Elsevier Open Access Platform

Fixed Quantity agreements

Overview guide
# 1. Key definitions

<table>
<thead>
<tr>
<th>Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitting corresponding author</td>
<td>Submitting corresponding author is the author who submits the article to Elsevier and stays in contact with Elsevier in the end-to-end journey</td>
</tr>
<tr>
<td></td>
<td>This is the author who makes the publishing choice on behalf of the author group</td>
</tr>
<tr>
<td></td>
<td>Every article has one corresponding author</td>
</tr>
<tr>
<td>Acceptance Date</td>
<td>This is the date the journal accepts the article for publication</td>
</tr>
<tr>
<td>Elsevier OA Platform</td>
<td>Elsevier OA Platform (EOAP) is a user-friendly interface where we present the institutional administrators with the open access articles eligible for the agreement.</td>
</tr>
<tr>
<td></td>
<td>Administrators at the institution validate the eligibility of the author for an OA agreement</td>
</tr>
<tr>
<td>Gold Open Access</td>
<td>The final version of the published journal article is made freely available, immediately, to everyone. An author can publish Gold Open Access in an open access journal OR in a Hybrid journal which offers open access</td>
</tr>
</tbody>
</table>
## 2. Eligibility criteria

<table>
<thead>
<tr>
<th>Eligibility component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceptance date</td>
<td>The acceptance date of the article should fall within the period of agreement for your institution</td>
</tr>
<tr>
<td>Author affiliation</td>
<td>The submitting corresponding author must be affiliated with a participating institution in the agreement.</td>
</tr>
<tr>
<td>Journal title</td>
<td>The article must be submitted to and accepted in a participating journal.</td>
</tr>
<tr>
<td>APC available</td>
<td>Institution has APCs for the year</td>
</tr>
</tbody>
</table>
3. Agreement Overview

<table>
<thead>
<tr>
<th>Journal Bucket</th>
<th>Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Hybrid/</td>
<td>The eligible submitting corresponding authors receive full APC coverage upon validation in EOAP. All institutions have a quota of</td>
</tr>
<tr>
<td>Core Gold</td>
<td>11138/11268/11410/11566 for 2024-2027</td>
</tr>
<tr>
<td>Cell Press/Lancet</td>
<td>The eligible submitting corresponding authors receive 10% discount upon validation in EOAP</td>
</tr>
<tr>
<td>Hybrid &amp; Gold</td>
<td></td>
</tr>
</tbody>
</table>
Notifications & access
Sign up and Log in
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

https://oap.elsevier.com/s/
The homepage

Click on the tiles to have access different areas of the platform.

- Requests: Review and manage all Article Publishing Charges
- Account settings: View your personal information and manage your institution(s) and administrators

Using the Elsevier Open Access Platform – Monthly reports
Requests
Managing your Article Publishing Charges
Requests tab

Using the Elsevier Open Access Platform – Managing requests

Requests

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>6</td>
</tr>
<tr>
<td>Pending (older)</td>
<td>24</td>
</tr>
<tr>
<td>Approved</td>
<td>712</td>
</tr>
<tr>
<td>Rejected</td>
<td>32</td>
</tr>
<tr>
<td>All</td>
<td>1062</td>
</tr>
</tbody>
</table>

Institution

- All institutions

Author

- All authors

4 May 2022

This is the title of another Article for Test V2 Huran

OXFORD UNIVERSITY PRESS SOCIETY | Mr Sanchit Mehta, joannaholme@brightgen.com

- View article
- Author ORCID profile

Approve

4 May 2022

This is the title of another Article for Test V2

AALTO UNIVERSITY | Dr. Sundar Ayyappan, sfopenscience2e@elsevier.com

- View article
- Author ORCID profile

Approve

Generate report (.CSV)
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 Science Direct

Based on this information you can chose to approve or reject the request
**Searching / Filtering**

You can filter down a list of APCs to look for a particular one.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>All institutions</td>
<td>All authors</td>
</tr>
<tr>
<td>Aalto University</td>
<td>All authors</td>
</tr>
<tr>
<td>National Institute of Health and Medical Research Pathophysiology and Treatment of Liver Disease</td>
<td>All authors</td>
</tr>
<tr>
<td>Oxford University Press Society</td>
<td>All authors</td>
</tr>
<tr>
<td>Test American Society for Gastrointestinal Endoscopy</td>
<td>All authors</td>
</tr>
<tr>
<td>University of California Riverside</td>
<td>All authors</td>
</tr>
<tr>
<td>University of Oxford</td>
<td>All authors</td>
</tr>
</tbody>
</table>

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

Additionally you have the option to search by author name.
Using the Elsevier Open Access Platform – Managing pending requests

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, and the article submitted, accepted and open access ordered dates.
APC detail window

Author details with the link to their ORCID profile

Possibility to make internal notes

The articles with internal notes will show up with this icon

Utilisation de la plateforme Elsevier Open Access – Gestion des demandes en attente

Titre de l’article

View article ➔ Author ORCID profile ➔

Institution:
Corresponding author:
Author’s email:
Author’s ORCID ID:

Show more

Approve Reject Internal note

- One single note may be added per request.
- Notes are not private and can be read/edited by others within this account.
- Elsevier will not act upon, nor share, any notes. Notes are not shared with authors.

Add a quick note (max. 255 characters)

255 characters left

13 Jun 2024

Add note
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.

A confirmation of the approval is shown on screen, and the APC moves onto the approved list.
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
APC detail window
Rejecting an APC.

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
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
In case the PO number is incorrect:

- The admin should contact the author for the correct PO code
- Admin can update the PO number in EOAP and approve the request

APC detail window
For POs
Emails to authors - rejection

the author does not provide the updated PO number within 15 working days:

- The admin can reject by selecting ‘Grant number not supplied/recognized’

- Admin contacts the author to contact oasupport@elsevier.com to have a second chance to secure the PO number, go through the journey again and add the new PO number

10% discount will be applied on the invoice sent to ChorusPro upon approval
Old requests (older than 14 days)

- **Due in 6 days**
  - 25 Jun 2024
  - (2024 period)
  - View article

- **Overdue for 1 day**
  - 18 Jun 2024
  - (2024 period)
  - Approve
  - Reject
  - View article
  - Author ORCID profile

- **Overdue for 6 days**
  - 13 Jun 2024
  - (2024 period)
  - Approve
  - Reject
  - View article
  - Author ORCID profile

**Rappel des jours restant pour approuver la demande**

**Les articles qui ont des notes internes**
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.

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.
Reporting Fields exported:
You can choose to view a .csv report on screen or export / download it.

- Institution
- Article title
- Corresponding author
- Article type
- Journal
- Journal type
- Journal ISSN
- PII
- User license
- PO number
- Grant Id(s)
- Full text article
- Article submitted on
- Article accepted on
- Open access ordered on
- EOAP decision date
- EOAP status
- Actioned by
- Reason for rejection
- Days pending
- Period
- List price
- Discount amount total
- Net amount
- Total tax value
- Quote total
- Note
- Note written by
- Note written on
Changing an article to another institution

- Admin leaves the request in EOAP in the pending status.
- Admin contacts the Agreement’s team (agreementactivation@elsevier.com) to change the affiliation of the author.
- Agreement’s team hides the request in EOAP to ensure it no longer appears in the dashboard.
- Agreement’s team requests reopening of the journey and updates the affiliation in the author journey.
- Agreement’s team requests the author changes the affiliation of the article by also copying the institutional admin.
- Elsevier recompletes the journey with the new affiliation, so the request lands in the correct admin EOAP account.
Support for authors and librarians/administrators

- For Authors— oasupport@elsevier.com

- For Librarians/Administrators, related to activating or modifying EOAP—
  agreementactivation@elsevier.com

- APC Couperin Team: apc@couperin.org

Links

Hub client Couperin (elsevier.com)

Elsevier < Couperin

Find a journal | Journal Finder (elsevier.com)