum eum vel impedit sapiente tenetur doloribus sit. Aut consectetur quae ipsum v...

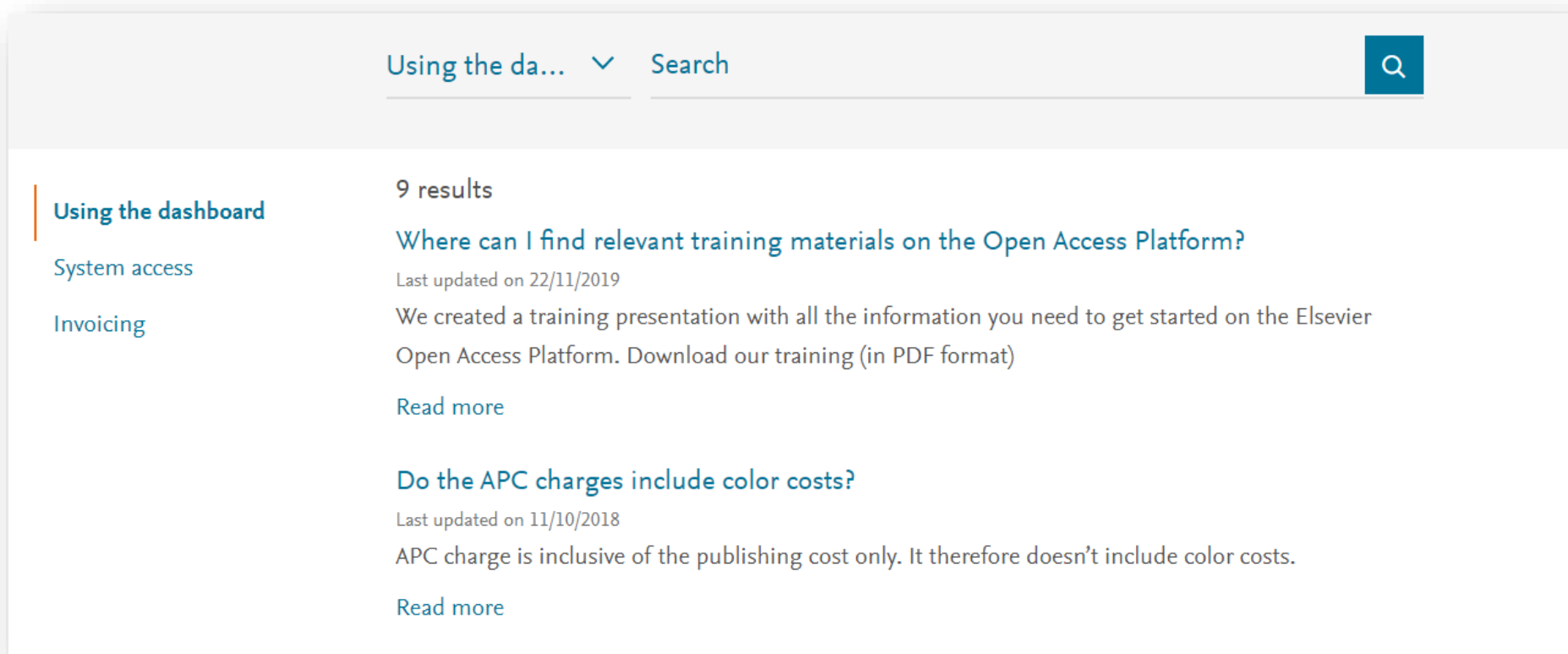
INSTITUTE 1 | Mr. Cody Langosh, a.korala@elsevier.com

<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

## Step 3: How we can support you

FAQs are posted  
on Open Access  
Platform Support  
Centre

These are  
managed by our  
Researcher  
Support Team



The screenshot shows a search results page for the Open Access Platform Support Centre. At the top, there is a header bar with the text "Using the da..." followed by a dropdown arrow and the word "Search". To the right of the header is a search icon. Below the header, on the left side, there is a sidebar with three links: "Using the dashboard" (which is highlighted with an orange vertical bar), "System access", and "Invoicing". The main content area on the right shows "9 results". The first result is titled "Where can I find relevant training materials on the Open Access Platform?" and includes the text "Last updated on 22/11/2019" and "We created a training presentation with all the information you need to get started on the Elsevier Open Access Platform. Download our training (in PDF format)". Below this result is a "Read more" link. The second result is titled "Do the APC charges include color costs?" and includes the text "Last updated on 11/10/2018" and "APC charge is inclusive of the publishing cost only. It therefore doesn't include color costs." Below this result is also a "Read more" link.

Using the da... ▾ Search

Using the dashboard  
System access  
Invoicing

9 results

[Where can I find relevant training materials on the Open Access Platform?](#)  
Last updated on 22/11/2019  
We created a training presentation with all the information you need to get started on the Elsevier Open Access Platform. Download our training (in PDF format)  
[Read more](#)

[Do the APC charges include color costs?](#)  
Last updated on 11/10/2018  
APC charge is inclusive of the publishing cost only. It therefore doesn't include color costs.  
[Read more](#)



## Step 3: How we can support you

If you can't find the answer from the FAQs, then please complete the online form and our Researcher Support Team will follow up with you

### Elsevier Open Access Platform Support Center

All Topics

Search

Email

#### Contact support

Contact reason

Please, select an option...

Subject

Your question

Please provide screenshots or files that may assist us helping you quicker.

Attachment (max size 20Mb) (optional)

Browse...

Your contact details

Title (optional)

#### Most viewed answers

Can I register myself or invite colleagues?

How can I generate a report of the previous requests I received?

How do I let the author know whether he/she has been accepted or not?

Do the APC charges include color costs?

Why can't I register to this portal?

# Consortia Admin Role Description

The Consortia Admin has the following responsibilities

- ✓ Provide user and institution information for the initial EOAP onboarding
  - ✓ Monitor the progress of agreement at consortium and institution level
  - ✓ Monitor the activated OA articles under the agreement
  - ✓ Collaborate with Elsevier to boost the uptake under the agreement
  - ✓ Raise requests for new institutions to be added or removed from the EOAP
  - ✓ Raise requests for new EOAP user accounts after initial EOAP onboarding
  - ✓ Set-up APC request email notifications to go to additional users (e.g. holiday cover)
  - ✓ Ensure Elsevier is kept updated of institutions and EOAP users for the Agreement
  - ✓ Use 'Country\_Agreement' name in Subject line of all requests to Elsevier Support
-

# Making it easier to work with us

Making it simpler for you to manage  
your APC requests

Allowing you to track and manage in  
real time

Enabling you to access your data  
when you need it





Thank you

