

# 5a: Author Workflow - Hybrid

**These next 7 slides take you through how an Author is offered the Open Access publishing for a hybrid article, and the steps they take in the system.**

# 5a: Author Workflow Hybrid

Open Access Offer Email sent to corresponding author with all authors copied

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Congratulations on the acceptance of your paper *Switzerland Demo Article Hybrid* (DOI: 10.1177/2050313116871371/ ID: ASE-PR20.R1).

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# 5a: Author Workflow Hybrid

The user is then taken to the Online portal:

SAGE openaccess STG



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Here you can choose to make your article open access and select your open access license.

**Choosing open access** will mean that your article can be read in the journal by anyone anywhere in the world without restriction. This may increase the number of readers of your article. It may also encourage collaboration and faster development in your field of research.

Open access for your article has been requested by  
**your institution**

The Consortium of Swiss Academic Libraries has an agreement with SAGE Publishing that allows you to publish your article Open Access at no additional cost. Your institution recommends to publish the article Open Access

Pricing Details	
Open access article processing charge	
Institutional discount (100.00%)	
<b>Total</b>	<b>0.00</b>

Price (GBP)
2,200.00
-2,200.00
<b>0.00</b>

No payment is required to make your article open access. There will be no charge to you.

Would you like to make your article open access?

- Yes, make my article open access
- No, publish my article subscription

Author choses OA publishing (or rejects)

**SAGE choice**

**Article Details**

Article  
Switzerland Demo Article Hybrid

DOI  
10.1177/2050313116871371

Journal  
Advances in Structural Engineering

Journal Type  
Hybrid

Authors  
[Expand All](#)

Pricing and discount shown here to make it clear that hybrid articles are free.

# 5a: Author Workflow Hybrid

## Declining Open Access Offer

Would you like to make your article open access?

Yes, make my article open access

No, publish my article subscription



### Reason

Author Name

Example (Optional)

Email

example@organization.co.uk

The reason I have declined open access for my article is:\*

Enter Reason

175 remaining

*\*Your comments will be shared with the person or organization named above who requested open access for your article.*

CONFIRM

If they do reject  
OA, they are  
required to give a  
reason

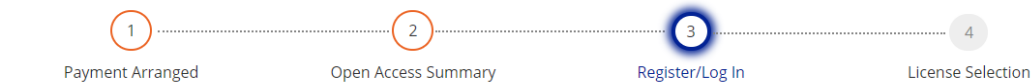
# 5a: Author Workflow Hybrid

## SOAP: Register/Log in

SAGE openaccess | STG

Now, the  
transacting  
Author confirms  
their identity

- Any author can take action
- Select name from the dropdown
- Register account with email address in article metadata
- SAGE must know who is signing the license



Let us know who you are

Only one of the named authors of the article may complete the next step: copyright and open access license selection.

Please select your name from the author dropdown to log in or register for an account.

### Author Selection

Author

Select Author

### Supported Browsers

Firefox: 81 to 83 - Windows and Mac | Chrome: 85 to 87 - Windows and Mac | Microsoft Edge: 87 - Windows OS | Internet Explorer: 10.0 and 11.0 - Windows: compatibility view is not supported | Safari: 12 to 13 - Mac OS

# 5a: Author Workflow Hybrid

## Open Access License Selection





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Author choses OA license type

Now, the transacting Author chooses the CC-BY license type.

- Swiss Authors will be offered a choice of CC-BY or CC-BY-NC here by default
- If they have declared a funder that requires a specific license (e.g. Wellcome funded articles) only the required license will be offered (e.g. CC-BY).
- Author may contact the customer service team ([openaccess@sagepub.com](mailto:openaccess@sagepub.com)) if they require a license option not presented

# 5a: Author Workflow Hybrid

## Copyright confirmation

1 Choose Open Access    2 Register/Log in    3 License Selection    4 Order Confirmation

Who owns the copyright of your Contribution?

- The copyright to the Contribution is owned by you  
You represent and warrant that the copyright to the Contribution is owned by you.
- U.S. Government work ⓘ  
You are employees of the United States Government and prepared the Contribution as part of your official duties.
- Other Government department work (not U.S.) ⓘ  
You are employees of the Government of the country indicated in the box provided and prepared the Contribution as part of your official duties.
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The Contribution was prepared by you at the direction of your employer and within the scope of your employment and copyright in the Contribution is owned by your employer.
- More than one of the options above applies

Terms & Signature

- I have read and accept the [Terms of the Agreement](#)
- I warrant that I am one of the named authors of the Contribution and that I am authorized to sign this Agreement; in the case of a multi-authored Contribution, I am authorized to sign on behalf of all other authors of the Contribution.

Signing Author : [username]

**Author choses Copyright status**

**Author Signs the agreement**

The transacting Author declares the copyright status and signs the agreement digitally

# 5a: Author Workflow Hybrid

## Order confirmation

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Dear Authors,

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- 10.1177/2050313116871371
- Advances in Structural Engineering

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WF4 EA14

All Authors on the paper are notified of the choice by email.

For Hybrid OA, articles are free, so this is the end of the process.



# 5b: Author Workflow - Gold

**These next 7 slides take you through how an Author is offered the Open Access publishing for a Gold OA article, and the steps they take in the system when the Institution (CBP) has agreed to be the bill payer. If the institution has not agreed to be the bill payer, the author will be presented with the APC information and will need to arrange for payment instead of the institution.**

# 5b: Author Workflow Gold

## License selection email

[Complete the Open Access process](#) for your article now

Dear **[Name]**,

Congratulations on the acceptance of your paper *Switzerland Demo Article Gold* (DOI: 10.1177/2050313117871172/ ID: TIA-PR20.R1).

Trends in Hearing is a Gold Open Access journal, in which all papers are made freely available and published with an Open Access license. In order to proceed with the publication of your article, you need to select the appropriate OA license type.

Select your license



Author clicks here

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# 5b: Author Workflow Gold

The user is then taken to the online portal:

SAGE openaccess STG



Welcome to SAGE's Open Access Portal

Your article has been accepted for publication in Trends in Hearing. In order to proceed with publication, select your open access license.

University of Basel has already agreed to pay the article processing charge to make your article open access.

There is no charge to you to make your article open access.

CONTINUE

Author clicks here

**TRENDS**  
*in Hearing*

Article Details

Article  
Switzerland Demo Article Gold

DOI  
10.1177/2050313117871172

Journal  
Trends in Hearing

Journal Type  
Gold

Authors [Expand All](#)

Marionne Chittenden +  
Corresponding author

Elisabeth...

- In the preapprove workflow, the institution will have already accepted or rejected the article.
- If they have accepted the article and agreed to pay the APC, this confirmation screen will appear to the author to confirm they will not be charged the APC amount.

# 5b: Author Workflow Gold

## SOAP: Register/Log in

SAGE openaccess STG



Now, the author confirms their identity

- Any author can take action
- Select name from the dropdown
- Register account with email address in article metadata
- SAGE must know who is signing the license

Let us know who you are

Only one of the named authors of the article may complete the next step: copyright and open access license selection.

Please select your name from the author dropdown to log in or register for an account.

### Author Selection

Author

Select Author

Select Author

Author Name

Author Name

### Supported Browsers

Firefox: 81 to 83 - Windows and Mac | Chrome: 85 to 87 - Windows and Mac |  
Microsoft Edge: 87 - Windows OS | Internet Explorer: 10.0 and 11.0 - Windows;  
compatibility view is not supported | Safari: 12 to 13 - Mac OS

# 5b: Author Workflow Gold

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- More than one of the options above applies

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- I have read and accept the [Terms of the Agreement](#)
- I warrant that I am one of the named authors of the Contribution and that I am authorized to sign this Agreement; in the case of a multi-authored Contribution, I am authorized to sign on behalf of all other authors of the Contribution.

Signing Author:

[SIGN AGREEMENT](#)

Author choses OA license type

Author choses Copyright status

Author Signs the agreement

Now, the author chooses the CC-BY license type.

- Swiss Authors will be offered a choice of CC-BY or CC-BY-NC here by default
- If they have declared a funder that requires a specific license only the required license will be offered (e.g. CC-BY).
- Author may contact the customer service team ([openaccess@sagepub.com](mailto:openaccess@sagepub.com)) if they require a license option not presented

The author declares the copyright status and signs the agreement digitally

# 5b: Author Workflow Gold

## Awaiting bill payer payment notification

### Awaiting bill payer payment

University of Basel has been asked to make payment of the article processing charge (APC) now.

Once they have processed the payment, you will be sent the order confirmation and your article will be published open access.

[GO TO DASHBOARD](#)

[LOG OUT](#)

Once the author has signed the license, the institution/bill payer will be notified and asked to proceed with the payment.



#### Article Details

##### Article

Switzerland Demo Article Gold

##### DOI

10.1177/2050313117871172

##### Journal

Trends in Hearing

##### Journal Type

Gold

##### Authors

[Expand All](#)

[Expand Author](#)

Corresponding author



[Expand Author](#)



# 5b: Author Workflow Gold

## bill payer notification

Next step: [Complete payment process](#)

Dear University of Basel ,

Recently, you agreed to be the bill payer for the article processing charge (APC) for the paper below. The author has now signed the Creative Commons license form. Next, please complete the payment process as soon as possible.

- Switzerland Demo Article Gold
- 10.1177/2050313116881173
- **Trends in Hearing** published by SAGE Publishing

[Complete payment process](#)



Bill payer clicks here

Production work on the paper will not start until you have completed the transaction. If you are having difficulty completing the transaction, please contact us so that we can assist you.

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The bill payer/institution is notified by email and asked to complete the payment process.

# 5b: Author Workflow Gold

The user is then taken to the Online portal:



Let us know who you are

## Bill Payer Log in

Email

Password

[Forgotten Password](#)

## Supported Browsers

Firefox: 81 to 83 - Windows and Mac | Chrome: 85 to 87 - Windows and Mac |  
Microsoft Edge: 87 - Windows OS | Internet Explorer: 10.0 and 11.0 - Windows;  
compatibility view is not supported | Safari: 12 to 13 - Mac OS

LOG IN

Select name from  
the dropdown and  
log in.



# 5b: Author Workflow Gold

## enter billing details

SAGE openaccess STG Welcome [User]

1 Approve Article   2 Author Process   3 **Confirm Billing**   4 Preview Invoice   5 Make Payment   6 Order Confirmation

Approved article ready for payment  
Article approved on 18 Feb 2021 by [User]  
Article License: choose open access license CC BY 4.0

Pricing Details	Price (GBP)
Open access article processing charge	1,110.00
Institutional discount (20.00%)	-222.00
<b>Subtotal</b>	<b>888.00</b>
Tax (0%) (Tax is calculated based on your account's billing address)	0.00
<b>Total</b>	<b>888.00</b>

[Apply Promo Code](#)

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- Aggregated Payment Schedule  
*New invoice cycle: 28 February 2021*
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Open Access Administrator  
CPPT@sagepub.com  
University of Basel / Kollegienhaus  
Petersplatz  
1

Basel  
4051  
Switzerland  
41 0911770202

**Billing Details**

Purchase Order Number

VAT ID

Note to appear on invoice

75 remaining

**PREVIEW INVOICE**

**Article Details**

Article  
Switzerland Demo Article Gold

Article Type  
Article

DOI  
10.1177/2050313116881173

Journal  
Trends in Hearing

Journal Type  
Gold

**Authors**

Corresponding author  
Universitat Basel  
Switzerland  
[Email](#)

Declared Funders  
None

15 January 2020

Peer Review Acceptance Date  
09 March 2020

Publication Status  
Not published subscription

Bill payer selects payment option

Bill payer fills in billing details

Bill payer clicks here to preview invoice

The bill payer will select their payment option from those available to them.

Bill payer can enter their purchase order number, VAT ID and invoice note if applicable.

# 5b: Author Workflow Gold

## preview invoice

SAGE openaccess STG

1 Approve Article

2 Author Process

3 Confirm Billing

4 Preview Invoice

5 Make Payment

Please check the details on the invoice preview below and select your payment method



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London EC1A 1DU, UK  
UK VAT No: 232 850 176

Invoice No. \_\_\_\_\_  
Invoice Date. \_\_\_\_\_  
Payment Due By. \_\_\_\_\_  
Customer Account No. C019000049

#### Article Details

Title: Switzerland Demo Article Gold  
DOI: 10.1177/226231318881173  
Publication: Trends in Planning (2577)  
License: CC BY 4.0  
Peer Review Submission Date: 15 January 2020  
Peer Review Acceptance Date: 09 March 2020

Bill to:  
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4001, Switzerland  
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VAT No: 1234  
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#### Order Details

Open Access Article Processing Charge: 1,170.00  
Institutional discount (20.50%): -222.00  
Subtotal: 948.00  
UK VAT (0%): 0.00  
Total Amount Payable on Card: 948.00

#### Price (GBP)

Author's corresponding author:  
University of Basel  
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Author Affiliation:  
University of Basel  
Ludwig-Maximilians-Universität, München

ORCID:  
456789  
None declared

Open Funder Name:  
None declared

The user will read the “payment terms and conditions” and will have the option to edit their billing details if necessary.

Before proceeding to the payment, the user will see a preview invoice.

They will choose to either “pay by credit card” or to send a final invoice.

I have read and agree to the [Payment Terms and Conditions](#)

EDIT BILLING DETAILS

Bill payer agrees to terms and conditions

Select payment method

PAY BY CREDIT CARD

SEND FINAL INVOICE

# 5b: Author Workflow Gold

## author payment confirmation email

### Open access transaction complete

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I am pleased to inform you that University of Basel has completed the transaction of the article processing charge for your paper.

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- Trends in Hearing
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