

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



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- 1. Accessing your Open Access Platform**
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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

ELSEVIER

Sign in

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

Email: sample@institution.org

Password:

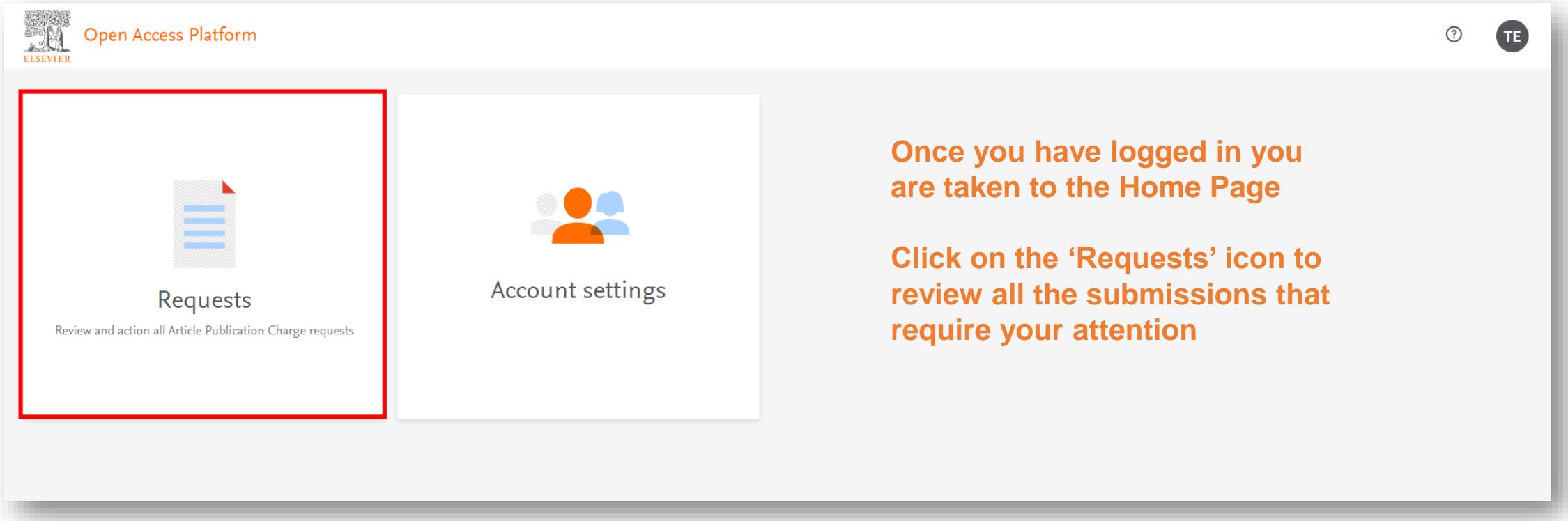
[Forgot password?](#)

Stay signed in (not recommended for shared devices)

Sign in

Sign in with a different account

Step 1: Accessing your Open Access Platform



Open Access Platform

Elsevier

?

TE

Requests

Review and action all Article Publication Charge requests

Account settings

Once you have logged in you are taken to the Home Page

Click on the 'Requests' icon to review all the submissions that require your attention

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

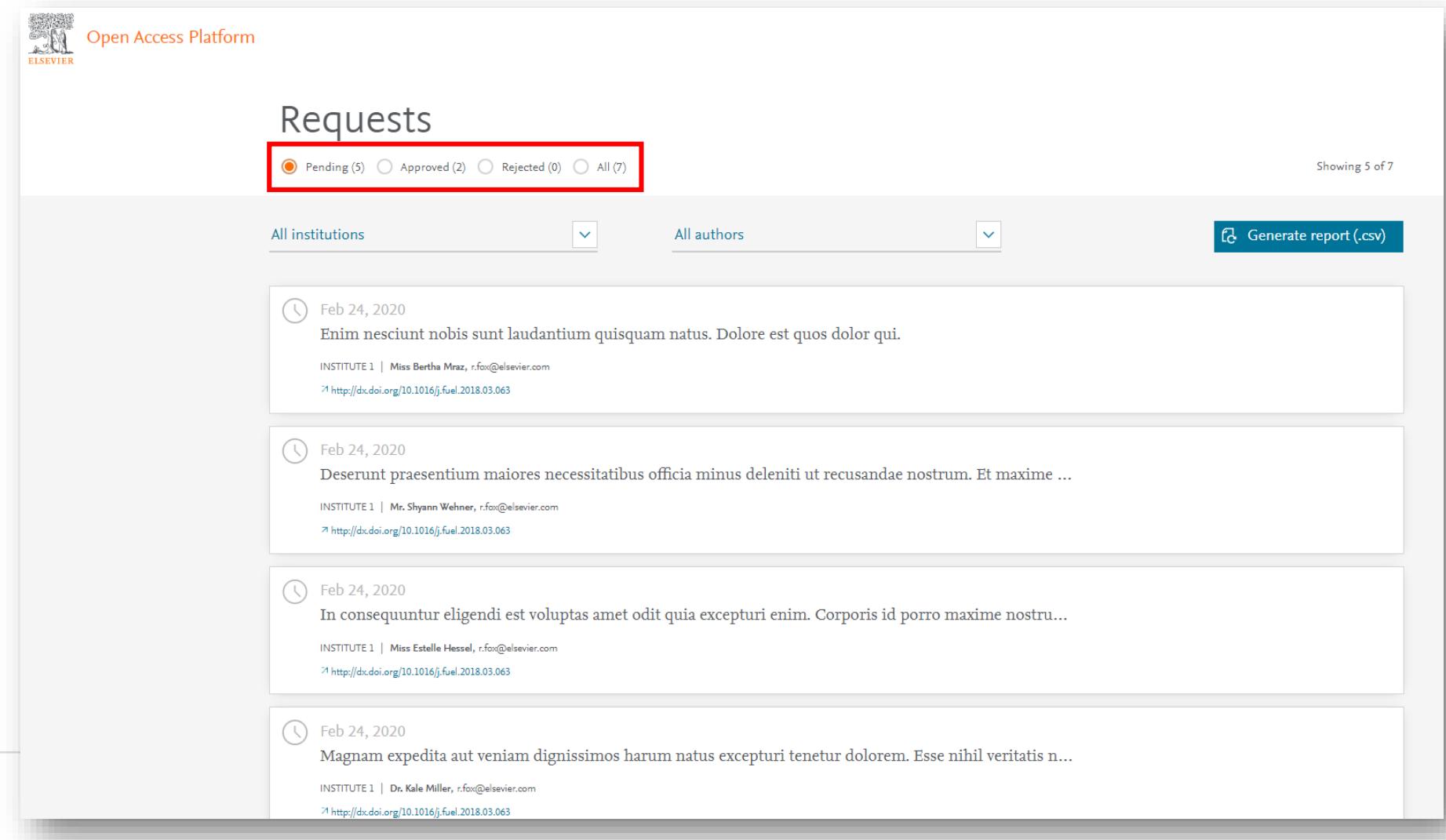


Step 2.1: Managing your Platform - Viewing Requests

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



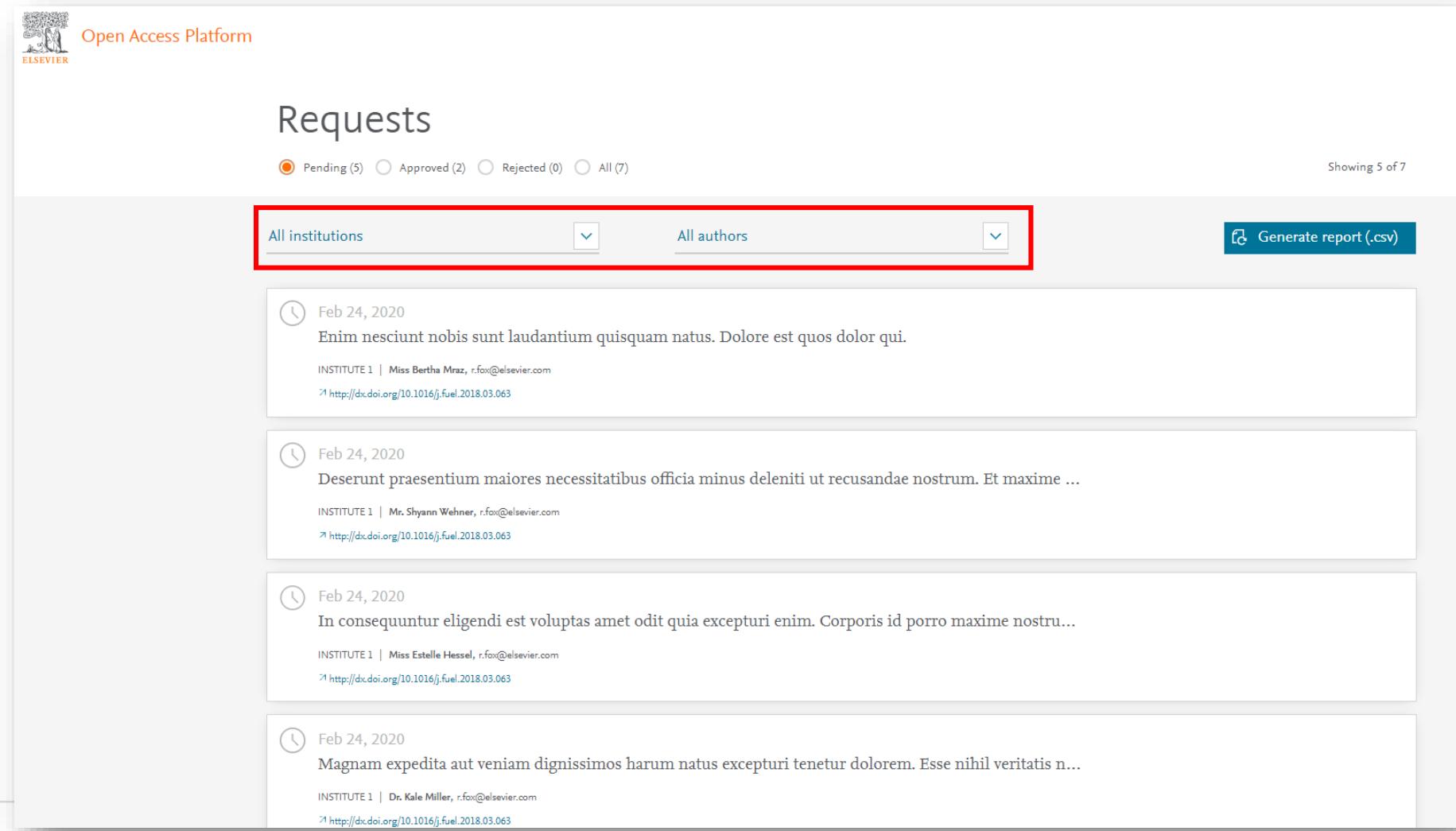
The screenshot shows the 'Requests' screen of the Open Access Platform. At the top, there is a navigation bar with the Elsevier logo and the text 'Open Access Platform'. Below the navigation bar, the word 'Requests' is displayed in a large, bold, black font. Underneath 'Requests', there is a horizontal navigation bar with four buttons: 'Pending (5)', 'Approved (2)', 'Rejected (0)', and 'All (7)'. The 'Pending (5)' button is highlighted with a red box. To the right of this bar, the text 'Showing 5 of 7' is visible. Below the navigation bar, there are two dropdown menus: 'All institutions' and 'All authors', each with a small blue dropdown arrow icon. To the right of these dropdowns is a blue button labeled 'Generate report (.csv)'. The main content area displays five request cards, each with a timestamp (Feb 24, 2020), a short description, the name of the institute, the name of the contact person, and a DOI link. The requests are as follows:

- 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



Open Access Platform

Requests

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

Showing 5 of 7

All institutions All authors Generate report (.csv)

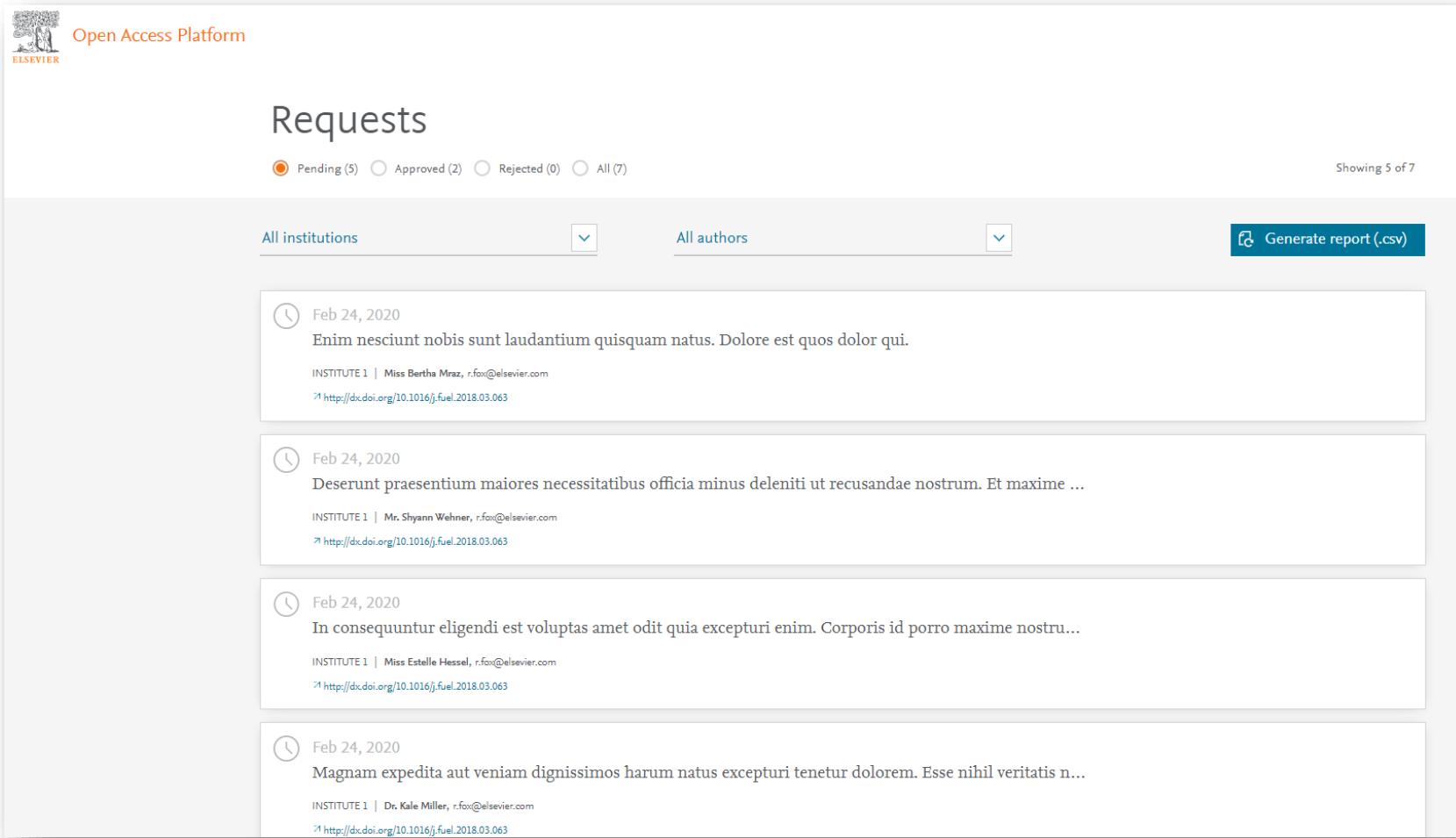
Feb 24, 2020
Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui.
INSTITUTE 1 | Miss Bertha Mraz, r.fox@elsevier.com
<http://dx.doi.org/10.1016/j.fuel.2018.03.063>

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



The screenshot shows the 'Requests' section of the Open Access Platform. At the top, there are filters for 'Pending (5)', 'Approved (2)', 'Rejected (0)', and 'All (7)'. Below the filters, there are dropdowns for 'All institutions' and 'All authors', and a 'Generate report (.csv)' button. The main area displays four requests, each with a timestamp, a truncated message, author information, and a DOI link. The requests are as follows:

- 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 shows a list of requests on the left and a detailed view of the first request on the right.

Left Panel (Requests):

- Header: Requests
- Filter buttons: Pending (3), Approved (2), Rejected (2), All (7)
- Search filters: All institutions, All authors
- Items (3):
 - 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: Magnam 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>

Right Panel (Detailed View):

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
PII:	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

Requests

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

Showing 2 of 7

All institutions ▼

All authors ▼

Generate report (.csv)

Each request tile provides the overview of who approved and when

Requests are sorted by most recently actioned

Historical approved requests are shown in the Approved request section and shows the number of requests stored

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

Requests

Pending (3) Approved (2) **Rejected (2)** All (7)

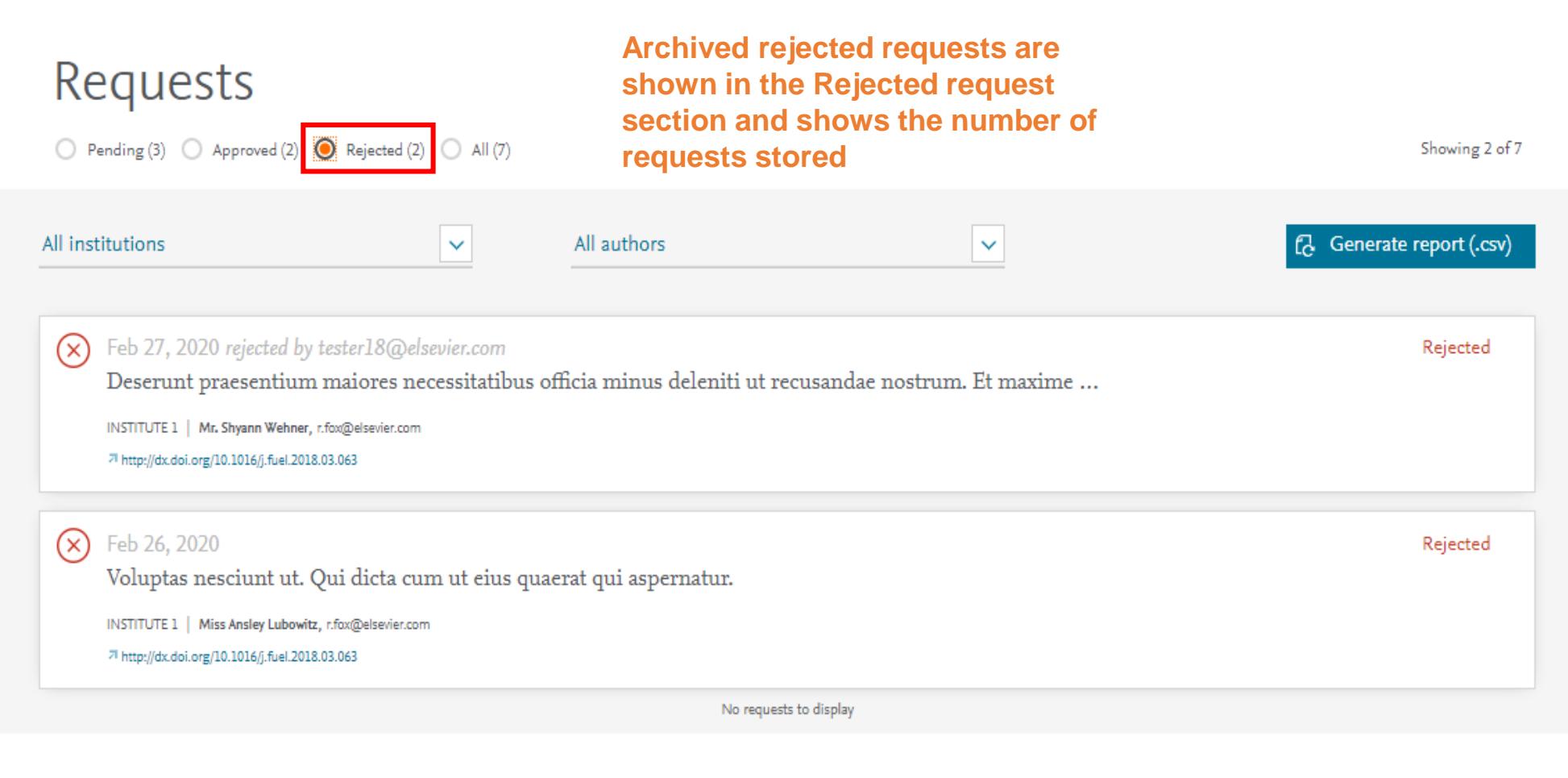
All institutions ▼ All authors ▼

Generate report (.csv)

Rejected

Rejected

No requests to display



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

Showing 2 of 7

Each request tile provides the overview of who rejected and when

Requests are sorted by most recently actioned

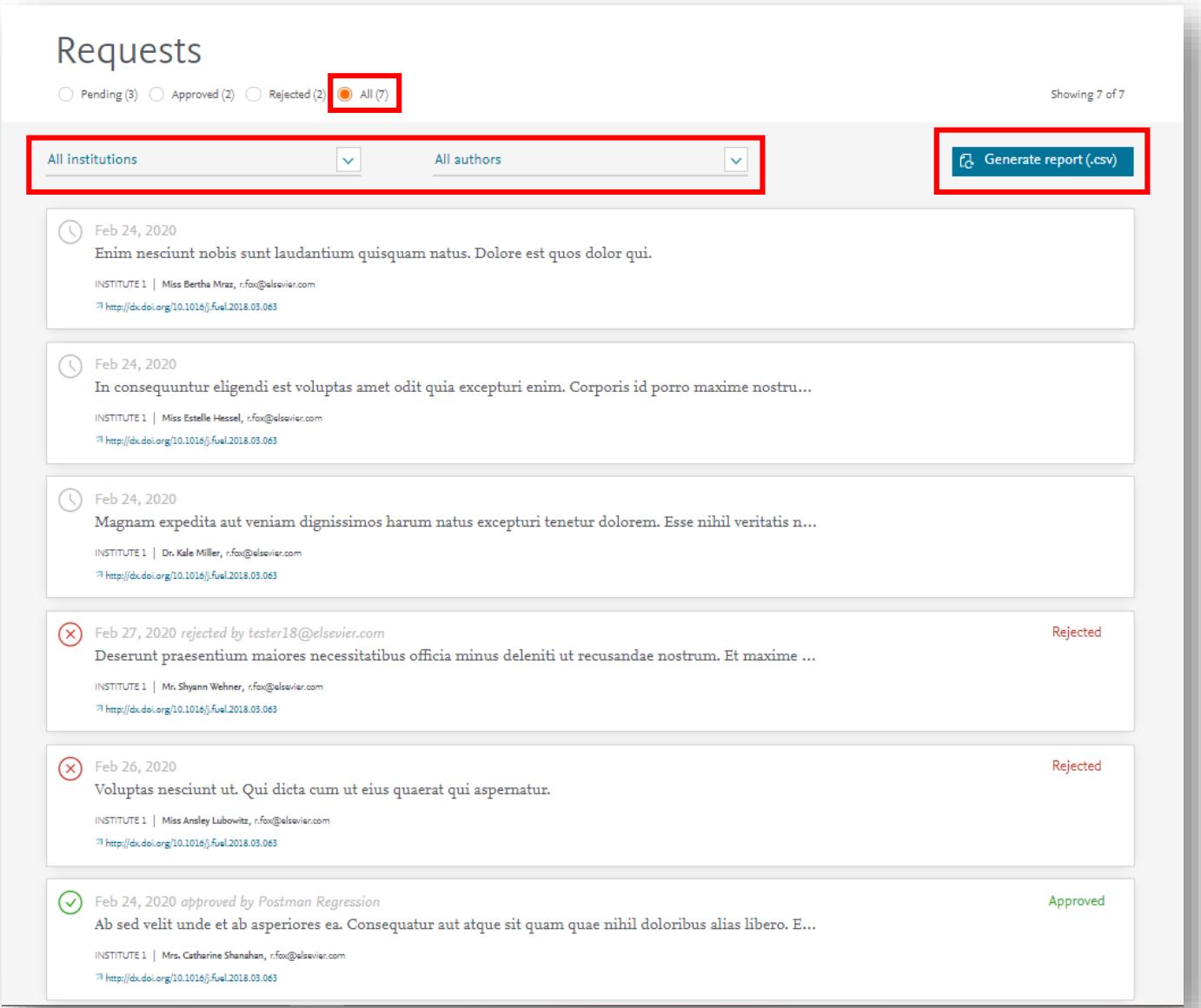
You can also view all requests – pending, approved and rejected all in one place. Click on ‘All’.

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



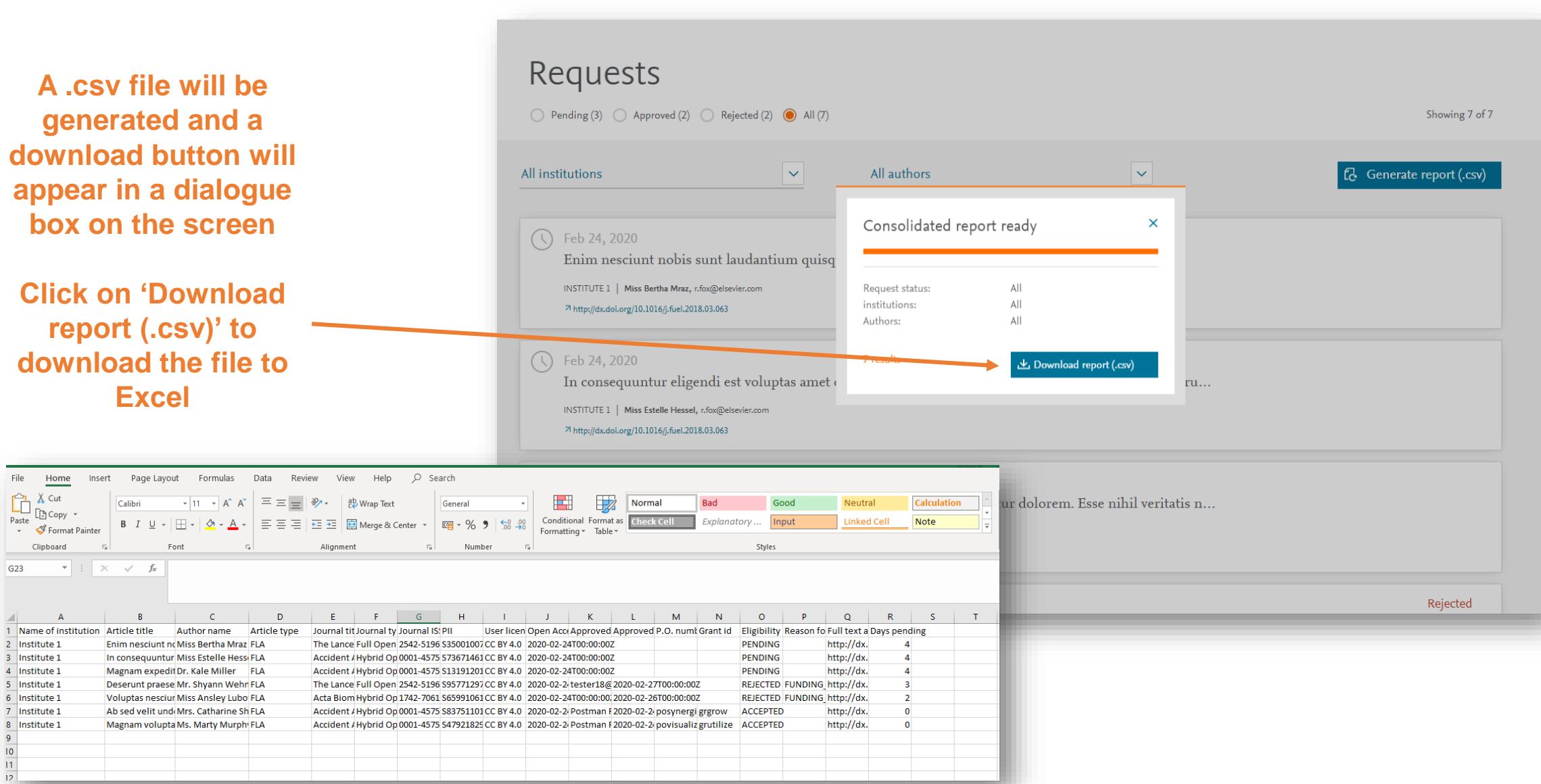
The screenshot shows a 'Requests' page with the following interface elements:

- Filter buttons: Pending (3), Approved (2), Rejected (2), and All (7). The 'All (7)' button is highlighted with a red box.
- Two dropdown menus: 'All institutions' and 'All authors', both highlighted with a red box.
- A 'Generate report (.csv)' button, also highlighted with a red box.
- Report list:
 - Feb 24, 2020: Enim nesciunt nobis sunt laudantium quisquam natus. Dolore est quos dolor qui. (Status: Pending)
 - Feb 24, 2020: In consequuntur eligendi est voluptas amet odit quia excepturi enim. Corporis id porro maxime nostru... (Status: Pending)
 - Feb 24, 2020: Magnam expedita aut veniam dignissimos harum natus excepturi tenetur dolorem. Esse nihil veritatis n... (Status: Pending)
 - Feb 27, 2020: rejected by tester18@elsevier.com (Status: Rejected)
 - Feb 26, 2020: Voluptas nesciunt ut. Qui dicta cum ut eius quaerat qui aspernatur. (Status: Rejected)
 - Feb 24, 2020: approved by Postman Regression (Status: Approved)
- Page footer: Showing 7 of 7

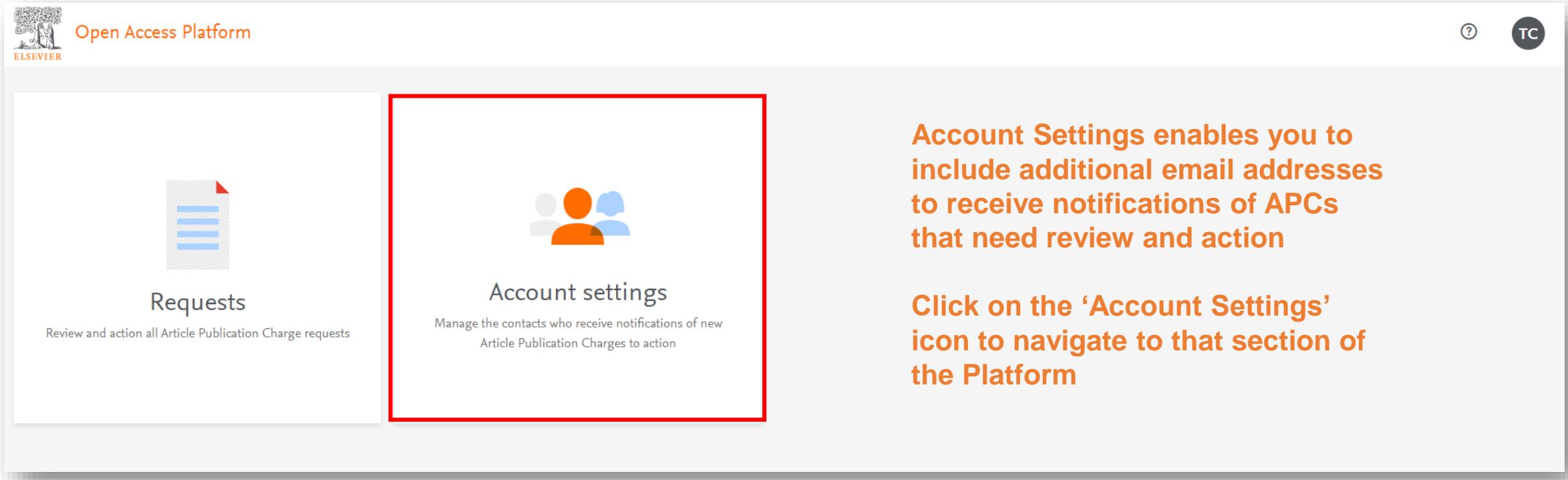
Step 2.3: Accessing a Consolidated Institution Report

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



Step 2.4: Managing your Platform - Account Settings

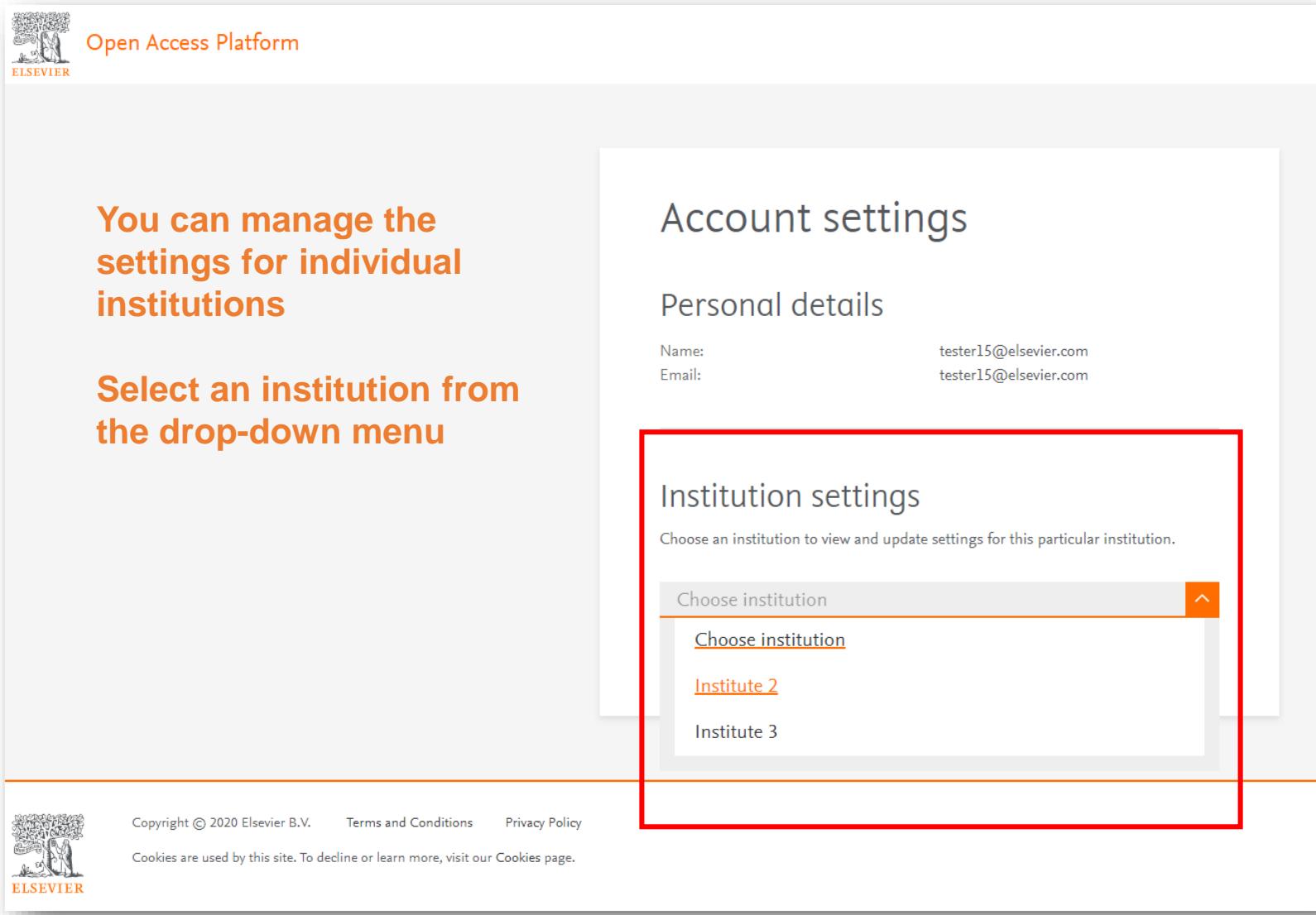


The screenshot shows the 'Open Access Platform' interface. On the left, there is a 'Requests' section with a document icon and the text 'Review and action all Article Publication Charge requests'. On the right, there is an 'Account settings' section with a user icon and the text 'Manage the contacts who receive notifications of new Article Publication Charges to action'. A red box highlights the 'Account settings' section. At the top right of the interface, there is a logo for 'ELSEVIER' and a 'TC' button.

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



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

Institute 2

Institute 3

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3 Steps to your Elsevier Open Access Platform

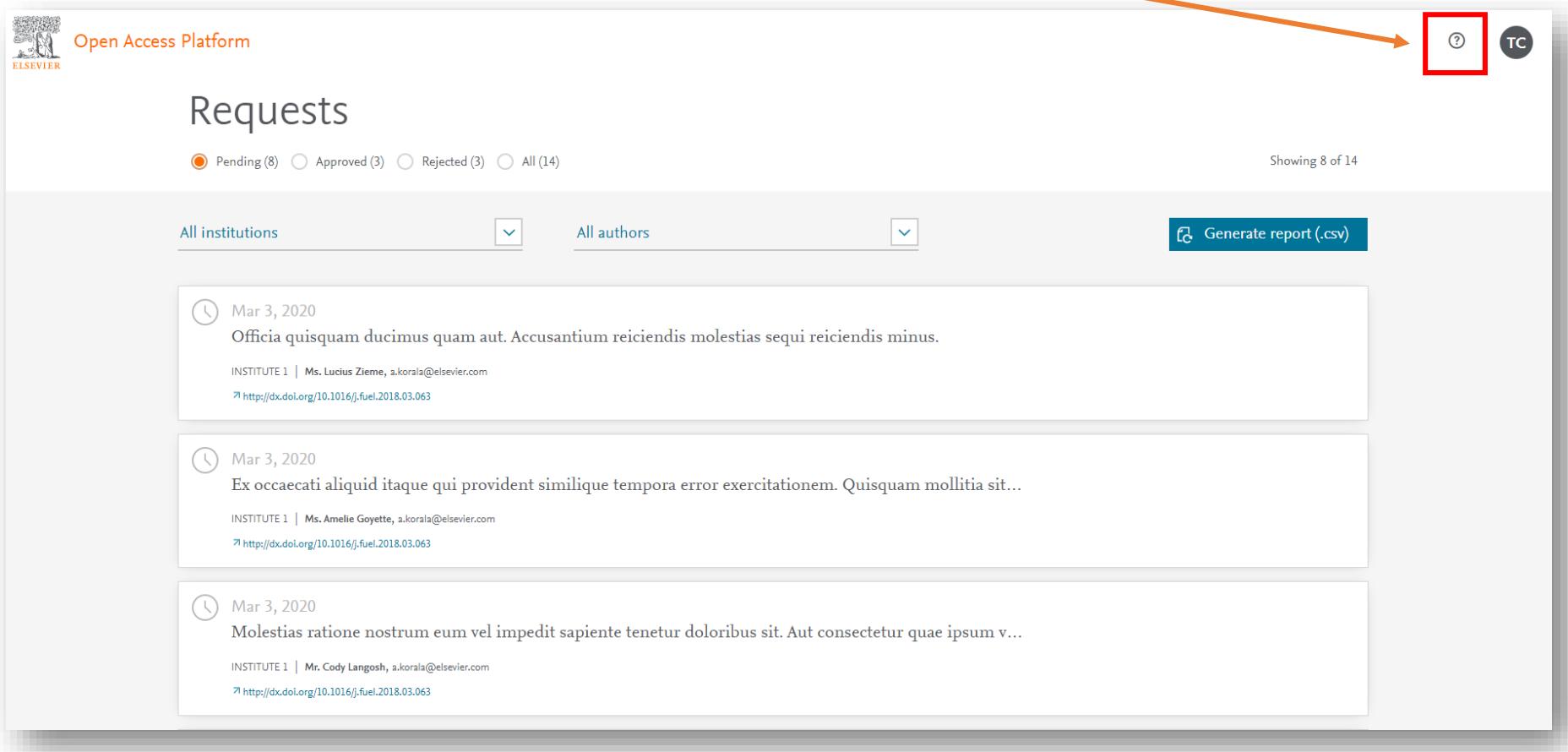
1. Accessing your Open Access Platform
2. Managing your Platform
3. **How we can support you**
4. Consortia Admin Role Description



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



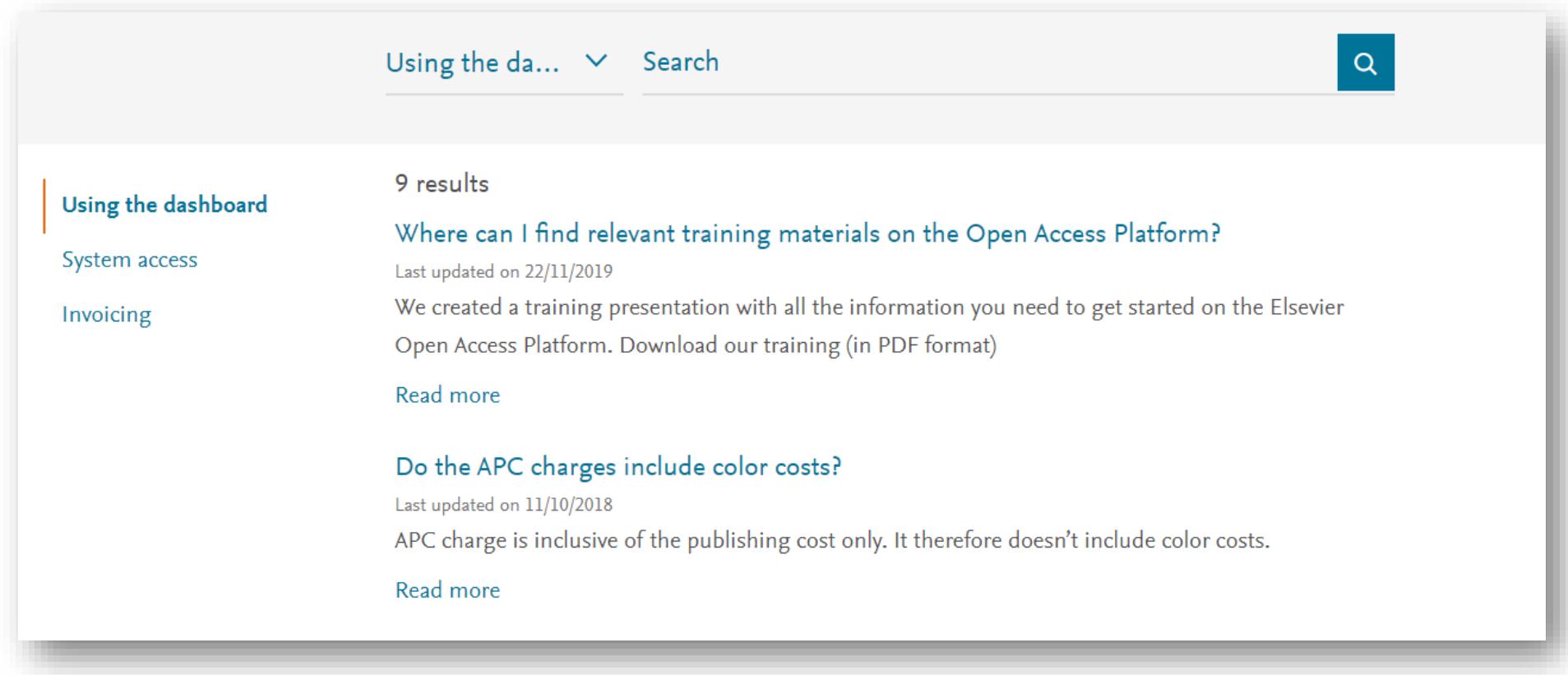
The screenshot shows the 'Requests' section of the Open Access Platform. At the top, there are filters for 'All institutions' and 'All authors', and a button to 'Generate report (.csv)'. Below these, three requests are listed, each with a timestamp (Mar 3, 2020), a message, the sender's name and email, and a DOI link. The first request is fully visible, while the second and third are partially visible. The top right corner of the interface has a help icon (a question mark inside a circle) and a 'TC' icon, both of which are highlighted with a red box and an orange arrow pointing from the text above.

Request ID	Timestamp	Message	Sender	DOI
1	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
2	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
3	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 on a website. The search bar at the top contains the text "Using the da...". To the right of the search bar is a magnifying glass icon. Below the search bar, the text "9 results" is displayed. On the left, there is a sidebar with three categories: "Using the dashboard" (which is highlighted with a vertical orange line), "System access", and "Invoicing". The main content area displays two search results. The first result is titled "Where can I find relevant training materials on the Open Access Platform?". It includes the last update date "Last updated on 22/11/2019" and a brief description: "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 is a "Read more" link. The second result is titled "Do the APC charges include color costs?". It includes the last update date "Last updated on 11/10/2018" and a brief description: "APC charge is inclusive of the publishing cost only. It therefore doesn't include color costs". Below this is a "Read more" link.

Using the da... Search

9 results

Using the dashboard

System access

Invoicing

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.

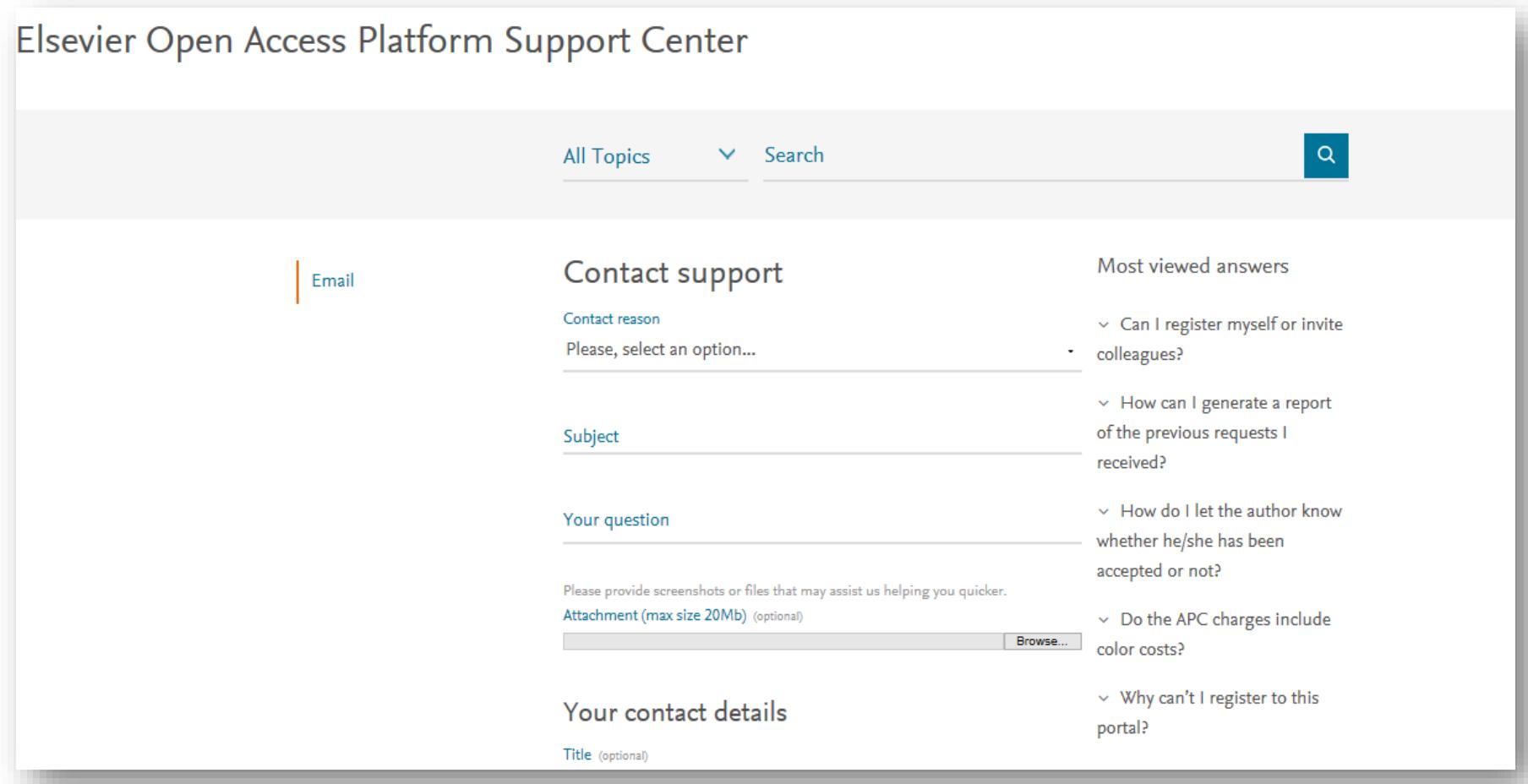
Attachment (max size 20Mb) (optional)

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





ELSEVIER

Thank you

