

The Wiley logo is displayed in a large, bold, black serif font at the top left of the slide.

ENABLING DISCOVERY | POWERING EDUCATION | SHAPING WORKFORCES

The background of the slide is a photograph of a slot canyon, showing smooth, undulating sandstone walls in shades of orange and red, illuminated from above. The text is overlaid on this image.

Ways in which publishers and libraries are adapting their workflows to the OA publishing paradigm

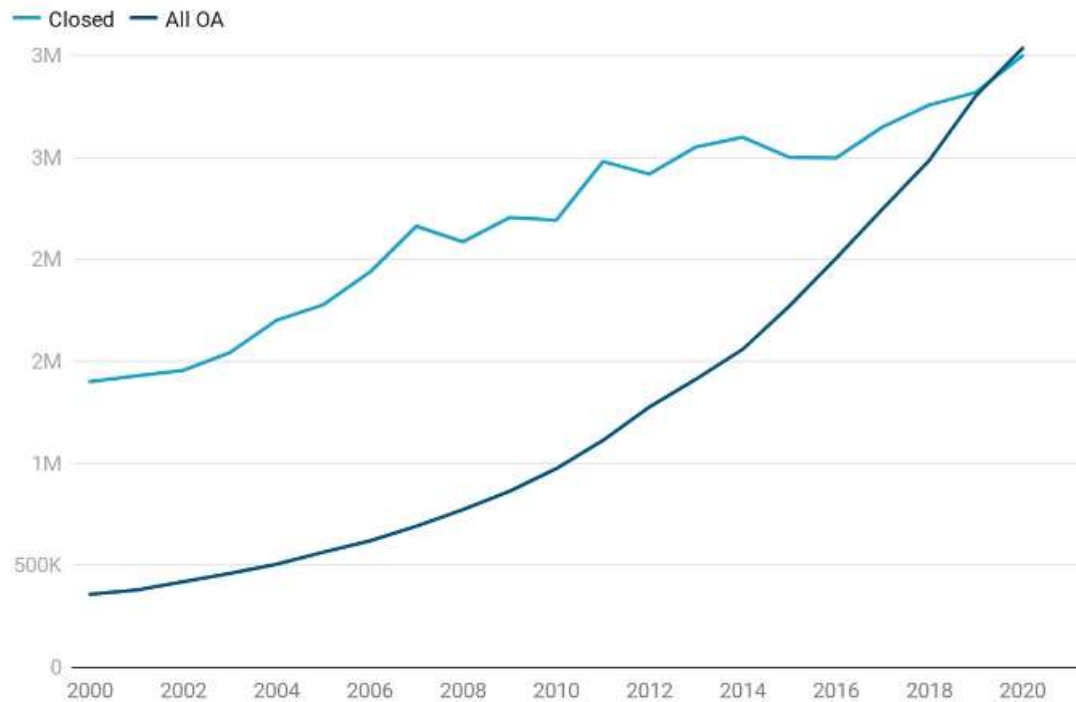
4 October 2022

ESAC Community of Practice

Sze-Kie Ho

Director, Wiley Open Access Accounts (Product Strategy and Operations)
and Open Access Transition

From subscription to OA since 2000



Open Access (OA)
surpasses
subscription
articles globally
for the first time
in 2020!

Dimensions blogpost (24 February 2021)

WILEY

Types of Open Access



Gold OA

- The article is immediately, freely available online for all to read, download, reuse and share
- An Article Publication Charge (APC) is typically applied. This may be covered by an institution or funder
- Published under a Creative Commons (CC) license, author retains copyright



Diamond/ Platinum OA

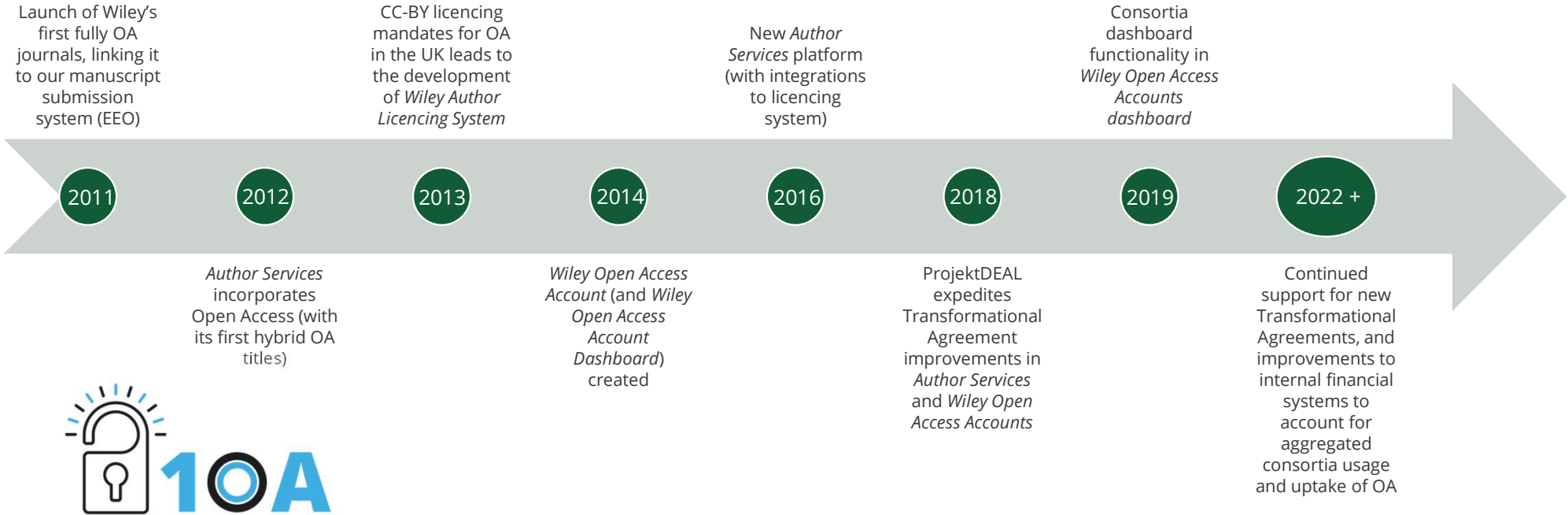
- The article is immediately, freely available online for all to read, download, reuse and share; author retains copyright
- No fees to publish – usually covered by the publisher, sponsor or not-for-profits



Green OA

- The author self-archives a version of the subscription article in an online repository or website
- Usually subject to a 12 or 24 month embargo period
- Authors retain the right to use their articles for certain purposes

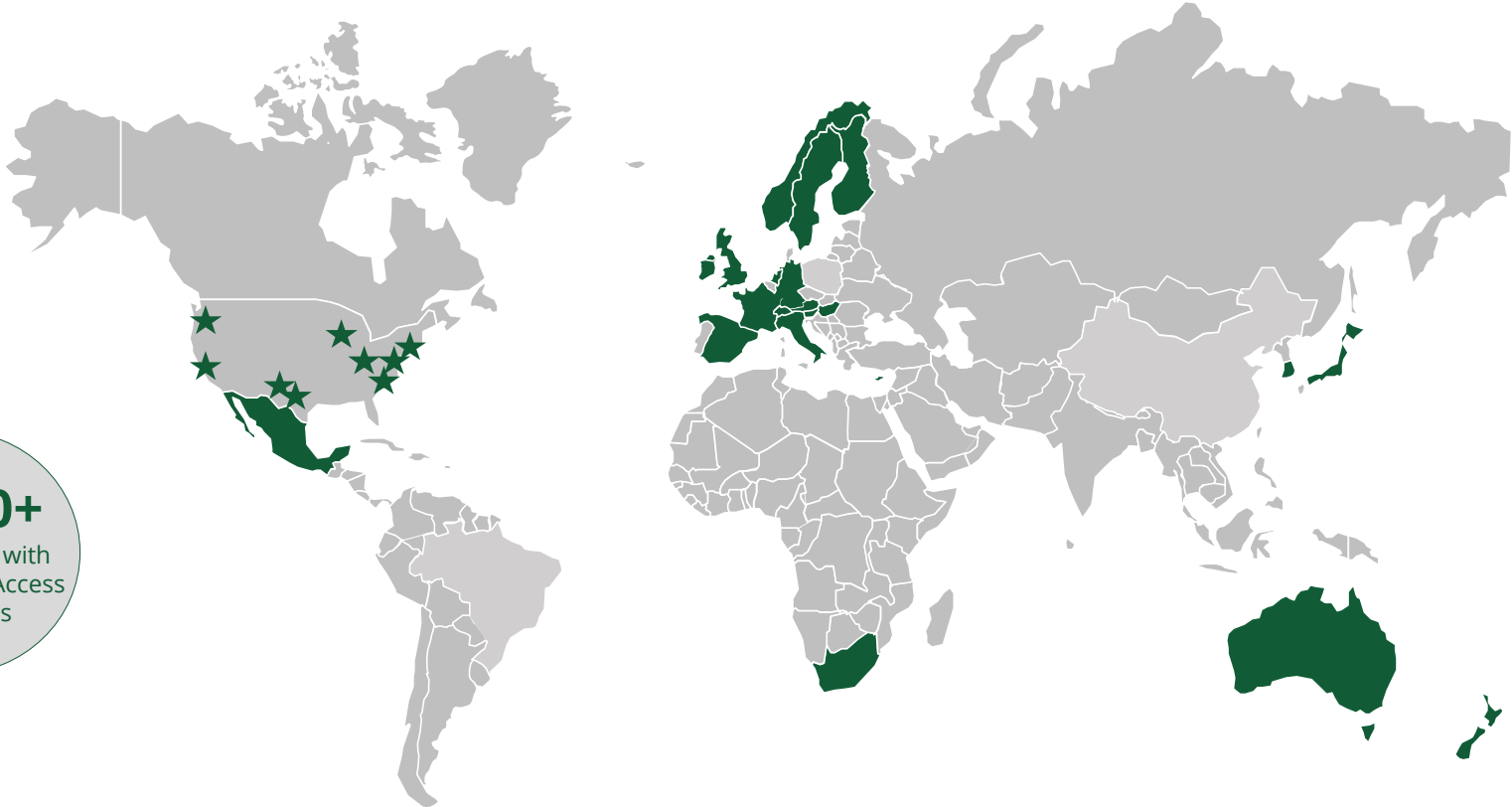
Technology Timeline of Open Access at Wiley



Wiley's Transformational Agreements

35+
Transformational
Agreements
worldwide

3,500+
Institutions with
Wiley Open Access
Accounts



Significant growth of Transformational Agreements

- Shifting allocation of spend
 - subscription
 - open access publications
- Large numbers of requests for variations in Transformational Agreements, with possible adjustments during lifetime of agreement due to external factors
 - Publish & Read
 - Read & Publish
- Significant changes in product development and operational processes, requiring platform changes and enhancements to achieve scalability



Author Services (AS) and Wiley Open Access Accounts (WOAAs)

Author Services
With you every step of the way

Manage my articles

openaccessaccount.wiley.com

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Welcome, **Sze-Kie Ho (ADMIN)** [Sign out](#)

[Account Info](#) [Consortia View](#)

Test University [Switch Account](#) [Manage All Accounts](#)

Pending Requests (3)

	Request Date	Author Name	Journal	Amount	Journal Revenue Model		
View	23 Apr 2021	Venetia Lipscombe	Cancer Medicine	€1,765	Open Access	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
View	23 Apr 2021	Venetia Lipscombe	Cancer Medicine	€1,765	Open Access	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
View	21 Jan 2020	Kristin Scharweber	Ecosphere	€1,190	Open Access	<input type="button" value="Approve"/>	<input type="button" value="Deny"/>
				Total: €4,720			

Account Summary as of:
22 May 2021 04:15:04

-
-
-
-

Approved Requests (9)

	Request Date	Request Status	Author Name	Journal	Amount	Journal Revenue Model	Publication Status
View	20 May 2021	Approved	Rodney Rouse	Clinical and Translational Science	€2,125	Open Access	In Production
View	20 May 2021	Approved	Rodney Rouse	Clinical and Translational Science	€2,125	Open Access	Under Review
View	20 May 2021	Approved	Venetia Lipscombe	Advanced Science	€3,539	Open Access	Under Review
View	19 May 2021	Approved	Venetia Lipscombe		€3,539	Open Access	Accepted
View	23 Apr 2021	Approved	Venetia Lipscombe	Cancer Medicine	€1,765	Open Access	In Production
View	23 Apr 2021	Approved	Venetia Lipscombe	Cancer Medicine	€1,765	Open Access	In Production
View	23 Apr 2021	Approved	Venetia Lipscombe	Cancer Medicine	€1,765	Open Access	In Production

Request Statuses

-
-
-

Publication Statuses

-
-
-
-
-
-
-



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New blog and video content from The Wiley Network



about 2 months ago

[Going Green At](#)



2 months ago

[World Health Day](#)



2 months ago

[United Nations'](#)



3 months ago

[Top 10 Wiley](#)

www.wileyauthors.com

WILEY

The evolution of Author Services (AS)

The screenshot displays the Wiley Author Services (AS) dashboard. At the top, there is a navigation bar with 'WILEY' on the left and 'HOME MY DASHBOARD AUTHORS REVIEWERS EDITORS HELP' on the right, along with a search icon and a user profile icon. The main content area is titled 'My Dashboard' and includes several widgets: 'My Dashboard' (with links to My Profile, View All Communication History, and View All Orders), 'MY ARTICLES' (with a progress bar showing 80% complete and buttons for ACTION REQUIRED, IN PRODUCTION, PUBLISHED ARTICLES, and ALL ARTICLES), 'My Profile' (with an 'Add ORCID' button), 'Measure My Impact' (showing Top 5 and Recent metrics), and 'Your Institution and Research Funder affiliations'. Below these, there are sections for 'Your License' and 'OnlineOpen'. A prominent red banner reads 'Action required' with the message: 'Article is eligible for Open Access through your institution at no fee'. Below this, a card for an article titled 'International Journal for Numerical Methods in Biomedical Engineering' is shown, with details like 'Test article', 'DOI: 10.1002/cnm.36220', and 'Status: In Production'. A 'Manage Article' button is visible at the bottom of the card. A 'Find a home for your next article' sidebar is also present on the right.

- General improvements to the author journey, e.g., integrating licence signing with OA selection workflow
- Upgrading to AS 3.0
 - change in underlying Business Process Management (BPM) engine for increased reliability and scalability
- Improved communication to authors on possible eligibility for WOAA agreements (including customised eligibility messaging by consortia partners)

The evolution of WOAs

The screenshot displays the Oable dashboard interface. On the left is a navigation sidebar with categories like Tasks, Requests, Inbox, Agreements, Deposit Accounts, Transactions, Reporting, My Institution, and My Account. The main dashboard area is titled 'My Dashboard' and contains several widgets: 'Tasks' (No tasks), 'Agreements' (1), 'Requests' (34), 'Cost Centres by Expenditure', 'Publishers by Expenditure', and 'Account Balances'. Below these is a 'WILEY' header with a user welcome message for 'Sze-Kie Ho (ADMIN)'. A 'Total Accounts 10' section includes filters for 'YTD', '7 Days', '14 Days', 'Month', 'Year', 'All history', and 'Custom Date Range'. It features buttons for 'Request Consortia View' and 'Request Detailed View', and a 'Total Requests' summary of 285, broken down into Pending (5), Approved (258), Denied (15), and Cancelled (7). At the bottom, an 'All Accounts Details' table lists accounts for University A, B, and C with their respective pending and approved request counts.

Account Name	Pending Requests	Approved Requests
University A	1	1
University B	1	9
University C	1	5

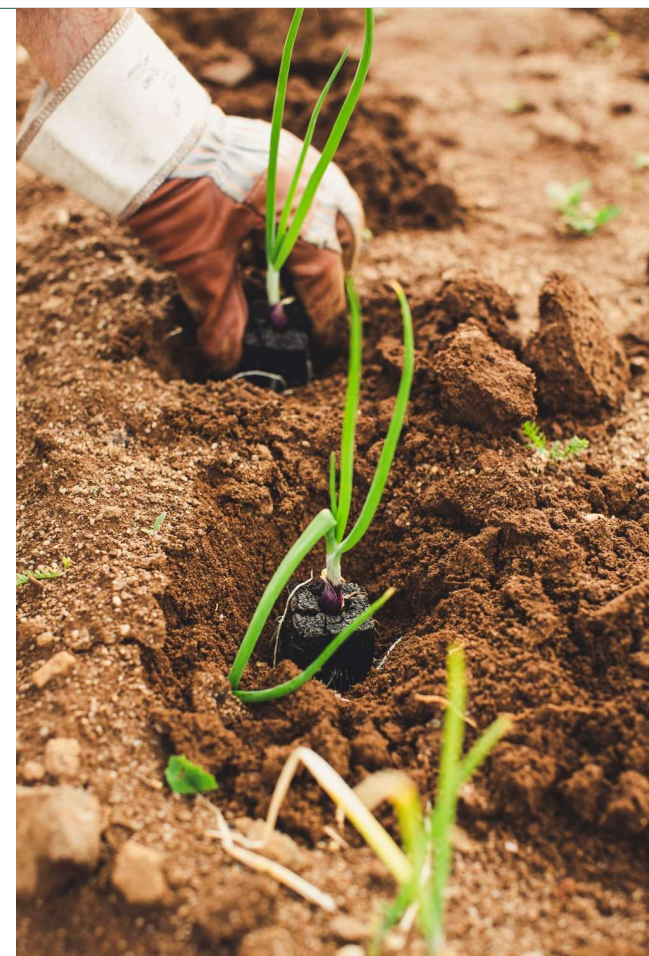
- Platform features and enhancements
 - addition of consortia dashboard views in addition to institution dashboard views
 - improvements to search bar within WOAD

- Customisations for partners
 - support for different (full APC coverage) Transformational Agreement models
 - new discounting workflows based on a researcher's affiliation to institutions with existing WOAs
 - customisable eligibility messaging to be shown to authors in the author workflow

- Migration to Oable

Beyond Author Services and Wiley Open Access Accounts

- Continuous digital workflows
 - Example: ReX (Research Exchange) platform
 - Wiley's system for researchers to submit manuscripts, regardless of the journals' individual peer review management systems
- Improved data capture
 - Example: article type harmonisation
 - Monumental collaboration between Editorial and Technology teams to consolidate over 29,000 display names for articles (published on Wiley Online Library) to a carefully curated list of ca. 500 display names, and 29 article types
 - Facilitates application of rules for eligibility calculations for researchers based on unified article types
- Open Access infrastructure
 - Example: pricing tool replacement
 - Allow better scalability (moving away from legacy systems)
 - Better transparency and visibility of prices for researchers



The need for continuous improvements

- Ever-evolving models of Transformational Agreements
- New governmental and funder policies, as well as changes to existing ones
- Trends in the Open Access landscape
- Rapidly changing workflows (researchers, librarians, as well as within internal Wiley processes)
- Increasing (regional) variance in requests and feedback from partners regarding our platform functionality

- Continued updates and enhancements across Wiley platforms and systems based on the above
- Balancing between streamlining existing processes for scalability versus accommodating larger-scale changes to our platforms for our longer-term strategy and to support continued OA growth



Vision for the (longer-term) future

- Automated Gold OA author workflows with integrations to submissions from ReX
- Unified author dashboard, as a central hub for everything authors need when publishing with Wiley
- Integrations with ROR hierarchies (in addition to existing links to Ringgold)
- Next-generation WOAA, to provide holistic research output for institutions (whether OA or not)
- OA financial system replacement and improved eCommerce capabilities for better scalability and ability to pivot with changing OA business models and extension of APCs to other currencies
- Improved referral systems and editorial screening tools for common pitfalls pre-peer review, beyond plagiarism checks etc.



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Q&A



Author resources

Wiley Author Services
www.wileyauthors.com

Librarian/Open Access administrator resources

Wiley Open Access Accounts
openaccessaccount.wiley.com

The Wiley Network: Open Access hub
[www.wiley.com/network/librarians/
open-access-resources](http://www.wiley.com/network/librarians/open-access-resources)

Product Management

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