

Agenda

WOAD Dashboard for Administrators and the management of OA requests

Author Workflow for Open Access Journals

Recap of the Author Workflow for Hybrid Journals

Resources for Librarians and Authors



WOADD Dashboard



-Your Wiley Open Access Account Administrator Dashboard

- Accessing the account view
- Reviewing, approving, and denying requests for funds for fully open access and hybrid journals
- Running reports
- Adjusting settings for email communications and alerts

- -Resources
- -Q&A



Wiley Open Access Accounts

Your Wiley Open Access Account makes it easier for authors to publish open access

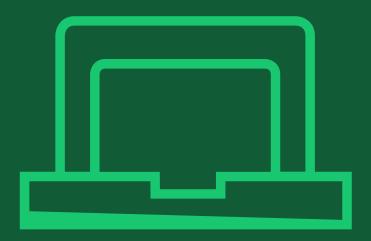
Authors affiliated with your institution(s) can publish research open access at no additional charge in two ways, depending on the setup of your agreement:

- 1. In Wiley's hybrid journals
- 2. In Wiley's fully open access journals

Hybrid and Gold article caps.

Starting Jan 1st 2025.





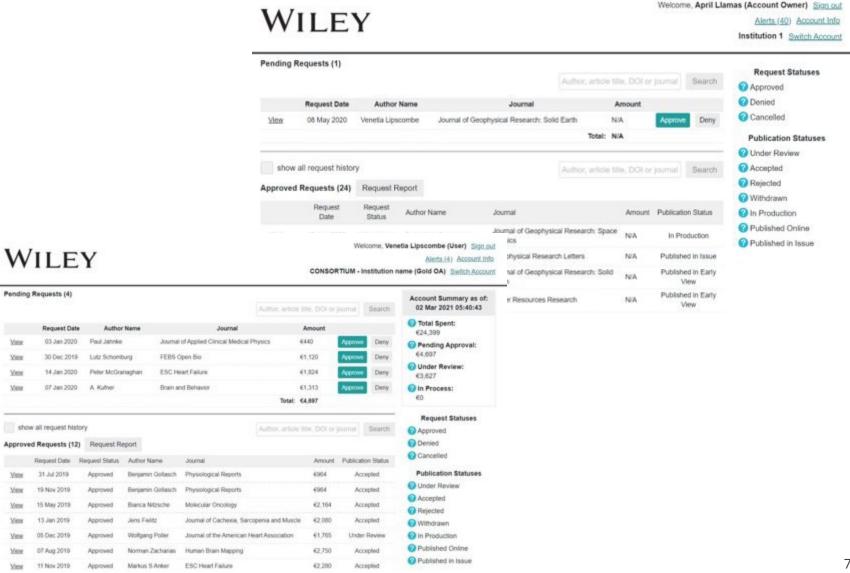
Your Wiley Open Access Account Dashboard

Manage your account easily and efficiently

Wiley Open Access Account Dashboard

Manage Your Account

- View and approve OA or hybrid payment requests
- Monitor your account's usage through real-time reporting
- Search articles by different criteria (DOI, author, article, journal, account name...)





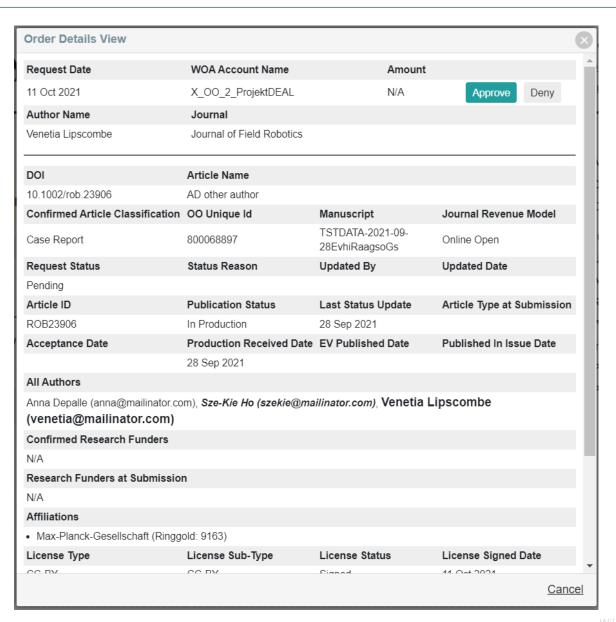
Wiley Open Access Dashboard

View requests

You can view details of each request, including account name (new), date of request, author name(s), funding sources, article/journal title.

The Responsible Corresponding Author will be in bold and one text size larger.

The Corresponding Author (s) will be in bold, italic and one text size smaller.



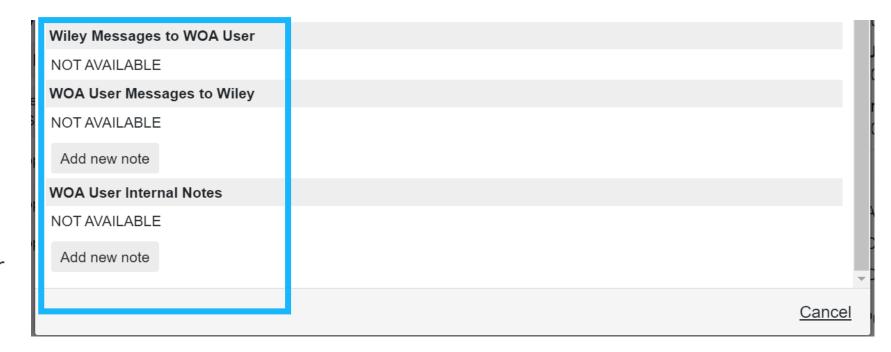


Wiley Open Access Dashboard

Add notes

You can add notes to open and approved requests to communicate with other administrators or the Wiley team.

Administrators can add internal notes to any article, and these notes will not trigger a customer support task.





Wiley Open Access Account Dashboard

Real-time reporting

- Generate detailed reports on your account's activity.
- Receive reports in your inbox by your preferred time range and get information on the author, article, and licensing type.
- Sign up to receive monthly or quarterly reports via email.

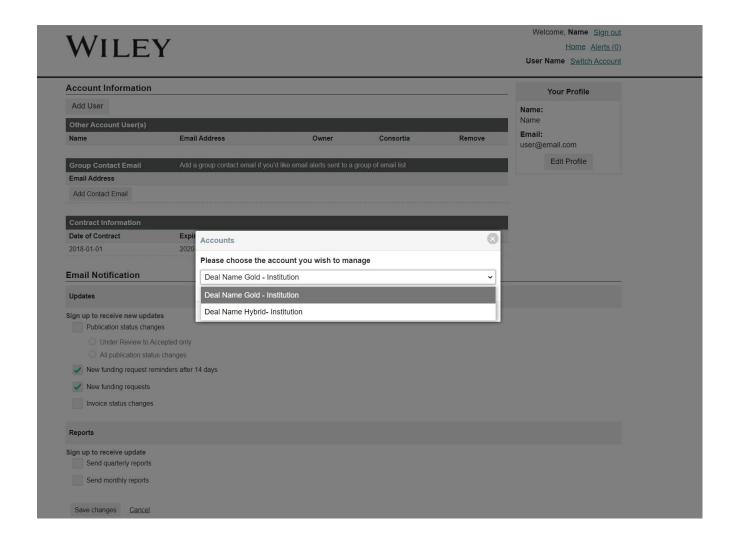




Wiley Open Access Accounts: Gold and Hybrid

Switching Accounts

- There will be two different accounts: One for hybrid journal requests and one for gold journal requests.
- It's easy to switch accounts.





Banner Alert

- A yellow banner will appear on all dashboard pages
- The text informs users about the updated tooltips
- This banner is temporary and will be removed a short time after the release



Welcome, Venetia Lipscombe (ADM

Account Info Co

Request Sta

? Pending? Approved? Funding Conf? Denied

No Funding P

Publication S

? Under Review
? Accepted
? Rejected
? Withdrawn
? In Production
? Published in I
? Published in I

DEFUNCT - Account Justice SIT CY23 - Akita Daigaku Switch Account Manage



Updates

With the recent WOAD release, please review the updated tooltips.

Pending Requests (15)

				Author	, article title, DOI,	journal or manus	script ID	Search
	Request Date	RCA Name	Journal	Amount	Journal Revenue Model	Publication Status		
<u>View</u>	28 Apr 2025	Dulshan Alahakoon	Cancer Medicine	N/A	Open Access	In Production	Approve	Deny
<u>View</u>	25 Apr 2025	Siarra Collier	Cancer Medicine	N/A	Open Access	In Production	Approve	Deny
<u>View</u>	25 Apr 2025	Dulshan Alahakoon	Cancer Medicine	N/A	Open Access	In Production	Approve	Deny
<u>View</u>	24 Apr 2025	Eleanor Dohner	Journal of Diabetes Investigation	N/A	Open Access	Under Review	Approve	Deny
<u>View</u>	24 Apr 2025	Eleanor Dohner	Journal of Diabetes Investigation	N/A	Open Access	Under Review	Approve	Deny
<u>View</u>	24 Apr 2025	Minidu Lankeshwara	Cancer Medicine	N/A	Open Access	In Production	Approve	Deny
<u>View</u>	23 Apr 2025	John Chipperfield	Cancer Medicine	N/A	Open Access	In Production	Approve	Deny
1/1000	22 Apr 2025	Luctin Marc	Journal of Cachexia,	NI/A	Open Access	Under Deview	A 22 22 22 22 22 22 22 22 22 22 22 22 22	Danie

Request Statuses and Publication Statuses changes

There is one new request status:

Funding Confirmed – this indicates that the request has deducted from available balance (less relevant for DEAL)

There are two new tooltips:

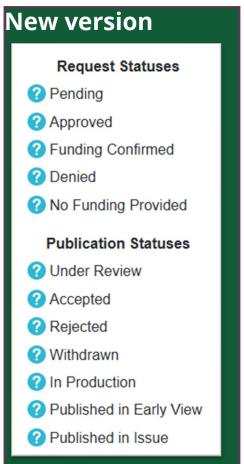
Funding Confirmed - new status, new tooltip Pending - existing status, new tooltip

There are two changed statuses and tooltips:

Cancelled *becomes* No Funding Provided
Published Online *becomes* Published in Early View

Existing funding requests will be updated with the changed statuses.

Request Statuses Approved Denied Cancelled **Publication Statuses** Under Review Accepted Rejected Withdrawn In Production Published Online Published in Issue



Tooltips changes for Account Summary & Request statuses

Account Summary (only changes to "Under Review" tooltip, others remain the same)

- Under Review (changed)
 - o "Total charges for articles for which funding requests have been approved but articles have not yet been accepted and therefore have not been deducted from the available balance."

Request Statuses

- Pending (New tooltip)
 - "The funding request for this article is waiting to be approved or denied."
- Approved
 - o "The funding request for this article has been approved and will be deducted from the available balance after editorial acceptance, if balance is available."
- Funding Confirmed (New)
 - o ""The funding request for this article has been approved and has been deducted from the available balance."
- Denied
 - "The funding request for this article has been denied."
- No Funding Provided (was Cancelled)
 - "The funding request for this article has been cancelled. It will not be charged to the account balance. Funding request cancellation can occur when a gold open access article is not accepted for publication, when an article is rejected by the system due to lack of available balance or when an author updates their metadata such that an existing funding request is no longer valid."

<u>Publication Statuses</u> - No changes to tooltips in this section.



- **? Total Spent:** £11,282
- **? Pending Approval:** £11,671.50
- **?** Under Review: £2,057

Request Statuses

- Pending
- Approved
- Funding Confirmed
- Openied
- No Funding Provided

Publication Statuses

- Under Review
- Accepted
- Rejected
- Withdrawn
- In Production
- Published in Early View
- Published in Issue

Funding request status flow

Pending > Approved > Funding Confirmed

 Approved requests move to "Funding Confirmed" once the article has deducted from balance in our financial systems.

Pending > Denied

- Denied requests will stay as "Denied" instead of moving to "No Funding Provided" (Cancelled).
- Note: This may cause confusion when filtering and reviewing historical data, as there will be two distinct sets of behaviors: prerelease and post-release.

Pending > No Funding Provided

• Requests move to "No Funding Provided" when cancelled e.g. article rejection, withdrawal, request moved to a different account.

New version Request Statuses Pending Approved Funding Confirmed Denied No Funding Provided **Publication Statuses** Under Review Accepted Rejected Withdrawn In Production Published in Early View Published in Issue

'No Funding Provided' Status Reasons

When the 'Request Status' indicates 'No Funding Provided', if available the 'Status Reason' will be displayed in the 'Order Details View'.

DOI	Article Name		
10.1002/cam4.75850	GOA Articles - 041505		
Confirmed Article Classification	OO Unique Id	Manuscript	Journal Revenue Model
Research Article	0	TSTDATA-2025-04- 15UbQqkbKHKWgU	Open Access
Request Status	Status Reason	Updated By	Updated Date
No Funding Provided	WOA Account Code Changed from B69A to NIHO	System User	23 Apr 2025
Article ID	Publication Status	Last Status Update	Article Type at Submission
CAM475850	In Production	15 Apr 2025	Original Research

DOI	Article Name			
	VK Manuscript Title oxidative stability			
Confirmed Article Classification	OO Unique Id	Manuscript	Journal Revenue Model	
	0	1011173	Open Access	
Request Status	Status Reason	Updated By	Updated Date	
No Funding Provided	Article rejected	System User	28 Apr 2025	
Article ID	Publication Status	Last Status Update	Article Type at Submission	
	Rejected		Research Article	
Acceptance Date	Production Received Date	EV Published Date	Published In Issue Date	

Here are some Status Reasons that may appear, along with their meanings:

WOA Account Code Changed from xxxx to xxxx

Request has been moved to a different account by the system due to a change in eligibility.

Article withdrawn

The article was withdrawn, likely at the author's request.

Article rejected

The article was editorially rejected.

Free text

Text added by Customer Support when manually cancelling a request (could include case numbers).



Reporting changes

We have added a new column to WOA reports called the "**Funds Assigned Date**". This is the date when the article was deducted from the available balance of the agreement (less relevant for DEAL).

The date will not be added to existing funding requests. It will only start to be filled with data after the release.

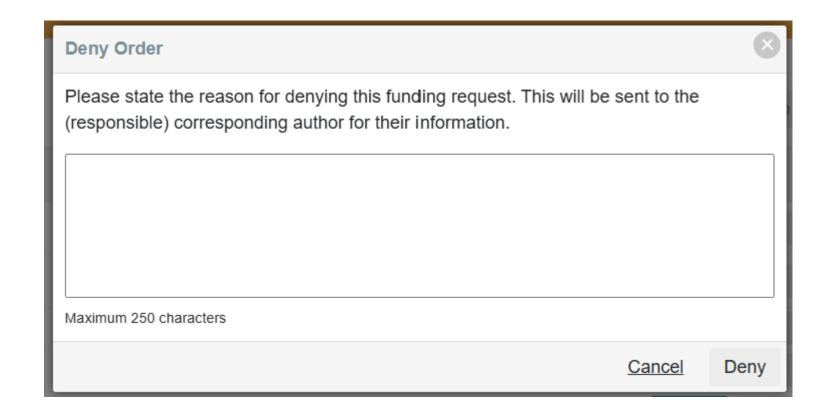
F	G	Н	1	J
Request approved date	Amount Charged	Full APC	Discount	Funds assigned date
7-May-2025				7-May-2025
6-May-2025				
1-May-2025				
1-May-2025				1-May-2025

D	E	F	G	Н	
Request approved date	Full APC	Discount	Funds assigned date	Amount Charged	Pı
	4700	0		4700	w
8-Apr-2025			8-Apr-2025		
	4700	0	•	4700	W
8-Apr-2025					
	1500	0		1500	W
4-Apr-2025			4-Apr-2025		
4-Apr-2025	1500	0		1500	W



Deny Decision - Pop Up Box Text

- When a Customer Admin denies a funding request, a pop-up text box appears, allowing them to provide a reason for the denial.
- Previously this denial reason was only sent to authors for accepted articles – this will change so denial reasons are always sent.
- The content in this box has been revised to explain this.







Resources

For administrator and authors

Wiley Open Access Accounts

Training Resources

For Administrators:

- Welcome Packet (email)
- Training Hub
- Open Access for Librarians
- Funder Agreement

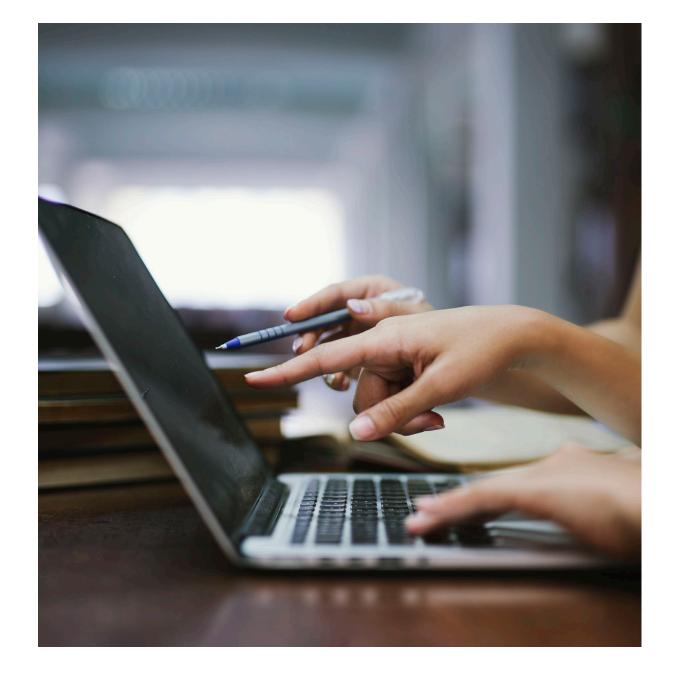
For Authors:

- Open Access Resources for Researchers
- Author Compliance Tool
- Author Services website
- Affiliation Policy and Payment
 Info for Authors



Demo of Dashboard

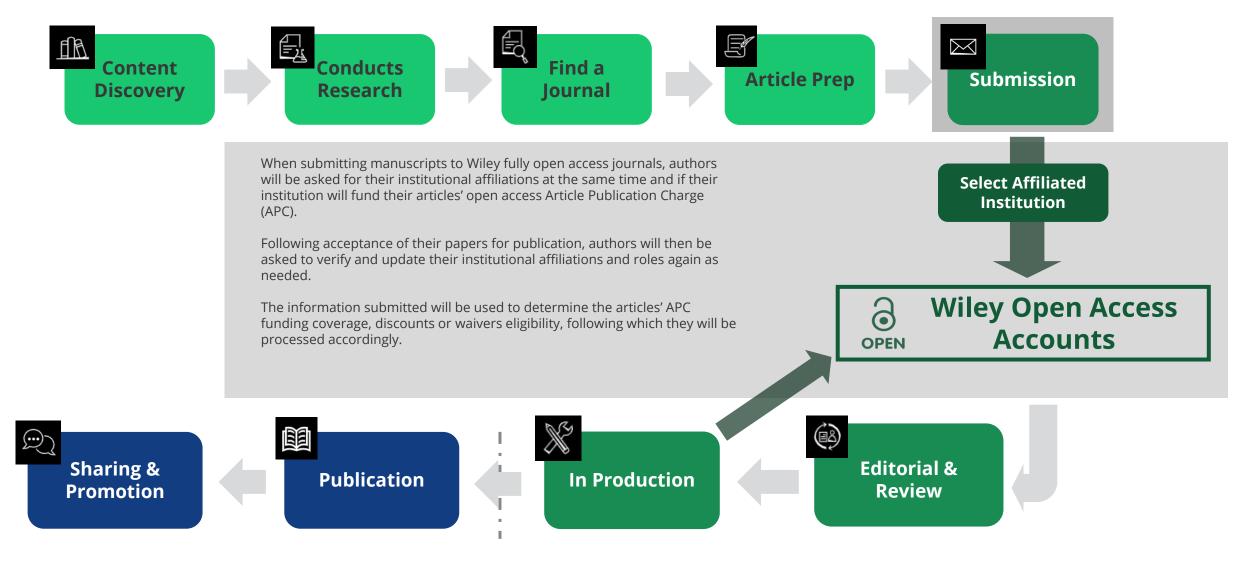
by Fabio diBello



Authors'
Workflow for
Open Access
Journals



Author Journey for Wiley Fully Open Access Journals







Step 1:

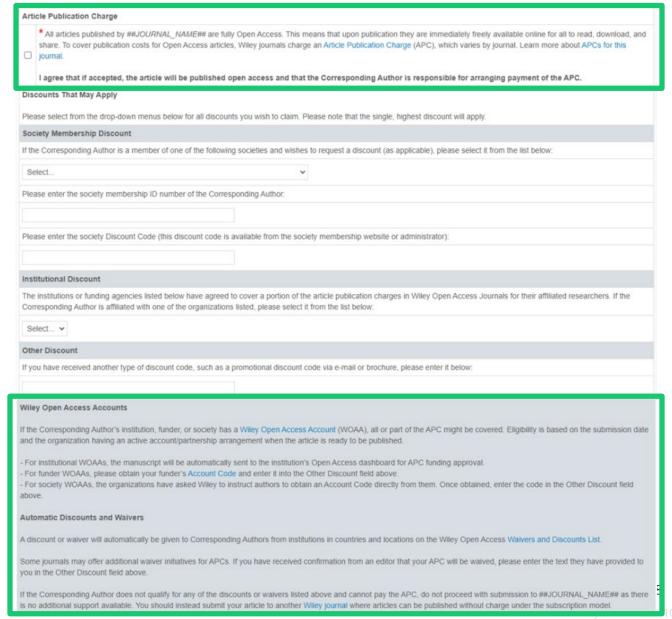
Author submits manuscript to Fully Open Access Journal

Submission to Open Access Journals

Institutional Affiliations

In Wiley fully open access journals, authors must agree that they are responsible for arranging payment of APC.

For authors seeking to apply for APC funding coverage under their institutions' Wiley Open Access Accounts, they need to ensure they state their affiliation to their institution in their submissions and their eligibility will be based on this provided information.





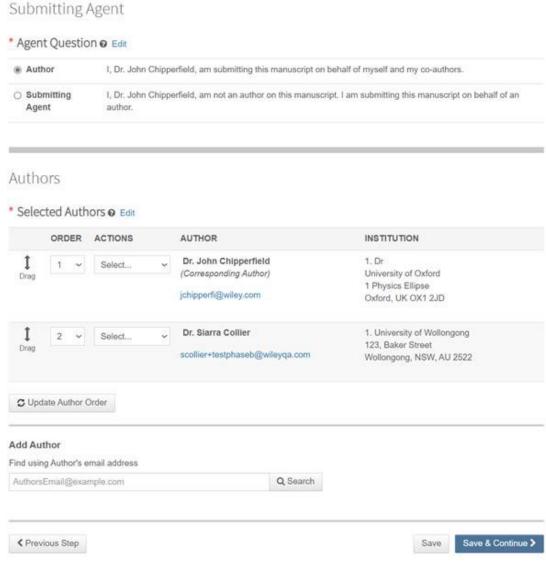
Submission to Open Access Journals

Institutional Affiliations

When entering author information in submissions, authors can key in their affiliated institutions and choose the best match from the suggestions given by the system.

This information can be updated when the paper has been accepted for publication. Authors will be invited into the dashboard again to verify if the information is up-to-date.



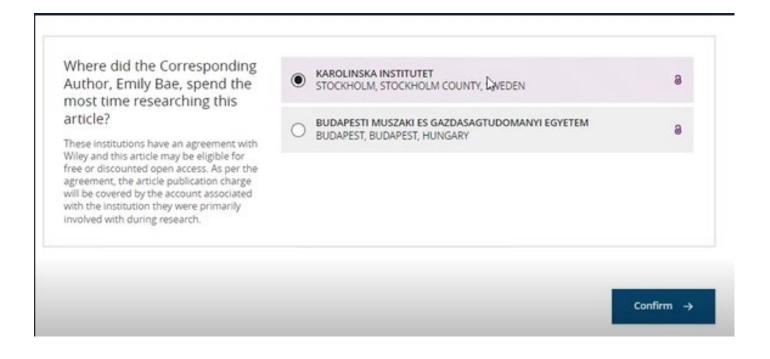




Multiple Affiliations

Reconfirming Institutional Affiliations and Other Information

• In the case of multiple eligible full coverage affiliations, ReX asks at which affiliation the CA spent the most time researching.







Author E-Mails Pre- Acceptance

Authors will receive multiple notifications when submitting to a Fully Open Access journal.

Funding Request sent to Institution (New)

Request sent

Authors will receive an email when they have triggered eligibility for their APC to be covered for a gold OA manuscript at submission, and when a request for funding has been sent to their institution, funder or society.

From: accountdashboardsupport@wiley.com

Subject: Your open access funding request

Body:

Dear < Author Name>,

I am writing to confirm that, based on the information you have provided during submission, a request has been sent to your institution, funder or society for conditional approval to pay the article publication charge for the following manuscript submitted to <Journal Title>.

Your funding request must be conditionally approved, and your institution or funder must have sufficient funds or article allocations when your article is editorially accepted and an OA license is signed, to pay the article publication charge.

Article Title: <Article Title>

Manuscript ID: <Manuscript ID>

Institution/Funder Name: <Institution Name> Funder Grant Number Provided: <Grant ID>

You may be contacted by your institution or funder with more details about your request.

Following conditional approval or denial of the request you will receive a further email notification of the decision and any further action required regarding the article publication charge.

If you have questions about the status of your manuscript, please contact the <Journal Title> Editorial Office at <Editorial Office Email>.

Thank you for submitting your manuscript to <Journal Title>.

Sincerely,

Wiley Open Access



Funding Request Approval (New)

Request Approval

Authors will receive an email, if their gold OA funding request has been approved by their institution, funder or society while the manuscript is still under editorial review. From: no-reply@wiley.com

Subject: Your open access funding request has been approved

Body:

Dear < Author Name >,

I am writing with an update on the request made to your institution, funder, or society to pay the article publication charge for the following manuscript submitted to <Journal Title>.

Your funding request has been approved.

If your manuscript is accepted for publication in <Journal Title>, you will not personally be asked by Wiley to pay the article publication charge.*

Article Title: <Article Title>

Manuscript ID: <Manuscript ID>

Institution/Funder Name: <Institution Name>

Funder Grant Number Provided: <Grant ID>

If you have questions about the status of your manuscript, please contact the <Journal Title> Editorial Office at <Editorial Office Email>.

Thank you for submitting your manuscript to <Journal Title>.

Sincerely,

Wiley Open Access

*Some Wiley DEAL institutional funding policies may differ for fully Gold Open Access journals. Please check with your library for any exceptions.



Funding Request Denial by Institution (New)

Request Denial

This e-mail will be sent to authors if their gold OA funding request has been denied by their institution, funder or society while the manuscript is still under editorial review. If a denial reason has been entered by the institution's admin, this will be included in this e-mail.

From: accountdashboardsupport@wiley.com

Subject: Your open access funding request has been denied

Body:

Dear < Author Name >,

I am writing with an update on the request made to your institution, funder or society to pay the article publication charge for the following manuscript submitted to <Journal Title>.

Your funding request has been denied. Denial reason (if provided by your institution, funder or society): <Denial Reason>

You will shortly receive a further notification email with details of the next steps regarding the article publication charge for your manuscript.

Article Title: <Article Title>

Manuscript ID: <Manuscript ID>

Institution/Funder Name: <Institution Name>
Funder Grant Number Provided: <Grant ID>

If you have questions about the status of your manuscript, please contact the <Journal Title> Editorial Office at <Editorial Office Email>.

Thank you for submitting your manuscript to <Journal Title>.

Sincerely,

Wiley Open Access





Step 2:

Post-acceptance, authors need to sign into the Author Dashboard to confirm author details

Invitation E-Mail to Author Services

Invitation E-Mail

This email is sent to the Responsible Corresponding Author when their article has been accepted for publication. The email asks the author to log into Author Services to confirm the authors on the article.

From: cs-author@wiley.com

Subject: ACTION REQUIRED: Confirm Corresponding Author(s) for <Article Title>

Body:

Dear <Author Name>,
Article ID: <Article AID>
Article DOI: <Article DOI>
Internal Article ID: <Article ID>

Article: <Article Title>
Journal: <Journal Title>

Congratulations on the acceptance of your article for publication in <Journal Title>.

In order to publish your article, we need you to log in to Author Services and confirm the article's author list.

Please click below to log in - if you are using a different email address to <Author Email>, you will need to manually assign this article to your Dashboard (see How do I assign a missing article to My Dashboard?):

Wiley has a new, unified log in process with CONNECT to streamline the author experience across all of its platforms. When you click on your invitation link, you will be redirected to log in through the new CONNECT portal before going back to manage your article.

<Login Link>

Once you confirm the author list, the responsible corresponding author will be able to complete the following actions:

Sign your license agreement (REQUIRED) -- you will receive an email when this task is ready on your dashboard.

Track your article's progress to publication

Make your article open access. Your institution or funder may help you publish your article open access, making it immediately and freely available to read, download, and share. Learn more here.

Access your published article

If you need any assistance, please click here to view our Help section.

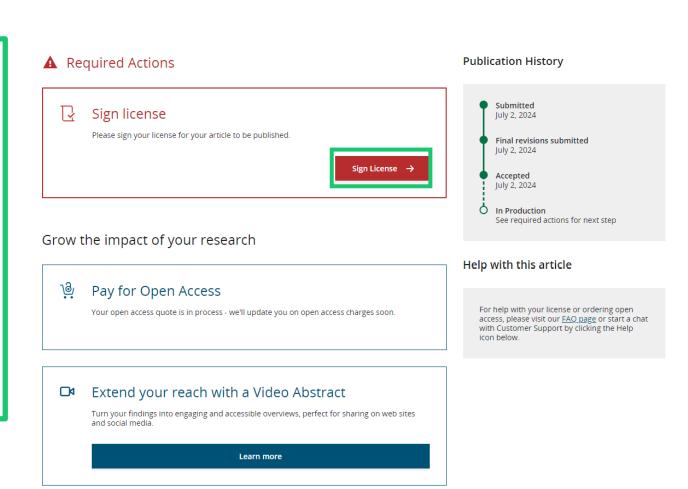
Sincerely,



Author Services - Manage Article

Author Services Manage Article screen

- Authors are invited to Author Services when their article has been accepted by a journal.
- Any articles requiring actions will be automatically featured on the top of their dashboard
- 'Manage article' button takes to this screen
- 'Sign License' kicks off the process





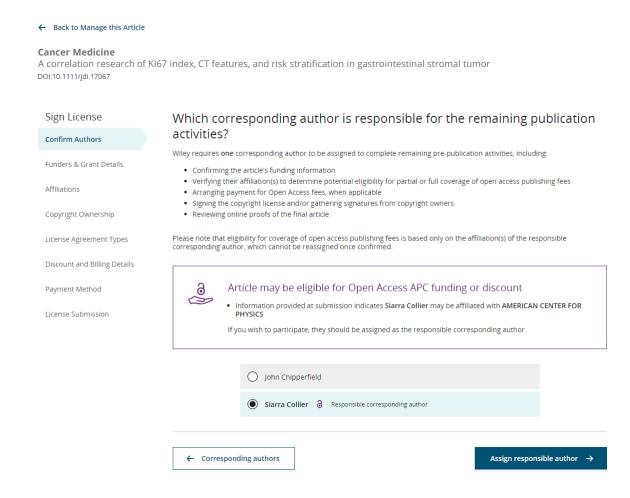


Updating Author Roles

Changing Author Roles

Authors will be asked to vet through all of the authors listed on the article and confirm their details and roles.

If there is a change in corresponding author roles and corresponding institutional information, the information may be used to reprocess the article's APC funding coverage application or available discounts or waivers, where applicable.





Updating Author Information, Institutional Affiliations

Reconfirming Institutional Affiliations and Other Information

Authors will be asked to reconfirm their institutional affiliation or any other information provided for when they first submitted their manuscript.

If there are any changes at this stage, the information provided will be used to recalibrate any APC funding coverage application, discounts or waivers applied for previously.

Test Research Open Access Test Article

DOI:10.1002/as0x.30027

Sign License

Funders & Grant Details 🗸

Affiliations

Copyright Ownership

License Agreement Types

License Submission

Please confirm your affiliations for this article

Please add your primary affiliation with the institution where the research for this article was conducted.

Correctly declaring your affiliations helps us determine if your institution can cover your open access Article Publication Charge (AP.C.). This will not affect any information in the published article.

- · Do not include any of your co-authors' affiliations
- When searching for your affiliation, select your institution only; do not include a department, office, or other subdivision (e.g., enter "University of Oxford" and not "University of Oxford Department of Economics")

Verified ✔ ⑨

Max-Planck-Gesellschaft MUNICH, BAVARIA, DE

m

n Delete

+ Add affiliation

Help with affiliations

- What does it mean if my institution is "not verified"?
- > What if my department is not
- What if my organization is not
- > Should I list the affiliations of my coauthors?
- What if I changed or moved organizations?
- What if my institution is listed, but its name or location is incorrect?

<u>Please let us know</u> if you cannot find your organization or there are errors with the displayed information.





Step 3:

License Submission with CC BY mandate*

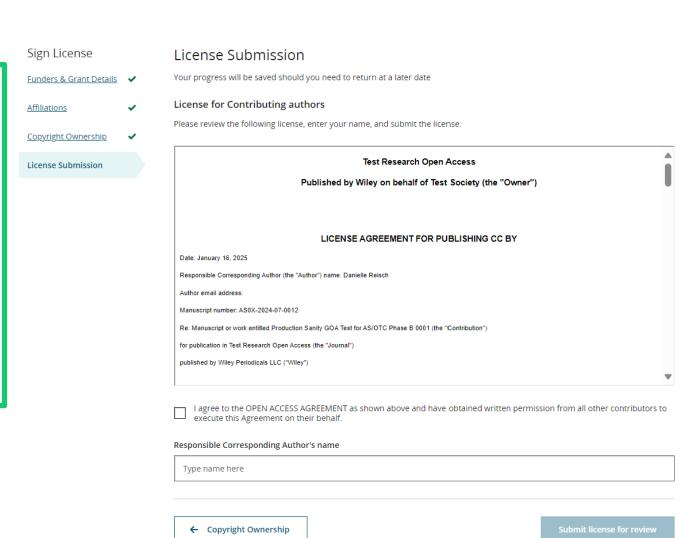
^{*}since January 2025

License Submission

Sign & Submit

The next step is license signing.

The responsible corresponding author will need to sign the Creative Commons license for the article to complete the administrative steps required.







License Confirmation



WILEY Home My Dashboard Authors - Reviewers - Editors - Help -





Back to Manage this Article

Your license has been successfully submitted

You will be able to download the license from your dashboard.

Article details:

Cancer Medicine

Test Fully Gold OA Article

DOI:10.1002/cam4.28492

Help us improve your experience

Indicate your agreement with the following statement:

"It was easy and straightforward to sign the copyright license or open access agreement for my journal article."

- O Strongly disagree
- Disagree
- O Neither agree nor disagree
- Agree
- O Strongly agree

Please add any comments below to expand on your reply.



SUBMIT





Step 4:

Author notified of APC funding approval

Request Approval (post-acceptance)

Request Approval

Authors will receive this email after their article has been accepted for publication, their funding request has been approved AND once the article APC or allocation has been deducted from their institution's available balance. If this email is sent it means the author has been funded under their institution's agreement.

From: no-reply@wiley.com Subject: Your open access funding request has been approved

Body:

Dear < Author Name >,

I am writing with an update on the request made to your institution, funder or society to pay the article publication charge for the following article submitted to <Journal Title>.

Your funding request has been approved.

Your article will be published open access as per the agreement between <Institution Name> and Wiley.*

Article Title: <Article Title>

Manuscript ID: <Manuscript ID> Article DH ID: <Article DH ID>

Article DOI: <Article DOI>

Institution/Funder Name: <Institution Name>

Sincerely,

Wiley Open Access

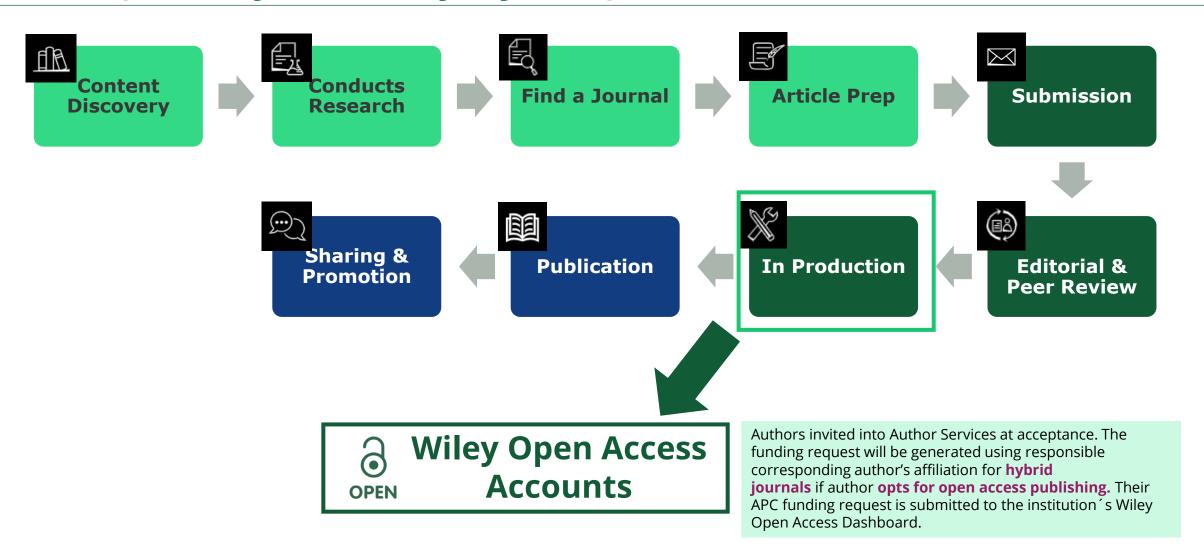
*Some Wiley DEAL institutional funding policies may differ for fully Gold Open Access journals. Please check with your library for any exceptions.



Authors'
Workflow for
Hybrid Journals



Author Journey for Wiley Hybrid Journals





Overview of the Author Workflow for Hybrid Journals

- Authors conduct research and prepare their articles.
- Submit the article for editorial and peer review.
- Receive an invitation to publish open access upon acceptance.
- Manage the article and confirm authors and their roles.
- Provide funder and grant details for funding requests.
- Confirm institutional affiliations to establish eligibility.
- Select copyright ownership and submit the license for publishing.





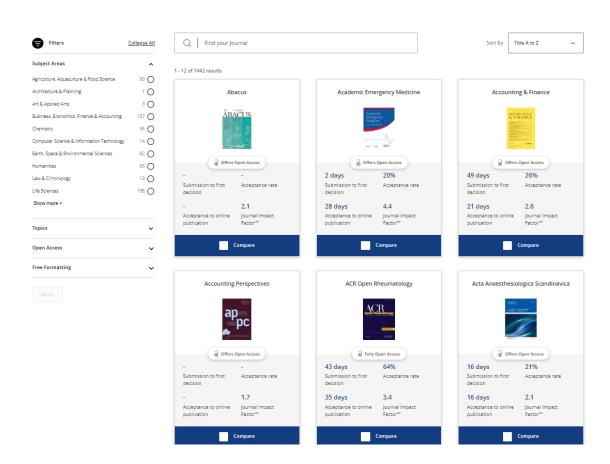
Resources

For librarians and authors

Wiley's Journal Finder

Find the right journal to publish with Wiley:

- Search directly across Wiley's journals or filter down to your areas of interest.
- Review titles side-by-side to compare editorial and publishing times, key journal metrics and policies.
- Easy access to the relevant journal author guidelines or submission site.
- Or simply click through to the journal homepage to discover the latest content.



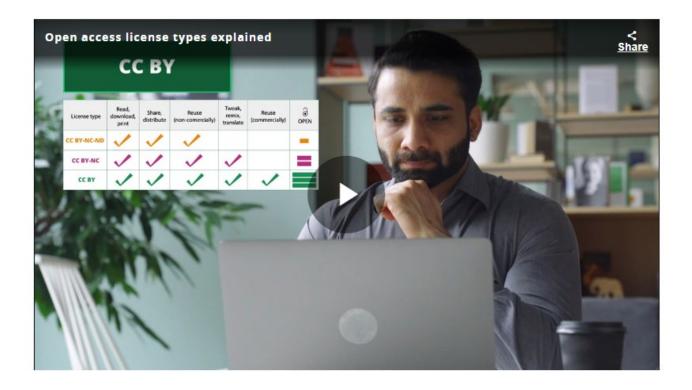


Support authors to learn about licensing and copyright

Visit our <u>support page</u> to find out about our standard Author Agreements, and an explanation video about different CC-BY Licenses.

Creative Commons Licenses for Open Access Articles

All of Wiley's fully open access journals and most* of Wiley's subscription journals with the open access option publish open access articles under a Creative Commons license. With Creative Commons licenses, the Author or, if applicable, the Author's Employer retains copyright and the public is allowed to reuse the content in accordance with the Creative Commons license. The copyright owner grants Wiley a license to publish the article and to identify as the original publisher.





Your Support Lines @Wiley

Which team should you send your questions to?

- Regarding individual articles: <u>accountdashboardsupport@wiley.com</u>
- Wiley Open Access Account (WOAA) account-level issues: accountdashboard@wiley.com
- Access to content, such as new IP addresses or access to statistics: <u>EAL@wiley.com</u>
- Related to APCs, referral prices: <u>authorservicesoperations@wiley.com</u>
- Contact for authors: <u>cs-openaccess@wiley.com</u>

Ideally, choose only one email address per request.

 Our ticketing system randomly selects one of several email addresses when multiple are included. Your email will therefore not be sent to multiple recipients as expected. Since this is automated, it may not go to the correct responsible party. This can lead to delays in response.



ENABLING DISCOVERY | POWERING EDUCATION | SHAPING WORKFORCES



Thank You!