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Oable Administration and Wiley Journals' Author Workflows

CARE-CRUI Transformative Agreement

July 2024

Fabio Di Bello
Senior Customer Training Manager

Graham Woodward
Customer Success Director

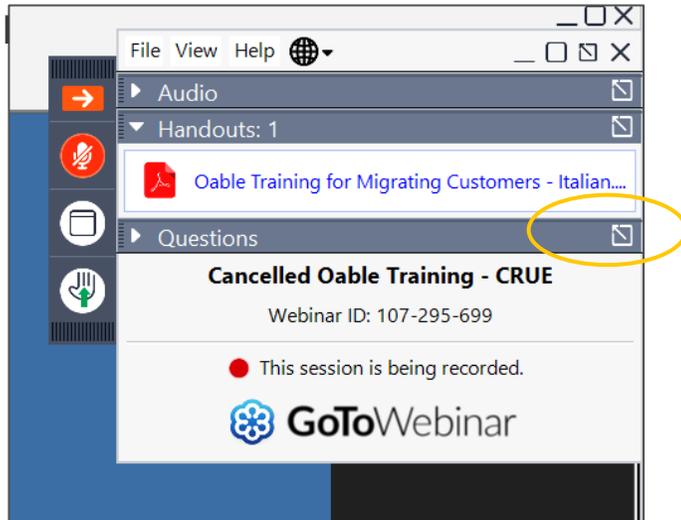
Using GoToWebinar

Ask questions

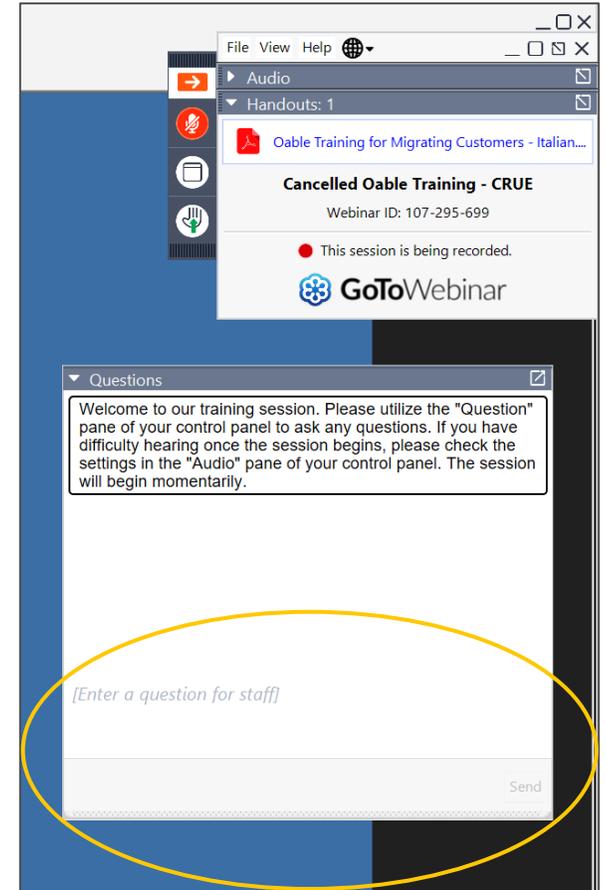
1. Click on the arrow in the upper right corner.



2. Click on the small box with the arrow in the Questions bar.



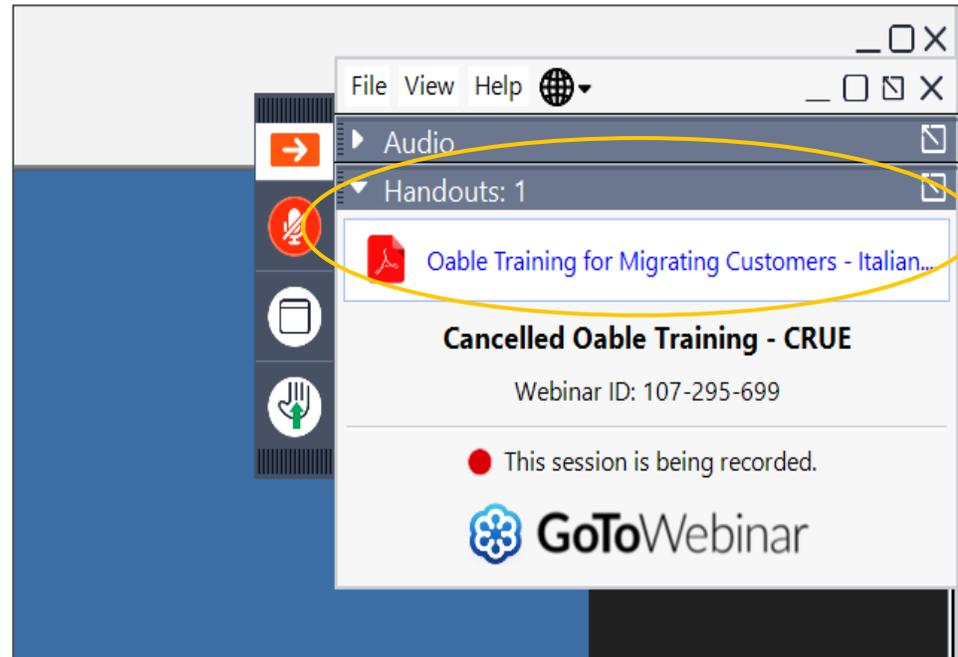
3. The Questions box pops out. Type your question and click send.



Using GoToWebinar

- Download the slides and/or handouts

Click on the link in the handouts section.



An email with a certificate of attendance and a link to the recording of the training will be sent 24 hours after the session.

Agenda

Oable Administrator Dashboard

- Managing your requests
- Running reports
- Managing your agreements
- Communications and preferences

Author Workflow for Wiley Journals

- Wiley hybrid journals
- Wiley fully open access journals

Resources and Next Steps

Wiley-CARE-CRUI Transformational Agreement, 2024-2027

Agreement Specifications

- Includes more than [1,300 hybrid journals](#) and over [500 Wiley gold open access journals](#) for open access publishing
- Eligible [article types](#) include
 - Primary research and review articles, including but not limited to original articles
 - Case studies
 - Reviews
 - Short communications
- Articles also have to be either
 - **Accepted for publication** in a [Wiley hybrid journal](#) from **1 January 2024**
 - **Submitted** to a [Wiley fully open access journal](#) from **1 January 2024**
- Authors will be identified as eligible for APC coverage under this agreement by their **institutional affiliation**

Wiley Open Access Account

Authors affiliated with your institution(s) can publish research open access at no additional charge using Wiley's open access option.

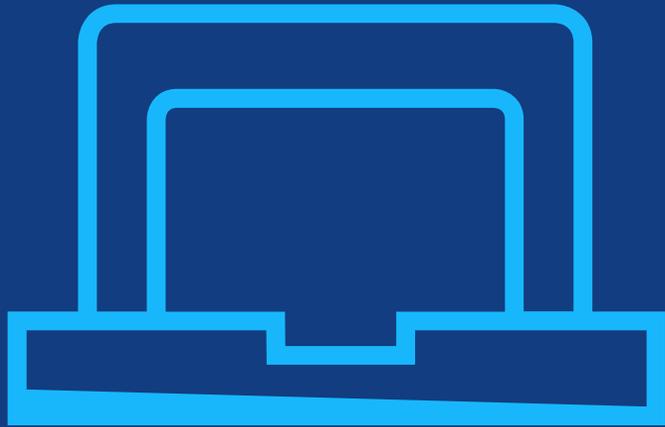
Your Wiley Open Access Account makes it easier for authors to publish open access

Oable: Your Administrator Dashboard

Oable is a Wiley service to approve, pay and manage Open Access agreements and publications.

- ✓ Oable is **publisher-agnostic**.
- ✓ It allows you to manage your Article Processing Charges or Transformational Agreements through **one dashboard**.
- ✓ It helps **transition** your publishing agreements to open access.

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Your Oable Administrator Dashboard

Manage your accounts and OA agreements more efficiently

Oable Dashboard

Managing your requests

- View, approve and deny payment requests
- Visualize requests according to status
- Search articles by different criteria and by publisher

Funding Requests

Ready for processing | Assign agreement | **Ready for approval** (1) | Approved | Denied (4) | Transactions planned (1) | Paid (5) | Cancelled

Search [] Creation Time [] TF [] + Add Filters [] 1 request

This is a Hybrid OA article
ID: cdufb474forfibo0lpg

PUBLISHER NAME Wiley	STATUS ready-for-approval	FEES APC	PUBLICATIONS 1.00	CREATED 2022-06-17
PUBLISHER JOURNAL TYPE	PUBLICATION TYPE Research article	TOTAL	1.00	SUBMITTED 2022-06-01
JOURNAL NAME International Journal for Numerical Methods in Biomedical Engineering	PUBLISHER PUBLICATION TYPE Original article	TRANSACTIONS		ACCEPTED 2022-02-17
JOURNAL ISSNS 2040-7939, 2040-7947	RAW PUBLISHER PUBLICATION TYPE Original Article	FUNDERS		APPROVED
JOURNAL ISSN-L 2040-7939	CURRENCY pub.	ATTACHMENTS		PAID
AGREEMENT NAME Wiley Hybrid Open Access Agreement	LICENCE cc-by			PUBLISHED ONLINE
	EXTERNAL ID			PUBLISHED IN ISSUE
	DOI			

Authors

NAME Max Mosterd	AFFILIATION Knowledge Unlatched (Germany)	ROLE Responsible corresponding author
EMAIL max+researcher@knowledgeunlatched.org	ORG. UNIT CHEM-1	

+ Add Note [] Edit [] + Add Task [] Processed by wilson+testsalescm@knowledgeunlatched.org Claim task: Approve/Deny Request []

My Institution [] 1 request

Oable Dashboard

Managing your requests

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

This info is now clearly featured on the Requests tab and categorized by status.

<input type="checkbox"/>	This is a Hybrid OA article ID: cblotj474forvaf1a17g			
PUBLISHER NAME Wiley ↗	STATUS ready-for-processing	FEES APC	PUBLICATIONS 1.00	CREATED 2022-08-04
PUBLISHER JOURNAL TYPE	PUBLICATION TYPE Research article	TOTAL	1.00	SUBMITTED 2022-06-01
JOURNAL NAME International Journal for Numerical Methods in Biomedical Engineering	PUBLISHER PUBLICATION TYPE Original article	TRANSACTIONS		ACCEPTED 2022-02-17
JOURNAL ISSNS 2040-7939, 2040-7947	RAW PUBLISHER PUBLICATION TYPE Original Article	FUNDERS		APPROVED
JOURNAL ISSN-L 2040-7939	CURRENCY pub.	ATTACHMENTS		PAID
AGREEMENT NAME	LICENCE cc-by			PUBLISHED ONLINE
	EXTERNAL ID			PUBLISHED IN ISSUE
	DOI			
Authors				
NAME Max Mosterd	AFFILIATION Knowledge Unlatched (Germany)	ROLE Responsible corresponding author		
EMAIL max+researcher@knowledgeunlatched.org ↗	ORG. UNIT CHEM-1			

Oable Dashboard

Managing your reports

- Generate detailed reports on your account's activity, for transactions or funding requests.
- Download reports directly as needed or schedule them according to your needs.
- Implement filters to customize your reports by publisher, status or other.

Create Report

General

Report Type

Transactions Report

Funding Requests Report

Transactions Report

Report Period

Last 30 Days

Filters

Scheduling

Run Now **Cancel**

Oable Dashboard

Managing your agreements

- Manage your agreements with multiple publishers in one centralized place
- Ability to edit agreements (based on settings – this may vary)
- Access to history to review changes in agreements over time

oable

Tasks

Requests

Inbox

Agreements

Deposit Accounts

Transactions

Reporting

Agreements

Search

New Agreement

3 agreements

Name ▲	Publisher	Time window	Requests	Newest	Effective	Managed by	Default		
Internal Open Access Fund		2022-01-01 - 2022-12-31	0	v3	v3	Institution	✓		
Wiley Gold Open Access Agreement	Wiley	2022-01-01 - 2023-12-31	0	v1	v1	Institution			
Wiley Hybrid Open Access Agreement	Wiley	2022-01-01 - 2023-12-31	0	v1	v1	Institution			

3 agreements

Oable Dashboard

Communications

Add internal notes to your requests, also visible to other administrators linked to your account.

Access your inbox to communicate externally, with authors, or the support team.

Edit Funding Request

ID: cbloto474forvaf1a180

Generic

Publisher & Journal

Authors

Funders

Pricing

Dates

Attachments

Notes

+ Add Internal Note

Add Internal Note

New Message

To

Start typing to find users or enter an email address

Start typing to find users or enter an email address

Enter your message here

Funding Requests

Start typing to find funding requests

Send



Cancel

Oable Dashboard

Personalize your email settings and easily assign tasks to you or others

Transactional Email Preferences

KU CONNECT

I would like to receive transactional emails from KU Connect

OABLE

I would like to receive the following emails from Oable:

- New funding request(s) is/are ready for processing
- Send notification when publisher added Date of Acceptance
- Send a reminder when my task is awaiting action for more than 14 days

Save

Tasks

My Tasks **2**

Unassigned

Assigned to others

Search in task name, desc

2 tasks

Check right ISSN

ID: 5e18523d-1e12-11ed-a781-7a96e8e8e879, Process: Process Request

CREATED

2022-08-17, 09:52

DUE

2022-08-31, 03:05

CREATOR

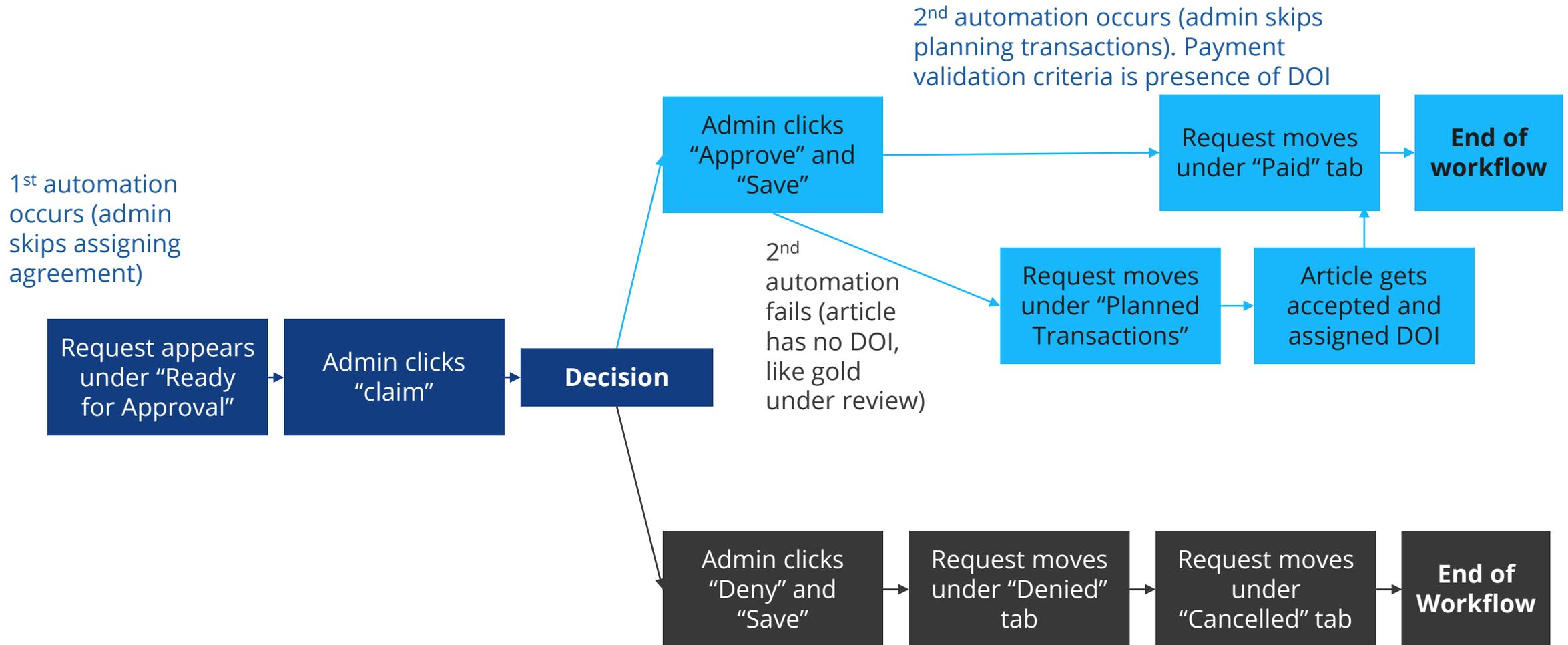
wilson+testsalescsm@knowledgeunlatched.org

DESCRIPTION

Confirm ISSN

Mark as Done

Request Approval Workflow in Oable



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**Oable
Administrator
Dashboard**

Live Demo



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Authors'
Workflows



The Author Workflow in Wiley Open Access Accounts



Open Access (fully gold)

Authors request funding on submission of their manuscript



Wiley Open Access Accounts (using Oable)

Open Access (hybrid)

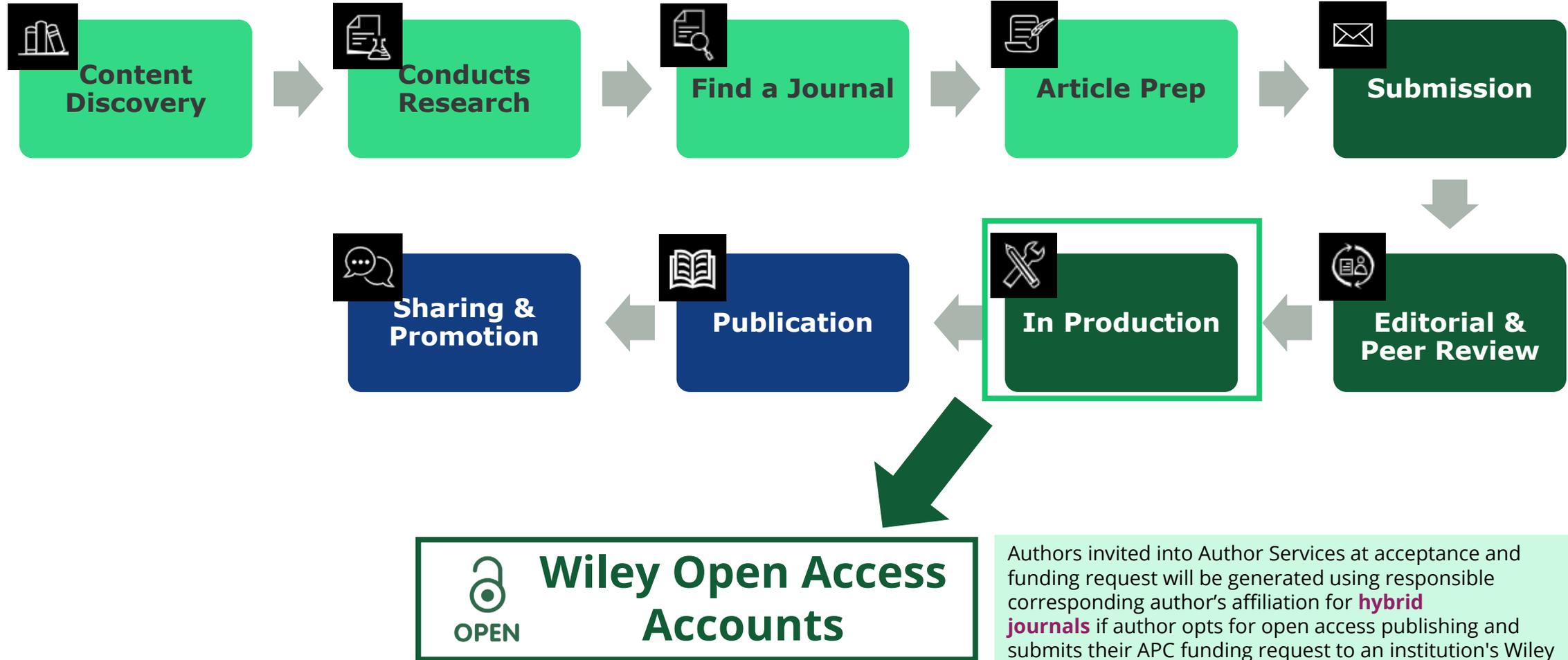
Authors invited into Author Services at acceptance of their manuscript for publication, and a funding request is generated using the responsible corresponding author's affiliation

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Authors' Workflow for Wiley Hybrid Journals



Author Journey for Wiley Hybrid Journals



Invitation Email

Customized Text for CARE CRUI members

Wiley and CARE-CRUI, have an agreement to cover the cost of your open access publishing. Visit our [Institutional & Funder Payments page](#) to find out what type of APC coverage is available from your institution.

In Production: Your article accepted in <journal title>

Dear Author,

Article ID: <article ID>

Article DOI: <DOI>

Journal: <journal title>

Congratulations on the acceptance of your article for publication in <journal title>.

Your article has been received and the production process is now underway. We look forward to working with you and publishing your article. Using Wiley Author Services, you can track your article's progress.

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Please click on the link below to login using <email>:

<https://authorservices.wiley.com/home.html>

If applicable, a list of available actions will appear below – check out your Author Services Dashboard for all actions related to your articles.

Sign your license agreement (REQUIRED)

Track your article's progress to [publication](#)

Submit an [OnlineOpen](#) order to make your article open access. Hint: Your open access publication fees may be covered by your institution or funder. [Learn more.](#)

Access your [published article](#)

Invite your colleagues to view your published [article](#)

If you need any assistance, please click here to view our [Help](#) section.

Sincerely,

Wiley Author Services

Author Services Invitation

Invitation

Authors are invited to Author Services when their article has been accepted by a journal, regardless of institutional affiliation.

To begin the author workflow for the article, they click on the 'Manage article' button.

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Home My Dashboard Authors ▾ Reviewers ▾ Editors ▾ Help ▾



My Articles

Communication History

Order History

My Author Profile

My Articles

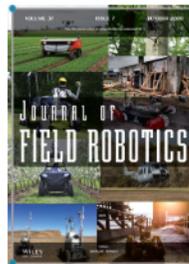
Articles missing?

Filter my articles

35 articles

Filter my articles by title, journal or DOI

Action required



Journal of Field Robotics

Test article

DOI: 10.1002/rob.23166

Status: In Production

Manage article

Find a home for your next article

Wiley partners with the world's best research leaders and organizations to publish hundreds of top-tier journals.

Find a journal

Author news delivered straight to your inbox

Sign up to receive important and relevant news for authors:

- Your article metrics reports
- New journal launches in your field
- Wiley's author update with news and services that can help you elevate the impact of your research

Sign me up

Help

Manage Article

Author Services Dashboard

Any articles requiring actions will be automatically featured on the top of the list; old articles after those with actions required.

'Manage article' button kicks off the process.

Manage this article



International Journal for Numerical Methods in Biomedical Engineering

Test Article

DOI: 10.1002/cnm.38605

Status: In Production

⚠ Required Actions



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Publication History



Accepted
September 5, 2022



In Production
See required actions for next step

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Manage article: Authors are invited to Author Services when their article has been accepted by a journal, regardless of institutional affiliation. From there, they can manage their article.

Confirm author roles: The author list will show all authors from the manuscript. You get to indicate who is the corresponding author and responsible corresponding author, who drives this process.

Confirm funders and affiliations: The author is presented with reported funders and affiliations (if provided at submission) and is given an additional option to add/edit any. The platform will help authors select their affiliation if missing and will alert them of the eligibility.

Confirm copyright: Author is presented with the Copyright Ownership selection.

Open Access confirmation: Author is presented with the choice of publishing their article in open access.

License Agreement: If open access is selected, the author is asked to select a Creative Commons license dependent on funding source(s) reported and journal license permissions.

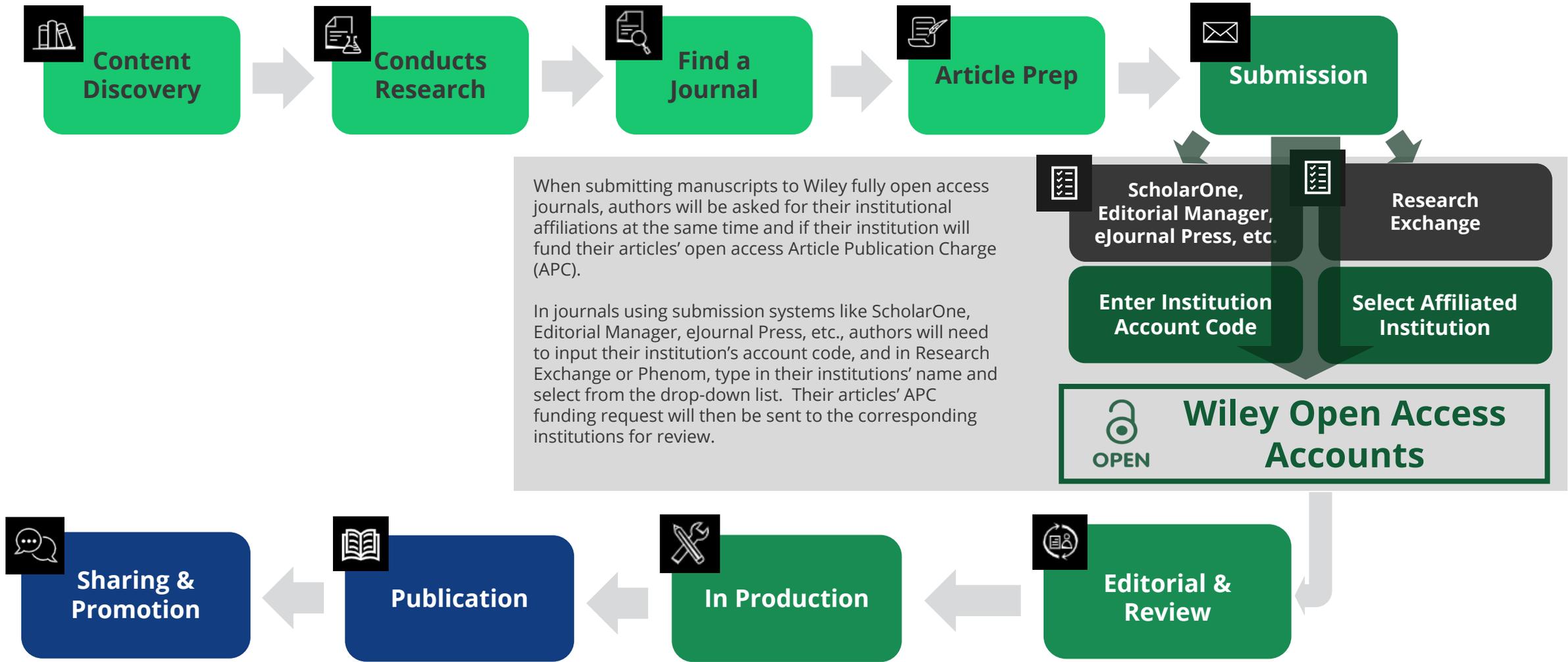
Signing: The next step is license signing and confirmation.

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**Authors' Workflow
for Wiley Fully Open
Access Journals**



Author Journey for Wiley Fully Open Access Journals



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**Authors' Workflow
for Submissions
through
ScholarOne,
Editorial Manager,
eJournal Press, etc.**



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Step 1:

Author submits manuscript to Open Access Journal and indicates affiliation with Wiley Open Access Account in payment question

Submission to Open Access Journals

(via ScholarOne, Editorial Manager, eJournalPress, etc)

Submission to OA journal

Authors will be presented with a payment question during manuscript submission.

They will indicate their affiliation with a Wiley Open Access Account.

Submission

- Step 1: Type, Title, & Abstract >
- Step 2: File Upload >
- Step 3: Attributes >
- Step 4: Authors & Institutions >
- Step 5: Reviewers >
- Step 6: Details & Comments >
- Step 7: Review & Submit >

Payment Options

Upon submission of your manuscript, you'll need to select **one** of the **three** payment options.

Please note that funding, discounts and waivers will only be awarded if the CORRESPONDING Author qualifies. Therefore it is essential that you have correctly flagged the Corresponding Author on the "Authors & Institutions" submission step.

Depending on the Corresponding Author's institutional affiliation or funding source:

- 1. The Corresponding Author's institution or funder has an existing agreement with Wiley and may pay the Article Publication Charge from this account on behalf of the author, or offer a discounted APC.**

Use our [Account Code Finder Tool](#) to check if the Corresponding Author's institution or funder has an agreement with Wiley that may pay your Article Publication Charge or offer a discounted APC. If their institution or funder is listed, choose this option.

- 2. The Corresponding Author (or their institution) will pay directly or will arrange payment (request an invoice) for the APC.**

Select this option to pay or to arrange payment for the Article Publication Charge. Choose this option if the institution requires an invoice for payment. You can pay by credit card, invoice or proforma. If you choose this option, you may also be eligible for certain discounts from the "Discounts That May Apply" section.

- 3. The Corresponding Author is from a country on the [Wiley Open Access Automatic Waiver List](#) and may be eligible for an automatic waiver of the Article Publication Charge.**

If the Corresponding Author is from a country that appears on the list linked to above, select the Automatic Waiver option.

Choose a Payment Option

- 1. The Corresponding Author's institution or funder has an existing agreement with Wiley and may pay the Article Publication Charge from this account on behalf of the author, or offer a discounted APC.**

Click here to access the [Account Code Finder Tool](#). Follow the directions on the page and enter the institution's code in the field below.

Please enter institution code here:

0 OUT OF 4 CHARACTERS

Enter the Grant/Project Number if the institution or funder requires this information:

- 2. The Corresponding Author will pay directly or will arrange payment (request an invoice) for the Article Publication Charge.** (Select from the dropdown menus below for any applicable discounts.)

- 3. The Corresponding Author is from a country on the [Wiley Open Access Automatic Waiver List](#) and requests an Automatic Waiver of the Article Publication Charge for this article.**

Editorial office comments (internal use):

Wiley Open Access Account Codes

Wiley Open Access Account Codes

Authors will search for their institution and then copy and paste the code into the appropriate field in the manuscript submission system.

The screenshot shows a navigation bar with tabs: Find Journal, Prepare, Submission & Peer Review, Licensing, Open Access (selected), Publication, and Promotion. The main heading is "Wiley Open Access Account Codes". Below it, a message states: "You've been directed to this page because you indicated that a third party may be paying for your article publication charge." A paragraph follows: "To check your eligibility, please use the dropdown menus below to find your affiliated institution or funder. If your institution or funder isn't listed, it does not currently have an active Wiley Open Access Account and you'll need to select a different payment option in the manuscript submission system." There are two dropdown menus: "Select your country:" with "Hungary" selected, and "Select your account:" with a list of institutions. The first item in the list, "Budapest University of Technology and Economics (Pays 100% of APC for primary research and review articles)", is highlighted in blue. A "Paste it" button is partially visible on the right side of the list.

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Hungary ▾

Select your account:

- Budapest University of Technology and Economics (Pays 100% of APC for primary research and review articles)**
- Central European University (Pays 100% of APC for primary research and review articles)
- Corvinus University of Budapest (Pays 100% of APC for primary research and review articles)
- Eotvos Lorand University (Pays 100% of APC for primary research and review articles)
- MTA Centre for Agricultural Research (Pays 100% of APC for primary research and review articles)
- MTA Research Centre for Natural Sciences (Pays 100% of APC for primary research and review articles)
- Pazmany Peter Catholic University (Pays 100% of APC for primary research and review articles)
- Semmelweis University (Pays 100% of APC for primary research and review articles)
- Szent Istvan University (Pays 100% of APC for primary research and review articles)
- University of Debrecen (Pays 100% of APC for primary research and review articles)
- University of Pecs (Pays 100% of APC for primary research and review articles)
- University of Szeged (Pays 100% of APC for primary research and review articles)
- University of Veterinary Medicine (Pays 100% of APC for primary research and review articles)

Paste it

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Wiley Open Access Account Codes

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Select your country:

Hungary ▾

Select your account:

University of Szeged (Pays 100% of APC for primary research and review articles) ▾

Based on your selections above, this is your institution's Wiley Open Access Account code.
Click on the button below to copy this code. When asked for your code in the manuscript submission system, please paste it into the specified field (CTRL+V or right-click and paste).

HUOS **COPY CODE**



Step 2:

After approval, author receives notification that their request to use the Wiley Open Access Account has been approved

Request Approval Provided

Request Approval

Authors will receive an email confirmation that their request to use the Wiley Open Access Account had been approved.

Dear Author,

I am responding to your request for your institution or funder to pay the article publication charge for the following manuscript submitted to Test Journal:

Article Title:

Manuscript ID:

Article Publication Charge:

Institution/Funder Name:

Funder Grant Number Provided:

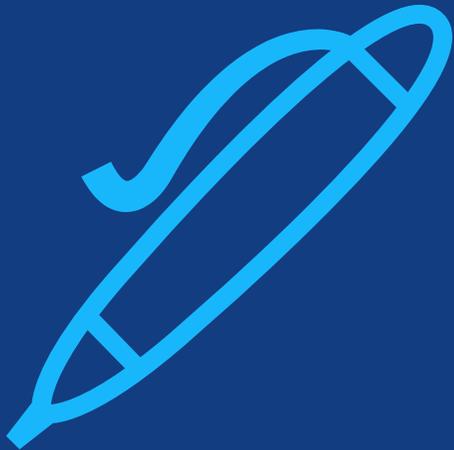
Your payment request has been accepted by the institution or funder.

If your manuscript is accepted for publication in Test Journal, you will not personally be asked to pay the article publication charge. If you have questions about the status of your manuscript, please contact the Editorial Office.

Thank you for submitting your manuscript to Test Journal.

Sincerely,
Wiley Open Access

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Step 3:

When article is accepted, author signs license agreement. No payment steps are necessary.

Author Services dashboard

Author Services Dashboard

The author will be asked to sign a license agreement.

No payment steps are necessary since the article publication charge has already been approved by the institutional account.

The screenshot displays the Wiley Author Services dashboard. At the top, the Wiley logo is on the left, and navigation links for Home, My Dashboard, Authors, Reviewers, Editors, and Help are on the right. A search bar and a user profile icon are also present. Below the navigation bar, there are tabs for My Articles, Communication History, and Order History. The 'My Articles' tab is active, showing a search filter for 'Filter my articles by title, journal or DOI' and a count of '2 articles'. A red banner at the top of the article list indicates 'Action required'. The first article listed is from 'Cancer Medicine', titled 'A correlation research of Ki67 index, CT features, and risk stratification in gastrointestinal stromal tumor'. It is marked as 'Open Access' and has a DOI of <https://doi.org/10.1002/cam4.1737>. The status is 'Published'. A red 'Manage Article' button is highlighted with a blue border.

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Authors' Workflow
for Submissions
through Research
Exchange



Submission to Open Access Journals (via Research Exchange)

Match Organizations

Help us find the organization that best matches each affiliation that you provided. We will use the best match from our database to determine if your manuscript is eligible for special benefits.

Your selections are for internal purposes and will not be published.

✓ Matched

Bath Spa University

What will be published

You confirmed from your manuscript:

Bath Spa University

If accepted for publication, your affiliation will be published as shown above.

Choose best match

BATH SPA UNIVERSITY
BATH, UNITED KINGDOM

BATH SPA UNIVERSITY GRADUATE SCHOOL
BATH, UNITED KINGDOM



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For journals using the ReX submission system, instead of institution account codes, authors will simply be asked to type in and select their affiliated institutions to claim eligibility for institutional funding coverage for open access publishing where applicable.

Open Access Discounts

APC coverage, discounts, and waivers are only applied if the corresponding author is eligible

Discounts this submission is eligible for

If you're eligible for multiple discounts, the highest available discount will apply



Open access APC discount or coverage

Because the corresponding author **Emily Bae** is associated with **Albion College**, this submission may be eligible for the Article Publication Charge (APC) to be discounted or entirely covered. If accepted, Wiley will contact you with further instructions.

[Learn more about institutional discounts and coverage](#)

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Resources

For administrator and authors

Oable

[Oable Training Hub](#)

- User guide, FAQ, translations and videos.

Also available:

- [Open Access for Librarians](#)
- [Funder Agreement](#)

WILEY HOME TRAINING RESOURCES WEBINARS OPEN ACCESS RESOURCES ABOUT US STAY IN TOUCH

OABLE TRAINING HUB

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Getting Started

- Oable User Guide
- Key Benefits of Oable
- What's New: Reviewing Funding Requests WOAAD vs. Oable
- What's New: Searching Your Activity WOAAD vs. Oable
- What's New: Generating Reports WOAAD vs. Oable
- What's New: Gold/Hybrid Accounts Management WOAAD vs. Oable
- Have a question or need help? CONTACT US
- Questions about the migration? CHECK OUR FAQ

Find Answers to Common Questions

Next Steps

- Account activation: email notifications from CSM and info@knowledgeunlatched.org.
- Follow-up and review of the dashboard after launch if needed
- Contact us to add any other non-Wiley agreements to Oable
- Events for authors on demand

Sessions for Researchers and Authors

Accessing Wiley Journals and Publication Tips for Authors and Researchers

- How to access Wiley Online Library to make the most out of your content
- How to run basic and advanced searches on Wiley Online Library
 - Where to find citation, Altmetric, and Impact Factor information
 - Where to submit your manuscript, find the Author Guidelines, and Aims & Scope of a journal
- Publication tips for authors:
 - Submission and review: what to expect?
 - Writing tips

Audience: Researchers and authors affiliated with an institution with a Wiley Open Access Account.

Author Workshop: How to publish in Wiley Open Access Journals

- What is Open Access and what are the benefits?
- Author workflow: how to submit a manuscript to an Open Access journal and getting the APC covered through an existing agreement with your institution
- Publication tips for authors:
 - Why publish
 - Submission and review: what to expect?
 - Writing tips
 - Tools for authors: Author Services and Wiley Editing Services

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- Gain post-event insight into attendance, engagement and overall satisfaction

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Thank you!

For questions, reach out to your Customer
Success Manager.

Graham Woodward

gwoodwar@wiley.com

Institution Contact:

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Technical Support:

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Author Contact:

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