



Elsevier Open Access Platform

Fixed Quantity agreements

Overview guide



Welcome

Welcome to Elsevier's Open Access Platform (EOAP). This guide is intended as a quick walkthrough of our platform.

You can find an FAQ page on our website at service.elsevier.com/app/home/supporthub/eoap/

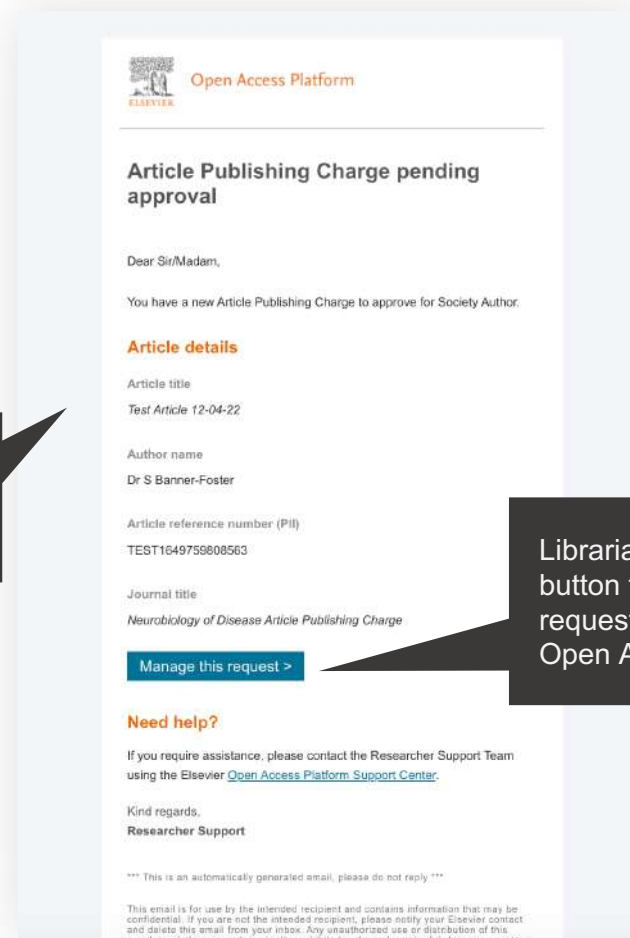
In this guide

Requests	6-20
Managing pending requests	
Approved requests tab	
Rejected requests tab	
All requests tab	
Reporting	
Agreement dashboard	21-25
Overall view	
Institution view	

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.

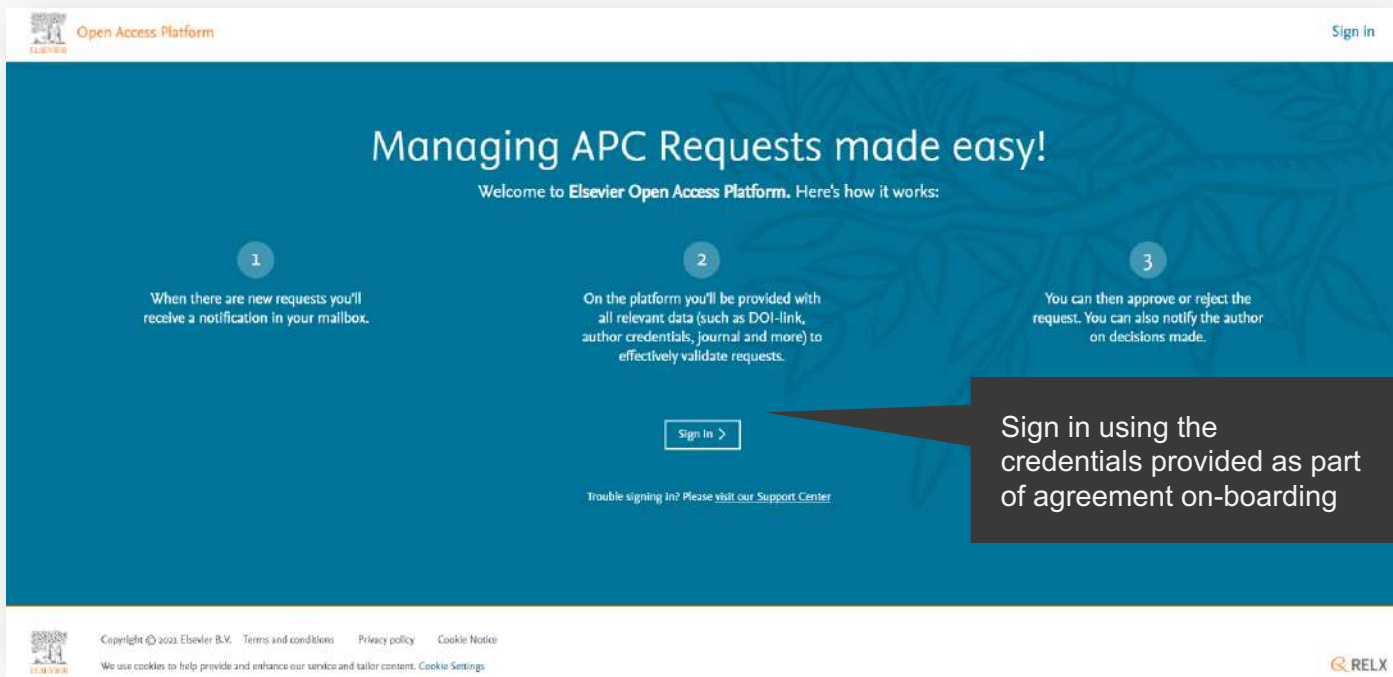
The email provides information on the request



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.



Open Access Platform

Sign in

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 >

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

Sign in using the credentials provided as part of agreement on-boarding

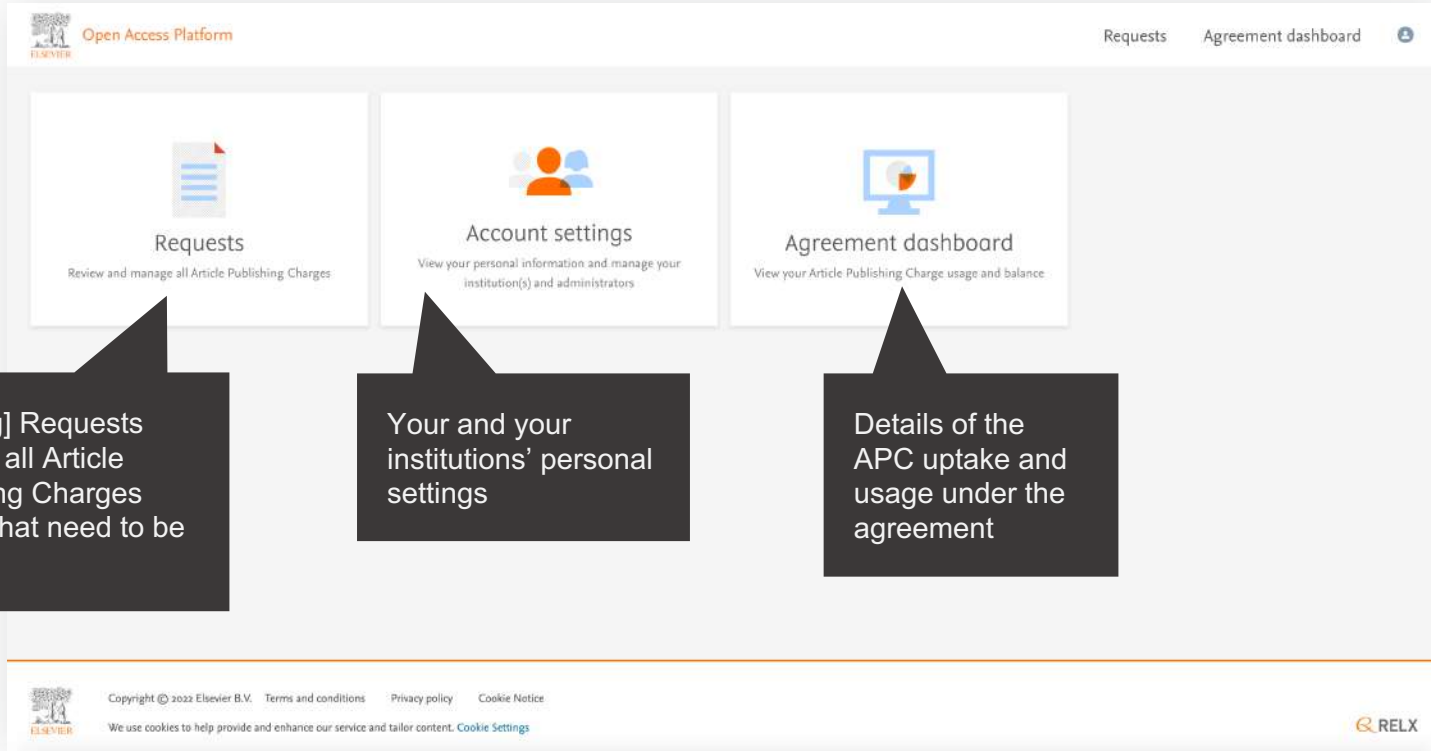
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We use cookies to help provide and enhance our service and tailor content. [Cookie Settings](#)

RELX

The homepage

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



The screenshot shows the Elsevier Open Access Platform homepage. At the top left is the Elsevier logo and the text 'Open Access Platform'. At the top right are links for 'Requests' and 'Agreement dashboard' with a user profile icon. The main content area features three white tiles on a light gray background:

- Requests**: Icon of a document with a red tab. Text: 'Review and manage all Article Publishing Charges'.
- Account settings**: Icon of three stylized people. Text: 'View your personal information and manage your institution(s) and administrators'.
- Agreement dashboard**: Icon of a computer monitor with a pie chart. Text: 'View your Article Publishing Charge usage and balance'.

Three black callout boxes with white text provide further details:

- Requests**: '[Pending] Requests contains all Article Publishing Charges (APCs) that need to be actioned'.
- Account settings**: 'Your and your institutions' personal settings'.
- Agreement dashboard**: 'Details of the APC uptake and usage under the agreement'.

The footer contains the Elsevier logo, copyright information 'Copyright © 2022 Elsevier B.V. Terms and conditions Privacy policy Cookie Notice', a cookie consent message 'We use cookies to help provide and enhance our service and tailor content. Cookie Settings', and the RELX logo.

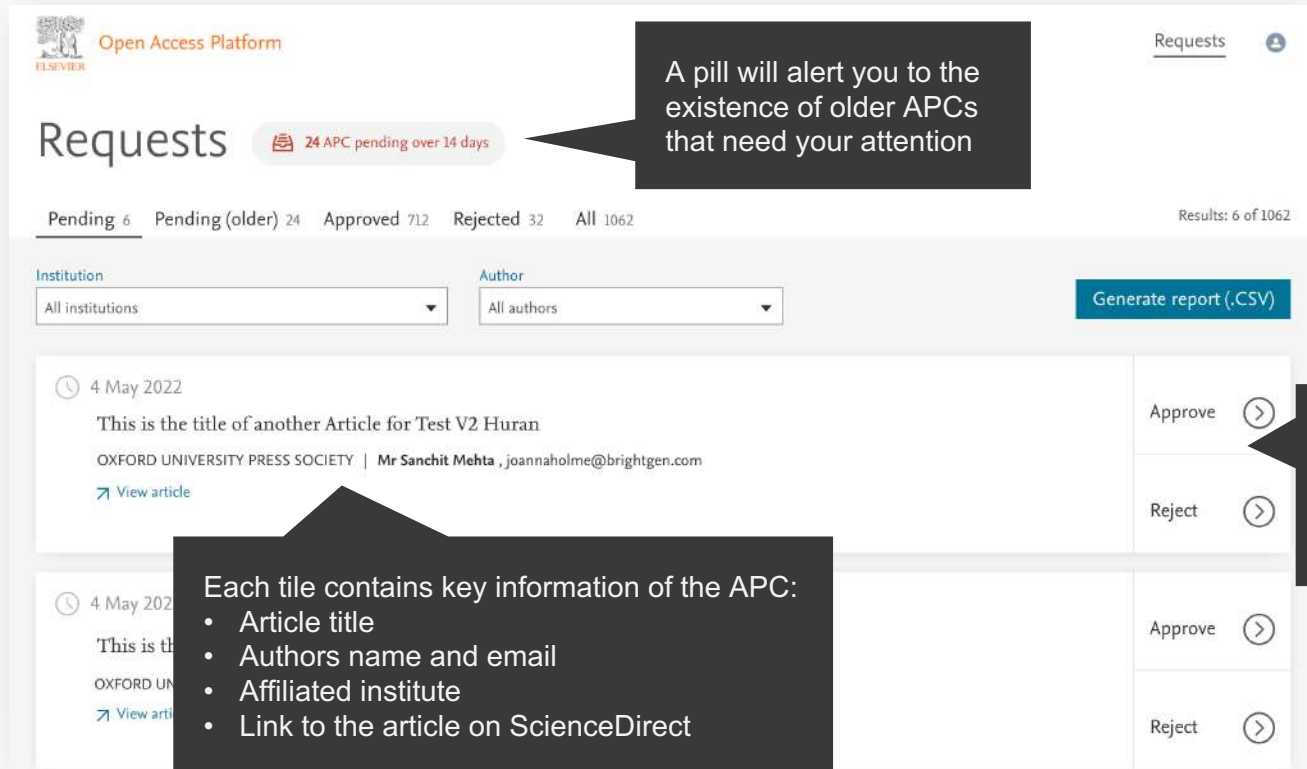
Requests

Managing your Article Publishing
Charges



Pending requests tab

Contains latest Article Publishing Charges (APCs) that need to be actioned.



Open Access Platform

Requests

24 APC pending over 14 days

Pending 6 Pending (older) 24 Approved 712 Rejected 32 All 1062

Results: 6 of 1062

Institution: All institutions Author: All authors

Generate report (.CSV)

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

Approve

Reject

4 May 2022

This is th

OXFORD UN

View arti

Approve

Reject

Each tile contains key information of the APC:

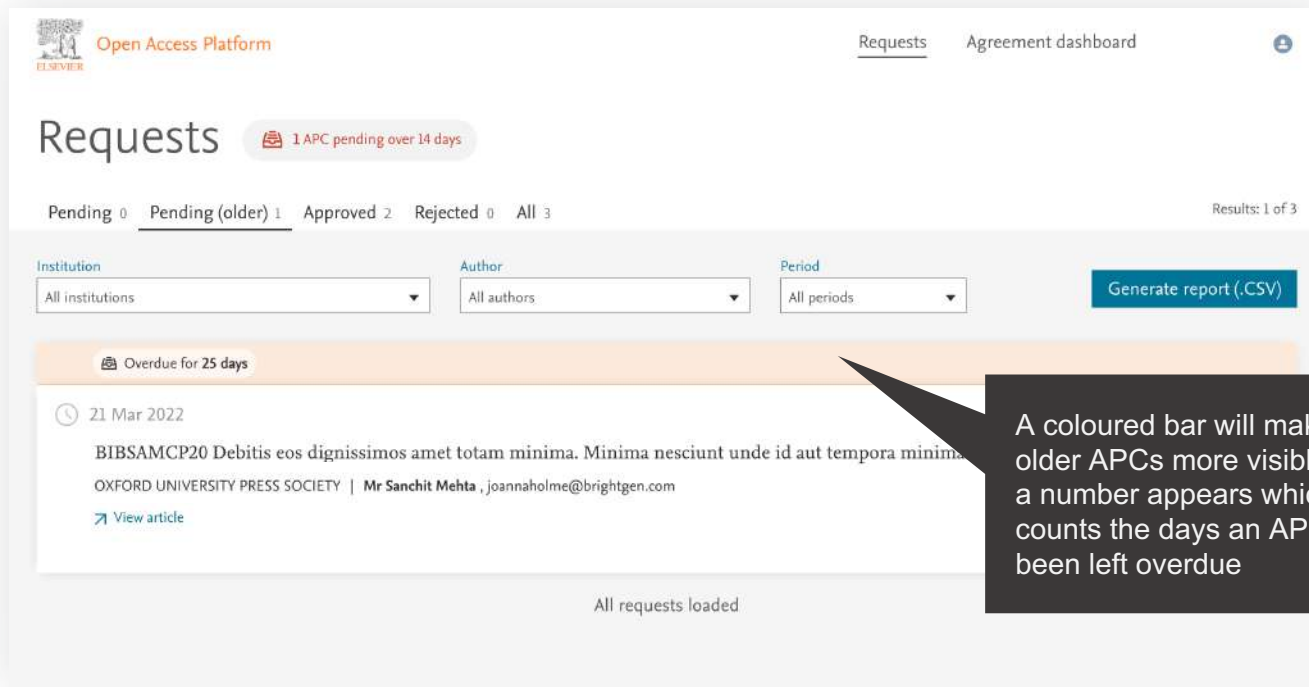
- Article title
- Authors name and email
- Affiliated institute
- Link to the article on ScienceDirect

Based on this information you can chose to approve or reject the request

A pill will alert you to the existence of older APCs that need your attention

Pending (older) requests tab

Contains all Article Publishing Charges (APCs) older than 14 days that need to be actioned.



Open Access Platform

Requests Agreement dashboard

Requests

1 APC pending over 14 days

Pending 0 Pending (older) 1 Approved 2 Rejected 0 All 3 Results: 1 of 3

Institution: All institutions Author: All authors Period: All periods [Generate report \(.CSV\)](#)

Overdue for 25 days

21 Mar 2022

BIBSAMCP20 Debitis eos dignissimos amet totam minima. Minima nesciunt unde id aut tempora minima

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

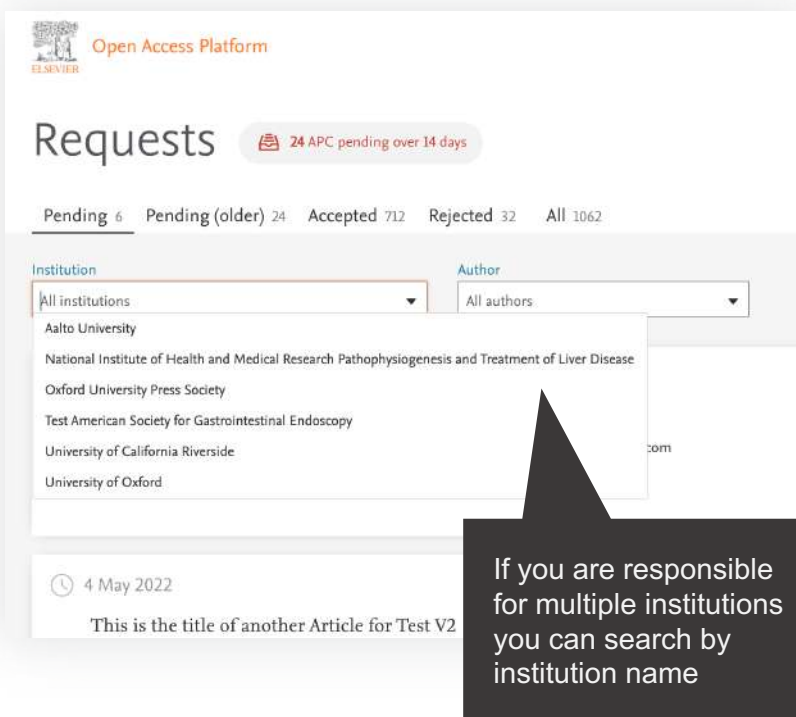
[View article](#)

All requests loaded

A coloured bar will make older APCs more visible and a number appears which counts the days an APC has been left overdue

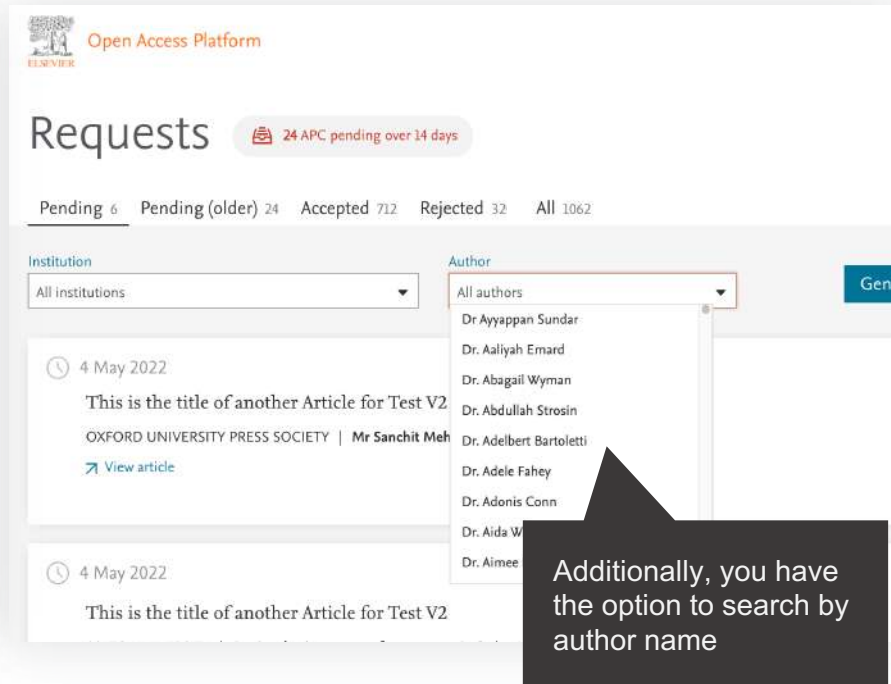
Searching / Filtering

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



The screenshot shows the 'Requests' page with a navigation bar indicating '24 APC pending over 14 days'. Below the navigation bar, there are tabs for 'Pending 6', 'Pending (older) 24', 'Accepted 712', 'Rejected 32', and 'All 1062'. The 'Institution' dropdown menu is open, showing a list of institutions including Aalto University, National Institute of Health and Medical Research Pathophysiology and Treatment of Liver Disease, Oxford University Press Society, Test American Society for Gastrointestinal Endoscopy, University of California Riverside, and University of Oxford. A callout box points to this menu.

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

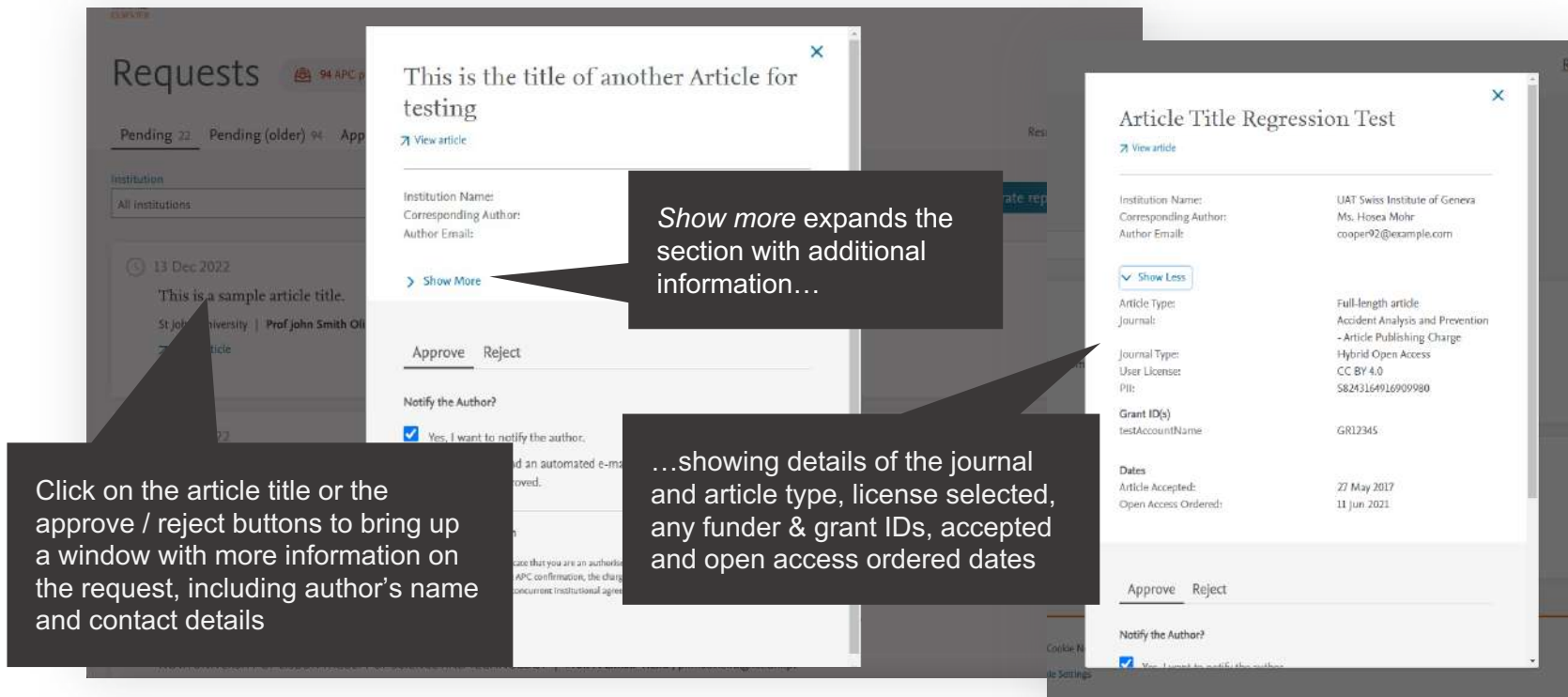


The screenshot shows the 'Requests' page with a navigation bar indicating '24 APC pending over 14 days'. Below the navigation bar, there are tabs for 'Pending 6', 'Pending (older) 24', 'Accepted 712', 'Rejected 32', and 'All 1062'. The 'Author' dropdown menu is open, showing a list of authors including Dr. Ayyappan Sundar, Dr. Aaliyah Emard, Dr. Abigail Wyman, Dr. Abdullah Strosin, Dr. Adelbert Bartoletti, Dr. Adele Fahey, Dr. Adonis Conn, Dr. Aida W, and Dr. Aimee. A callout box points to this menu.

Additionally, you have the option to search by author name

APC detail window

Displays full details of the APC request which allow you to approve or reject it.



The screenshot shows a web interface for managing APC requests. A 'Requests' sidebar on the left lists pending requests. The main content area displays a detailed view for an article titled 'Article Title Regression Test'. A 'Show More' button is highlighted with a callout box. Another callout box points to the 'Approve' and 'Reject' buttons. A third callout box points to the article details section, which includes information about the journal, article type, license, funder, and grant IDs.

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, accepted and open access ordered dates

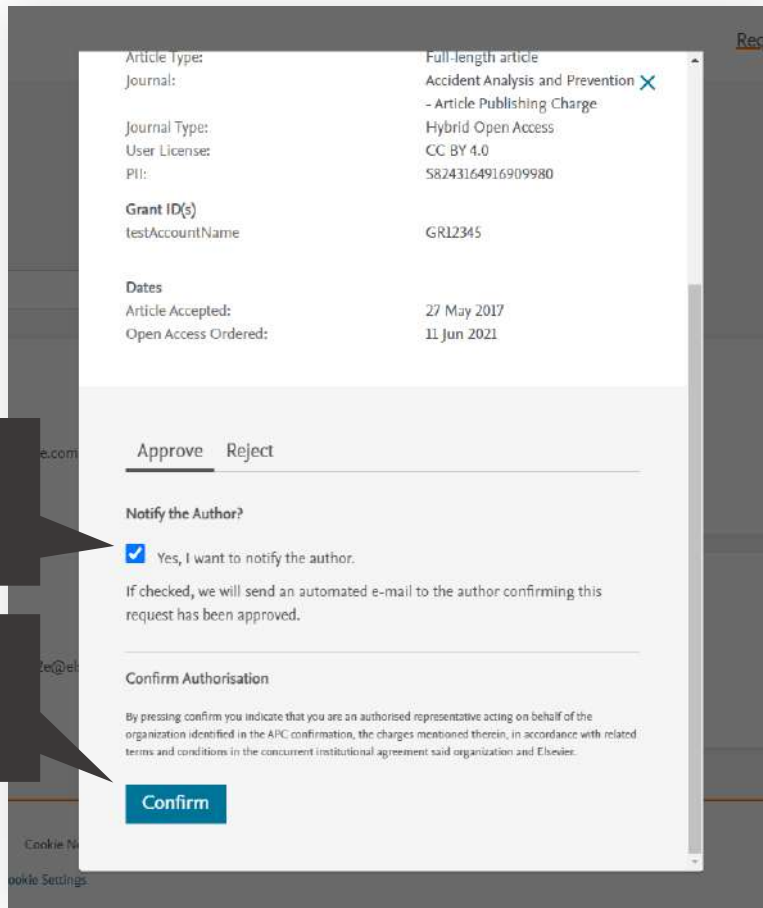
Article Title Regression Test	
Institution Name:	UAT Swiss Institute of Geneva
Corresponding Author:	Ms. Hosea Mohr
Author Email:	cooper92@example.com
Show Less	
Article Type:	Full-length article
Journal:	Accident Analysis and Prevention
Journal Type:	- Article Publishing Charge
User License:	Hybrid Open Access
PII:	CC BY 4.0
Grant ID(s):	S8243164916909980
testAccountName:	GRI2345
Dates	
Article Accepted:	27 May 2017
Open Access Ordered:	11 Jun 2021
Approve Reject	
Notify the Author?	
<input checked="" type="checkbox"/> Yes, I want to notify the author.	

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



Article Type: Full-length article
Journal: Accident Analysis and Prevention X
Journal Type: Hybrid Open Access
User License: CC BY 4.0
PII: S0243164916909980

Grant ID(s)
testAccountName: GR12345

Dates
Article Accepted: 27 May 2017
Open Access Ordered: 11 Jun 2021

[Approve](#) [Reject](#)

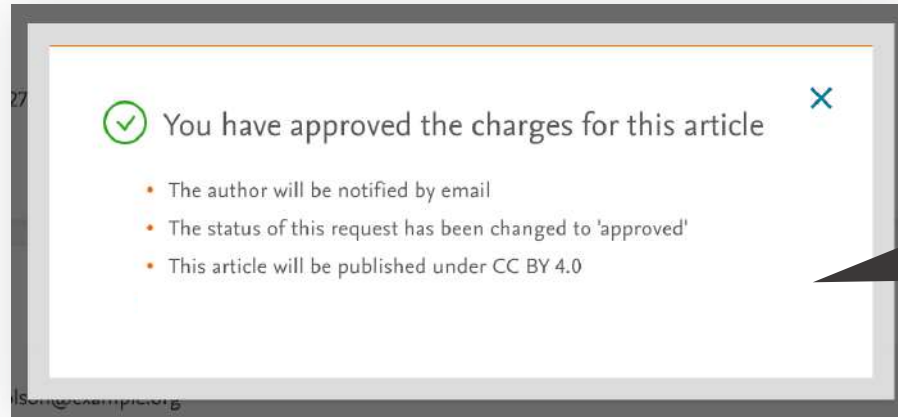
Notify the Author?
 Yes, I want to notify the author.
If checked, we will send an automated e-mail to the author confirming this request has been approved.

Confirm Authorisation
By pressing confirm you indicate that you are an authorised representative acting on behalf of the organization identified in the APC confirmation, the charges mentioned therein, in accordance with related terms and conditions in the concurrent institutional agreement said organization and Elsevier.

[Confirm](#)

APC detail window

Approving an APC.

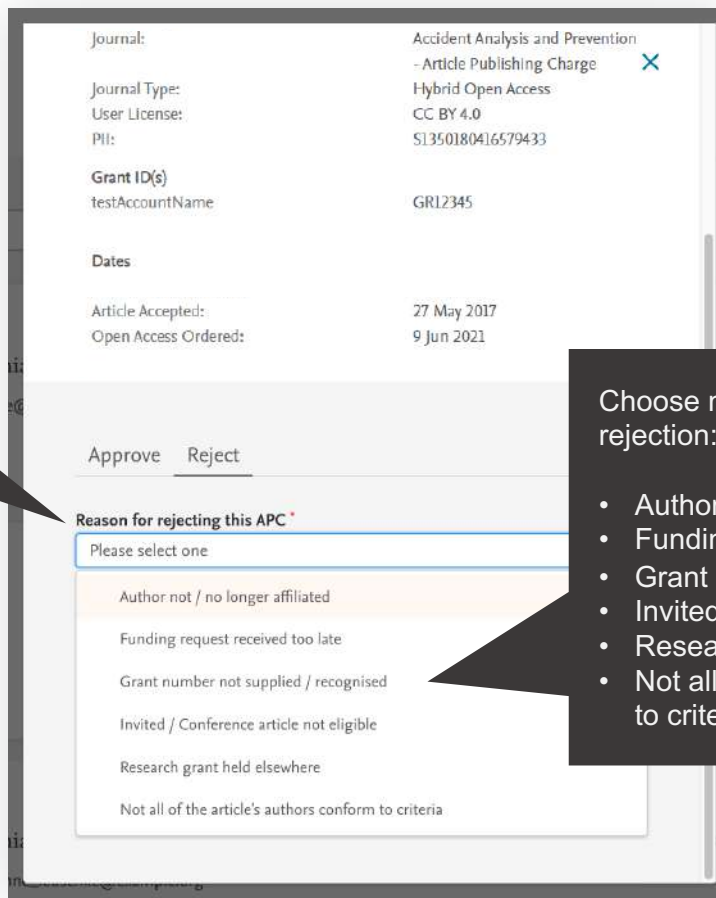


A confirmation of the approval is shown on screen, and the APC moves onto the approved list

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



Journal: Accident Analysis and Prevention
- Article Publishing Charge X

Journal Type: Hybrid Open Access
User License: CC BY 4.0
PII: S1350180416579433

Grant ID(s)
testAccountName: GR12345

Dates
Article Accepted: 27 May 2017
Open Access Ordered: 9 Jun 2021

Approve Reject

Reason for rejecting this APC *

Please select one

- Author not / no longer affiliated
- Funding request received too late
- Grant number not supplied / recognised
- Invited / Conference article not eligible
- Research grant held elsewhere
- Not all of the article's authors conform to criteria

Choose most appropriate reason for the rejection:

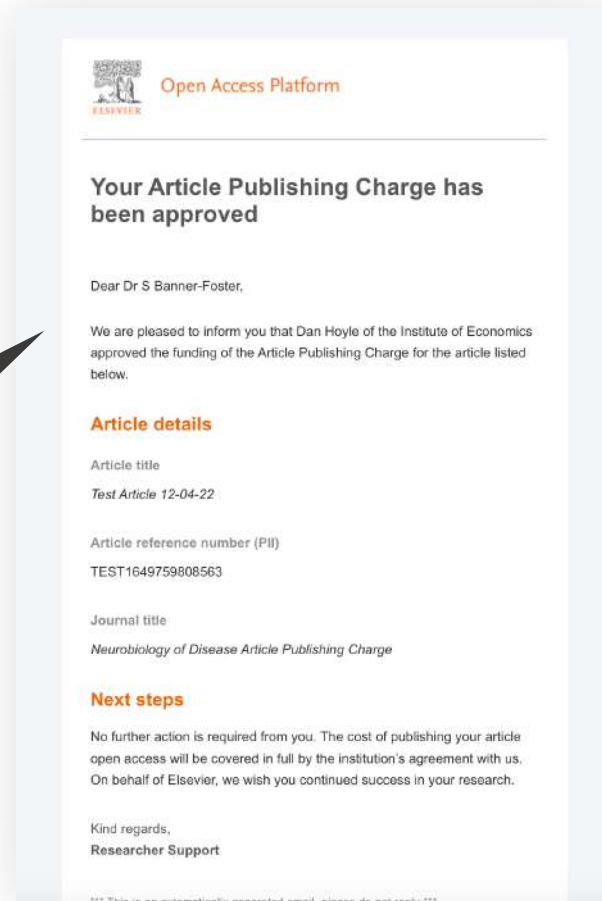
- Author not/no longer affiliated
- Funding request received too late
- Grant number not supplied/recognized
- Invited/Conference article not eligible
- Research grant held elsewhere
- Not all of the article's authors conform to criteria

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

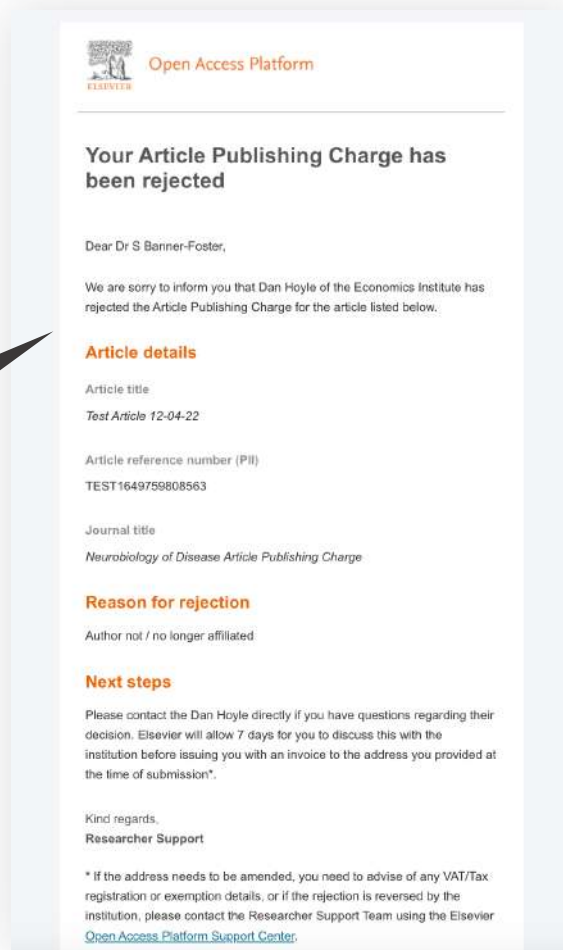


Emails to authors - rejection

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



The screenshot shows an email template with the following content:

Open Access Platform

Your Article Publishing Charge has been rejected

Dear Dr S Banner-Foster,

We are sorry to inform you that Dan Hoyle of the Economics Institute has rejected the Article Publishing Charge for the article listed below.

Article details

Article title
Test Article 12-04-22

Article reference number (PII)
TEST1649759808563

Journal title
Neurobiology of Disease Article Publishing Charge

Reason for rejection

Author not / no longer affiliated

Next steps

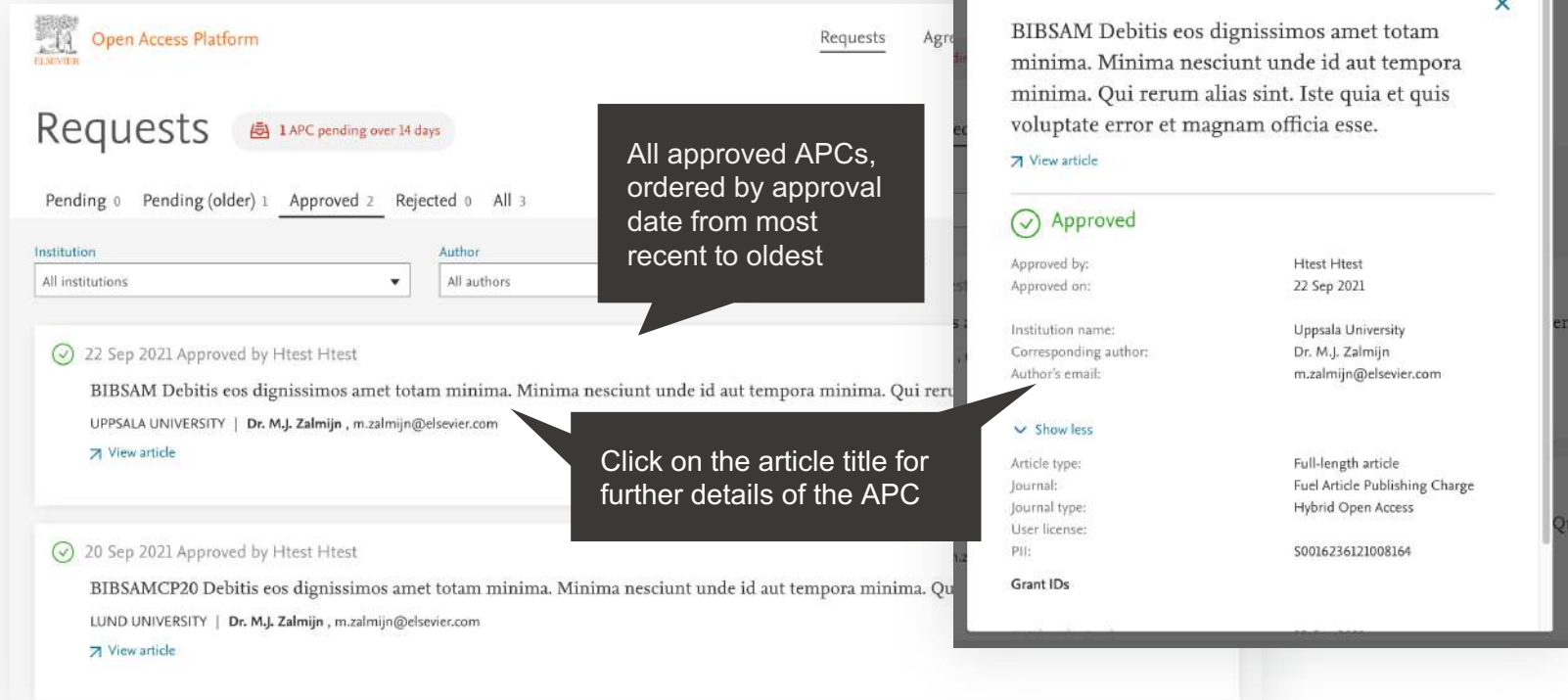
Please contact the Dan Hoyle directly if you have questions regarding their decision. Elsevier will allow 7 days for you to discuss this with the institution before issuing you with an invoice to the address you provided at the time of submission*.

Kind regards,
Researcher Support

* 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 institution, please contact the Researcher Support Team using the Elsevier [Open Access Platform Support Center](#).

Approved requests tab

Shows a full history of all approved APCs overtime.



The screenshot displays the 'Requests' tab on the Elsevier Open Access Platform. At the top, there is a navigation bar with 'Open Access Platform' and 'Requests'. Below this, a summary shows '1 APC pending over 14 days'. A filter bar indicates 'Approved 2' requests. The main list shows two approved requests, with the most recent at the top. A callout box points to this list, stating: 'All approved APCs, ordered by approval date from most recent to oldest'. The first request is for 'BIBSAM Debitis eos dignissimos amet totam minima...' and is approved by 'Htest Htest' on '22 Sep 2021'. A second callout box points to the article title, stating: 'Click on the article title for further details of the APC'. A detailed view of this request is shown on the right, featuring a green checkmark and the word 'Approved'. It lists the approval details and provides a 'View article' link. Below this, a 'Show less' link is visible, followed by article details: 'Full-length article', 'Fuel Article Publishing Charge', 'Hybrid Open Access', and 'User license'. The 'Grant IDs' section shows 'S0016236121008164'.

Requests

Open Access Platform

1 APC pending over 14 days

Requests

Pending 0 Pending (older) 1 **Approved 2** Rejected 0 All 3

Institution: All institutions Author: All authors

22 Sep 2021 Approved by Htest Htest

BIBSAM Debitis eos dignissimos amet totam minima. Minima nesciunt unde id aut tempora minima. Qui rerum aliam voluptate error et magnam officia esse.

UPPSALA UNIVERSITY | Dr. M.J. Zalmijn , m.zalmijn@elsevier.com

[View article](#)

Approved

Approved by: Htest Htest
Approved on: 22 Sep 2021

Institution name: Uppsala University
Corresponding author: Dr. M.J. Zalmijn
Author's email: m.zalmijn@elsevier.com

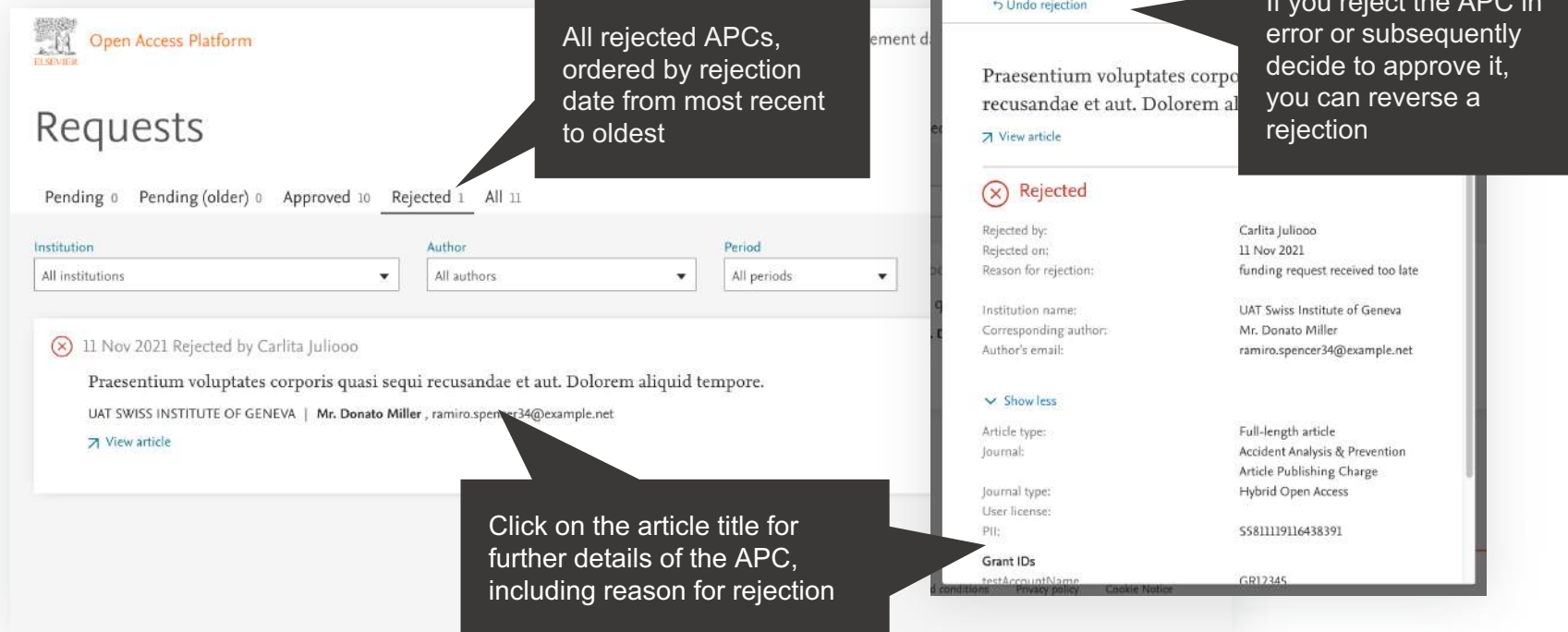
[Show less](#)

Article type: Full-length article
Journal: Fuel Article Publishing Charge
Journal type: Hybrid Open Access
User license:
PII: S0016236121008164

Grant IDs

Rejected requests tab

Shows a full history of all rejected APCs overtime.



The screenshot displays the 'Requests' tab on the Elsevier Open Access Platform. The 'Rejected' sub-tab is active, showing a list of rejected requests. A callout points to the list, stating: "All rejected APCs, ordered by rejection date from most recent to oldest".

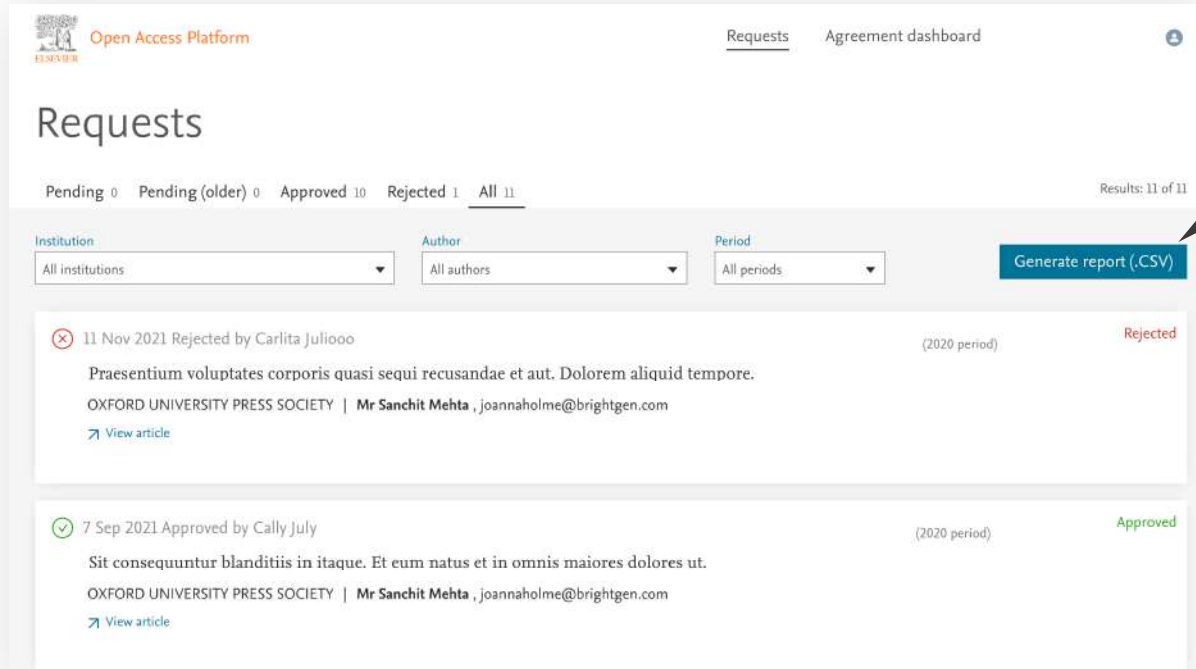
The first entry in the list is: **11 Nov 2021 Rejected by Carlita Juliooo**. The article title is "Praesentium voluptates corporis quasi sequi recusandae et aut. Dolorem aliquid tempore." The author information is "UAT SWISS INSTITUTE OF GENEVA | Mr. Donato Miller, ramiro.spencer34@example.net". A callout points to the article title, stating: "Click on the article title for further details of the APC, including reason for rejection".

Clicking on the article title leads to a detailed view of the rejected request. A callout at the top right of this view states: "If you reject the APC in error or subsequently decide to approve it, you can reverse a rejection". The details include:

- Undo rejection** (link)
- View article** (link)
- Rejected** (status)
- Rejected by:** Carlita Juliooo
- Rejected on:** 11 Nov 2021
- Reason for rejection:** funding request received too late
- Institution name:** UAT Swiss Institute of Geneva
- Corresponding author:** Mr. Donato Miller
- Author's email:** ramiro.spencer34@example.net
- Show less** (link)
- Article type:** Full-length article
- Journal:** Accident Analysis & Prevention
- Journal type:** Article Publishing Charge
- Hybrid Open Access**
- User license:** S581119116438391
- PII:** S581119116438391
- Grant IDs:** testAccountName, GRI2345

All requests tab

Shows a full history of all pending, approved and rejected APCs overtime.



Open Access Platform

Requests Agreement dashboard

Requests

Pending 0 Pending (older) 0 Approved 10 Rejected 1 All 11 Results: 11 of 11

Institution: All institutions Author: All authors Period: All periods [Generate report \(.CSV\)](#)

- 11 Nov 2021 Rejected by Carlita Juliooo (2020 period) **Rejected**
Praesentium voluptates corporis quasi sequi recusandae et aut. Dolorem aliquid tempore.
OXFORD UNIVERSITY PRESS SOCIETY | Mr Sanchit Mehta , joannaholme@brightgen.com
[View article](#)
- 7 Sep 2021 Approved by Cally July (2020 period) **Approved**
Sit consequuntur blanditiis in itaque. Et eum natus et in omnis maiores dolores ut.
OXFORD UNIVERSITY PRESS SOCIETY | Mr Sanchit Mehta , joannaholme@brightgen.com
[View article](#)

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 *Export* will give you various download options

Clicking on the *Generate report (.CSV)* button in the "all requests" tab will generate/display the report on screen

Export

Export View

Formatted Report
Export the report, including the report header, groupings, and filter settings.

Details Only
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

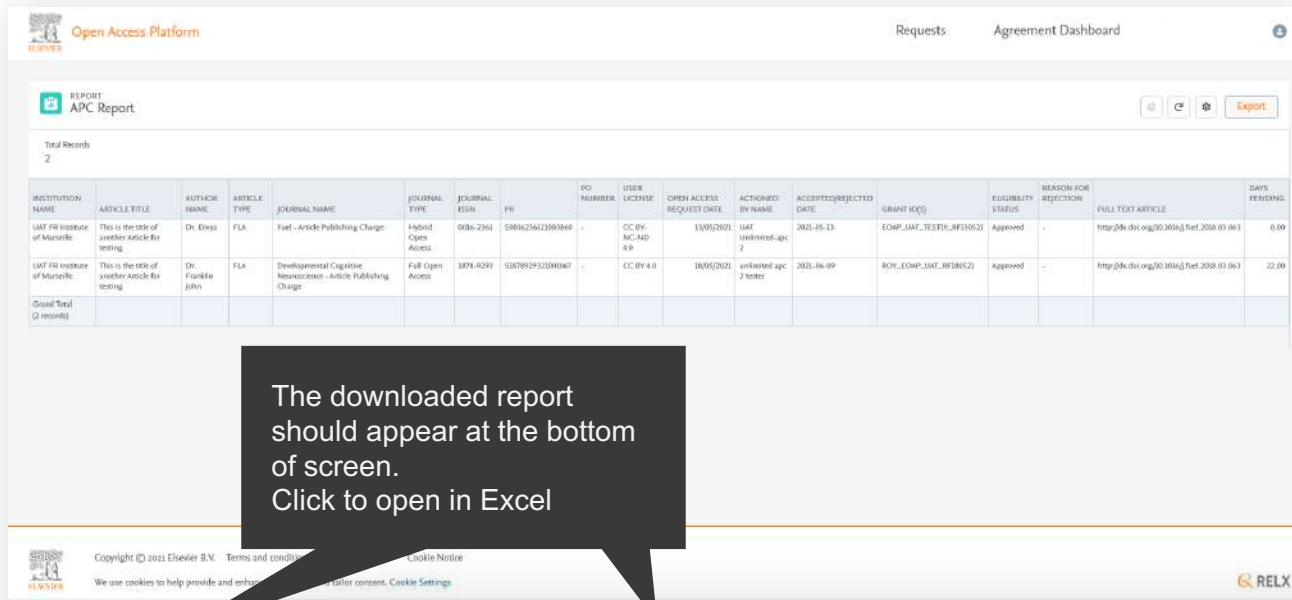
Format:

- Excel Format.xlsx
- Excel Format.xls
- Excel Format.xlsx
- Comma Delimited.csv

Cancel Export

Reporting

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



Open Access Platform

Requests Agreement Dashboard

REPORT
APC Report

Total Records
2

INSTITUTION NAME	ARTICLE TITLE	AUTHOR NAME	ARTICLE TYPE	JOURNAL NAME	JOURNAL TYPE	JOURNAL ISSN	PII	PO NUMBER	USER LICENSE	OPEN ACCESS REQUEST DATE	ACTIONED BY NAME	ACCEPTED/REJECTED DATE	GRANT CODE	ELIGIBILITY STATUS	REASON FOR REJECTION	FULL TEXT ARTICLE	DAYS PENDING
UAT FR Institute of Marseille	This is the title of another Article for testing	Dr. Divya	FLA	Fuel - Article Publishing Charge	Hybrid Open Access	0036-2361	S0016236121003860	-	CC BY-NC-ND 4.0	13/05/2021	UAT FR Institute-APC 2	2021-05-13	COMP_LIAT_TESTER_#F31621	Approved	-	http://dx.doi.org/10.1016/j.fuel.2020.03.063	0.00
UAT FR Institute of Marseille	This is the title of another Article for testing	Dr. Franklin John	FLA	Developmental Cognitive Neuroscience - Article Publishing Charge	Full Open Access	1878-9293	S1878929321001067	-	CC BY 4.0	18/05/2021	unfunded apc 2 tester	2021-06-09	COM_LIAT_TESTER_#F31621	Approved	-	http://dx.doi.org/10.1016/j.fuel.2020.03.063	22.00
Grand Total (2 records)																	

Export

The downloaded report should appear at the bottom of screen. Click to open in Excel

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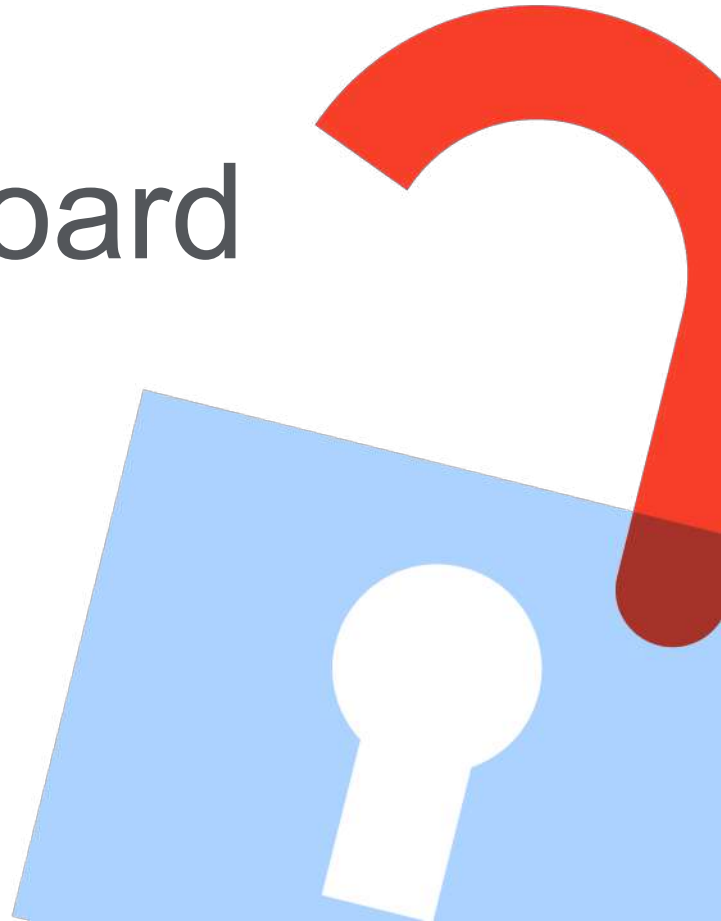
We use cookies to help provide and enhance your navigation, analyze site usage, assist in our marketing efforts, and to enhance our site. Cookie Settings

RELX

	A	B	C	D	E	F	G	H	I
1	Institution Name	Article Title	Author Name	Article Type	Journal Name	Journal Type	Journal ISSN	PII	PO Number
2	UAT FR Institute of Marseille	This is the title of another Article for testing	Dr. Divya	FLA	Fuel - Article Publishing Charge	Hybrid Open Access	0016-2361	S0016236121003860	CC B
3	UAT FR Institute of Marseille	This is the title of another Article for testing	Dr. Franklin John	FLA	Developmental Cognitive Neuroscience - Article Publishing Charge	Full Open Access	1878-9293	S1878929321001067	CC B
4									
5									

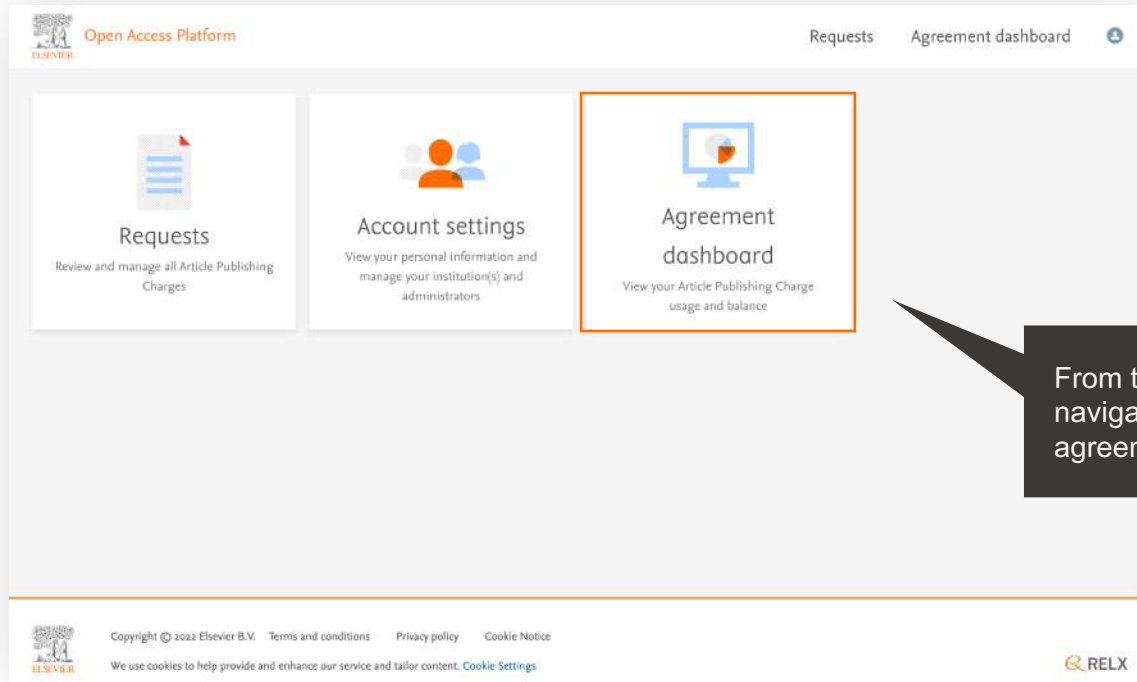
Agreement dashboard

Visibility of the Article Publishing
Charge uptake and usage under
the agreement



Agreement dashboard

Manage APC uptake and usage.



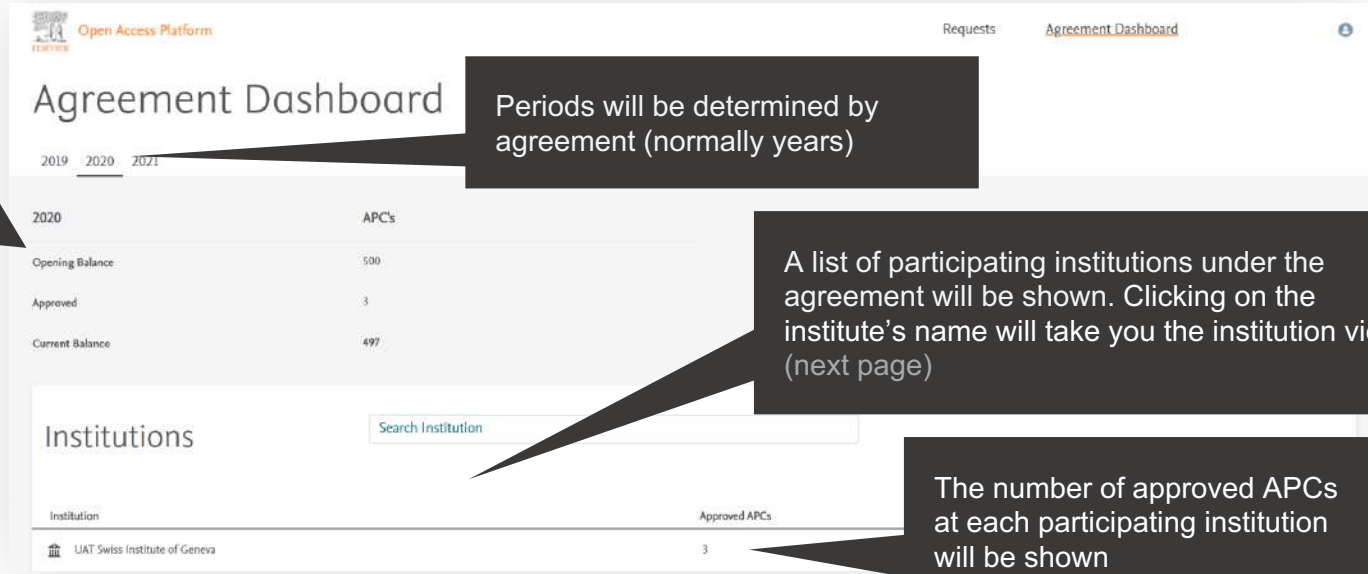
The screenshot shows the 'Open Access Platform' interface. At the top, there is a navigation bar with 'Requests' and 'Agreement dashboard' (highlighted with a blue circle). Below the navigation bar are three main cards: 'Requests' (Review and manage all Article Publishing Charges), 'Account settings' (View your personal information and manage your institution(s) and administrators), and 'Agreement dashboard' (View your Article Publishing Charge usage and balance). The 'Agreement dashboard' card is highlighted with an orange border. At the bottom, there is a footer with the Elsevier logo, copyright information (© 2022 Elsevier B.V.), and links for Terms and conditions, Privacy policy, and Cookie Notice. A RELX logo is also present in the bottom right corner.

From the homepage, navigate to the agreement dashboard

Overall view

View overall APC uptake and usage.

Fixed Quantity APC agreements show the allocation of APCs, number of approved APCs and current balance



Open Access Platform

Requests Agreement Dashboard


Agreement Dashboard

2019 2020 2021

2020		APCs
Opening Balance		500
Approved		3
Current Balance		497

Institutions

Search Institution

Institution	Approved APCs
 UAT Swiss Institute of Geneva	3

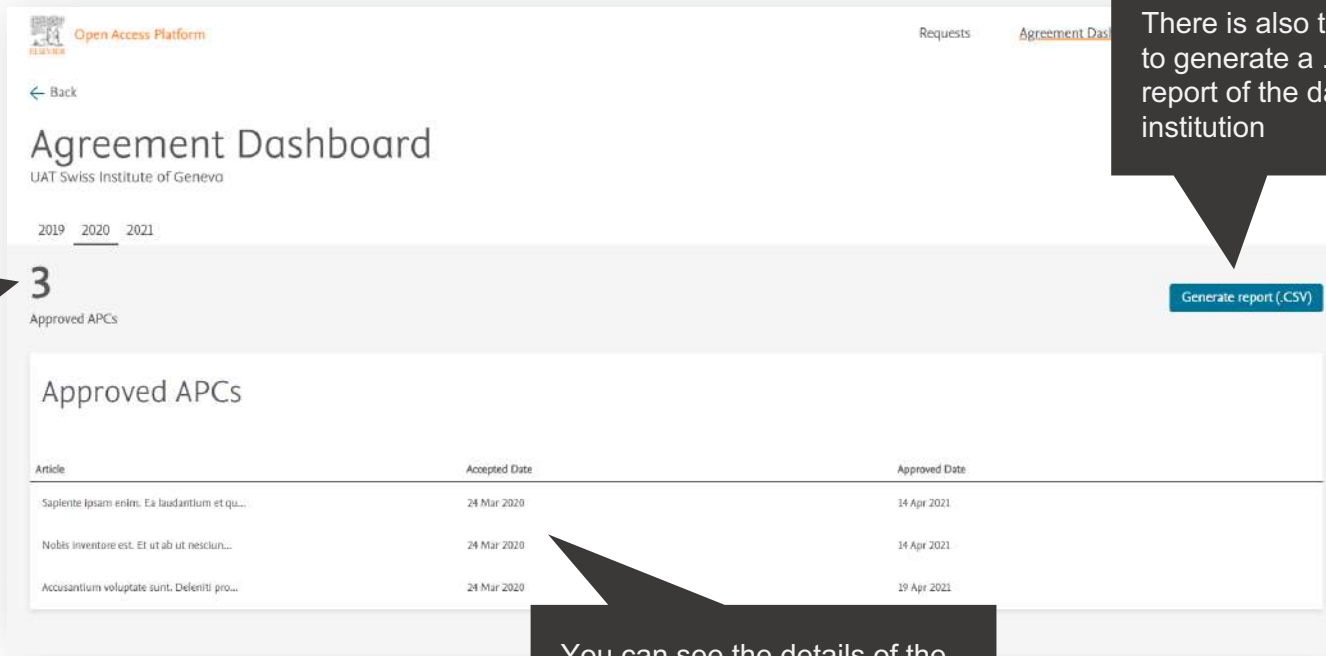
Periods will be determined by agreement (normally years)

A list of participating institutions under the agreement will be shown. Clicking on the institute's name will take you the institution view (next page)

The number of approved APCs at each participating institution will be shown

Institution view

View the APC uptake and usage per institution.



Open Access Platform

Requests Agreement Dashboard

← Back

Agreement Dashboard

UAT Swiss Institute of Geneva

2019 **2020** 2021

3
Approved APCs

[Generate report \(.CSV\)](#)

Approved APCs

Article	Accepted Date	Approved Date
Sapiente ipsam eorum. Ea laudantium et qu...	24 Mar 2020	14 Apr 2021
Nobis inventore est. Et ut ab ut nesciunt...	24 Mar 2020	14 Apr 2021
Accusantium voluptate sunt. Deleniti pro...	24 Mar 2020	19 Apr 2021

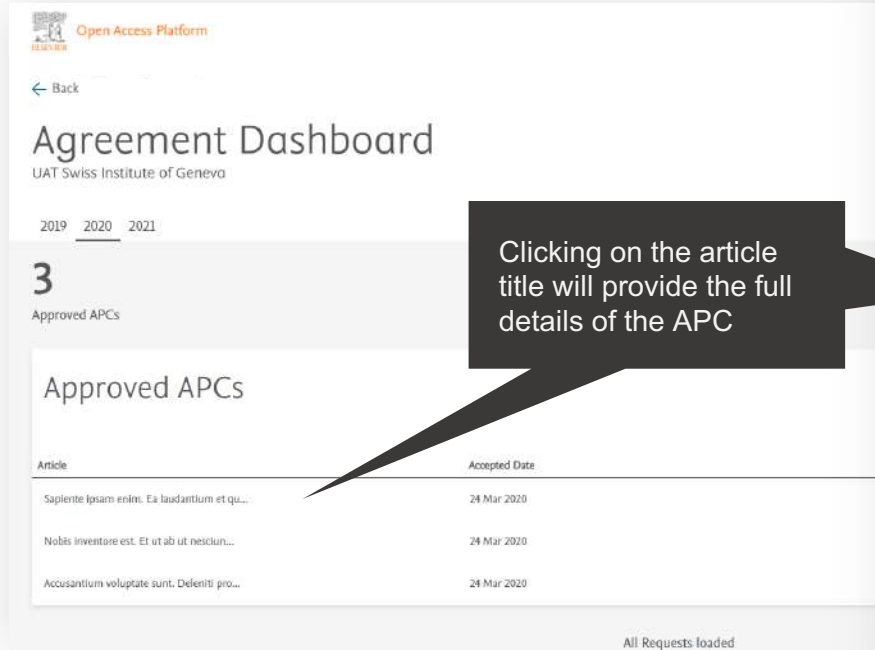
Number of approved APCs for the institution

There is also the option to generate a .CSV report of the data at the institution

You can see the details of the approved APCs at the individual institute

Institution view

View the APC uptake and usage per institution.



Open Access Platform

← Back

Agreement Dashboard

UAT Swiss Institute of Geneva

2019 2020 2021

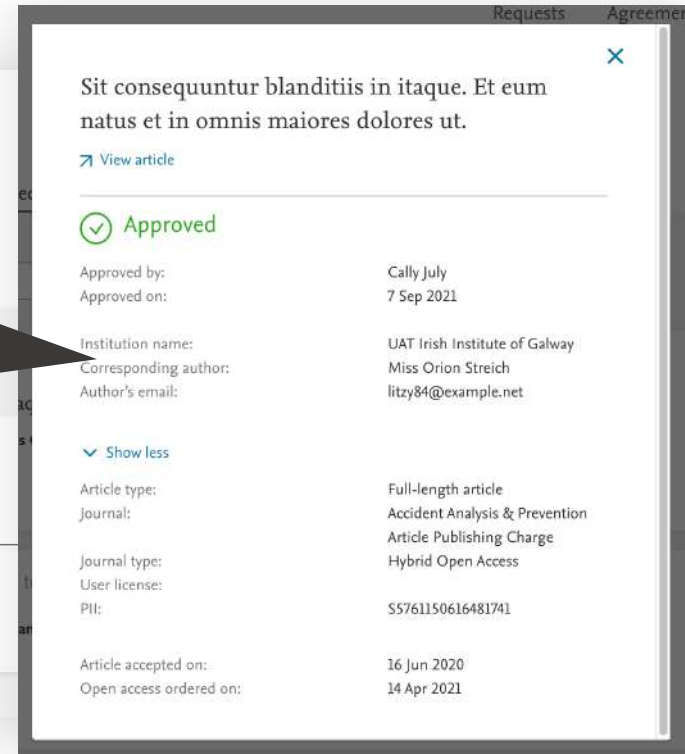
3
Approved APCs

Approved APCs

Article	Accepted Date
Sapiente ipsam enim. Ea laudantium et qu...	24 Mar 2020
Nobis inventore est. Et ut ab ut neclud...	24 Mar 2020
Accusantium voluptate sunt. Deleniti pro...	24 Mar 2020

All Requests loaded

Clicking on the article title will provide the full details of the APC



Sit consequuntur blanditiis in itaque. Et eum natus et in omnis maiores dolores ut.

[View article](#)

✓ **Approved**

Approved by: Cally July
Approved on: 7 Sep 2021

Institution name: UAT Irish Institute of Galway
Corresponding author: Miss Orion Streich
Author's email: litzy84@example.net

[Show less](#)

Article type: Full-length article
Journal: Accident Analysis & Prevention
Journal type: Hybrid Open Access
User license:
PII: S5761150616481741

Article accepted on: 16 Jun 2020
Open access ordered on: 14 Apr 2021



Thank you

