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

Empowering Knowledge™

ELSEVIER

Making it easier to work with us

Open Access: Institution 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 manage your institution's APCs so you have all the information in **one place.**

3 Steps to your Elsevier Open Access Platform

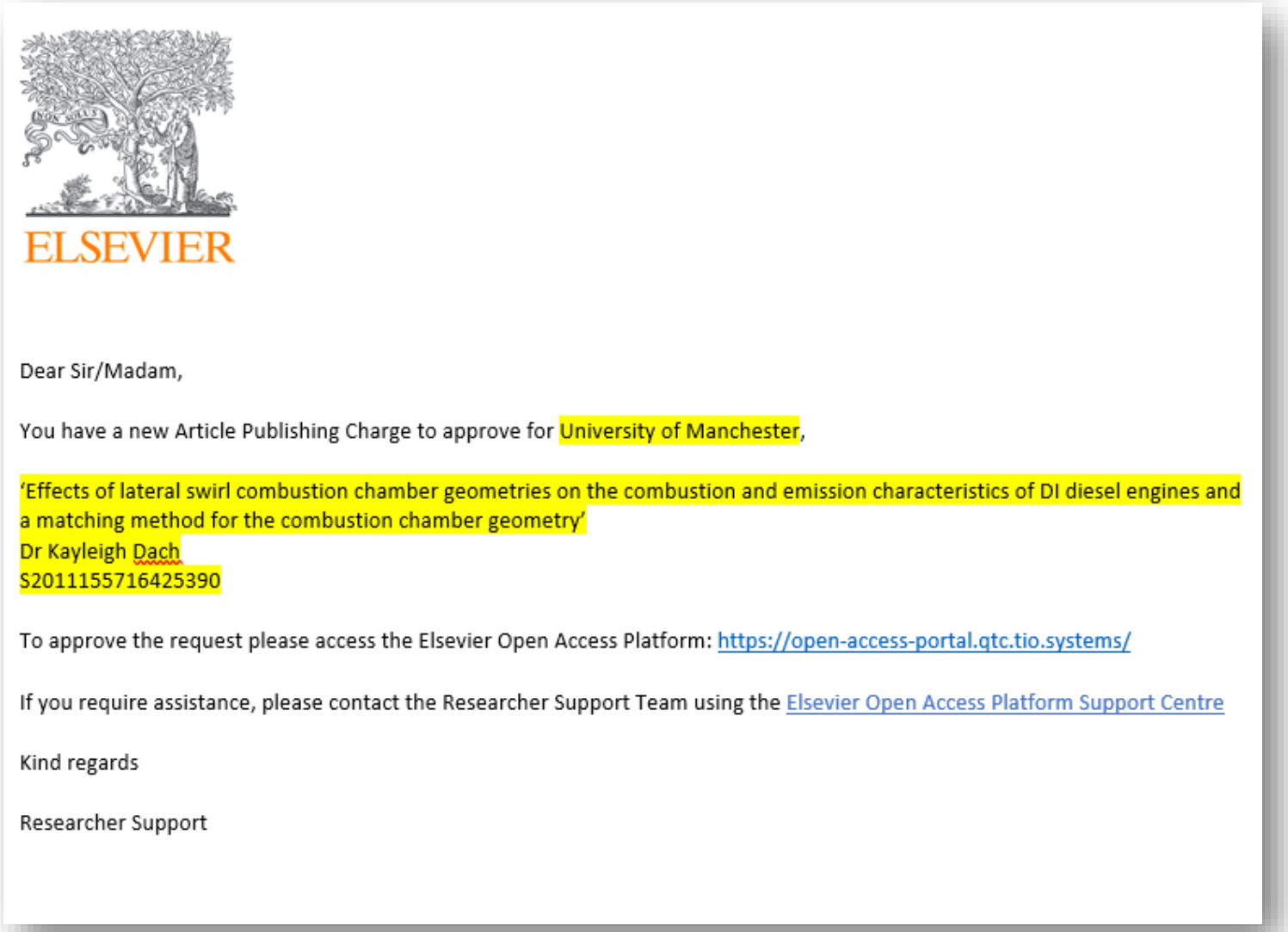
1. Accessing your Open Access Platform
2. Managing your Platform
3. How we support you

3 Steps to your Elsevier Open Access Platform

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

Step 1: Accessing your Open Access Platform

When an author completes the Rights and Access Form, an email notification is sent to you with a link to the Elsevier Open Access Platform (EOAP)



ELSEVIER

Dear Sir/Madam,

You have a new Article Publishing Charge to approve for University of Manchester,

'Effects of lateral swirl combustion chamber geometries on the combustion and emission characteristics of DI diesel engines and a matching method for the combustion chamber geometry'
Dr Kayleigh Dach
S2011155716425390

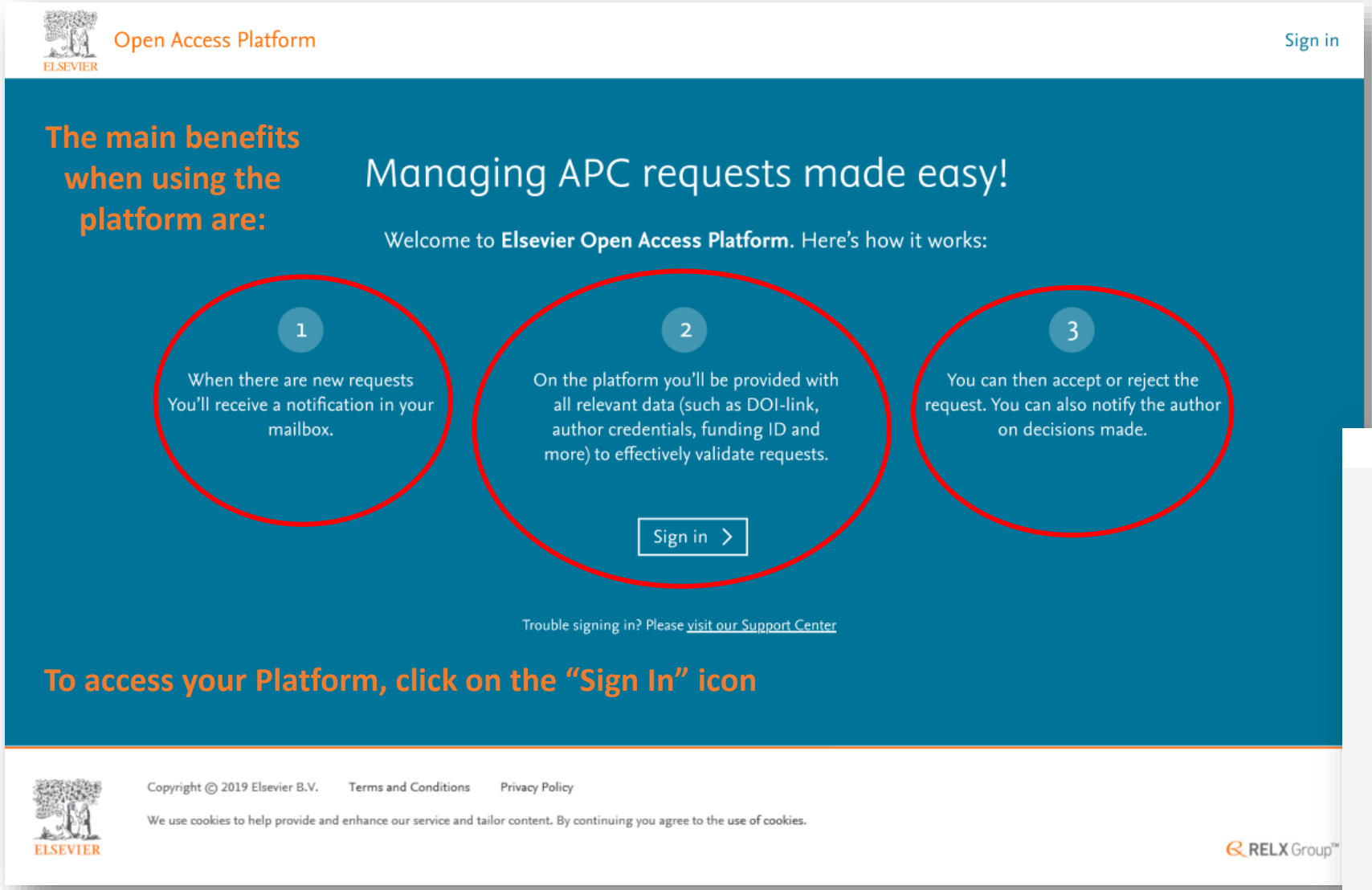
To approve the request please access the Elsevier Open Access Platform: https://open-access-portal.qtc.tio.systems/

If you require assistance, please contact the Researcher Support Team using the Elsevier Open Access Platform Support Centre

Kind regards

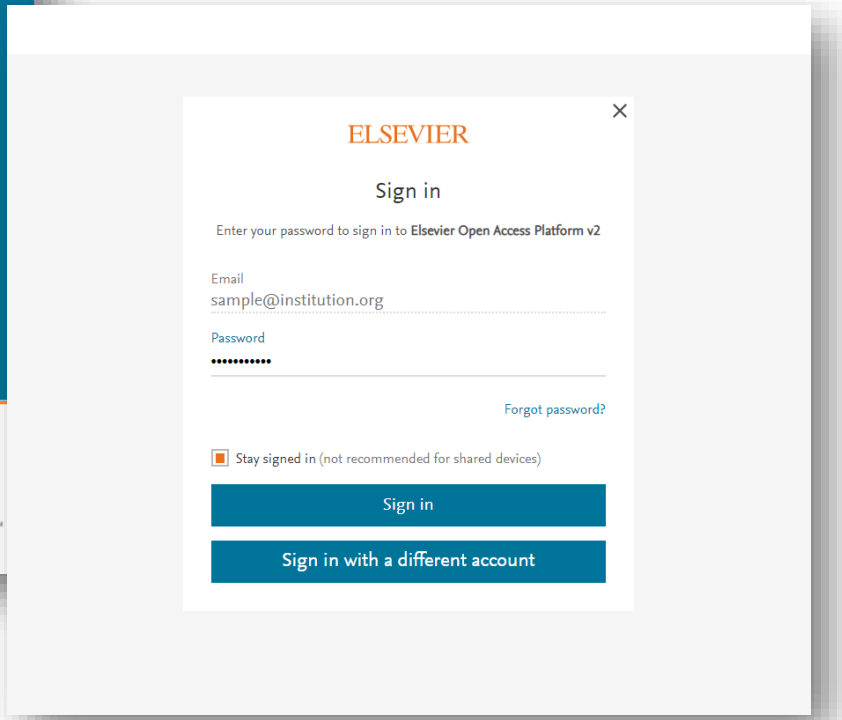
Researcher Support

Step 1: Accessing your Open Access Platform

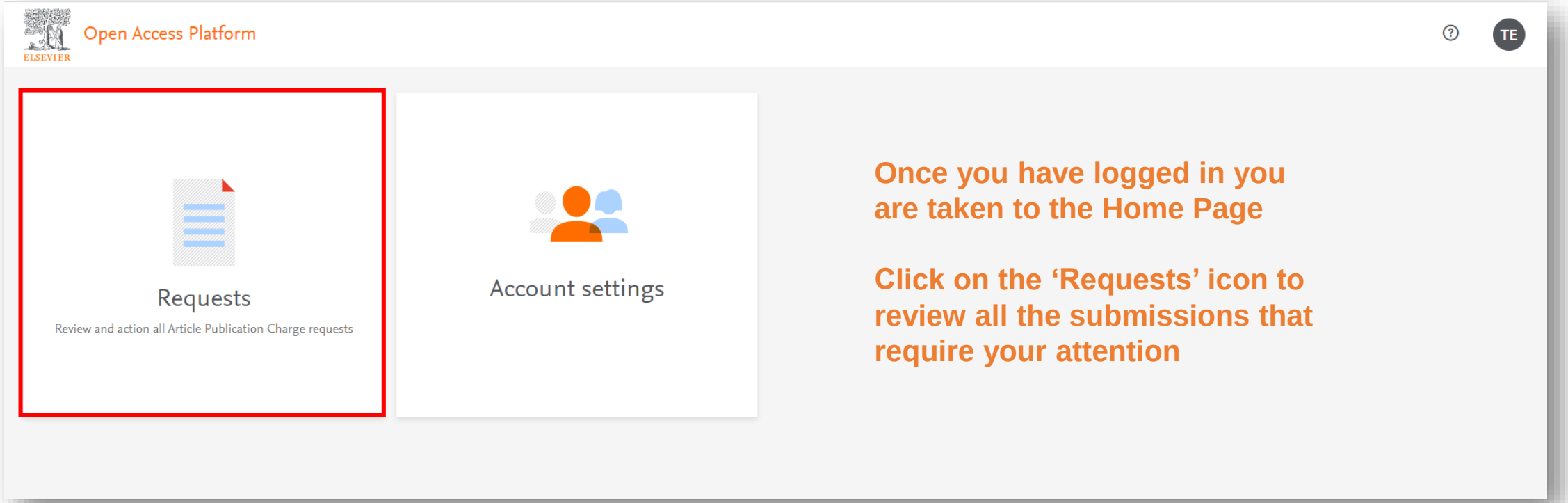


When an institutional agreement is set up, you are provided with a user name and login credentials

On receipt of the request to approve the APC, you log in to the Portal using that institutional email and the password provided by Elsevier



Step 1: Accessing your Open Access Platform



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

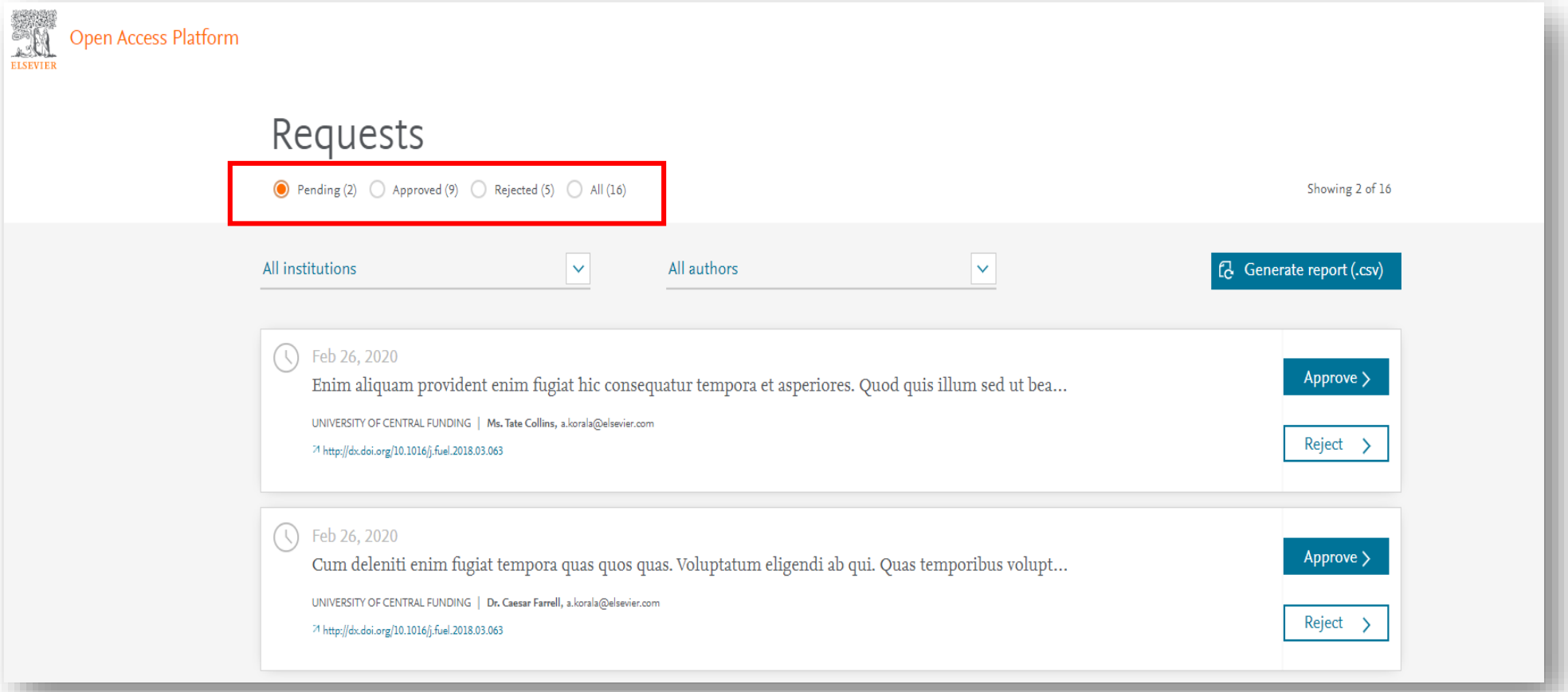
1. Accessing your Open Access Platform
2. **Managing your Platform**
    - **Approving Requests**
    - **Rejecting Requests**
    - **Viewing Historical Requests**
    - **Generating a Report**
    - **Account Settings**
3. How we can support you

Step 2.1: Managing your Platform - Approving Requests

Your Open Access Platform allows you to manage any APCs

The Requests screen shows all Pending requests; these require your approval or rejection

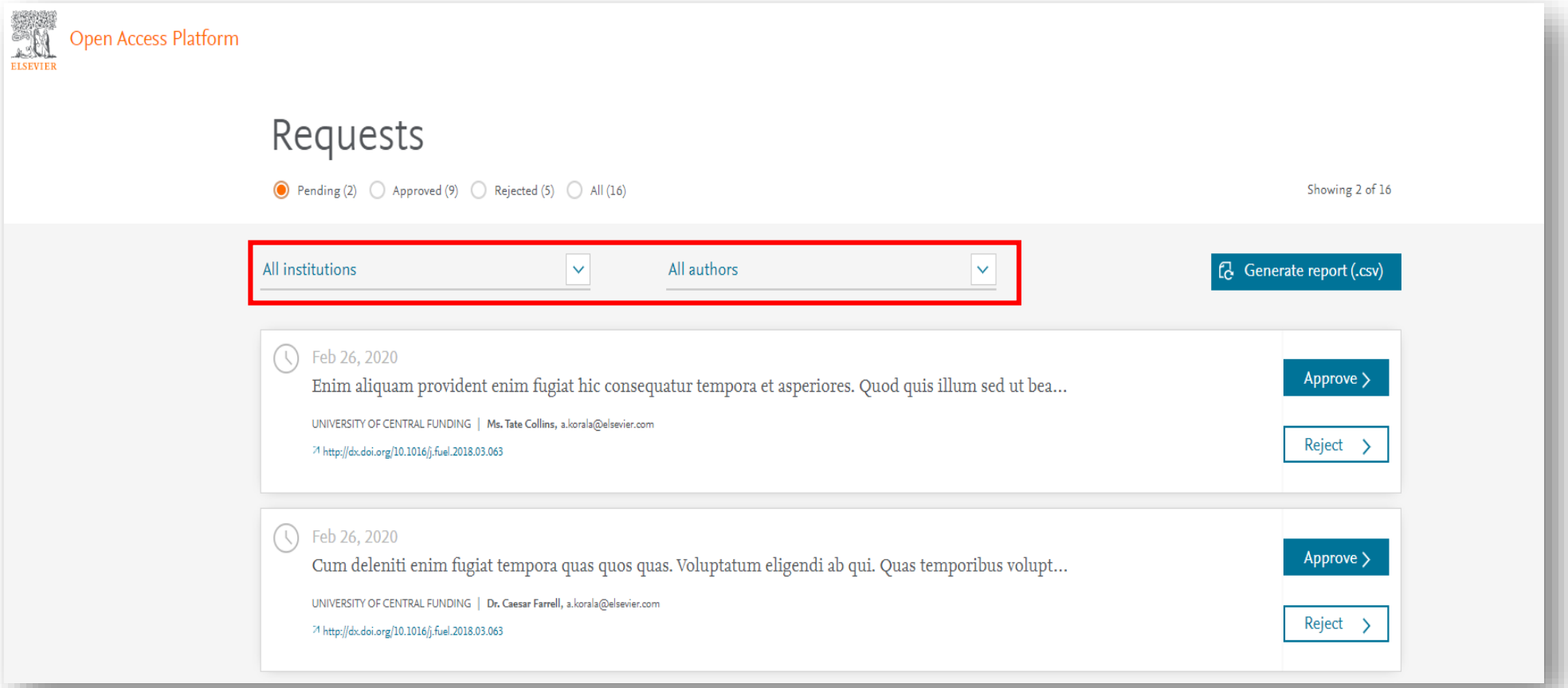
Filter by Approved or Rejected requests, or view All requests on one screen



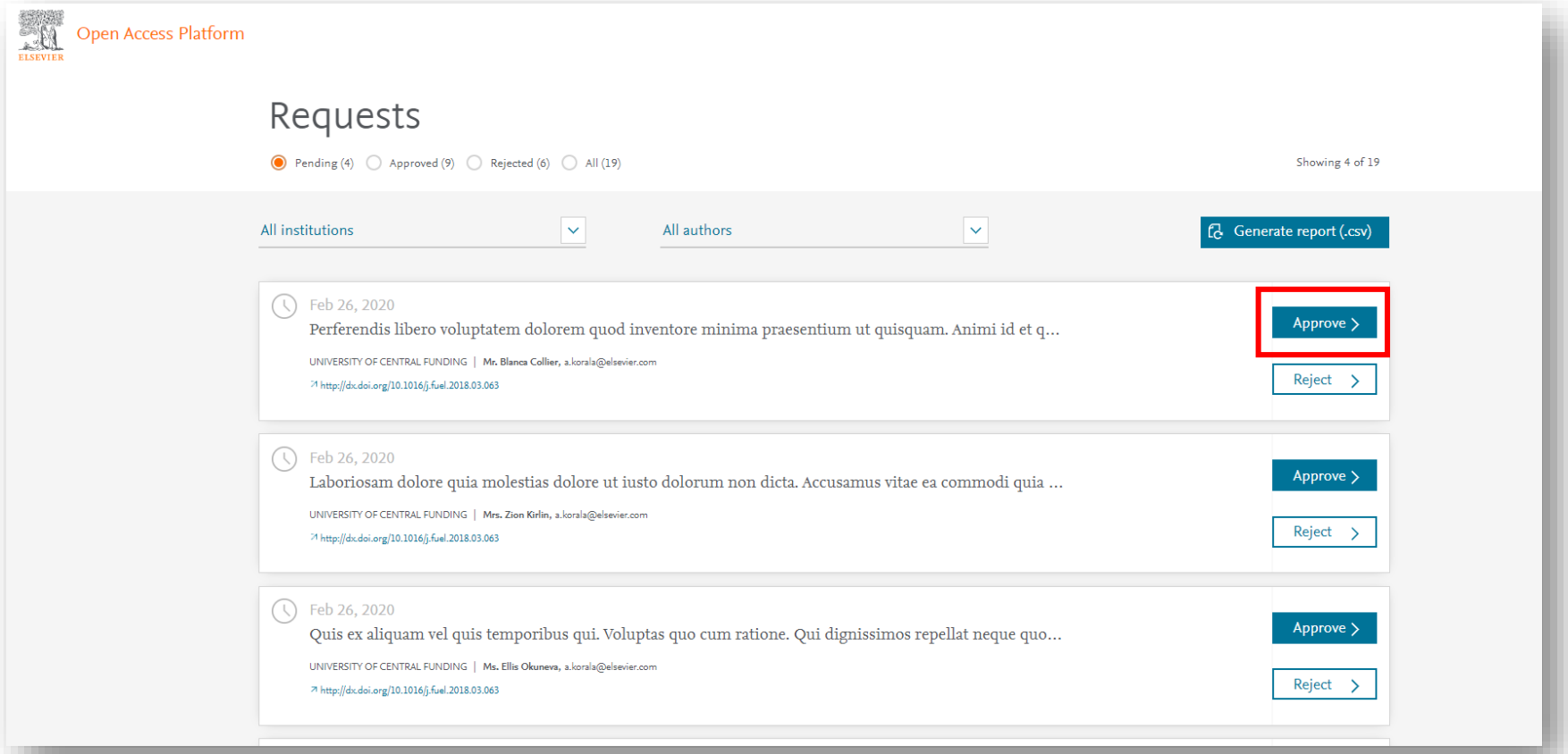
Step 2.1: Managing your Platform - Approving Requests

If you manage multiple institutions, filter for specific institutions using the ‘All institutions’ drop-down menu

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



Step 2.1: Managing your Platform - Approving Requests



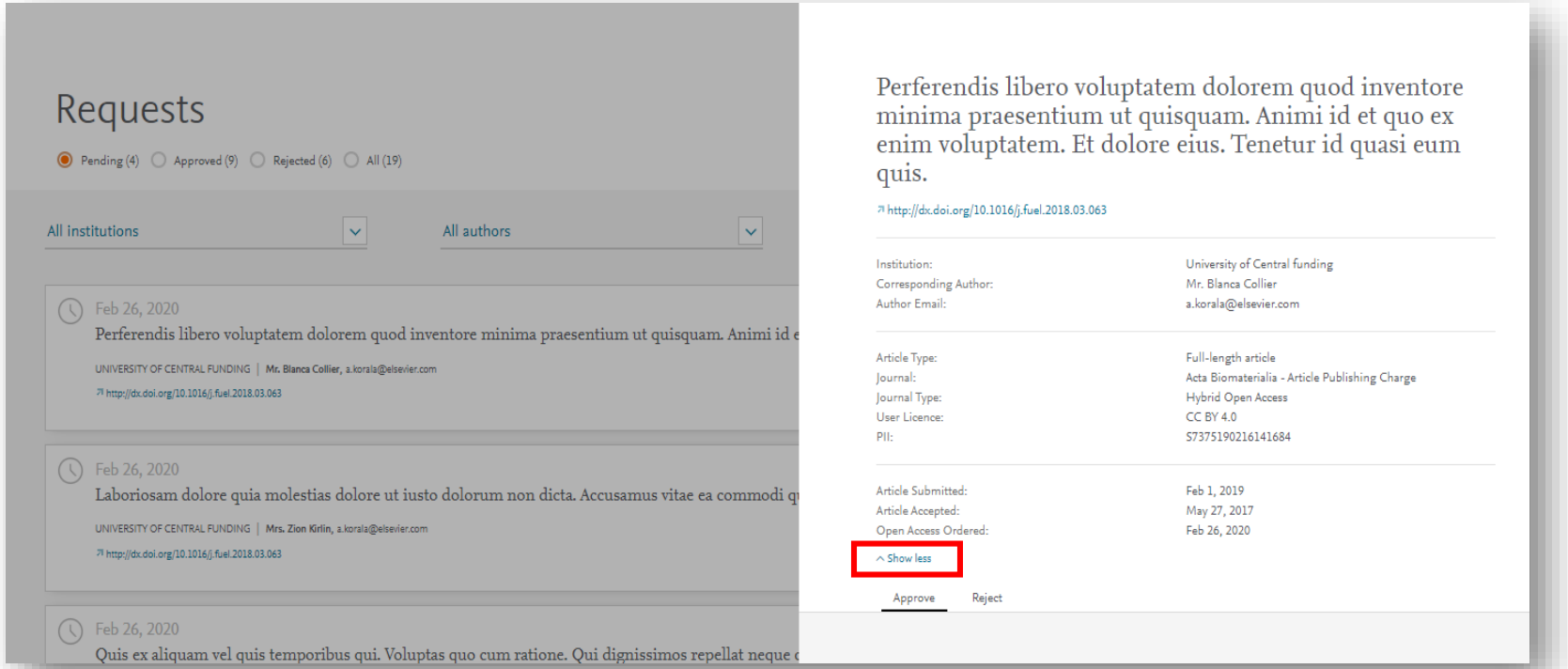
The APC request shows the detail of the APC including:

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

You have the option to Approve or Reject the APC request

To approve a request, click on ‘Approve’

Step 2.1: Managing your Platform - Approving Requests



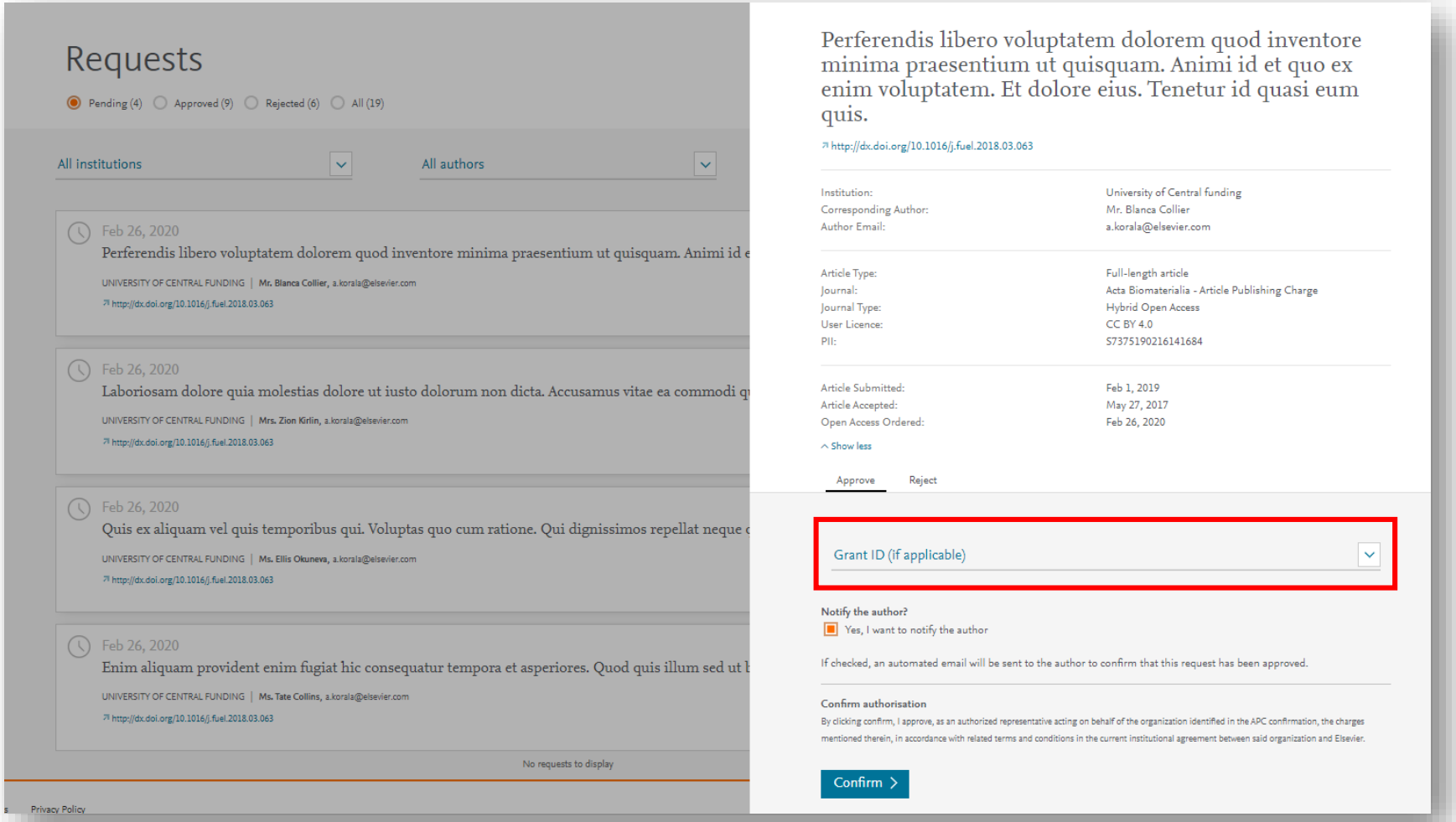
The information panel that appears to the right shows further details of the APC including:

- **Link to the full text article**
- **Author and institution details**
- **Article type**
- **Journal details**
- **User licence**

- **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 2.1: Managing your Platform - Approving Requests

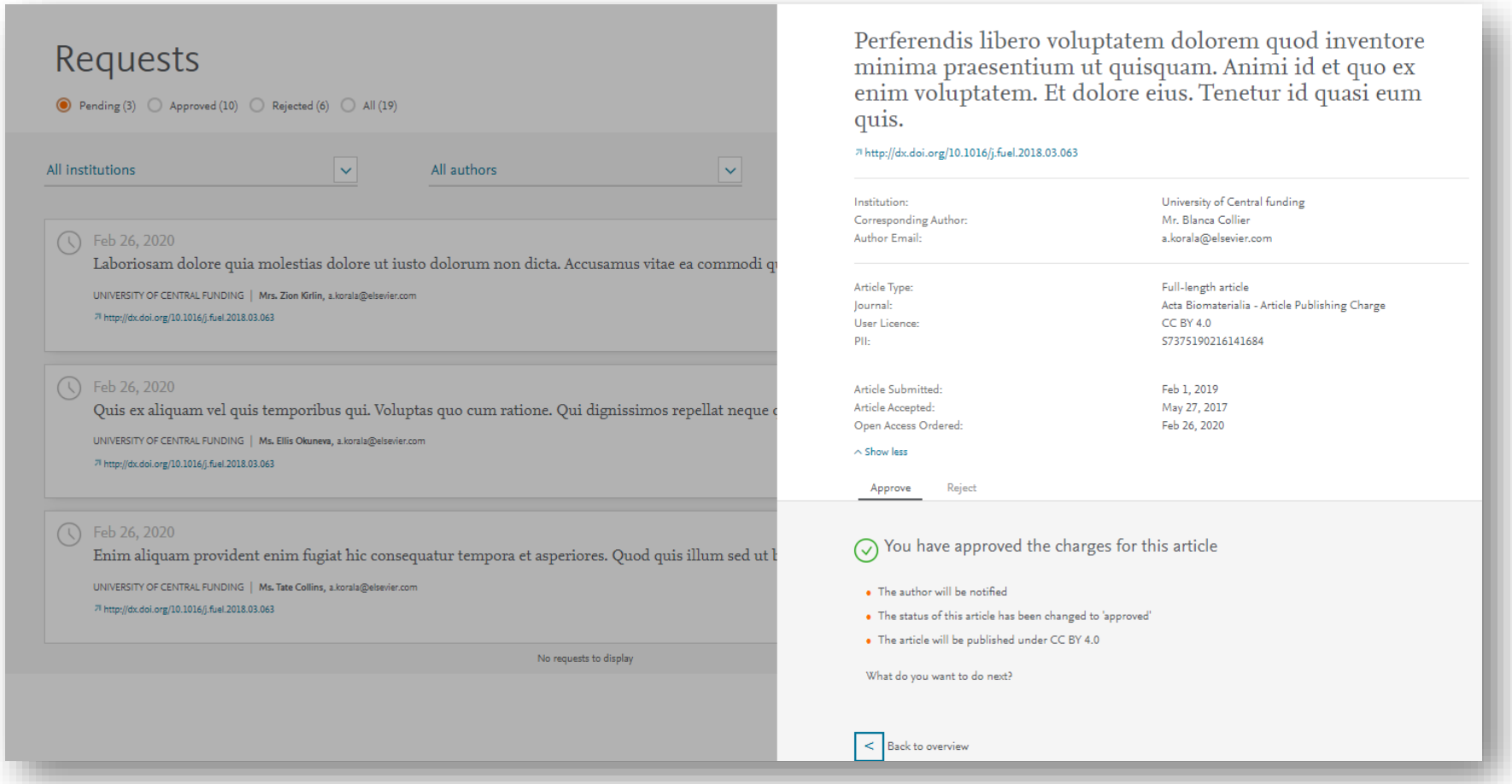


If the author has entered a Grant ID, that can be selected from the drop-down menu. Or you can enter an alternative Grant ID.

The author will be notified when the APC request is approved, unless you uncheck the 'Notify the author?' box

By clicking 'Confirm', you confirm that you are authorised to approve on behalf of the institution

Step 2.1: Managing your Platform - Approving Requests

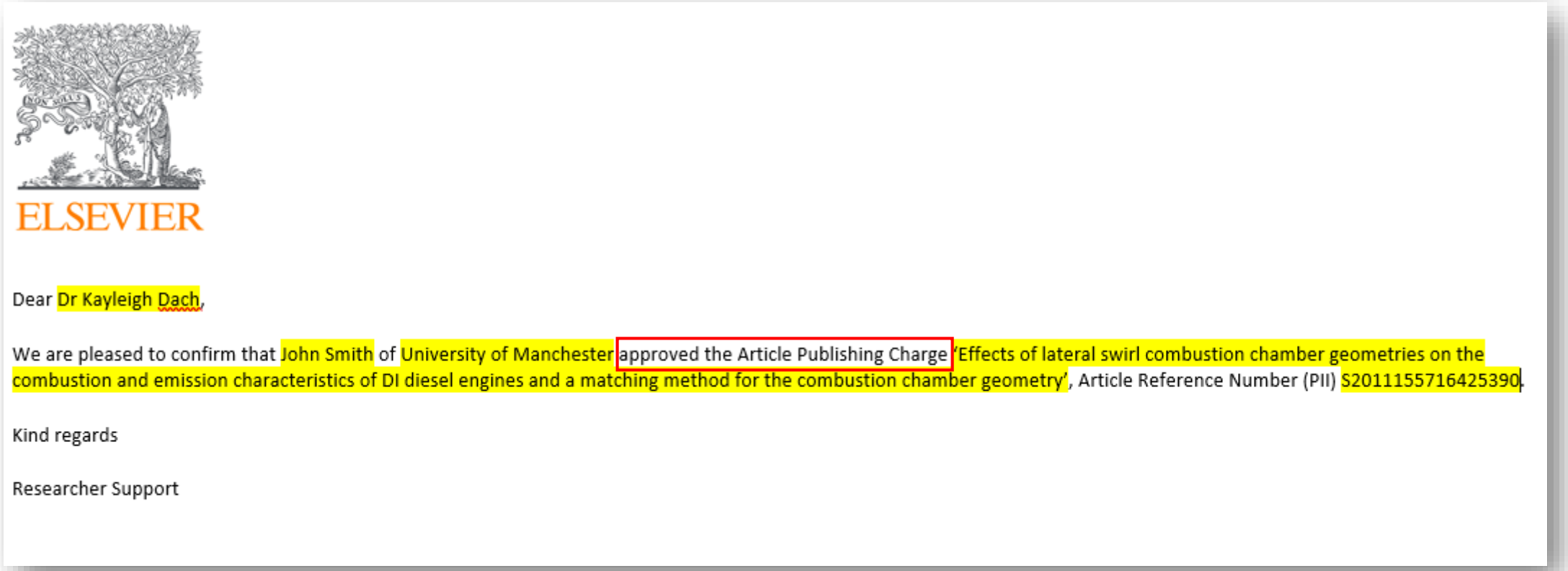


This final screen confirms approval of the APC

The APC is now approved and the request shows in the Approved requests section

Click ‘Back to overview’ to return to the Pending Requests screen

Step 2.1: Managing your Platform - Approving Requests



ELSEVIER

Dear Dr Kayleigh Dach,

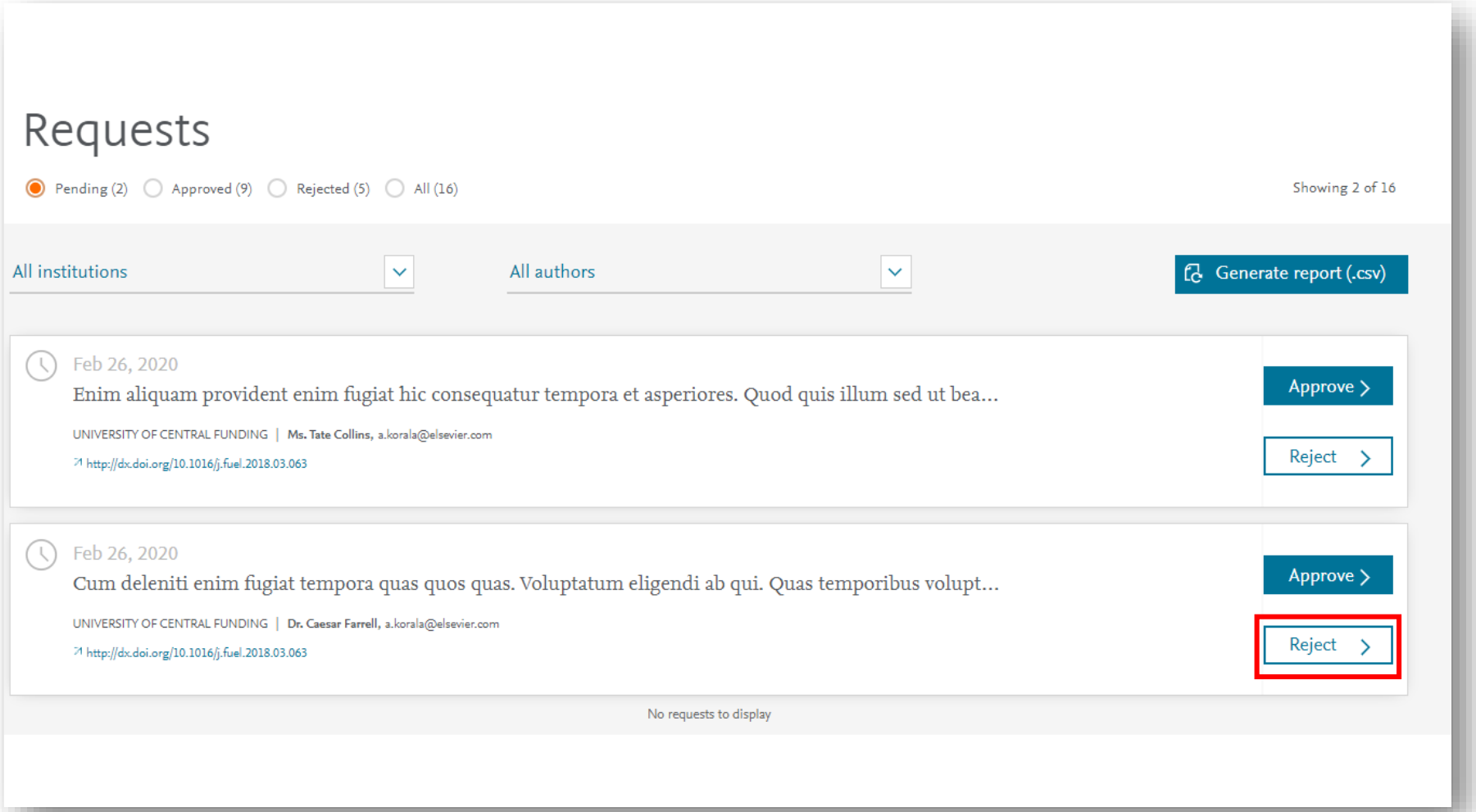
We are pleased to confirm that John Smith of University of Manchester approved the Article Publishing Charge 'Effects of lateral swirl combustion chamber geometries on the combustion and emission characteristics of DI diesel engines and a matching method for the combustion chamber geometry', Article Reference Number (PII) S2011155716425390.

Kind regards

Researcher Support

An email notification is sent to the author acknowledging that the APC is approved

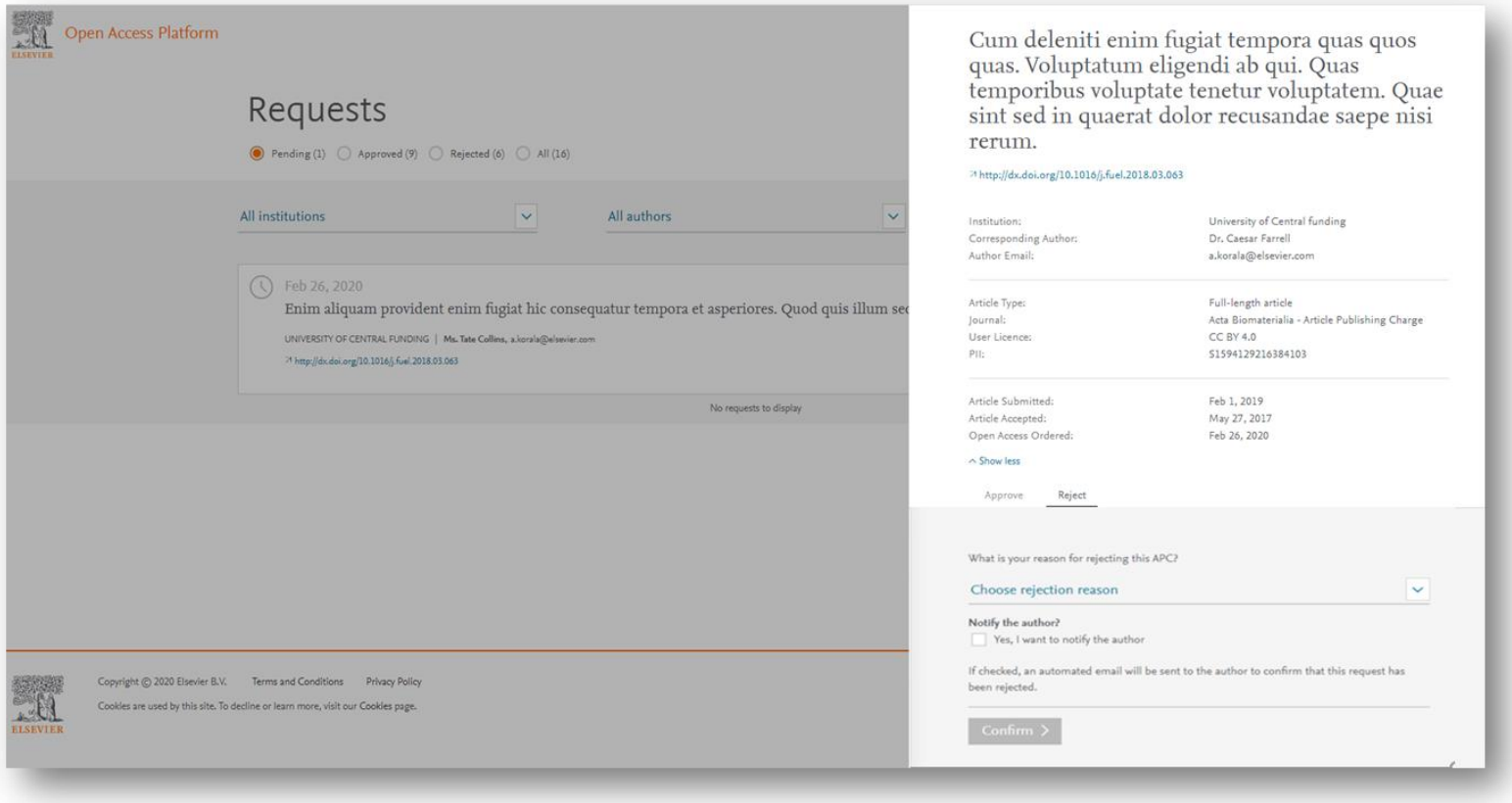
Step 2.2: Managing your Platform - Rejecting Requests



Rejecting the APC can be also be actioned via the Platform

Click on ‘Reject’ to start the process

Step 2.2: Managing your Platform - Rejecting Requests

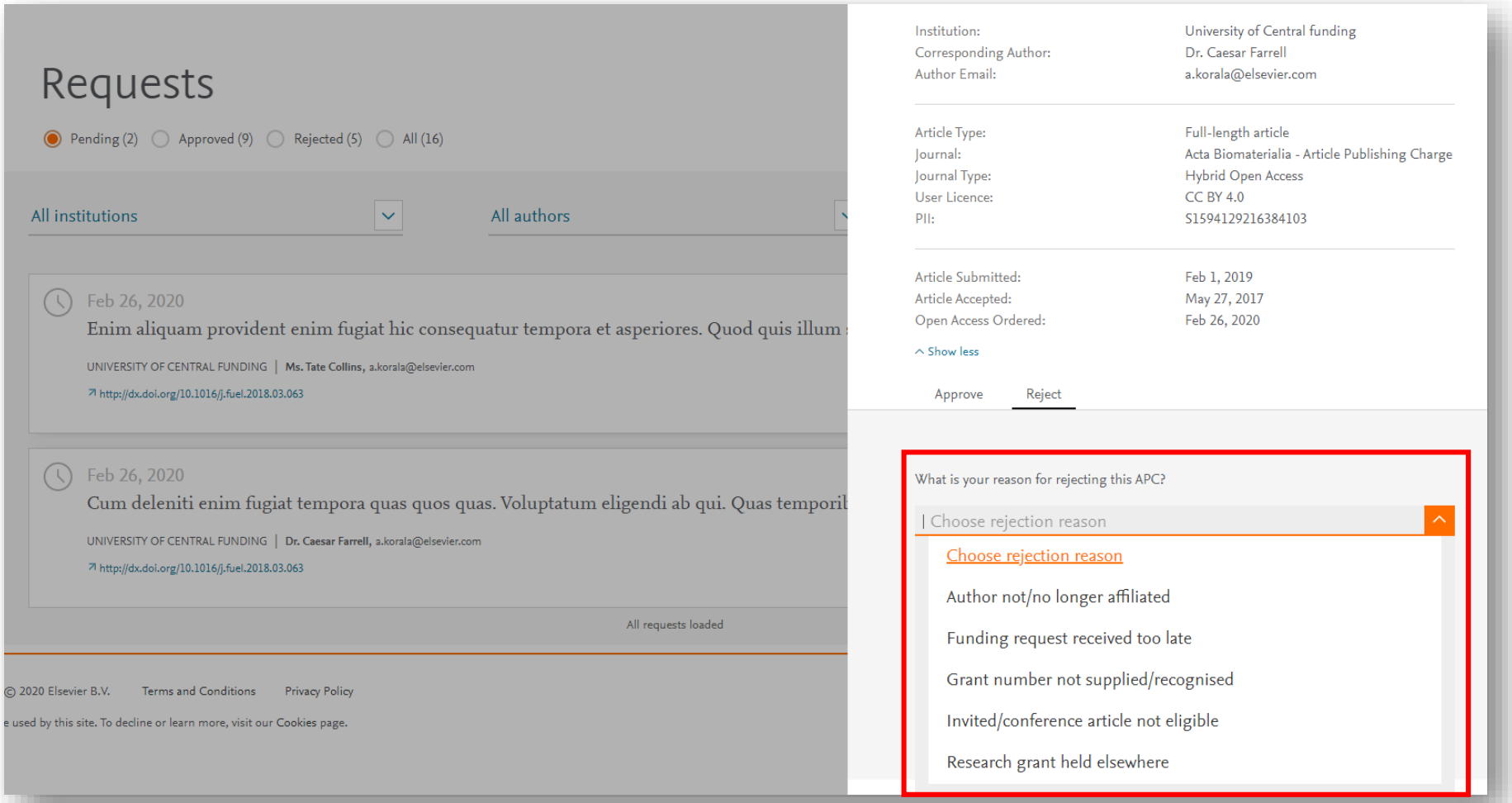


The information panel that appears to the right shows further details of the APC including:

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

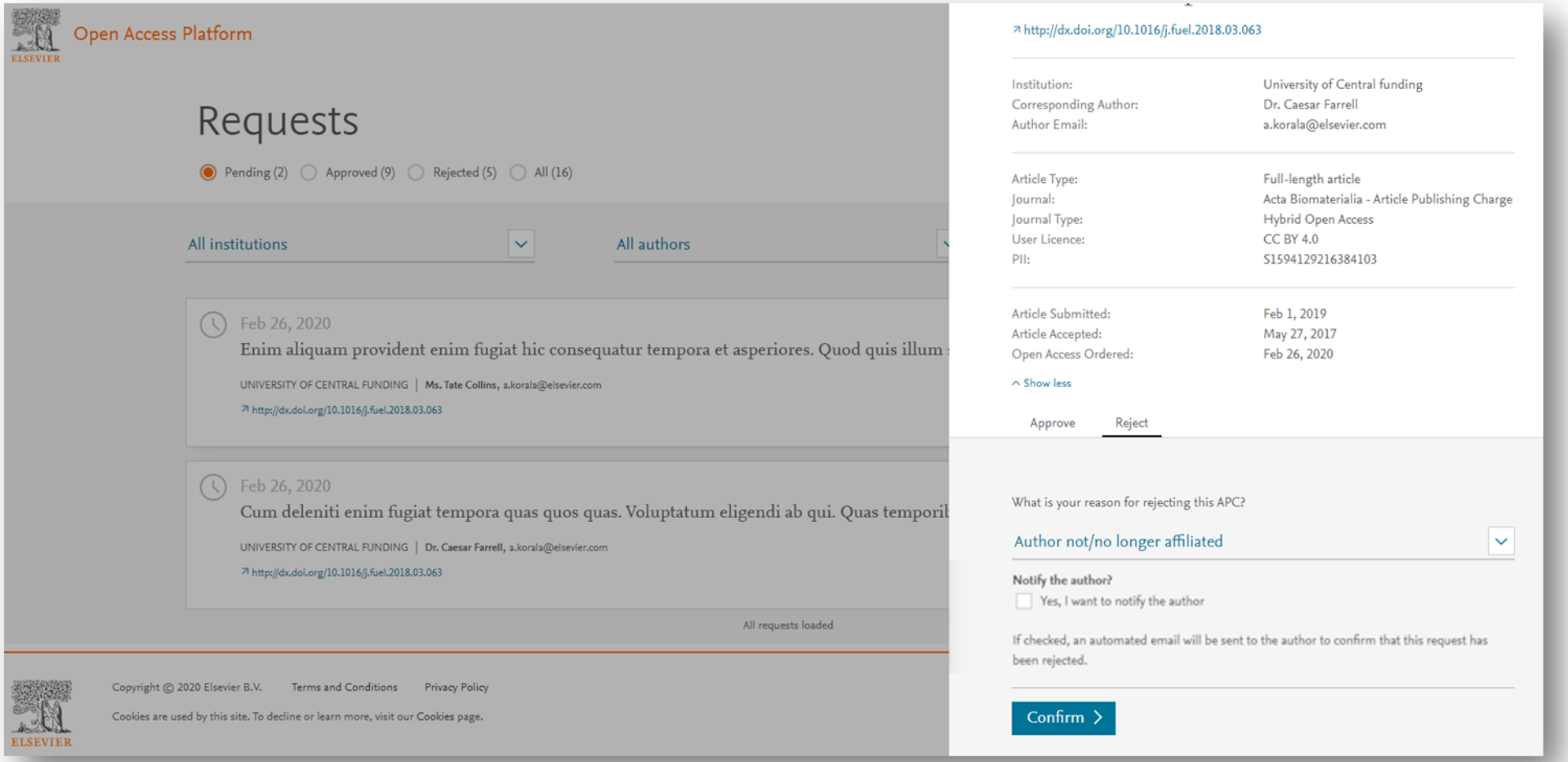
You can reduce the view by clicking on ‘Show less’

Step 2.2: Managing your Platform - Rejecting Requests



Select a reason for the rejection from the drop-down menu

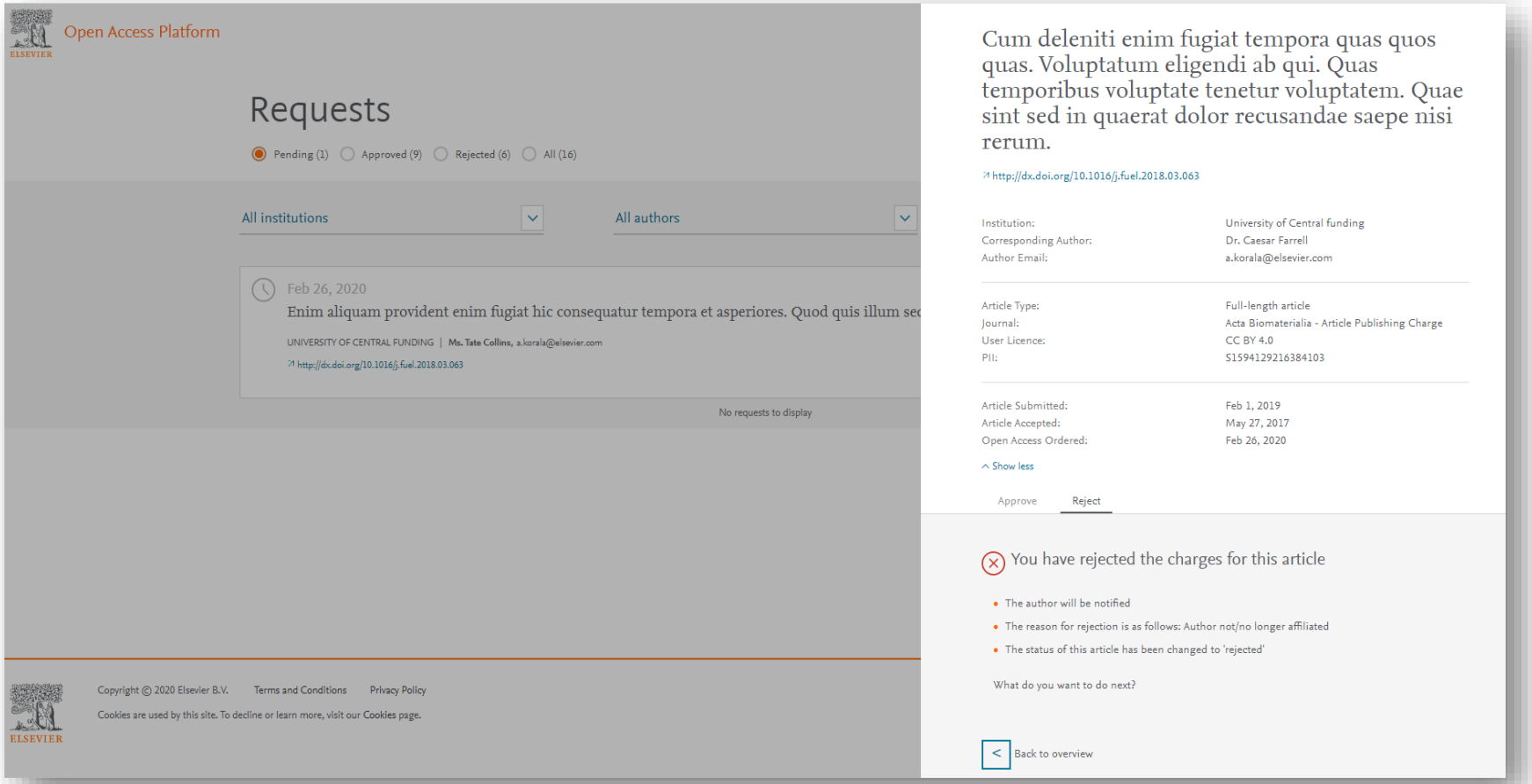
Step 2.2: Managing your Platform - Rejecting Requests



Opt in by checking the box if you wish the author to be notified

Click ‘Confirm’ to reject the APC

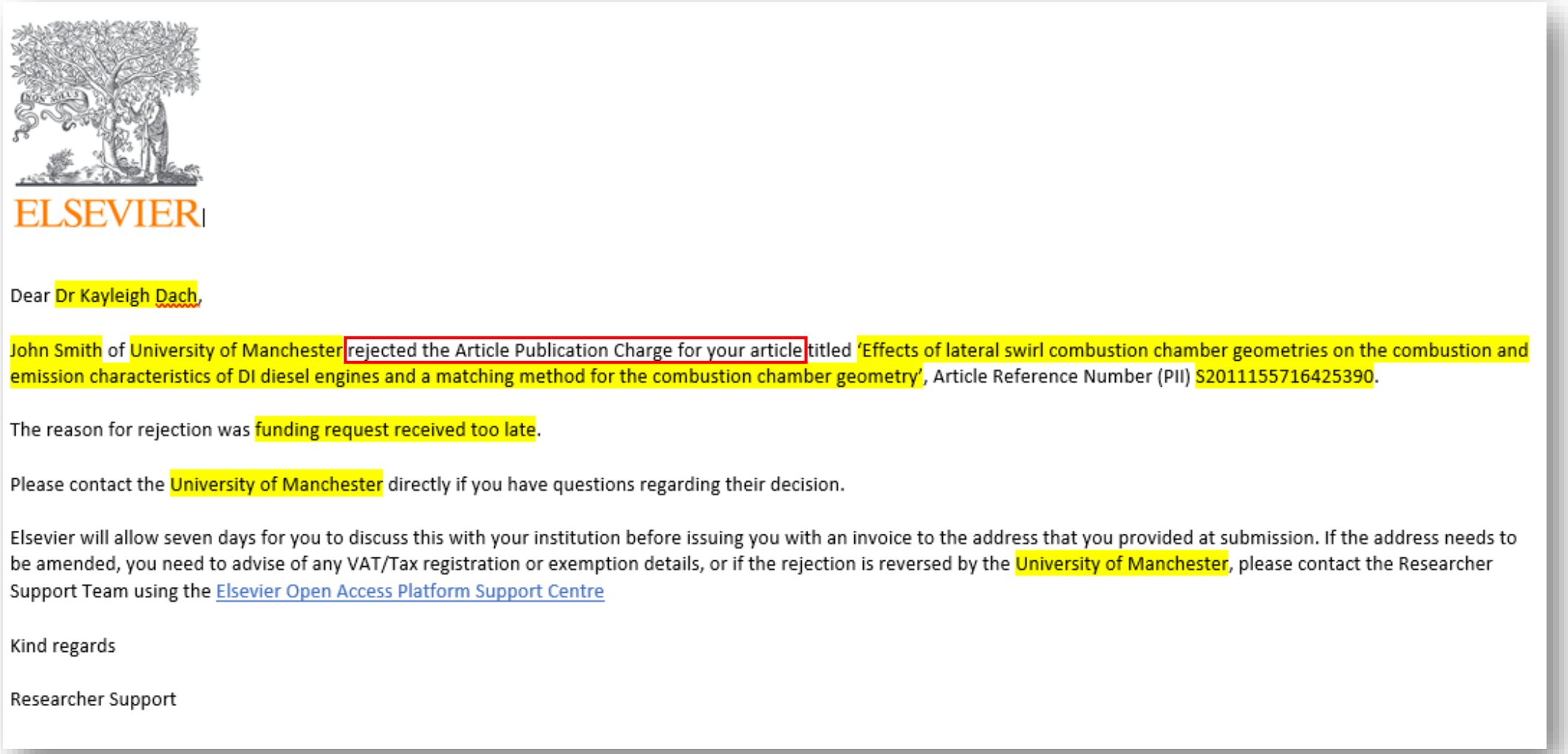
Step 2.2: Managing your Platform - Rejecting Requests



This final screen confirms that you have rejected the APC request

The APC is now rejected and the request shows in the Rejected requests section

Step 2.2: Managing your Platform - Rejecting Requests



ELSEVIER

Dear Dr Kayleigh Dach,

John Smith of University of Manchester rejected the Article Publication Charge for your article titled 'Effects of lateral swirl combustion chamber geometries on the combustion and emission characteristics of DI diesel engines and a matching method for the combustion chamber geometry', Article Reference Number (PII) S2011155716425390.

The reason for rejection was funding request received too late.

Please contact the University of Manchester directly if you have questions regarding their decision.

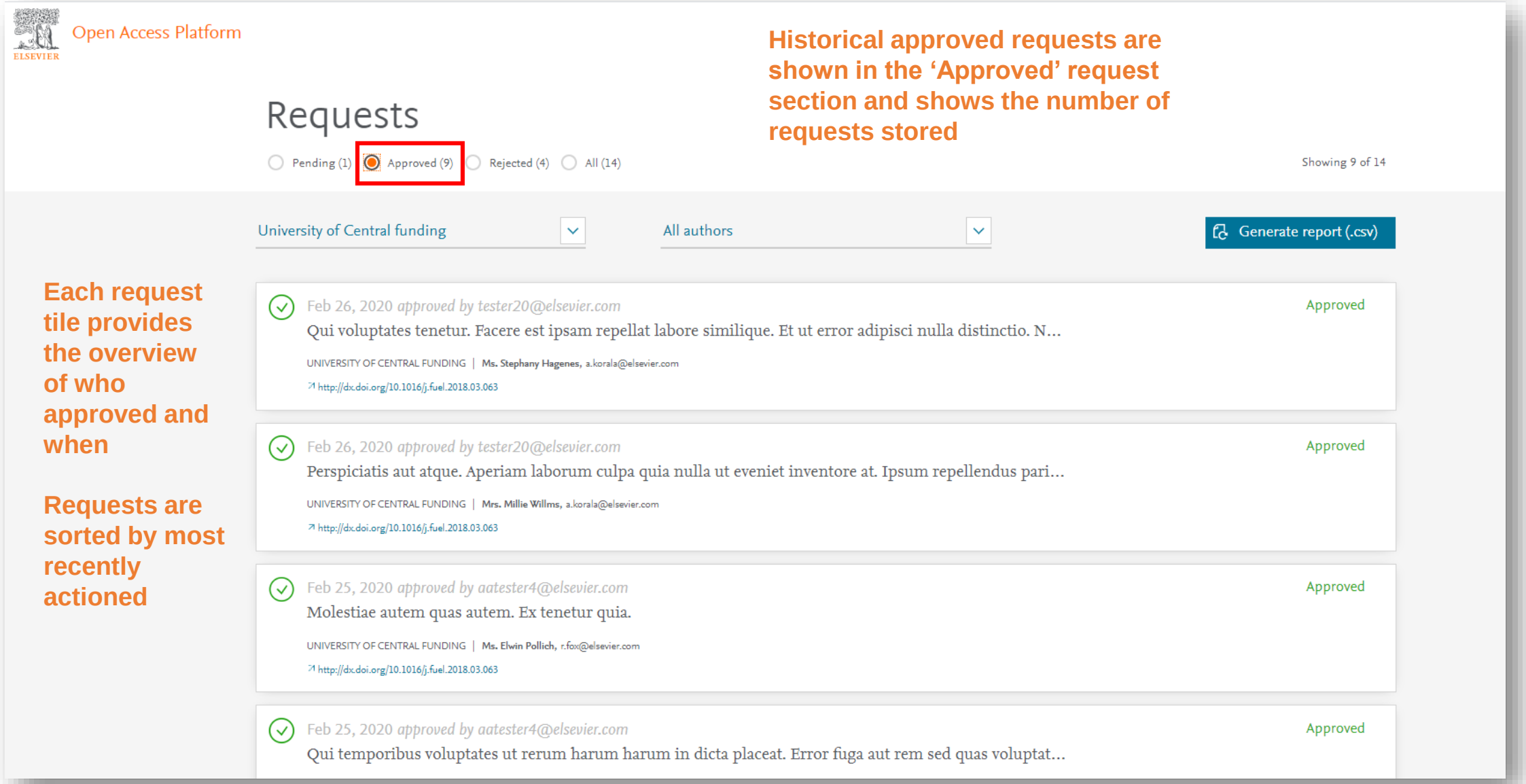
Elsevier will allow seven days for you to discuss this with your institution before issuing you with an invoice to the address that you provided at submission. If the address needs to be amended, you need to advise of any VAT/Tax registration or exemption details, or if the rejection is reversed by the University of Manchester, please contact the Researcher Support Team using the Elsevier Open Access Platform Support Centre

Kind regards

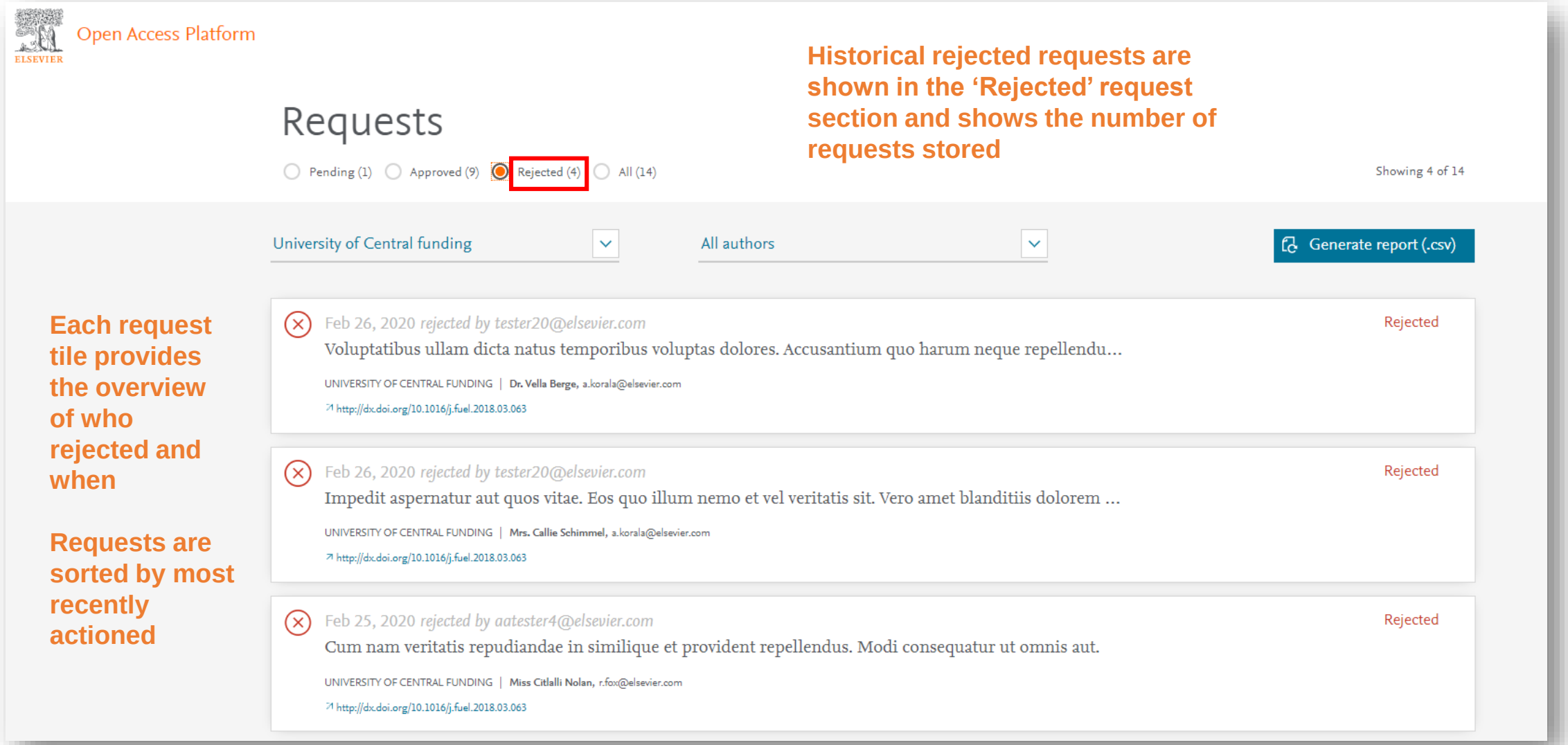
Researcher Support

If selected, an email is sent to the author confirming that the payment is rejected with instructions on the next steps

Step 2.3: Managing your Platform – Historical Approved Requests



Step 2.3: Managing your Platform - Historical Rejected Requests



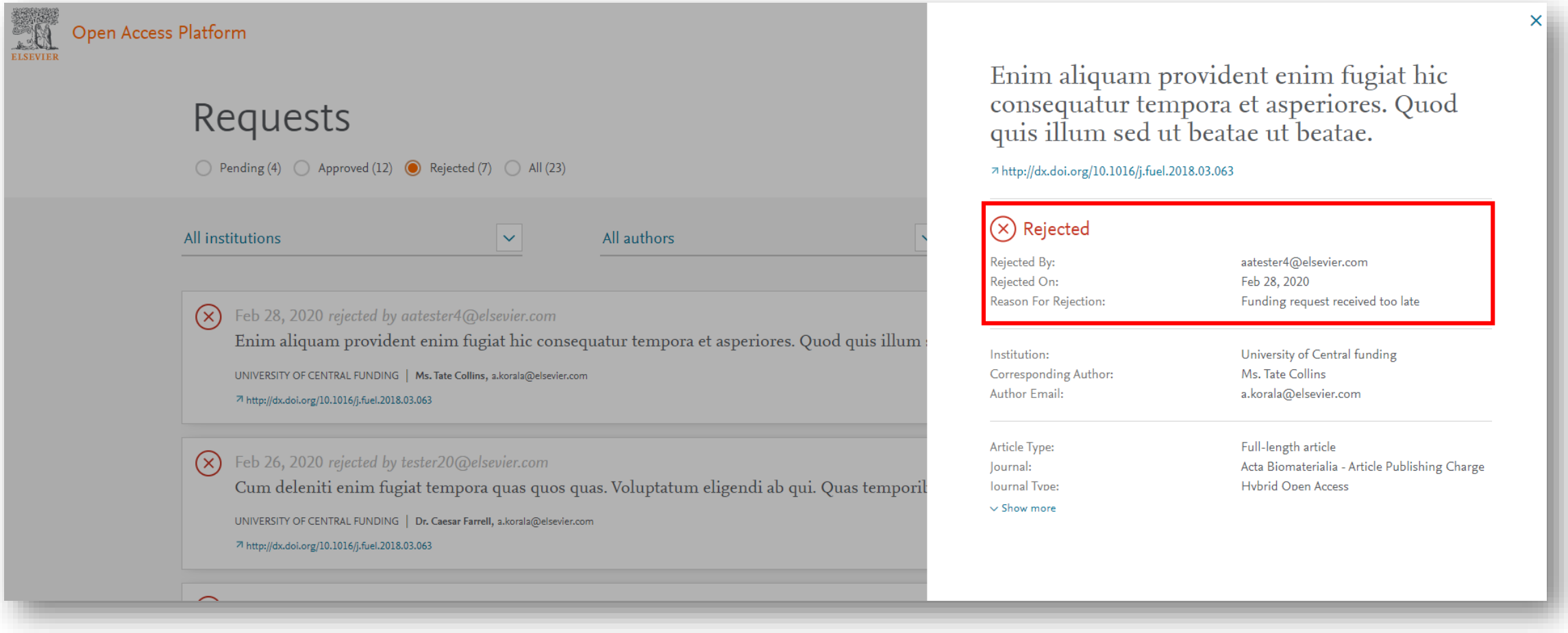
Historical rejected requests are shown in the 'Rejected' request section and shows the number of requests stored

Each request tile provides the overview of who rejected and when

Requests are sorted by most recently actioned

Or you can view <u>all</u> requests – pending, approved and rejected all in one place. Click on 'All'.

Step 2.3: Managing your Platform - Historical Rejected Requests

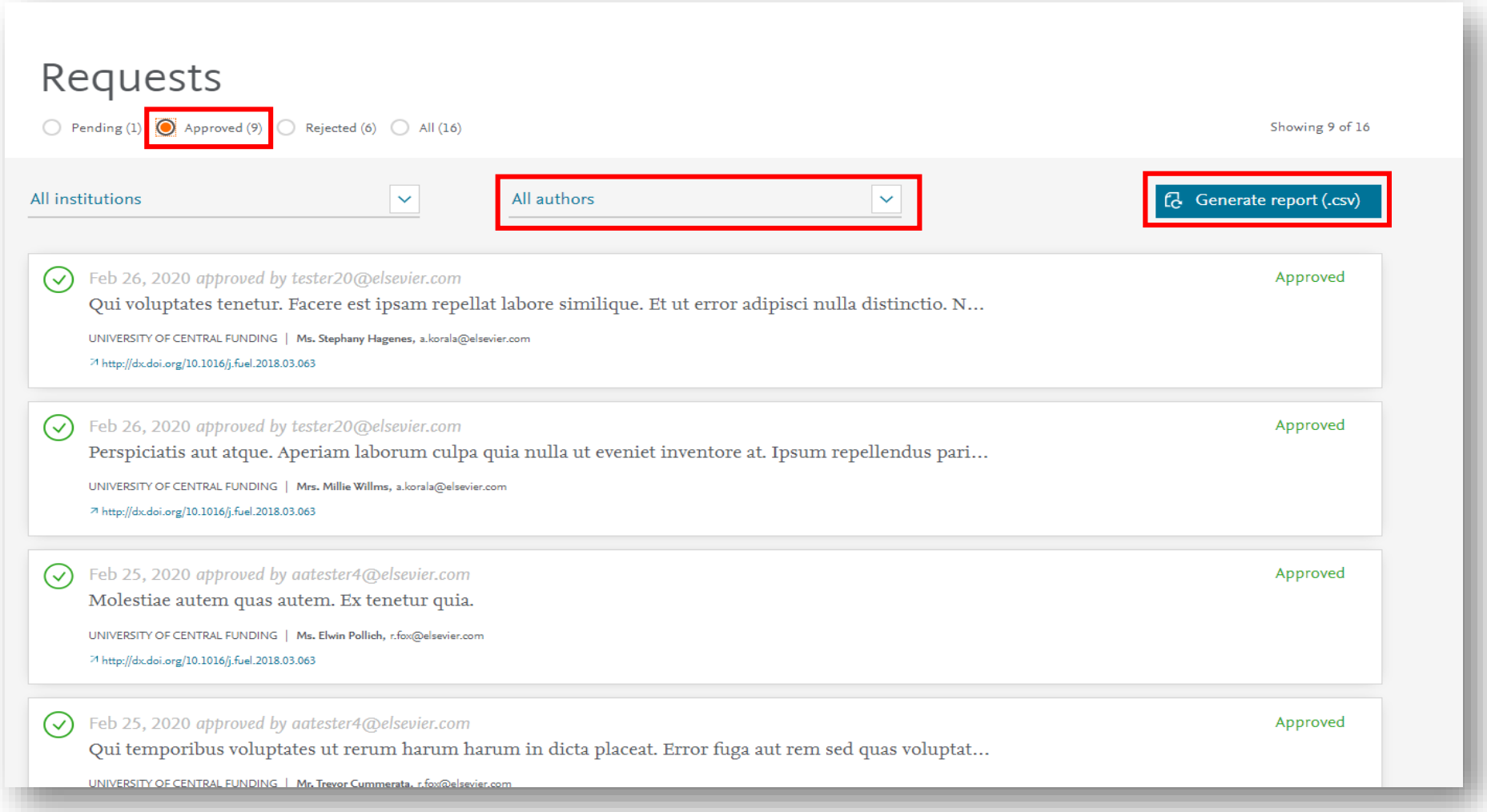


To view the reason for rejection from the historical rejected screen, click on the article title and the information panel that appears shows the rejection reason

Step 2.4: Generating a 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

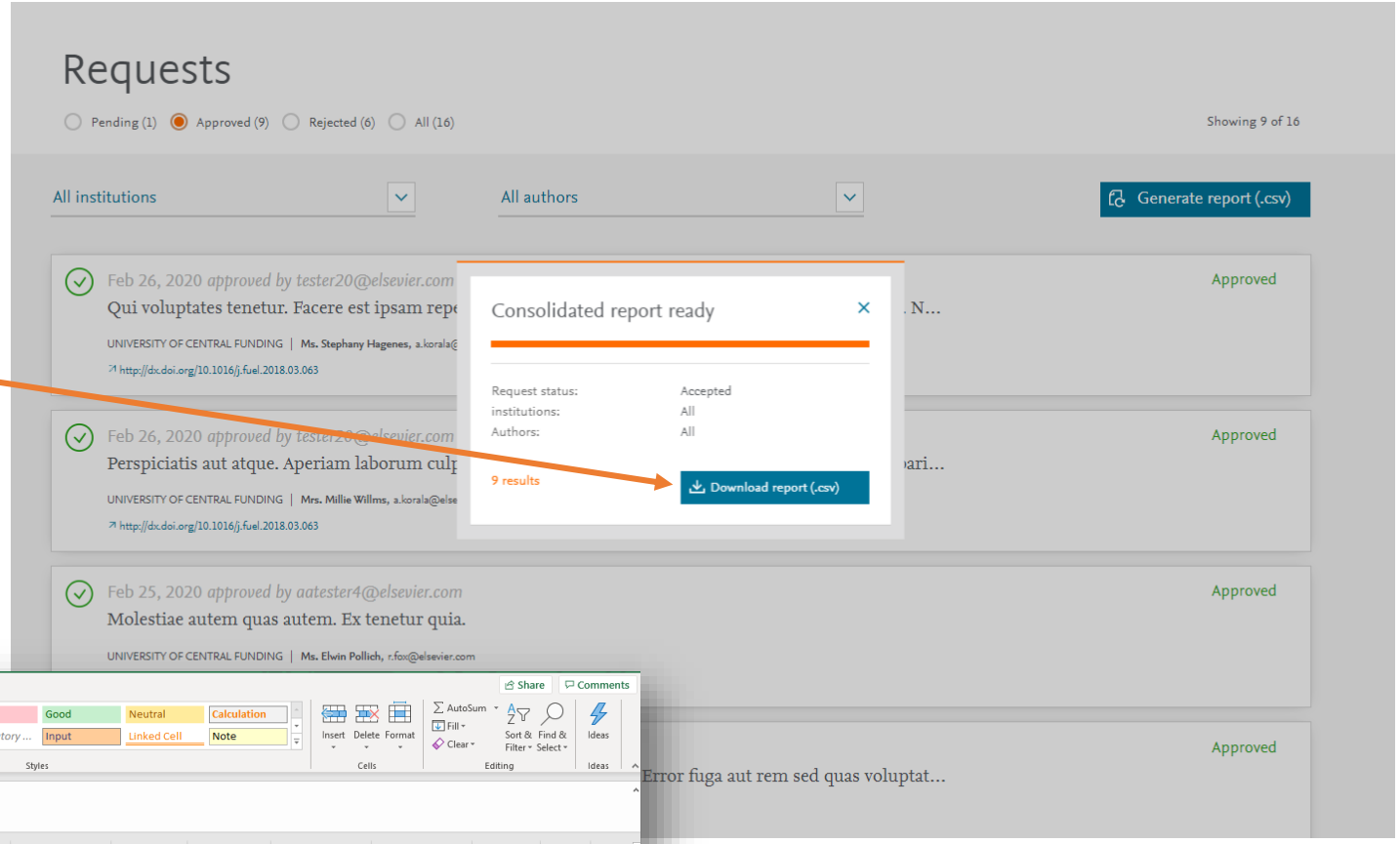
For a report on requests for a specific author, filter for the relevant author from the drop-down menu before generating the report

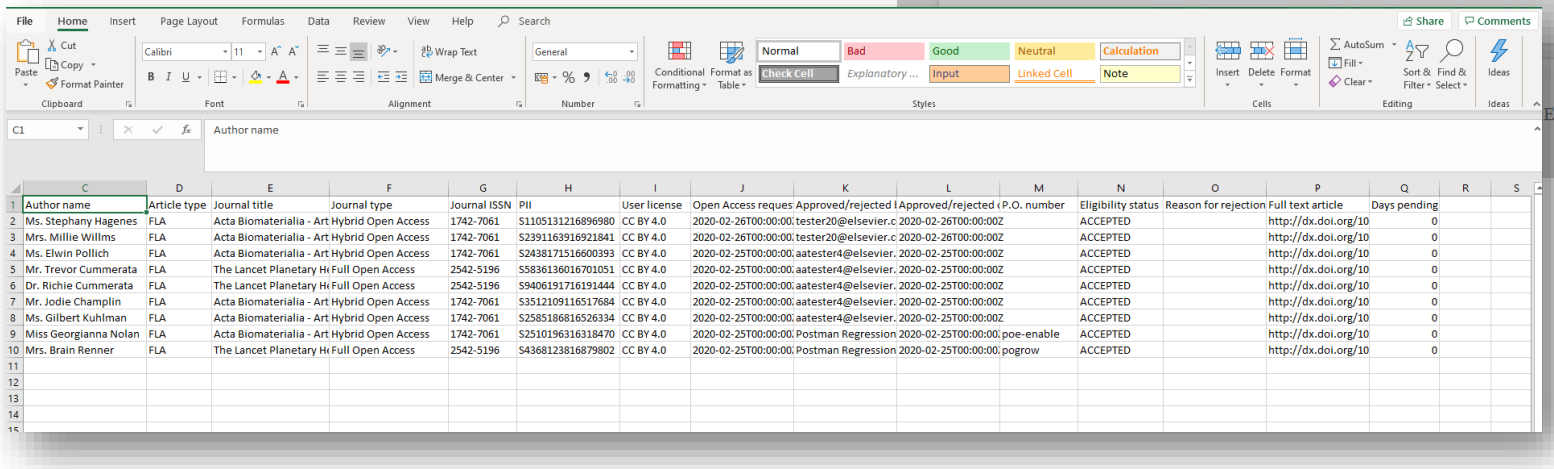


Step 2.4: Generating a Report

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

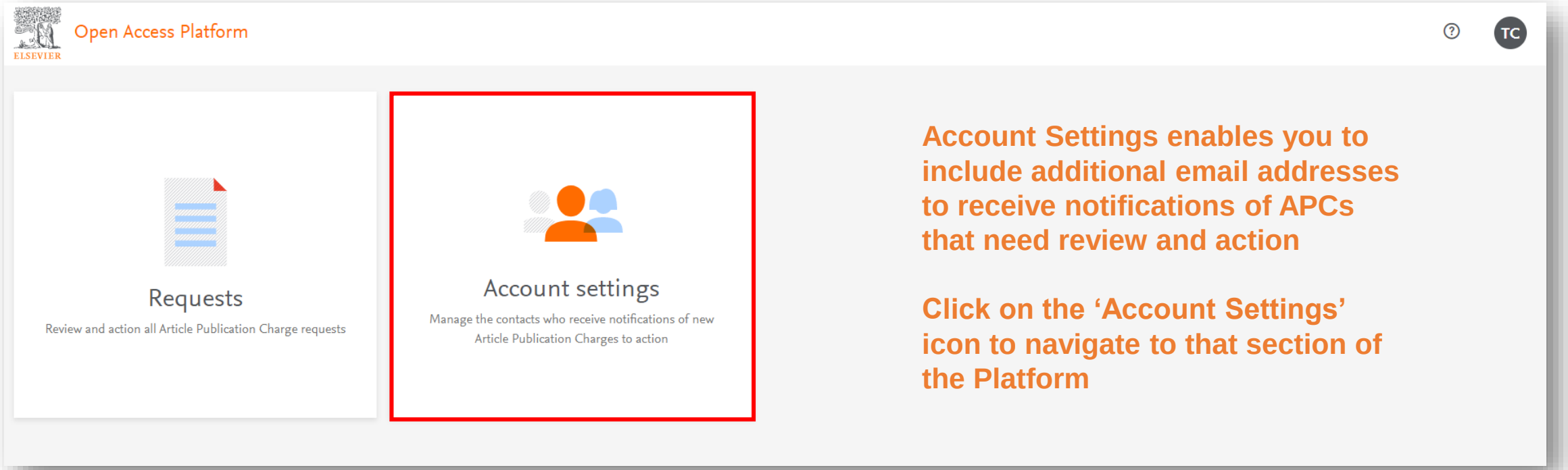
Click on ‘Download report (.csv)’ to download the file to Excel (see example file below)





	Author name	Article type	Journal title	Journal type	Journal ISSN	PII	User license	Open Access reques	Approved/rejected	Approved/rejected	P.O. number	Eligibility status	Reason for rejection	Full text article	Days pending
2	Ms. Stephany Hagenes	FLA	Acta Biomaterialia - Art	Hybrid Open Access	1742-7061	S1105131216896980	CC BY 4.0	2020-02-26T00:00:00.	tester20@elsevier.c	2020-02-26T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
3	Mrs. Millie Willms	FLA	Acta Biomaterialia - Art	Hybrid Open Access	1742-7061	S2391163916921841	CC BY 4.0	2020-02-26T00:00:00.	tester20@elsevier.c	2020-02-26T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
4	Ms. Elwin Pollich	FLA	Acta Biomaterialia - Art	Hybrid Open Access	1742-7061	S2438171516600393	CC BY 4.0	2020-02-25T00:00:00.	aatester4@elsevier.	2020-02-25T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
5	Mr. Trevor Cummerata	FLA	The Lancet Planetary H	Full Open Access	2542-5196	S5836136016701051	CC BY 4.0	2020-02-25T00:00:00.	aatester4@elsevier.	2020-02-25T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
6	Dr. Richie Cummerata	FLA	The Lancet Planetary H	Full Open Access	2542-5196	S9406191716191444	CC BY 4.0	2020-02-25T00:00:00.	aatester4@elsevier.	2020-02-25T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
7	Mr. Jodie Champlin	FLA	Acta Biomaterialia - Art	Hybrid Open Access	1742-7061	S3512109116517684	CC BY 4.0	2020-02-25T00:00:00.	aatester4@elsevier.	2020-02-25T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
8	Ms. Gilbert Kuhlman	FLA	Acta Biomaterialia - Art	Hybrid Open Access	1742-7061	S2585186816526334	CC BY 4.0	2020-02-25T00:00:00.	aatester4@elsevier.	2020-02-25T00:00:00Z		ACCEPTED		http://dx.doi.org/10	0
9	Miss Georgianna Nolan	FLA	Acta Biomaterialia - Art	Hybrid Open Access	1742-7061	S2510196316318470	CC BY 4.0	2020-02-25T00:00:00.	Postman Regression	2020-02-25T00:00:00.	poe-enable	ACCEPTED		http://dx.doi.org/10	0
10	Mrs. Brain Renner	FLA	The Lancet Planetary H	Full Open Access	2542-5196	S4368123816879802	CC BY 4.0	2020-02-25T00:00:00.	Postman Regression	2020-02-25T00:00:00.	pogrow	ACCEPTED		http://dx.doi.org/10	0

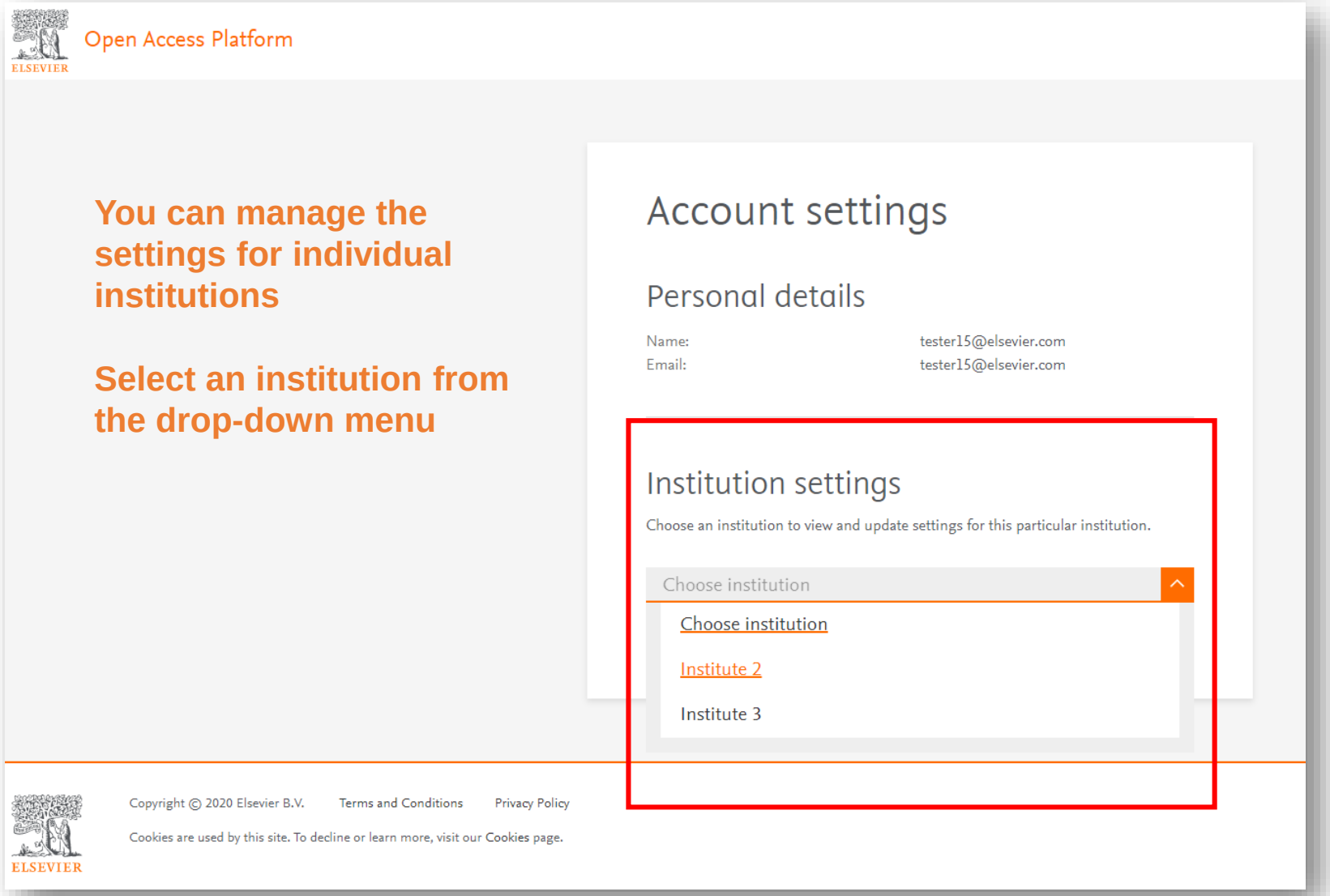
Step 2.5: Managing your Platform - Account Settings



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 2.5: Managing your Platform - Account Settings



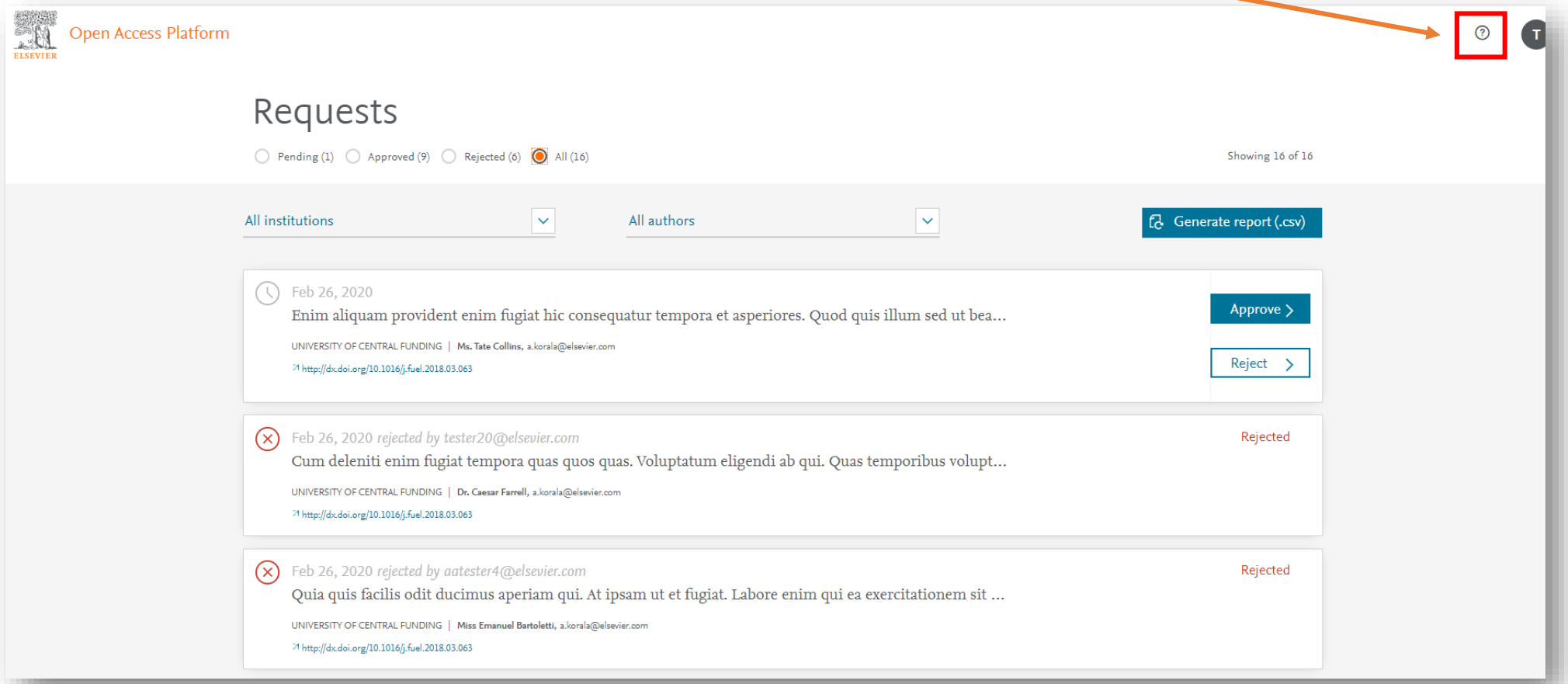
3 Steps to your Elsevier Open Access Platform

1. Accessing your Open Access Platform
2. Managing your Platform
3. **How we can support you**

Step 3: How we can support you

If you need support using the Open Access Platform, we have a dedicated resource centre set up

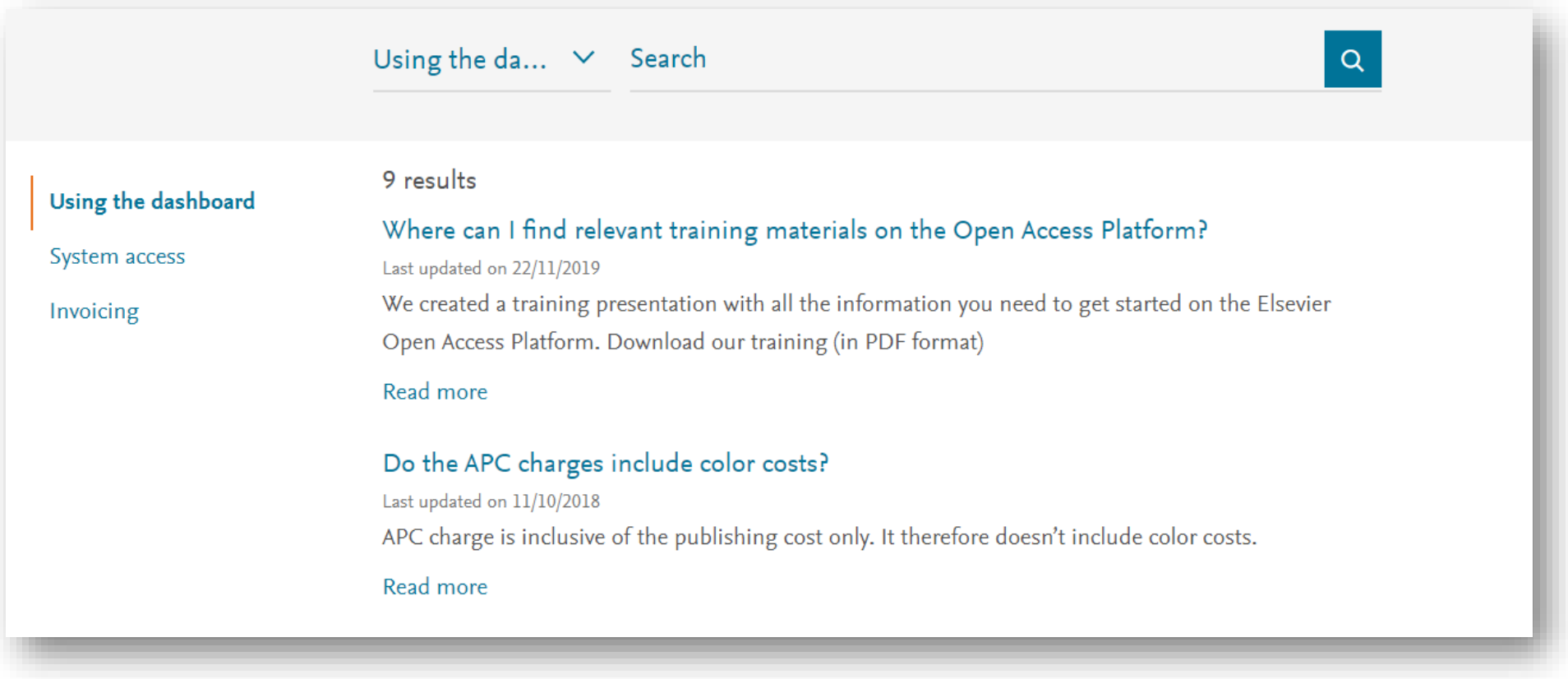
Click on the Help option to go to the Open Access Platform Support Centre



Step 3: How we can support you

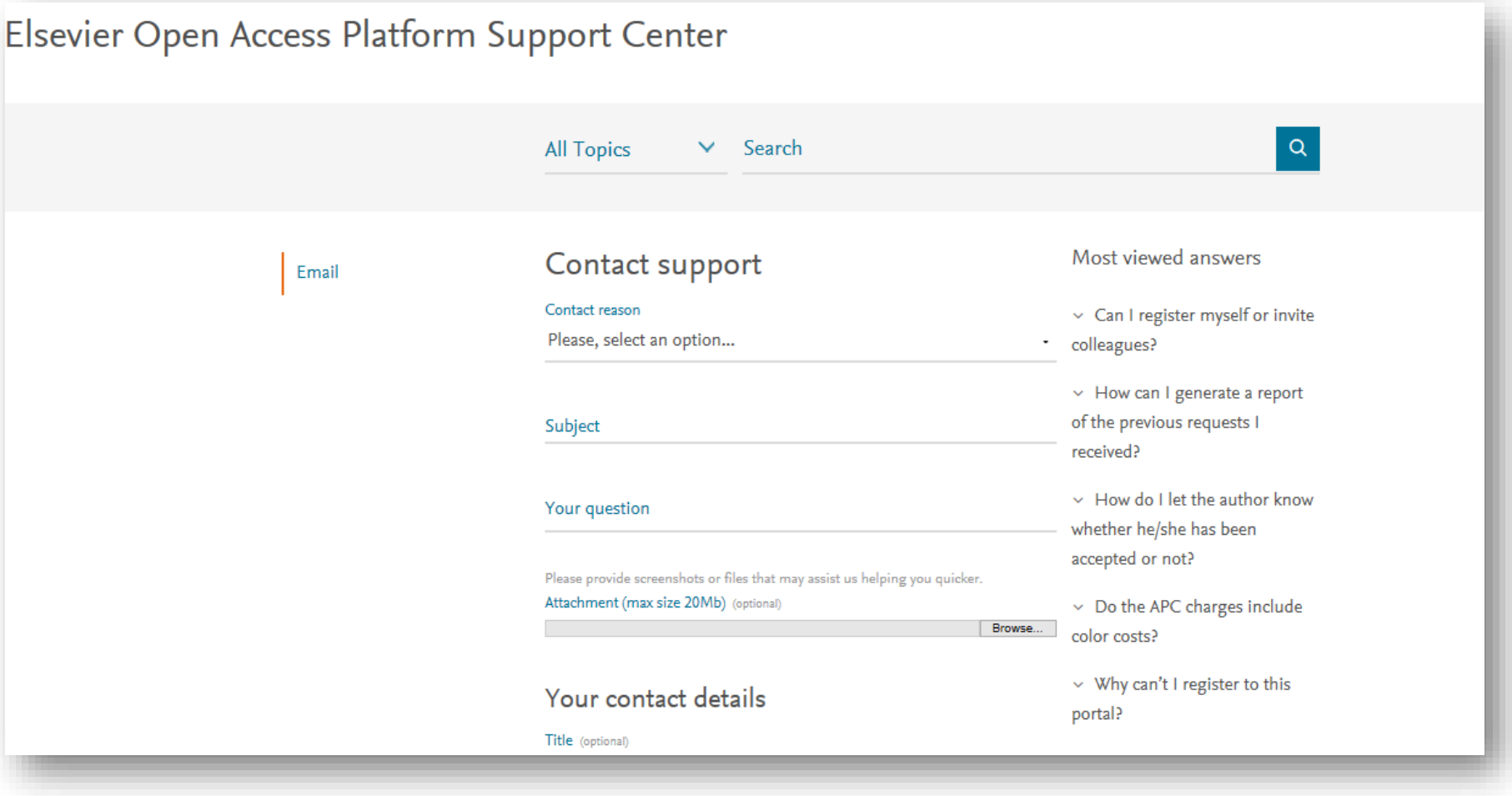
FAQs are posted on Open Access Platform Support Centre

These are managed by our Researcher Support Team



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



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