OnlineOpen: Hybrid Open Access Option
Author Invitation Workflow

All authors are guided through these steps in this order, regardless of how they enter the workflow (via email link, Author Services Dashboard, etc.)

- Step 1: Invitation Email
- Step 2: Log in to Author Services Dashboard
- Step 3: Confirm Affiliations
- Step 4: Enter Funder Information
- Step 5: Select OnlineOpen
- Step 6: Copyright Ownership Selection
- Step 7: Creative Commons License Selection
- Step 8: License Signing
- Step 9: Confirmation
Step 1: Invitation Email
In Production: Your article accepted in Journal of Test

Dear Author,

Article ID: JAAAL1234
Article DOI: 10.1002/jaaal.1234
Journal: Journal of Test

Congratulations on the acceptance of your article for publication in Journal of Test.

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.

Wiley has an agreement with your institution, UNIVERSITY OF SZEGED, a member of the Electronic Information Service National Programme, which covers the cost of the open access article publication charges (APCs) for affiliated corresponding authors. Choosing the OnlineOpen option won’t incur any additional costs to you, your institution, or funder.

If you have any further questions, please get in touch with your local Open Access contact.

Please click on the link below to login using atest@mailinator.com:
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
Step 2: Log in to Author Services Dashboard to Review Actions
The author will see two blue buttons on the dashboard and have two required actions:

1) Sign a license
2) Make an OO selection

Clicking either one of these buttons will take them into the following flow.
Step 3: Confirm Affiliations
Confirm/Enter Institutional Affiliation – Ringgold Exact Match

Author is taken to the new Institutional Affiliation(s) Confirmation screen.

If the institution(s) entered into EEO and ingested into AS match with Ringgold database (exact match), this screen will apply.
Confirm/Enter Institutional Affiliation – One Close Match with Ringgold

Author is taken to the new Institutional Affiliation(s) Confirmation screen.

If the institution(s) entered into EEO and ingested into AS doesn’t have an exact match with Ringgold database, but we have one close match, this screen will apply.
Confirm/Enter Institutional Affiliation – Multiple Close Matches

Author is taken to the new Institutional Affiliation(s) Confirmation screen.

If the institution(s) entered into EEO and ingested into AS doesn’t have an exact match with Ringgold database, but we have multiple close matches, this screen will apply.
Confirm/Enter Institutional Affiliation – No Institution(s) From EEO

Author is taken to the new Institutional Affiliation(s) Confirmation screen.

If the author has not entered an institution into EEO during article submission, this screen will be shown requesting that the author please add an institutional affiliation for his/her article.
Confirm/Enter Institutional Affiliation – Geo-targeting via IP Range (Country)

Author is taken to the new Institutional Affiliation(s) Confirmation screen.

In certain cases we will also show a geo-targeted message to users with an IP address within one of our eligible countries to encourage them to select their institution from our list.
If the author enters a custom affiliation not recognized in the Ringgold database, an additional screen will ask the author to select from a list of institutions with Wiley Open Access Accounts filtered by country.
If the author enters affiliations with multiple institutions and more than one of the institutions has a Wiley Open Access Account, an additional screen will be presented asking the author to select which institution is most appropriate to cover the open access fees.
Once the author selects one of the institutions, all future screens show the eligibility notification for the institution that was selected.
Step 4: Enter Funder Information
Licensing Signing – Funders

Author is presented with reported Funders (if provided at submission), and is given an additional option to add/edit any new/existing Funder(s).
Step 5: OnlineOpen Selection Defaulted Yes Option
‘Yes’ is Pre-Selected for Author

Select OO – Default Yes

Author is presented with ‘OnlineOpen – Open Access Option’ pre-selected to “Yes, I would like to make my article OnlineOpen” by default.
Author Changes Selection From Default ‘Yes’ to ‘No’

Select OO – Author Changes Selection From Default “Yes” to “No”

Author is presented with ‘OnlineOpen – Open Access Option’ pre-selected to “Yes, I would like to make my article OnlineOpen” by default and actively changes selection to “No, I don’t want to make my article OnlineOpen.”

Author is then presented with a warning message.

Once author clicks, “Confirm” button, author’s opt-out/active selection of ‘No’ will be recorded for reporting and the author will continue on to sign the appropriate CTA license.
Step 6: Copyright Ownership Selection
License Signing – Copyright Ownership

Author is presented with License Signing options: Copyright Ownership selection, Creative Commons licensing selection, etc.
License Signing – Copyright Ownership Choices

Copyright Ownership

Author is presented with the following choices when selecting ownership type.

If other signatures are required, some ownership types will require the corresponding author to download a PDF license, sign offline (collect all relevant signatures), and then upload the completed PDF back to Wiley Author Services Dashboard.
Step 7: Creative Commons License Selection
License Signing – License Agreement Selection

License Agreement

If OnlineOpen is selected, the author is asked to select a Creative Commons license dependent on funding source(s) reported and journal license permissions*.

A short description of each Creative Commons license type is made available per license type to aid authors when deciding which license to sign.

* Some journals will only allow a Creative Commons Attribution License (CC-BY) if mandated by a funding source.
Step 8: Sign License
License Signing – Option to Sign or Save for Later

Once author completes all License Signing sections, author is presented with confirmation icons.

Author has the option to click “SAVE FOR LATER” or “SAVE & SIGN” to proceed.
Review License Agreement

Author is presented with electronic copy of the Creative Commons license agreement selected and asked to review. If author agrees with all items within agreement presented, author must:

- confirm by ticking box (“I agree to the OPEN ACCESS AGREEMENT...”)
- type full name (electronic signature)
- Click “SIGN” button to complete licensing signing process.
Step 9: License and OO Order Confirmation
License/Order Confirmation

License Signing and OO Selection - Confirmation

If Author continued with “Yes” for OnlineOpen, the order is submitted automatically on behalf of the author and the author is presented with a confirmation screen. New text TBD to make clear that the OO selection has also been submitted.

To exit the License Signing Form, click “BACK TO DASHBOARD” button.
Fully Open Access Journals
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

Authors will be presented with a payment question during manuscript submission to the OA journal. They will indicate their affiliation with a Wiley Open Access Account when they answer the payment question.
Authors will search for their institution and then copy and paste the code into the appropriate field in the manuscript submission system.
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.
Step 2: Author receives notification that their request to use the Wiley Open Access Account has 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,
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cs-openaccess@wiley.com
Step 3: When article is accepted, author signs license agreement. No payment steps are necessary.