How to get the most out of your new Elsevier Open Access Platform

2019

Making it easier to work with us

Open Access: Society Eligibility Validation

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

Today we are going to tell you about some changes that will allow you to easily manage membership validations so you have all the information in **one place**.

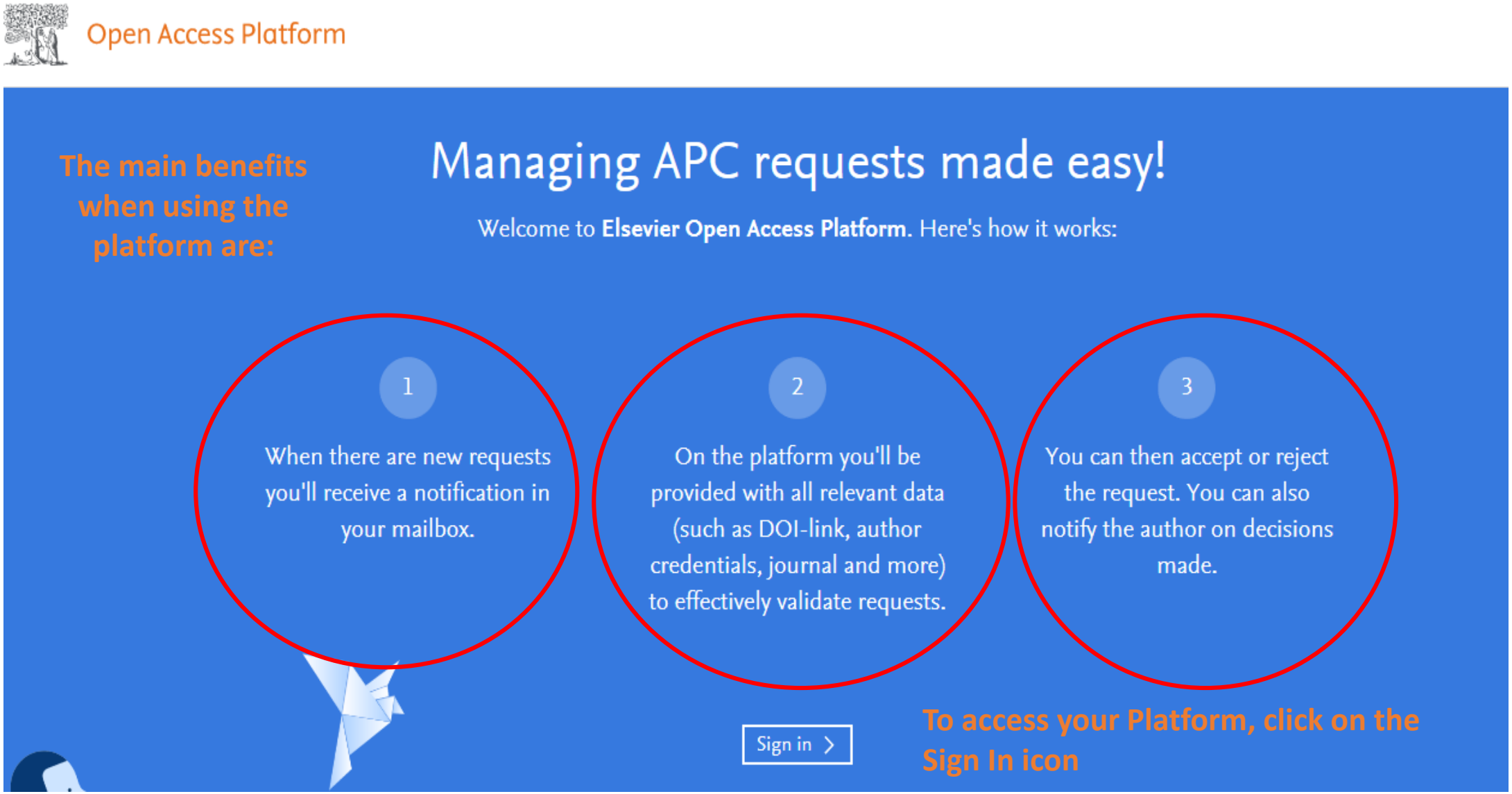
3 Steps to your Elsevier Open Access Platform

1. Accessing your Open Access Platform
2. Managing membership validation requests
3. How we can support you

3 Steps to your Elsevier Open Access Platform

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

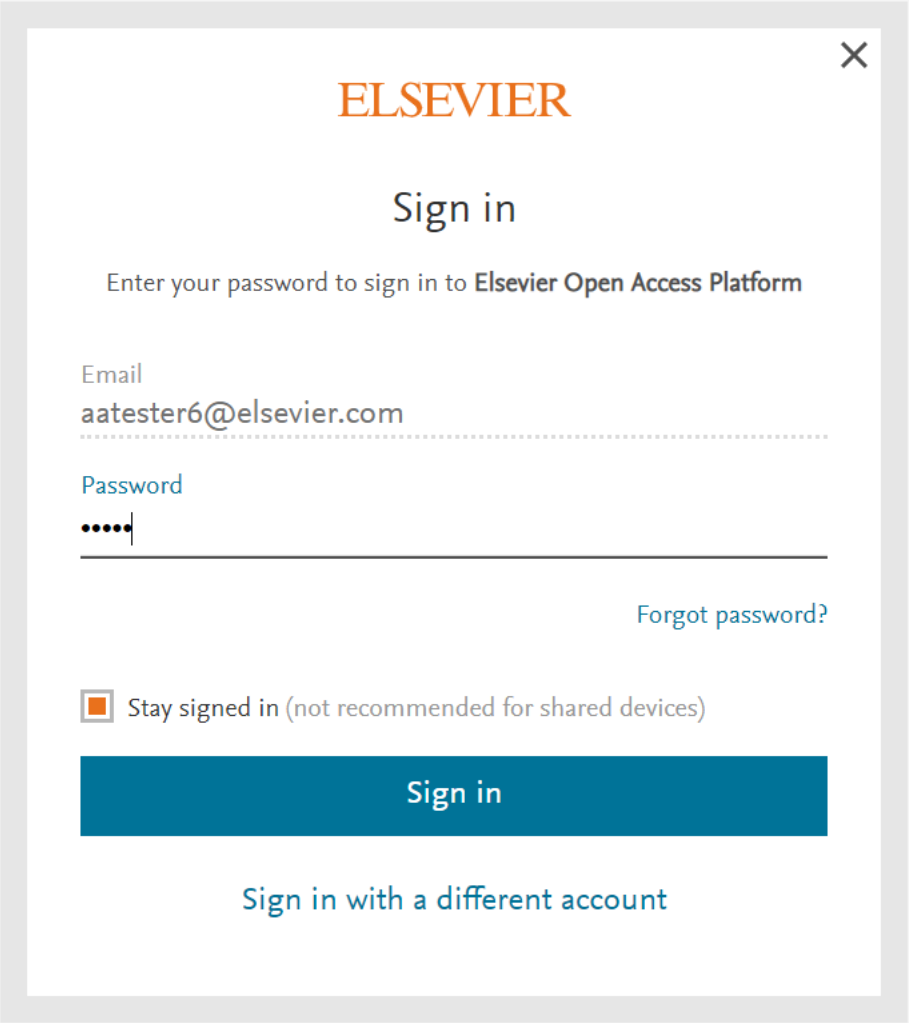
Step 1: Accessing your Open Access Platform



Step 1: Accessing your Open Access Platform

ELSEVIER

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



When the agreement is set up, you will be provided with a user name and login credentials

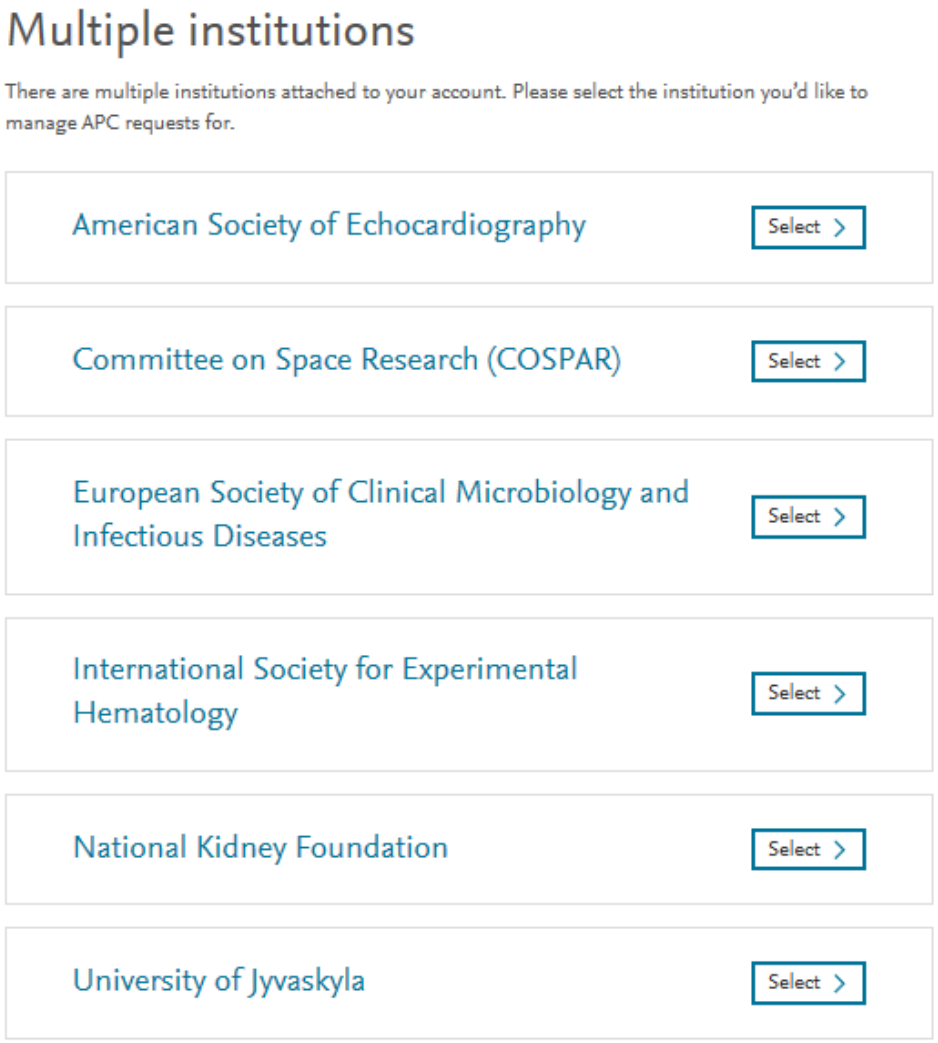
On receipt of the request to validate Society membership, you need to log in to the Portal

Use your institutional email and the password provided by Elsevier to access the platform

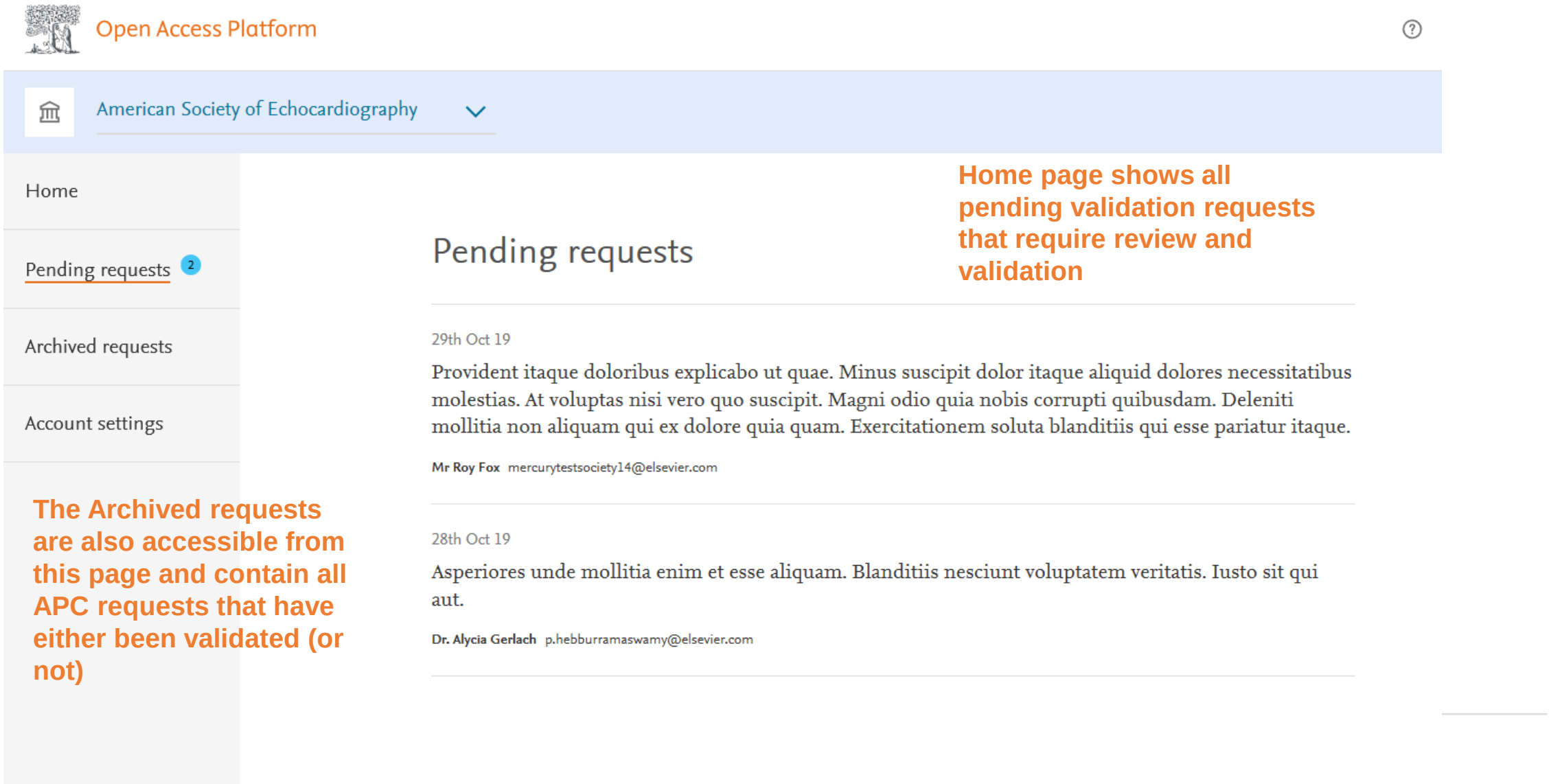
Step 1: Accessing your Open Access Platform

If you are supporting multiple Societies, then these will be listed here

Click on the relevant account to view the validation request



Step 1: Accessing your Open Access Platform



Home page shows all pending validation requests that require review and validation

The Archived requests are also accessible from this page and contain all APC requests that have either been validated (or not)

3 Steps to your Elsevier Open Access Platform

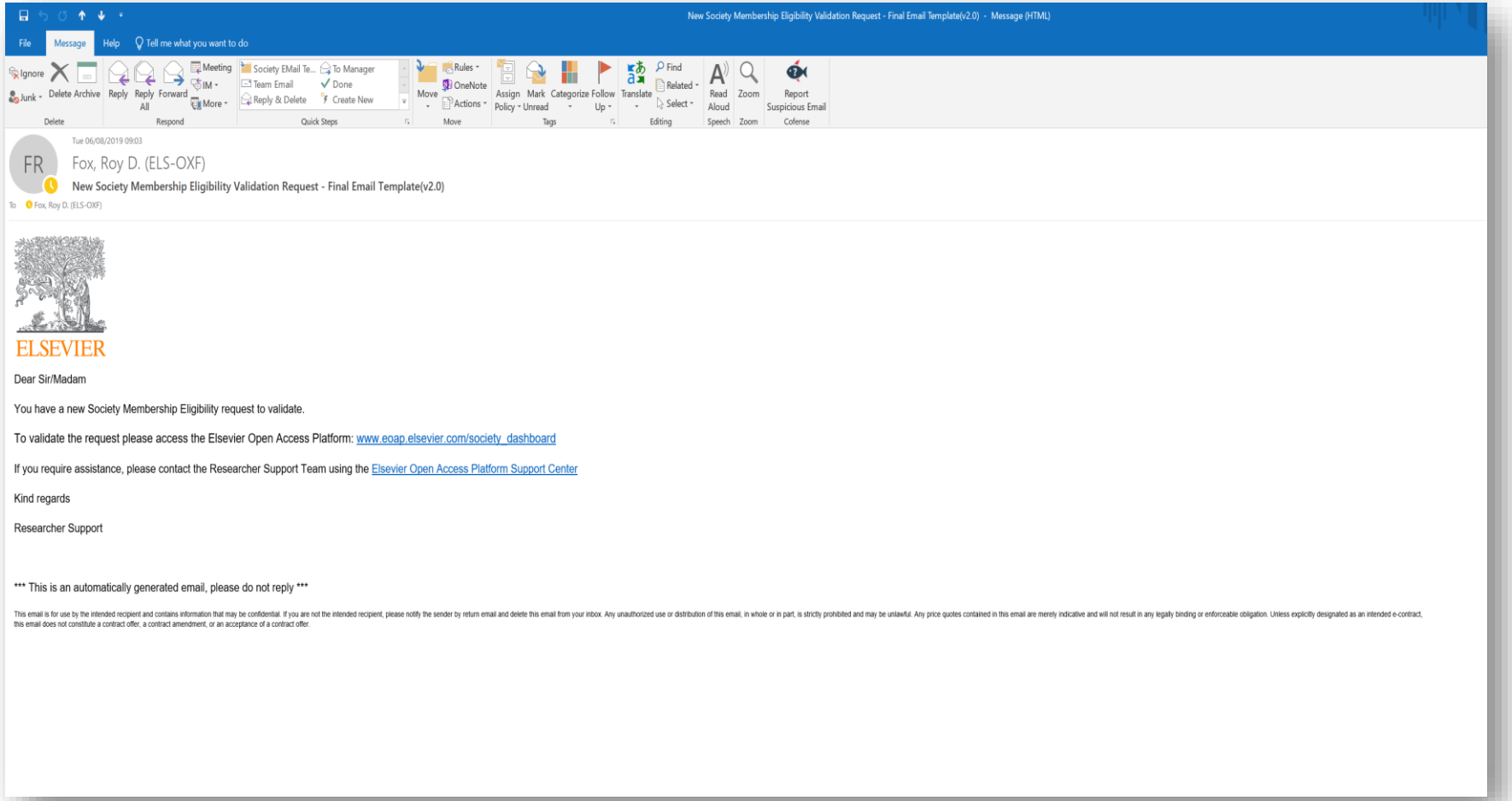
1. Accessing your Open Access Platform
2. **Managing membership validation requests**
    - **Valid Requests**
    - **Invalid Requests**
    - **Managing Archived Requests**
    - **Account Settings**
3. How we can support you

Step 2.1: Managing membership validation - Validating Requests

Your Open Access Platform allows you to manage any validation requests

Any pending requests will be highlighted. These require your validation.

Step 2.1: Managing membership validation – Validating Requests



Society Administrator is sent an e-mail notification to advise a new request is available to review and validate in the Society Dashboard

Clicking on the link will take them to the Dashboard

There is also a link to the Support Center if they have any queries or issues

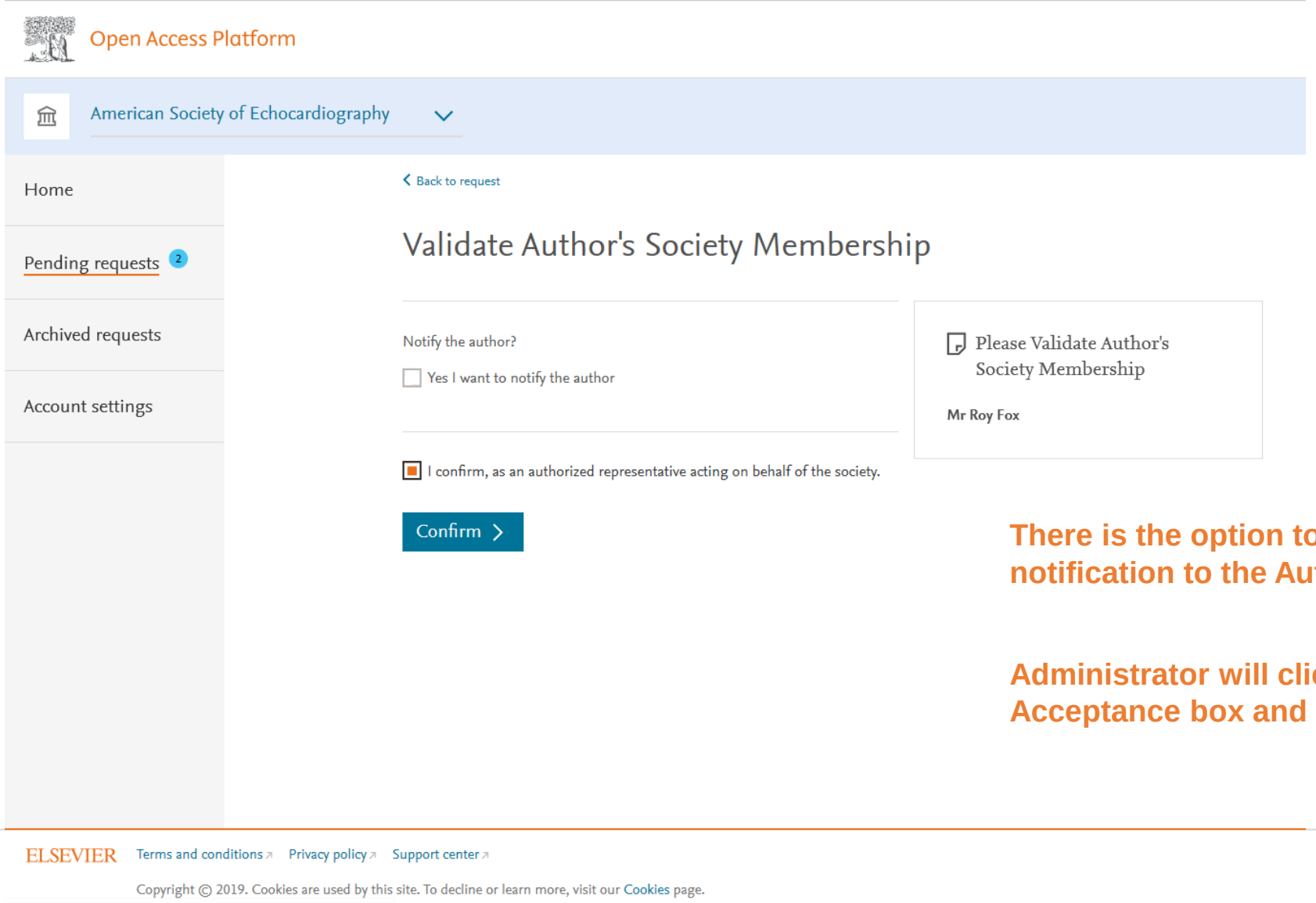
Step 2.1: Managing membership validation – Validating Requests

Selecting the APC from the Pending requests shows the detail of the APC including:

- **Link to the full text article**
- **Author details and Journal**
- **Society Membership Number**

Administrator has the option to validate or not validate the request

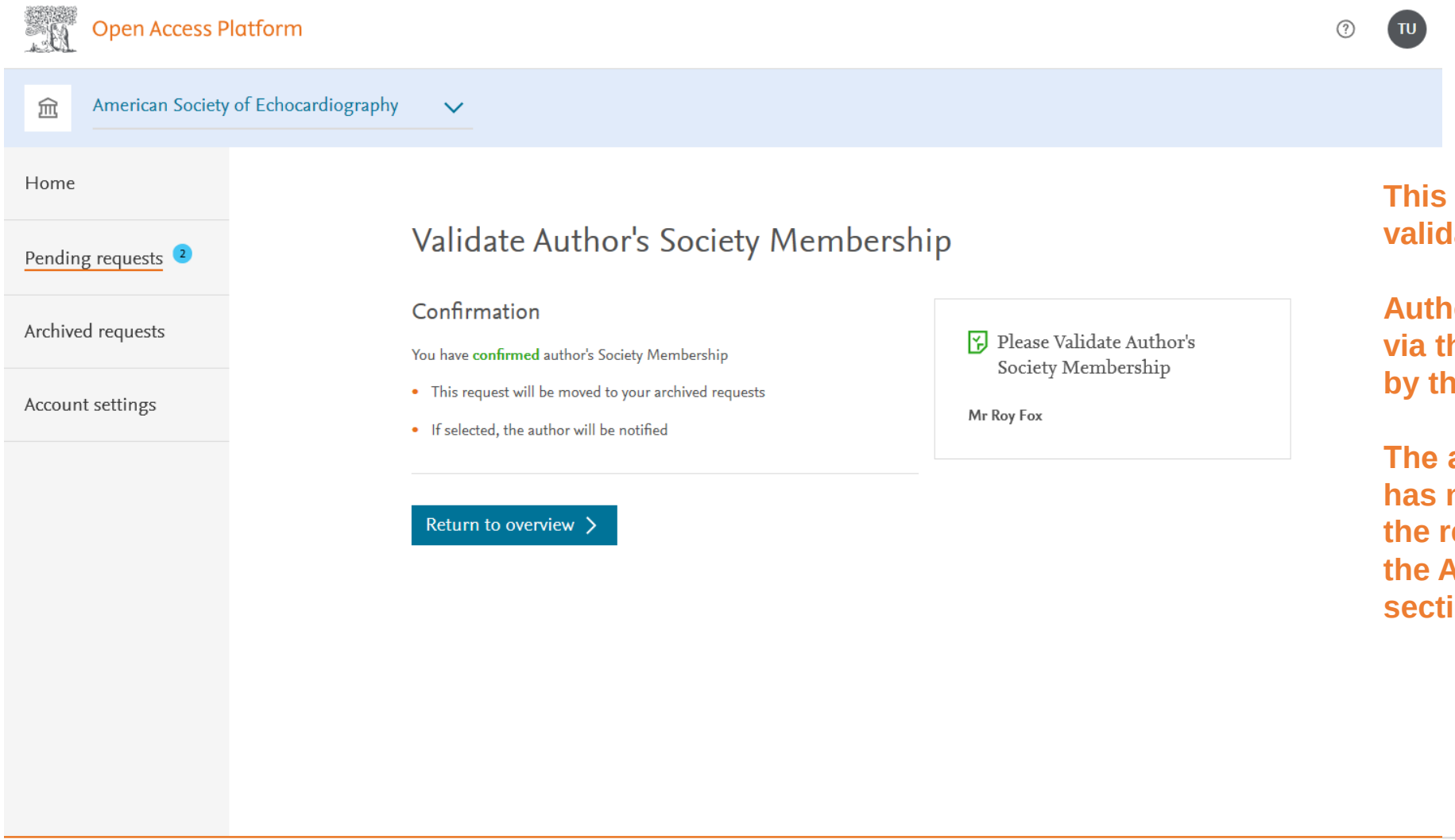
Step 2.1: Managing membership validation – Valid Requests



There is the option to send a notification to the Author

Administrator will click the Acceptance box and Confirm

Step 2.1: Managing membership validation – Valid Requests

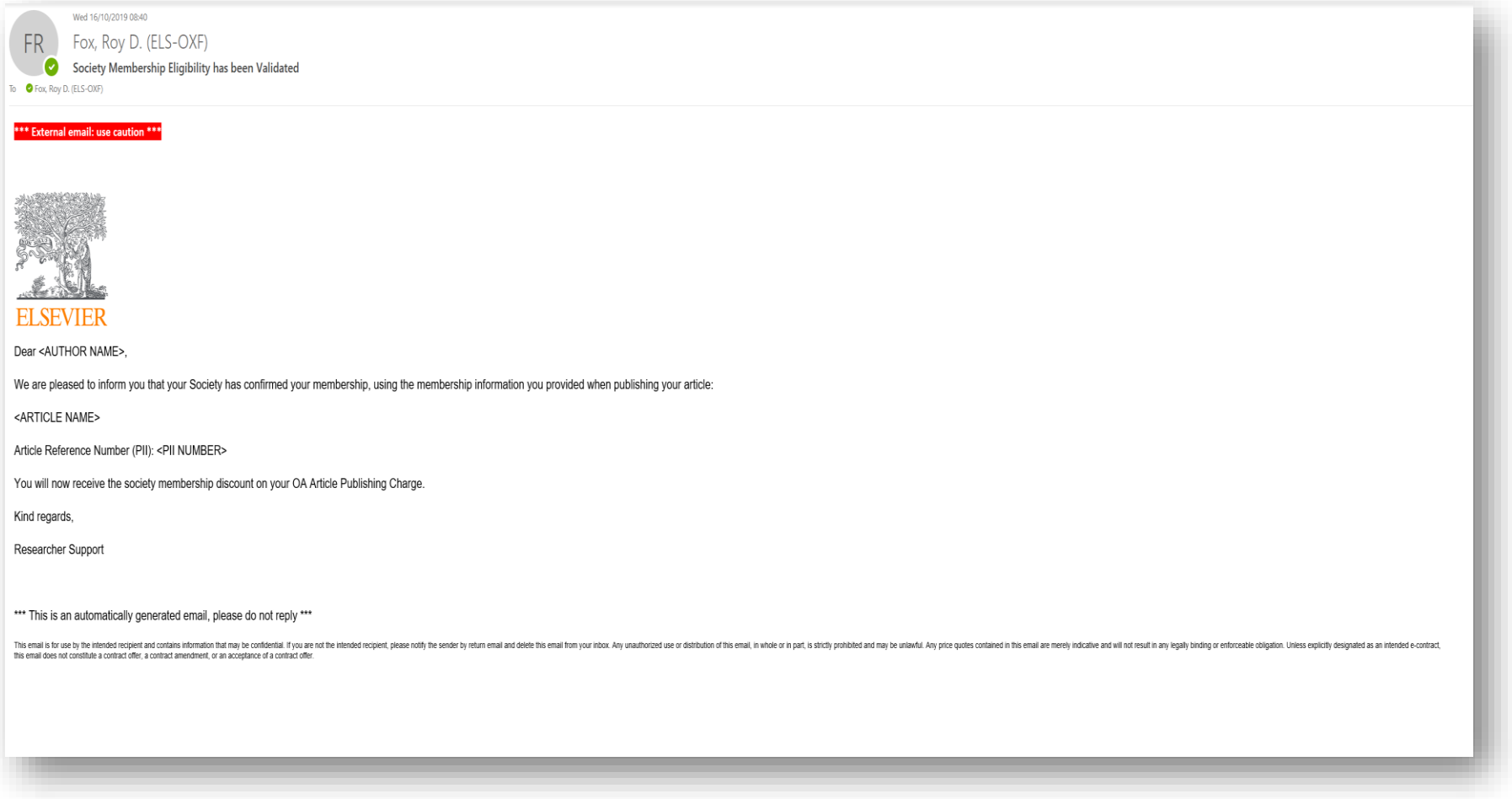


This final step confirms the validation

Author will be notified either via the Platform or directly by the Institution

The author's membership has now been validated and the request will now show in the Archived Requests section

Step 2.1: Managing membership validation – Valid Requests



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FR

Fox, Roy D. (ELS-OXF)

Society Membership Eligibility has been Validated

To Fox, Roy D. (ELS-OXF)

*** External email: use caution ***

ELSEVIER

Dear <AUTHOR NAME>,

We are pleased to inform you that your Society has confirmed your membership, using the membership information you provided when publishing your article:

<ARTICLE NAME>

Article Reference Number (PII): <PII NUMBER>

You will now receive the society membership discount on your OA Article Publishing Charge.

Kind regards,

Researcher Support

*** This is an automatically generated email, please do not reply ***

This email is for use by the intended recipient and contains information that may be confidential. If you are not the intended recipient, please notify the sender by return email and delete this email from your inbox. Any unauthorized use or distribution of this email, in whole or in part, is strictly prohibited and may be unlawful. Any price quotes contained in this email are merely indicative and will not result in any legally binding or enforceable obligation. Unless explicitly designated as an intended e-contract, this email does not constitute a contract offer, a contract amendment, or an acceptance of a contract offer.

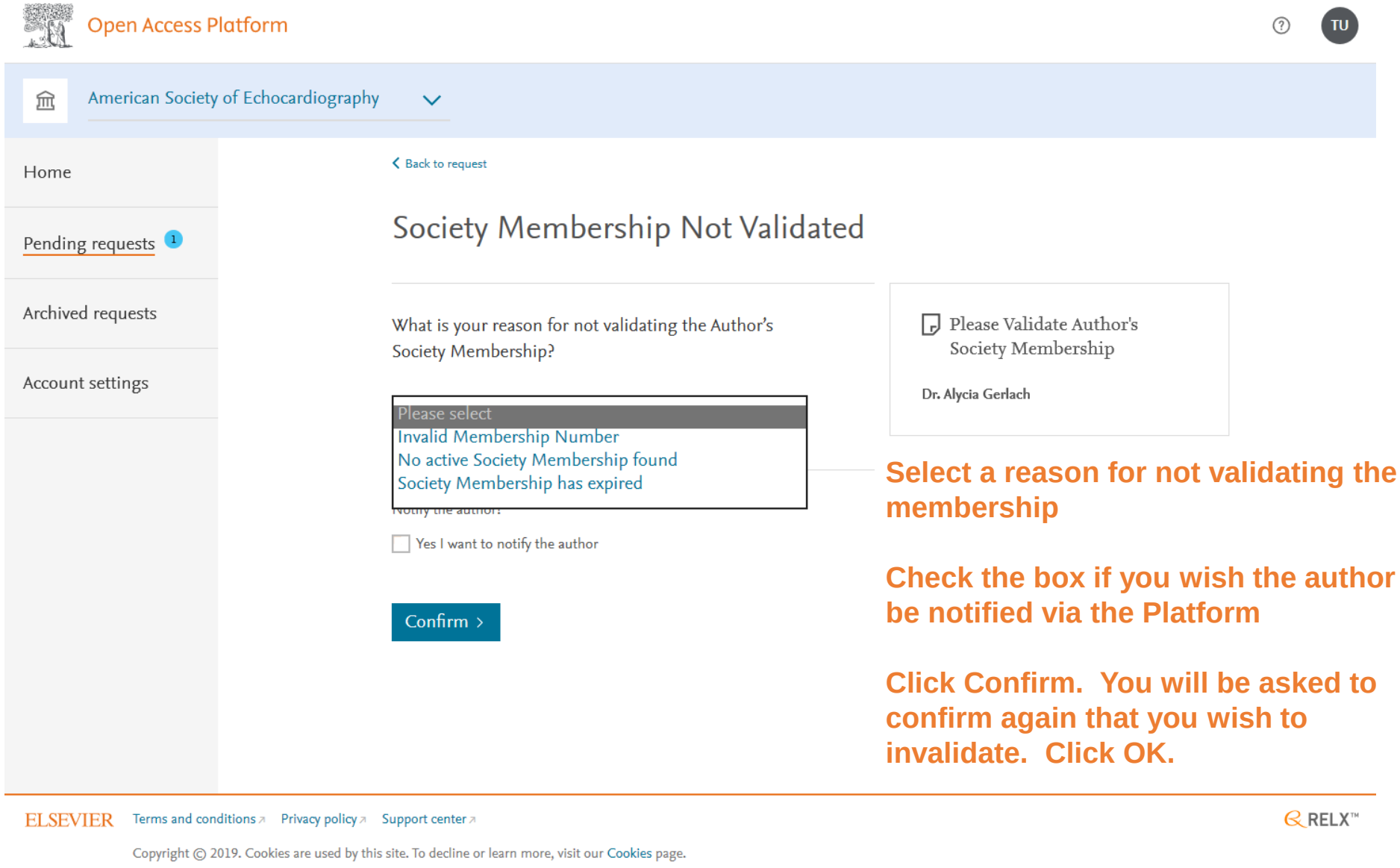
An email notification can be sent to the author acknowledging that the membership is validated

The e-mail will be populated with information submitted by the Author

Step 2.2: Managing membership validation - Invalid Requests

Not validating the membership can be also be actioned via the Platform Click on 'Invalid membership' to begin the process of notifying the author and invoicing

Step 2.2: Managing membership validation – Invalid Requests

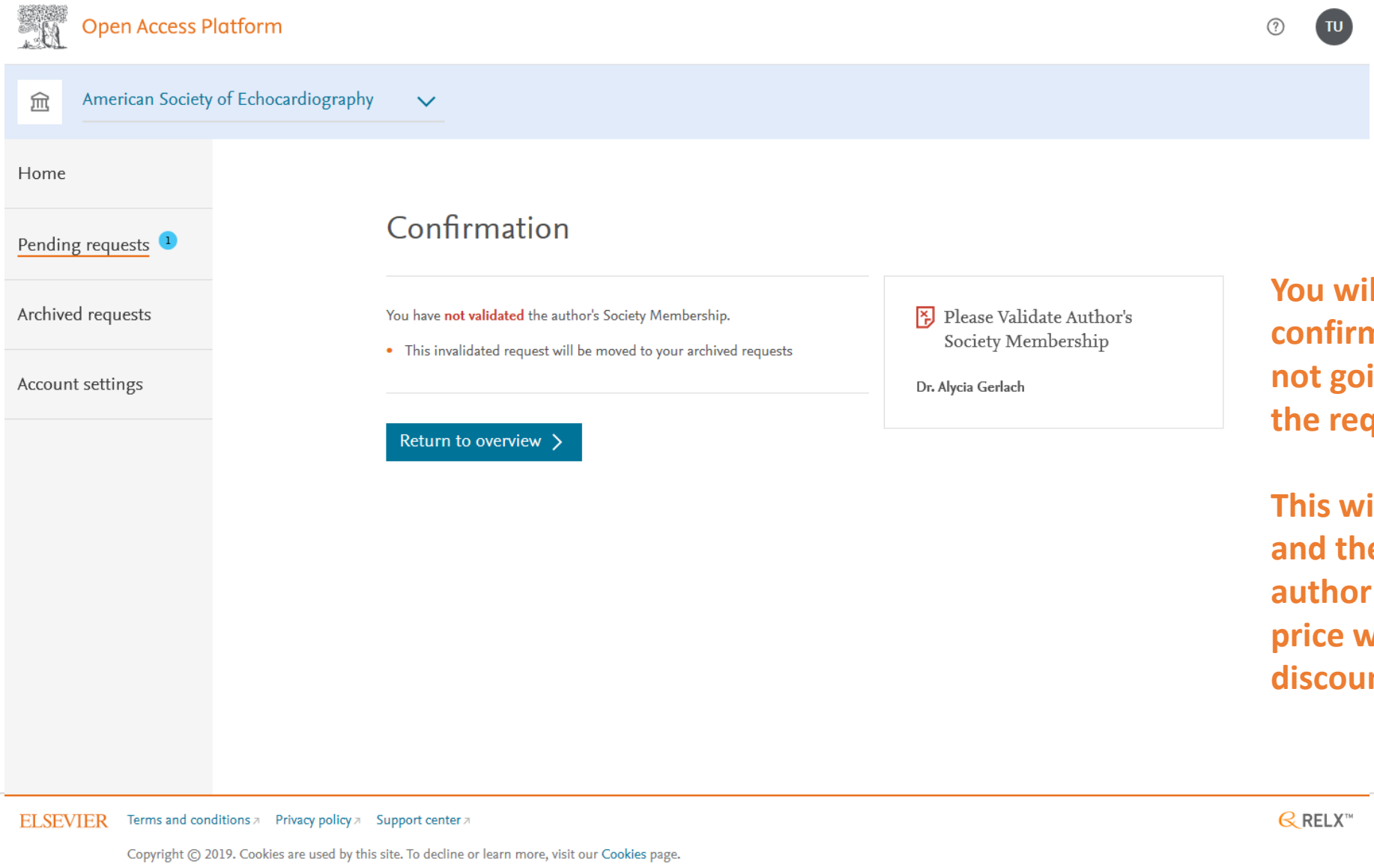


Select a reason for not validating the membership

Check the box if you wish the author to be notified via the Platform

Click Confirm. You will be asked to confirm again that you wish to invalidate. Click OK.

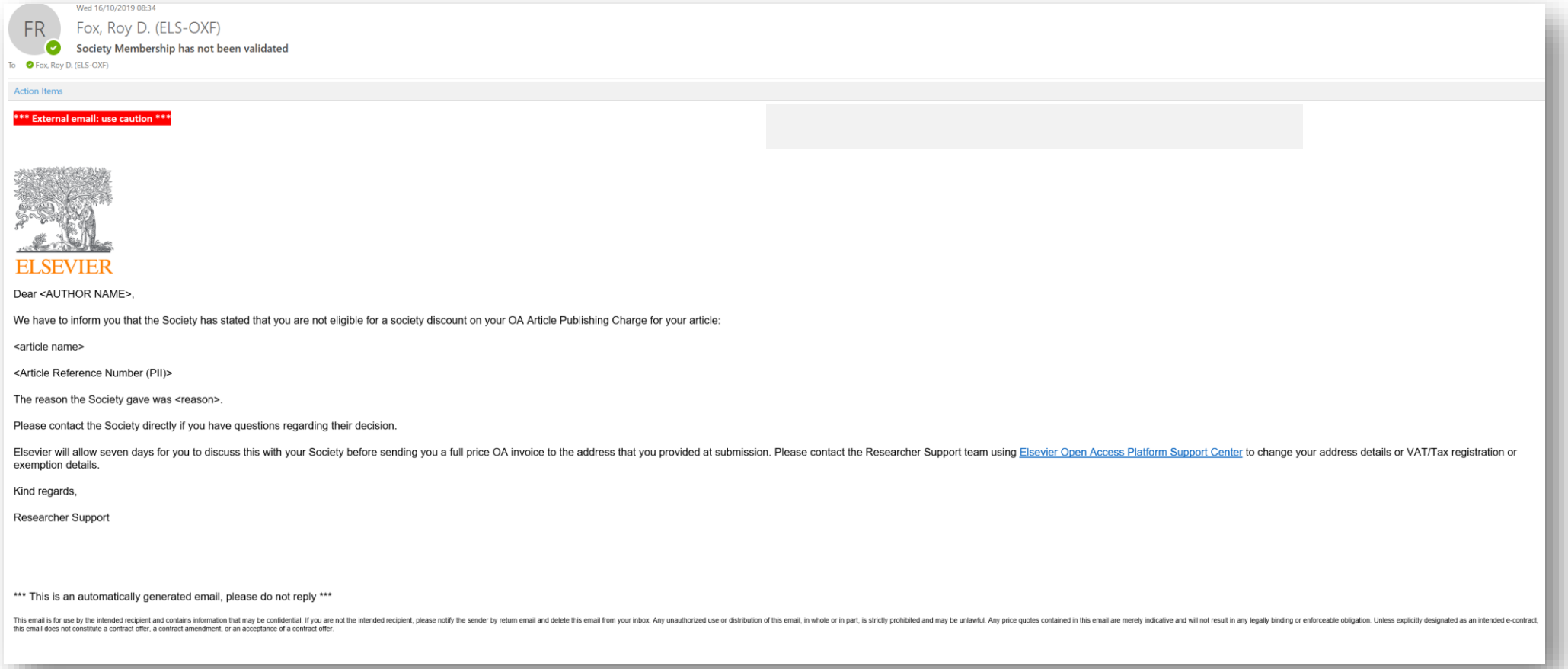
Step 2.2: Managing membership validation – Invalid Requests



You will receive confirmation that you are not going to be validating the request

This will notify Elsevier and they will invoice the author for the full list price without the society discount

Step 2.2: Managing your Platform - Invalid Requests



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Fox, Roy D. (ELS-OXF)

Society Membership has not been validated

To Fox, Roy D. (ELS-OXF)

Action Items

*** External email: use caution ***

ELSEVIER

Dear <AUTHOR NAME>,

We have to inform you that the Society has stated that you are not eligible for a society discount on your OA Article Publishing Charge for your article:

<article name>

<Article Reference Number (PII)>

The reason the Society gave was <reason>.

Please contact the Society directly if you have questions regarding their decision.

Elsevier will allow seven days for you to discuss this with your Society before sending you a full price OA invoice to the address that you provided at submission. Please contact the Researcher Support team using Elsevier Open Access Platform Support Center to change your address details or VAT/Tax registration or exemption details.

Kind regards,

Researcher Support

*** This is an automatically generated email, please do not reply ***

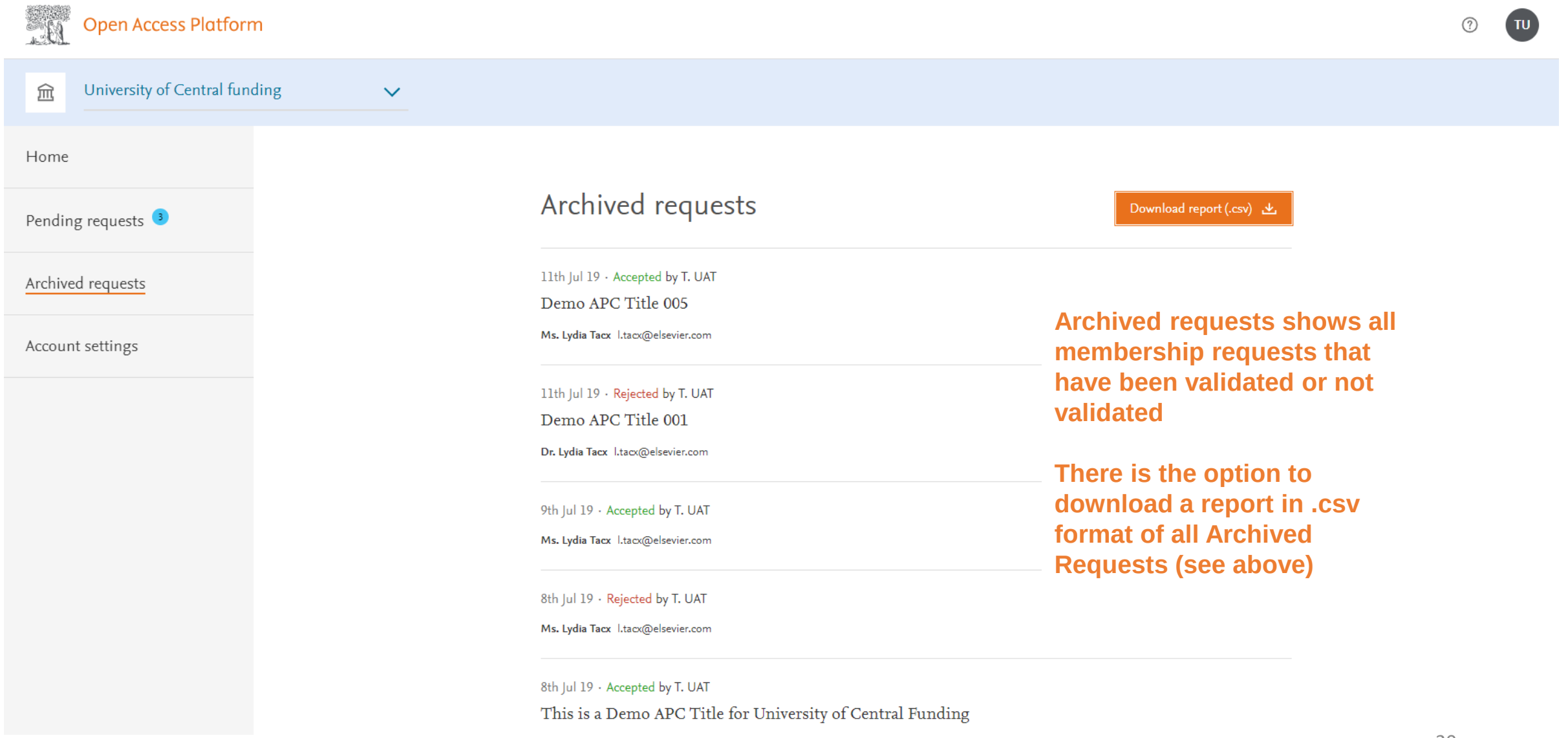
This email is for use by the intended recipient and contains information that may be confidential. If you are not the intended recipient, please notify the sender by return email and delete this email from your inbox. Any unauthorized use or distribution of this email, in whole or in part, is strictly prohibited and may be unlawful. Any price quotes contained in this email are merely indicative and will not result in any legally binding or enforceable obligation. Unless explicitly designated as an intended e-contract, this email does not constitute a contract offer, a contract amendment, or an acceptance of a contract offer.

If selected, an email is sent to the author confirming that membership has not been validated

The e-mail will be populated with information submitted by the Author

The selected reason for not validating request will be shown in the e-mail

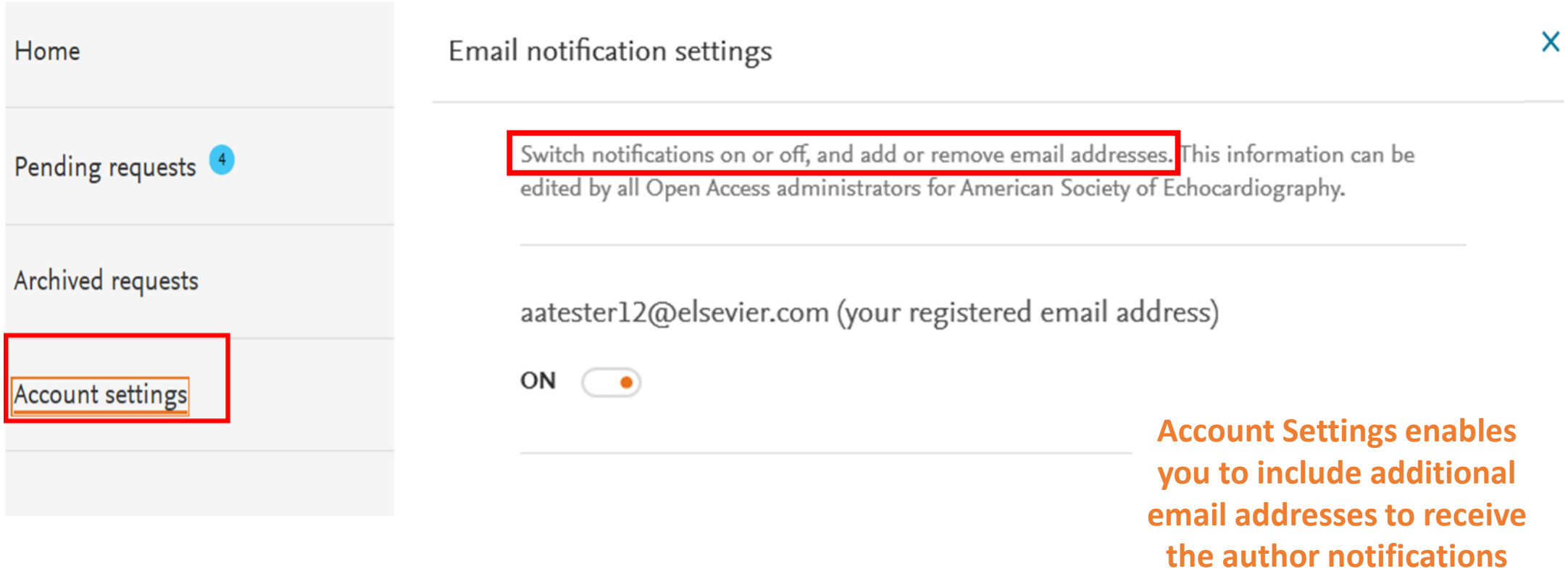
Step 2.3: Managing membership validation - Archived Requests



Archived requests shows all membership requests that have been validated or not validated

There is the option to download a report in .csv format of all Archived Requests (see above)

Step 2.4: Managing your Platform - Account Settings



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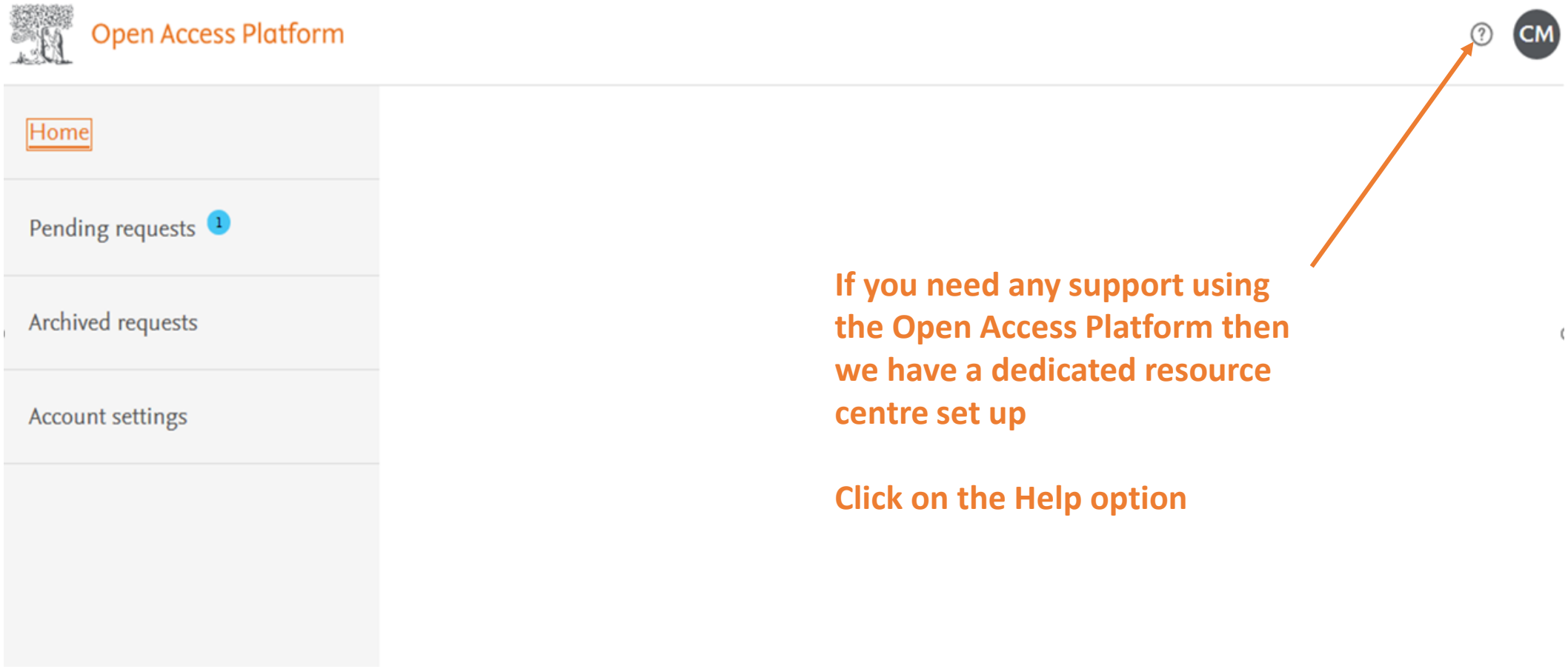
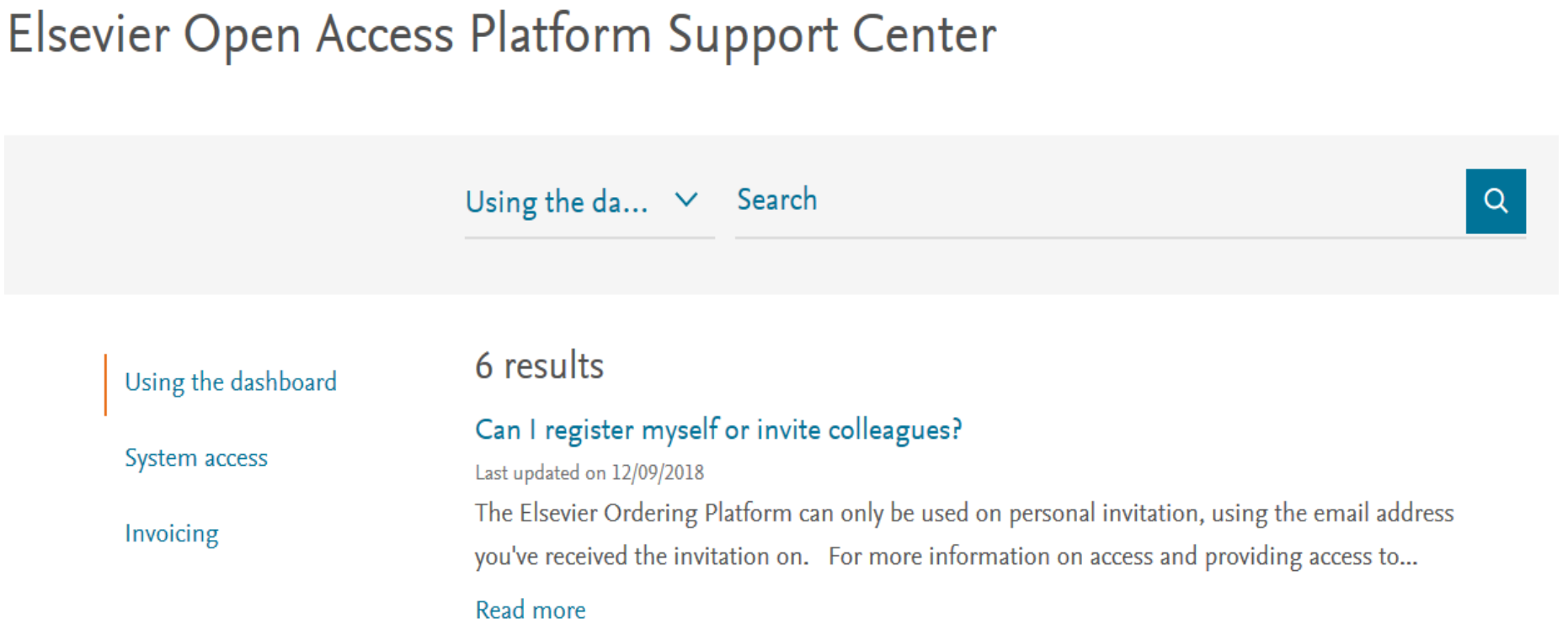
Step 3: How we can support you



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

Click on the Help option

Step 3: How we can support you

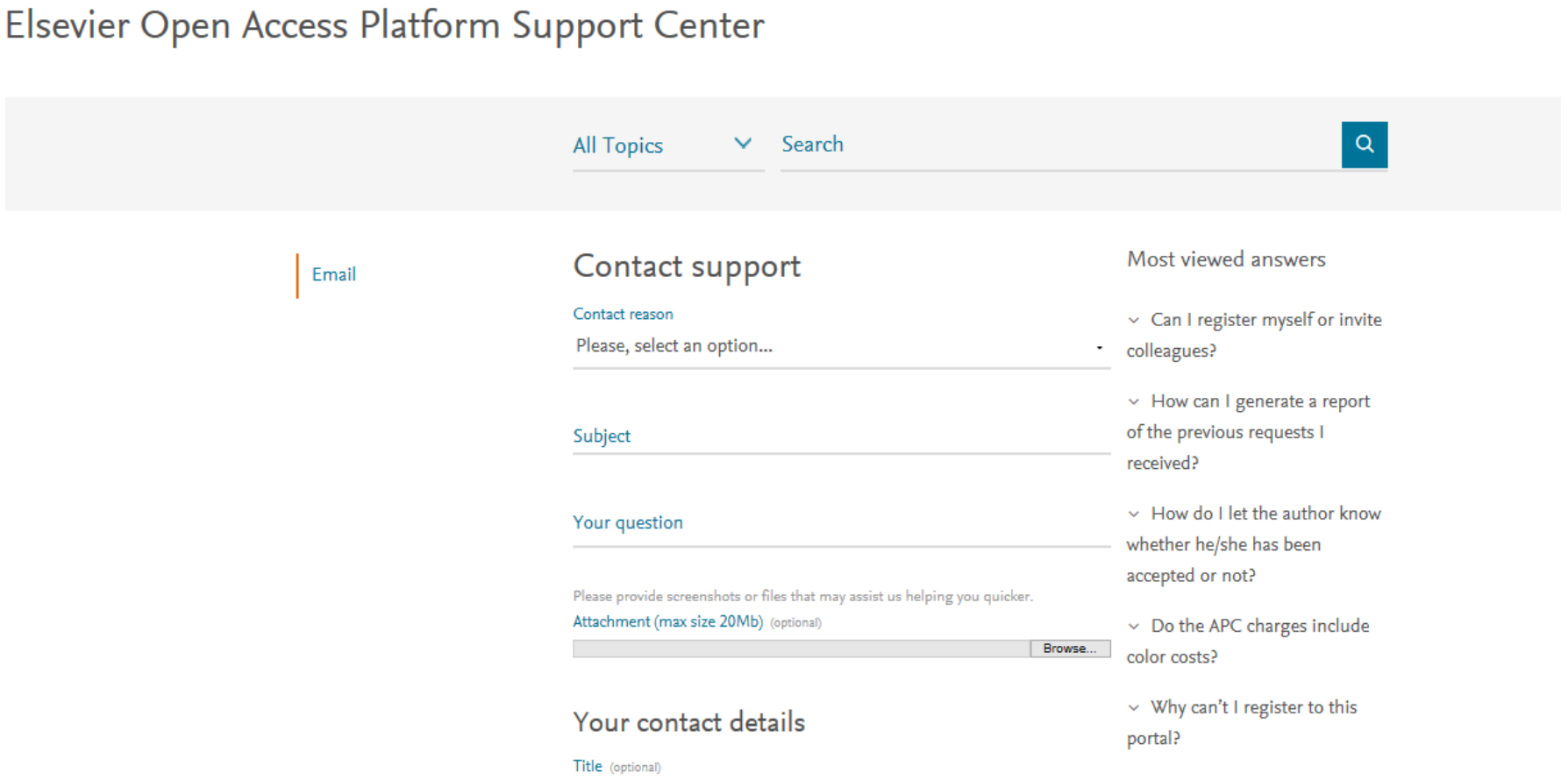


FAQs are posted on Open Access Platform Support Centre

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



Resources & Contact Details

For further resources on the Open Access Platform including a list of FAQs, please go to

https://service.elsevier.com/app/answers/list/c/15686/supporthub/eoap/

Making it easier to work with us

Making it simpler for you to manage Society Eligibility Validation

Allowing you to track and manage in real time

Enabling you to access your data when you need it

Thank you