

# Open Access at IEEE

Process for Authors and Institutions

# Purpose of presentation

- This presentation is meant for administrators or those interested in institutional open access accounts.
- It will show the process of open access (OA) publication from submission to post-publication reporting.

# Covered in this presentation

- Submission process
- Copyright transfer and billing
- Acknowledgement and approval emails
- Accepted article alerts
- Monthly usage reports
- Searching IEEE *Xplore* and setting alerts

# Submission process

- The corresponding author will complete the submission process.
- Authors submitting to fully OA journals will be asked to accept OA terms and charges during Step 1.
- Authors submitting to hybrid journals will not be asked to select OA until after the article is accepted.

# Submission – Step 1 – OA journal

ScholarOne Manuscripts™ | Alison Larkin | Instructions & Forms | Help | Log Out

IEEE Power and Energy Technology Systems Journal

Home | Author | Review | Manage | Support

Author Dashboard / Submission

### Submission

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

## Step 1: Type, Title, & Abstract

Select your manuscript type. Enter your title and abstract into the appropriate boxes below. If you need to insert a special character, click the "Special Characters" button. When you are finished, click "Save and Continue." [Read More...](#)

\* = Required Fields

\* Type:  Edit

CHOICE	TYPE
<input type="radio"/>	Journal paper

\* Title  Edit

Preview  0 OUT OF 316 CHARACTERS

\* Abstract  Edit

Write or Paste Abstract

Preview  0 OUT OF 250 WORDS

### Open Access Agreement

\* I have read and agree to the terms below.

By submitting this manuscript to the Power and Energy Technology Systems Journal, I agree that if accepted, it will be published as open access and that I am responsible for the following publication fees:

US \$1,350 per manuscript up to a maximum of 8 published pages  
US \$120 per published page in excess of 8 pages

Some institutions offer assistance for open access funding. Check our [institutional partners list](#) to see if yours is one.

Save Save & Continue >

### Open Access Agreement

\* I have read and agree to the terms below.

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US \$1,350 per manuscript up to a maximum of 8 published pages  
US \$120 per published page in excess of 8 pages

Some institutions offer assistance for open access funding. Check our [institutional partners list](#) to see if yours is one.



Note: Page charges are set at the society's discretion, and differ from journal to journal. Not all journals charge page charges.

# Submission – Step 1 – hybrid journal

Note: Open Access question is not present.

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IEEE GRSS IEEE Transactions on Geoscience and Remote Sensing

Home Author Review Administrator Center Client Configuration Center

Author Dashboard / Submission

This is not a production environment

### Submission

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

## Step 1: Type, Title, & Abstract

Select your manuscript type. Enter your title, running head, and abstract into the appropriate boxes below. If you need to insert a special character, click the "Special Characters" button. When you are finished, click "Save and Continue." [Read More ...](#)

\* = Required Fields

\* Type: [Edit](#)

CHOICE	TYPE
<input type="radio"/>	Regular paper
<input type="radio"/>	Letter to the Editor

\* Title [Edit](#)

[Preview](#) [Special Characters](#) 0 OUT OF 250 CHARACTERS

\* Abstract [Edit](#)

Write or Paste Abstract

[Preview](#) [Special Characters](#) 0 OUT OF 250 WORDS

[Save](#) [Save & Continue >](#)

# Submission process

- Later in the submission process, the corresponding author will be required to enter manuscript details, list all contributing authors, suggest reviewers, and upload manuscript files.
- If the manuscript is accepted, the author will be prompted to upload the final files and confirm all manuscript details.
- For papers in a hybrid journal, the author will have to choose whether or not to publish OA.
- Authors of all papers will have to choose a license agreement and select a payment method.

# Post acceptance – final files upload

ScholarOne Manuscripts™ (Alison Larkin) as Christine Kurzawa End Proxy Instructions & Forms Help Log Out

  IEEE Transactions on Geoscience and Remote Sensing

Home **Author** Review Administrator Center Client Configuration Center

Author Dashboard

This is not a production environment

**Author Dashboard**

- 1 Unsubmitted and Manuscripts in Draft
- 1 Awaiting Final Files**
- Start New Submission
- Legacy Instructions
- 5 Most Recent E-mails

## Awaiting Final Files

**ATTENTION:** As part of your final file submission you *MUST* upload:

1. A source file for your manuscript in Word or LaTeX format AND
2. A final version of your manuscript in PDF format named "FINAL VERSION.PDF"

Your source files can be uploaded in a zip file, but you *MUST* upload your final PDF as an individual file.

ACTION	STATUS	ID	TITLE	SUBMITTED	DECISIONED
	ADM: Plaza, Antonio ADM: Larkin, Alison	TGRS-2017-00761	This is a test paper	11-Jul-2017	11-Jul-2017

[Submit Final Files](#)

- Accept (11-Jul-2017)

[Graphics Checker](#)

- Accept for Final Submission

[view decision letter](#)



# Electronic copyright transfer

- Corresponding authors must use the electronic copyright form (eCF) system to select their license type.
- Authors publishing OA can choose between the CC BY and OAPA licenses.
  - More information on OA license types can be found at [http://www.ieee.org/publications\\_standards/publications/oa\\_license\\_options.pdf](http://www.ieee.org/publications_standards/publications/oa_license_options.pdf).
- Authors are also asked if they are government employees, since some government employees are required to publish under specific licenses.

# eCF – Step 1

This is the first page of the eCF.

The screenshot shows the IEEE Publication Agreement eCF interface. At the top, there is a navigation bar with links for IEEE.org, IEEE Xplore Library, IEEE Standards, and IEEE Spectrum. The main heading is "IEEE Publication Agreement" with a progress indicator showing five steps, where the first step is highlighted in orange. Below the heading is a "Welcome" message and a bold instruction: "The following steps will lead you through the process of either transferring copyright or licensing publishing rights to IEEE." This is followed by a list of five steps: 1. Confirm article information, 2. Confirm article originality and signing authority, 3. Select the appropriate publishing agreement, 4. Sign the publication agreement, and 5. Download the signed publication agreement. A prominent orange "Start" button is located to the right of the steps. On the right side of the page, there are two informational panels: "About signing this agreement" and "About Open Access". The "About signing this agreement" panel explains that the author is signing on behalf of all co-authors and that the digital agreement uses a digital signature. The "About Open Access" panel includes a note that some IEEE Journals require payment before publication and provides a link to the IEEE Support Center. At the bottom of the page, there is a footer with links for Home, Contact & Support, Nondiscrimination Policy, and Privacy & Opting Out of Cookies, along with a copyright notice for 2017 IEEE.

IEEE.org | IEEE Xplore Library | IEEE Standards | IEEE Spectrum

## IEEE Publication Agreement

Welcome

**> The following steps will lead you through the process of either transferring copyright or licensing publishing rights to IEEE.**

- STEP 1: Confirm article information.
- STEP 2: Confirm article originality and signing authority.
- STEP 3: Select the appropriate publishing agreement.
- STEP 4: Sign the publication agreement.
- STEP 5: Download the signed publication agreement.

[Start](#)

Select Language

### About signing this agreement

As corresponding author, or authorized agent, you will be signing on behalf of all your co-authors. Therefore, please be sure to confirm any changes with them.

This digital Publication Agreement uses a digital signature, which requires an author simply to type

### About Open Access

NOTE: Some IEEE Journals require payment before an article can be published. For a list of publications with this requirement please visit [IEEE Support Center](#), Search Accept-Pay-Publish.

Authors who select open access will be directed to the OA

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# eCF – Step 3

The corresponding author must acknowledge and accept the APC.

IEEE.org | IEEE Xplore Library | IEEE Standards | IEEE Spectrum

## IEEE Publication Agreement

1 2 3 4 5

STEP 3: Select the appropriate publication agreement

Select Language ▼

### Open Access Article Processing Charge:

**Article Title:** An earth-shattering discovery

**Authors:** Krista Thom

**Open Access Publishing Option:**

Allows authors' articles to be accessed by all IEEE Xplore users, and requires a payment of an Article Processing Charge. For more information, see the sidebar.

I understand there is an Article Processing Charge.

Back Continue

#### Information

Authors who select open access will be directed to the OA Payment Page before they sign their publication agreements.

Open Access publishing requires payment of an Article Processing Charge, ranging from US \$1,350 to US \$1,950. See individual journal "Information for Authors" instructions for specific details.

Authors will not be asked to pay voluntary page charges for an open access article.

Authors who need a hardship waiver should follow this link for Special Circumstances Criteria:  
[http://www.ieee.org/membership\\_servic](http://www.ieee.org/membership_servic)

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# eCF – Step 3

Authors of OA articles may choose between the OAPA and CC BY licenses.

IEEE.org | IEEE Xplore Library | IEEE Standards | IEEE Spectrum

## IEEE Publication Agreement

1 2 3 4 5

Select Language

### Step 3: Selecting the appropriate publishing model

► Please select the appropriate open access license type.

I would like to publish under the Open Access Publishing Agreement (OAPA).

I would like to publish under the Creative Commons (CCBY) License.

**Notice to Authors who have received Wellcome Trust funding**  
In order to support Wellcome Trust's Open Access policy, all articles by authors who have received funding from Wellcome Trust to cover article processing charges (APC) must be published under the Creative Commons Attribution License (CC BY). Wellcome Trust will not cover the APC cost if an author chooses a license other than CC BY.

Back Continue

**About the Open Access Publishing Agreement (OAPA):**  
The OAPA offers four important benefits: any complaints or abuse (such as infringement and plagiarism) of your content.

4. The OAPA allows others to copy your work, as well as to translate it or to reuse it for text/data mining, as long as the usage is for noncommercial purposes.

**About CC BY License**  
Points to Consider:  
article processing charges.

If your work has not been supported by a funding agency, you may also opt to use the CC BY license.

If you select CC BY, you will also need to sign an IEEE Terms and Conditions agreement.

Home | Contact & Support | Nondiscrimination Policy | Privacy & Opting Out of Cookies

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# eCF – Step 3

IEEE.org | IEEE Xplore Library | IEEE Standards | IEEE Spectrum

## IEEE Publication Agreement

1 2 3 4 5

Select Language ▼

### Step 3: Select the appropriate publication agreement

➤ Please select your employment status:

- Employed by a Crown Government
- Employed by the European Commission
- Employed by the United States Government
- None of the above

Back Continue

**Employment status = copyright status**

An author's copyright status is determined to a large extent by the type of employer for whom the author works. For example, if you are employed by the U.S. Government, and you are the sole author of your paper, then you should select "Employed by United States Government."

Similarly, if you are the sole author and you are employed by a Crown Government (or if you and all your coauthors are Crown Government employees), then copyright to your paper will remain with the Crown Government. You should select "Employed by a Crown Government."

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Some government employees are required to use specific copyright forms. Authors who select these options will be provided with the correct forms.

# eCF – Step 3

This is the last step in the copyright transfer process. Authors complete it by clicking “Continue to Payment Portal.”

The screenshot displays the IEEE Publication Agreement interface. At the top, there is a navigation bar with links for IEEE.org, IEEE Xplore Library, IEEE Standards, and IEEE Spectrum. The main heading is "IEEE Publication Agreement" with a progress indicator showing five steps, with step 3 highlighted. Below the heading, the text reads "STEP 3: Select the appropriate publishing agreement". A sub-heading states: "Confirm your article details before continuing to the Open Access (OA) Payment Portal:". The article details are as follows:

- Article Title: An earth-shattering discovery
- Publication Title: IEEE ACCESS
- Publication Type: Periodical
- Authors: Krista Thom
- Article Identifier: 24601
- Publication Agreement: OAPA
- Your Email: k.thom@ieee.org

At the bottom of the details section, there are two buttons: "Back" and "Continue To Payment Portal". On the right side, there is a sidebar titled "About OA Payment" which contains the following text:

You must arrange for payment of APCs before signing the publishing agreement.

By clicking on the "Continue to Payment Portal" button below you will be automatically redirected to the IEEE OA Payment Portal to pay this APC. Once you have completed your payment you can return here to complete your publishing agreement.

You will need the following items in order to complete the OA Payment:

- o Credit Card Number or Purchase Order Number
- o Complete Contact Information for payer

Follow this link for Special Circumstances Criteria [http://www.ieee.org/membership\\_sel](http://www.ieee.org/membership_sel)

Open Access publishing requires payment of an Article Processing Charge(APC), ranging from US

At the bottom of the page, there is a footer with links for Home, Contact & Support, Nondiscrimination Policy, and Privacy & Opting Out of Cookies. A copyright notice states: "© Copyright 2017 IEEE - All rights reserved. Use of this Web site signifies your agreement to the IEEE Terms & Conditions". The IEEE logo is visible in the bottom right corner.

# Payment portal

- After the corresponding author completes all copyright information, he or she will be transferred to the payment portal.
- The author must select the method of payment. The default payment method is a credit card.
- If the APC will be paid using an institutional account, the author must select “IEEE Open Access Institutional Account” under “Institutional Payment Options.”

# Payment portal – top of page



The world's largest technical professional organization for the advancement of technology

## IEEE Open Access - Payment Processing

Description	Amount
<b>Open Access</b> - Automatic Control: Open Access article processing charge <b>Manuscript ID: myarticle</b>	US\$1,950.00

Shipping & handling : US\$0.00

**Total: US\$1,950.00**

### Questions?

Please direct your inquiries to the IEEE Support Center

Quote Id: 1-4XQM593

# Payment portal – payment options

### Institutional Payment Options

**IEEE Open Access Institutional Account** [?](#)

Some institutions pay in advance to cover APCs from eligible authors. Check this option to see a list of eligible accounts.

**Third party billing** [?](#)

This option will send the invoice directly to your institution or author for payment.

### Institutional Payment Options

IEEE Open Access Institutional Account [?](#)

Some institutions pay in advance to cover APCs from eligible authors. Check this option to see a list of eligible accounts.

Third party billing [?](#)

This option will send the invoice directly to your institution or author for payment.

### Personal Payment Options

Credit Card

Bank wire transfer

Check

Pre-approved waiver [?](#)

You must already have a pre-approved waiver from the publication editor-in-chief or sponsoring society. If you do not have a pre-approved waiver contact your publication editor-in-chief before processing.

Special payment circumstances [?](#)

IEEE realizes that economic circumstances may impact members ability to pay the full amount of Open Access APC. For this reason, the special circumstance categories have been established. Please visit us at [IEEE Special Circumstances](#) to see if you qualify.

Payment type: IEEE Open Access Institutional Account    Amount: US \$ 1,950.00

Please select your institutional account from the list of IEEE Open Access Institutional Partners below. If you do not find your institution, please click on the Third Party Billing Option under Institutional Payment Options.

<a href="#">Aberystwyth University - Hugh Owen Lib</a> Aberystwyth, United Kingdom	<a href="#">Brunel University Middlesex</a> , United Kingdom	<a href="#">Cardiff University</a> Cardiff, United Kingdom
<a href="#">Cern</a> Geneva 23, Switzerland	<a href="#">Consortium - Scotland (SHEDL)</a> Glasgow, United Kingdom	<a href="#">Cranfield University</a> Wiltshire, United Kingdom
<a href="#">De Montfort University</a> Leicester, United Kingdom	<a href="#">Durham Univ</a> Durham, United Kingdom	<a href="#">Google, Inc.</a> California, USA
<a href="#">Gotham University</a> New York, USA	<a href="#">Heriot-Watt University</a> Edinburgh, United Kingdom	<a href="#">Lancaster University</a> Lancaster, United Kingdom
<a href="#">List of English Writers</a> Cambridge, United Kingdom	<a href="#">Liverpool John Moores University</a> Merseyside, United Kingdom	<a href="#">Loughborough Univ</a> Loughborough, United Kingdom
<a href="#">Manchester Metropolitan Univ</a> Manchester, United Kingdom	<a href="#">Newcastle University</a> Newcastle, United Kingdom	<a href="#">Queen Mary University of London</a> London, United Kingdom

1 2 3 Next >

Showing 1 - 18 of 45

[Cancel](#)

Once the author selects “IEEE Open Access Institutional Account”, a list of institutions will appear on the right. The author must click on their institution.

# Payment portal – Complete Order

### IEEE Open Access - Payment Processing

Description	Amount
<b>Open Access - Automatic Control: Open Access article processing charge</b> Manuscript ID: myarticle	US\$1,950.00
Shipping & handling :	US\$0.00
Tax <input type="checkbox"/> :	US\$0.00
<b>Total: US\$1,950.00</b>	

#### Shipping Address

Tester One  
445 Hoes Ln  
Piscataway, New Jersey 08854-4141 USA

[Edit](#) › Add new address

#### Payment Options

Selected payment option: IEEE Open Access Institutional Account

Institution name: Gotham University

[Edit](#) › Change Payment type

[Complete Order](#) › [Cancel](#)

Once all shipping and payment information is entered, authors will click on “Complete Order” at the bottom right of the page.

# Payment portal - confirmation



The world's largest technical professional organization for the advancement of technology

## Thank You

Your payment information was successfully submitted. A confirmation and any further instruction will be sent to the email address provided on the payment form.

If you have any questions you can contact us at [oaprocessing@ieee.org](mailto:oaprocessing@ieee.org) for IEEE Open Access orders and at [reprints@ieee.org](mailto:reprints@ieee.org) for all other orders.

You can now complete the copyright process. Please click below to proceed to the Electronic Copyright application form.

[Complete Copyright Form](#)

### Order Summary :

Description	Amount
Open Access - Automatic Control: Open Access article processing charge <b>Manuscript ID: myarticle</b>	US\$1,950.00

#### Order details:

Order number: 1-10745666751  
Date 06-Mar-2018  
Member/Customer number: **94464811**

#### Shipping Address(for Taxation):

**Tester One**  
445 Hoes Ln  
Piscataway, New Jersey 08854-4141 USA

#### Payment details:

**Selected payment option:** IEEE Open  
Access Institutional Account

**Institution name:**

Shipping & handling: US\$0.00

Tax  : US\$0.00

**Total: US\$1950.00**

#### Questions?

Please direct your inquiries to the IEEE Support Center

Quote Id: 1-4XQM593

Once the author clicks "Complete Order," a confirmation page will appear.



# Acknowledgement emails

- Once the author has selected an institutional account and confirmed the purchase, he or she will receive an acknowledgment email.
- The administrator of the account will receive an email asking him or her to approve the article.

# Acknowledgment email

The world's largest technical professional  
organization for the advancement of technology



Dear Sam Salmon,

Thank you for publishing with the IEEE. The IEEE will contact your institution to arrange payment and no further action is required. If the selected institution does not authorize payment, an IEEE representative will contact you and you will be responsible for any outstanding charges.

Manuscript ID/Article ID/DOI-	123 TIP
Article Title-	title test
IEEE Publication-	IEEE Access: Open Access article processing charge
IEEE Order Number-	1-10032279591
Invoice Amount-	USD\$1,750.00

If you need to contact IEEE for further information about this message, please e-mail:

IEEE Open Access Processing – at [OAprocessing@ieee.org](mailto:OAprocessing@ieee.org)

Sample acknowledgment email sent to authors.



# Approval email

On Wed, Jul 26, 2017 at 3:23 PM, [REDACTED] wrote:  
Dear [REDACTED]  
Please let me know if the articles attached are approved to be published as open access.

[REDACTED] ✕  
**Open Access Processing**  
Phone: [REDACTED]  
Fax: [REDACTED]  
Email: [REDACTED]

**IEEE Operations Center**  
445 Hoes Lane  
Piscataway, NJ 08854

Sample administrator approval email. Article details will either be included in the body of the email (for single articles) or as an attachment (if there are several outstanding articles).

# Accepted article alerts

- An alert will be sent to an institutional administrator upon an article's acceptance if:
  - The corresponding author is from an institution with an OA account.
  - The article was accepted for publication in an IEEE journal.
  - The author chose to publish under a traditional (non-OA) license.
- Alerts contain article details and instructions for switching to an OA license and publishing under the institutional account.

# Accepted article alert

Dear [Administrator],

The following article has been accepted for publication by the IEEE and we have identified the corresponding author as having an affiliation with your organization.

[MS Title]

[Journal Title]

[DOI]

[Corresponding Author Name]

[Corresponding Author Affiliation]

[Corresponding Author Email]

The author has chosen to publish under a IEEE license and has chosen not to publish under an institutional account.

If these selections are correct, then no further action is necessary.

If you would like to change the license type or payment method, please follow the steps below.

- 1) Forward this email to the corresponding author, and request that they make the suggested change.
- 2) The corresponding author must then forward the email to [oinstitution@ieee.org](mailto:oinstitution@ieee.org) and [editsupport@ieee.org](mailto:editsupport@ieee.org) along with note confirming their consent to the change.
- 3) IEEE will make the article OA under a CC BY license, unless otherwise specified, and debit the APC against your account. IEEE may request more information from either the author or institution.

Please note that IEEE needs the corresponding author's confirmation in order to process this request through your institutional account.

If you or the corresponding author require assistance during this process, please contact [oinstitution@ieee.org](mailto:oinstitution@ieee.org).

Sample alert email sent to administrators.

# Monthly usage reports

- Every month, IEEE will send account administrators a usage report that lists all activity on an account.
- Reports are cumulative, and will show activity from the time the account was opened.
- Reports show article name, publication name, author name, order ID, and order date. DOI numbers and transaction amounts will be shown if applicable.

# Monthly usage report – sample report

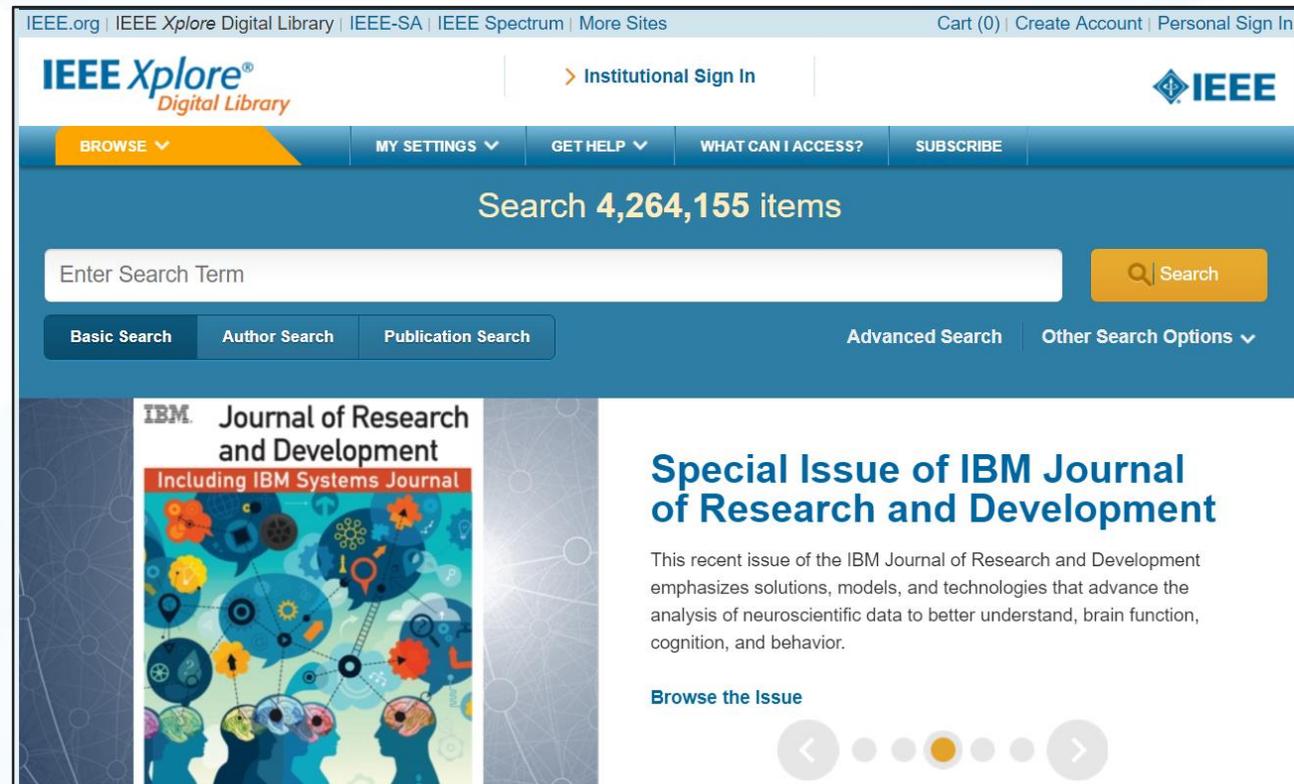
TRANS TYPE	ORDER ID	ORDER DATE	AUTHOR NAME	PUBLISHED ARTICLE NAME	PUBLICATION NAME	DOI NUMBER	TRANS AMOUNT
 OPEN ACCESS DEPOSIT ACCOUNT ACTIVITY AS OF 30-JUN-17							
DEPOSIT	1-4470485763	02-May-14	N/A	N/A	N/A	N/A	
DEPOSIT	SF1-8738768448	27-Oct-16	N/A	N/A	N/A	N/A	
DEPOSIT SUB-TOTAL:							
TRANSACTION	1-4717606222	24-Jul-14	JANUSZ BIALEK	ADAPTIVE PARAMETER ESTIMATION OF POWER SYSTEM DYNAMIC MODEL USING MODAL INFORMATION	POWER SYSTEMS: OPEN ACCESS ARTICLE PROCESSING CHARGE	2316916	
TRANSACTION	1-8817312283	11-Nov-16	JONATHAN HAMMLER	FREE-SPACE PERMITTIVITY MEASUREMENT AT TERAHERTZ FREQUENCIES WITH A VECTOR NETWORK ANALYSER	TERAHERTZ SCIENCE AND TECHNOLOGY: OPEN ACCESS ARTICLE PROCESSING CHARGE	T-TST-REG-05-2016-00091.R1	
TRANSACTION SUB-TOTAL:							
 ACCOUNT BALANCE							

# Search and setting IEEE *Xplore* alerts

- Many administrators want to monitor the publishing activity from their institution.
- They can do this by searching or setting up alerts in IEEE *Xplore*.

# Searching for published articles

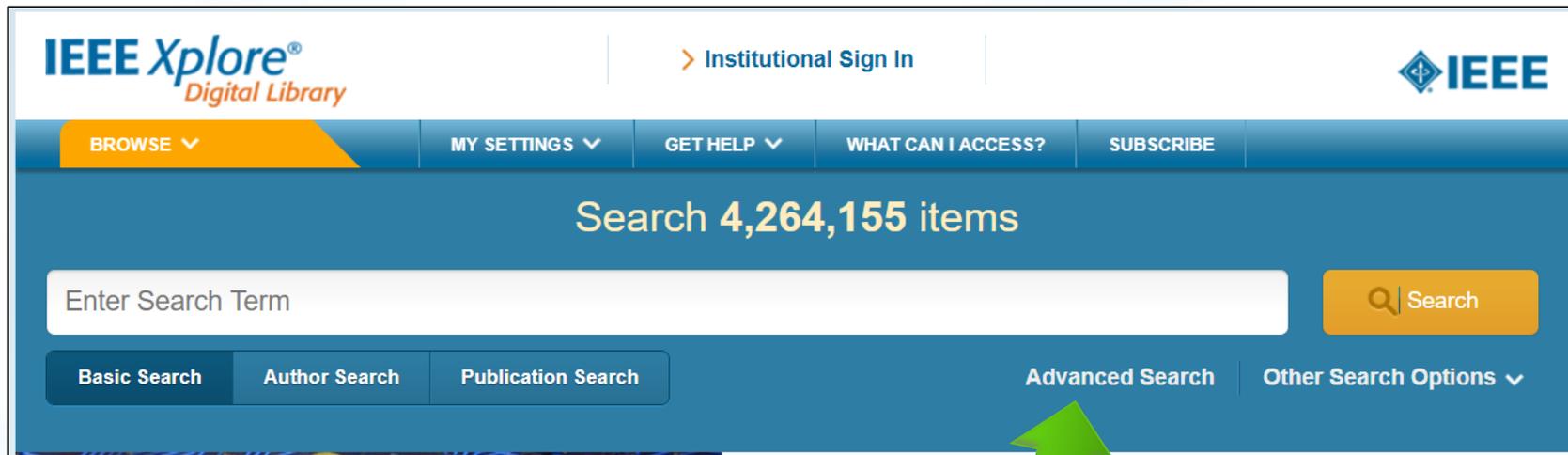
- You can search IEEE *Xplore* for articles by affiliation and/or by funding agency. You can also set alerts.



The screenshot displays the IEEE Xplore Digital Library search page. At the top, there is a navigation bar with links for 'IEEE.org', 'IEEE Xplore Digital Library', 'IEEE-SA', 'IEEE Spectrum', and 'More Sites'. On the right side of the navigation bar, there are links for 'Cart (0)', 'Create Account', and 'Personal Sign In'. Below the navigation bar, the IEEE Xplore logo is visible on the left, and 'Institutional Sign In' is on the right. A secondary navigation bar contains 'BROWSE', 'MY SETTINGS', 'GET HELP', 'WHAT CAN I ACCESS?', and 'SUBSCRIBE'. The main content area features a search bar with the text 'Search 4,264,155 items' above it. Below the search bar is a search input field with the placeholder 'Enter Search Term' and a 'Search' button. Underneath the search bar are tabs for 'Basic Search', 'Author Search', and 'Publication Search', along with links for 'Advanced Search' and 'Other Search Options'. The main content area is divided into two sections. The left section shows a cover image for the 'IBM Journal of Research and Development' with the subtitle 'Including IBM Systems Journal'. The right section features a 'Special Issue of IBM Journal of Research and Development' with a description: 'This recent issue of the IBM Journal of Research and Development emphasizes solutions, models, and technologies that advance the analysis of neuroscientific data to better understand, brain function, cognition, and behavior.' Below the description is a 'Browse the Issue' link and a set of navigation arrows.

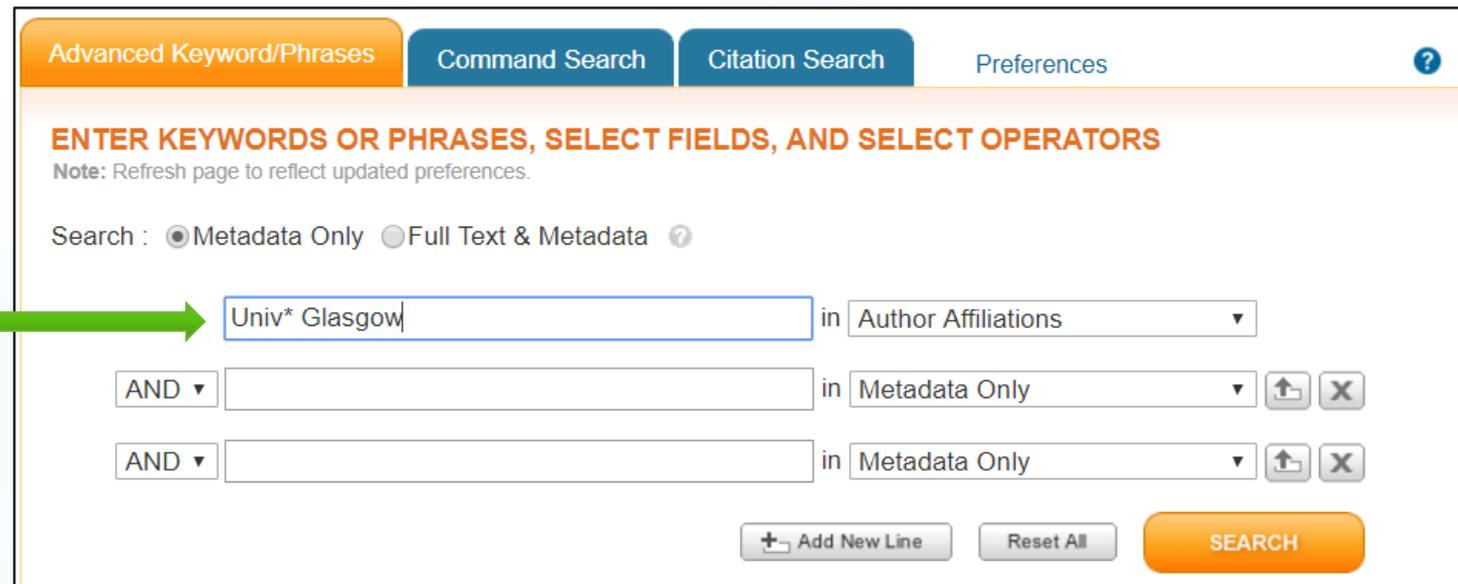
# Searching by affiliation

- From the IEEE *Xplore* homepage, click on “Advanced Search.”



# Searching by affiliation

- Select "Author Affiliation" from the dropdown menu, and enter the relevant search term.
- You may also want to include alternate spellings or abbreviations in the search.



The screenshot shows the IEEE search interface with the following elements:

- Navigation tabs: **Advanced Keyword/Phrases** (selected), **Command Search**, **Citation Search**, and **Preferences**.
- Instruction: **ENTER KEYWORDS OR PHRASES, SELECT FIELDS, AND SELECT OPERATORS**
- Note: Refresh page to reflect updated preferences.
- Search options:  Metadata Only,  Full Text & Metadata
- Search input: **Univ\* Glasgow** (highlighted with a green arrow) in the **Author Affiliations** dropdown.
- Additional search lines: **AND** [ ] in **Metadata Only** (two lines).
- Buttons: **+ Add New Line**, **Reset All**, and **SEARCH**.

# Searching by funding agency

- If you like, you can add funding agencies to your search.
- When performing an advanced search, select “Funding Agency” from the dropdown menu.
- When searching on multiple fields, make sure you are using the correct Boolean operators.

# Searching by funding agency

Boolean operators

Advanced Keyword/Phrases | Command Search | Citation Search | Preferences ?

**ENTER KEYWORDS OR PHRASES, SELECT FIELDS, AND SELECT OPERATORS**  
Note: Refresh page to reflect updated preferences.

Search :  Metadata Only  Full Text & Metadata ?

Univ\* Glasgow in Author Affiliations

AND Research Councils UK in Funding Agency

OR RCUK in Funding Agency

+ Add New Line | Reset All | SEARCH

# Searching by affiliation

**▼ PUBLISHER**

Return Results from

<input checked="" type="checkbox"/> IEEE(3,946,161)	<input type="checkbox"/> TUP(2,521)
<input type="checkbox"/> IET(231,215)	<input type="checkbox"/> URSI(912)
<input type="checkbox"/> SMPTE(24,885)	<input type="checkbox"/> Morgan & Claypool(768)
<input type="checkbox"/> MITP(24,481)	<input type="checkbox"/> CSEE(134)
<input type="checkbox"/> VDE(9,144)	<input type="checkbox"/> CMP(43)
<input type="checkbox"/> AGU(7,944)	<input type="checkbox"/> CES(29)
<input type="checkbox"/> IBM(6,399)	<input type="checkbox"/> CPSS(22)
<input type="checkbox"/> Nokia Bell Labs(6,314)	
<input type="checkbox"/> BIAI(3,086)	

**▼ CONTENT TYPES**

<input type="checkbox"/> Conference Publications (3,028,447)	<input type="checkbox"/> Early Access Articles (14,294)
<input checked="" type="checkbox"/> Journals & Magazines (1,182,219)	<input type="checkbox"/> Standards (8,106)
<input type="checkbox"/> Books & eBooks (30,635)	<input type="checkbox"/> Courses (454)

**▼ PUBLICATION YEAR**

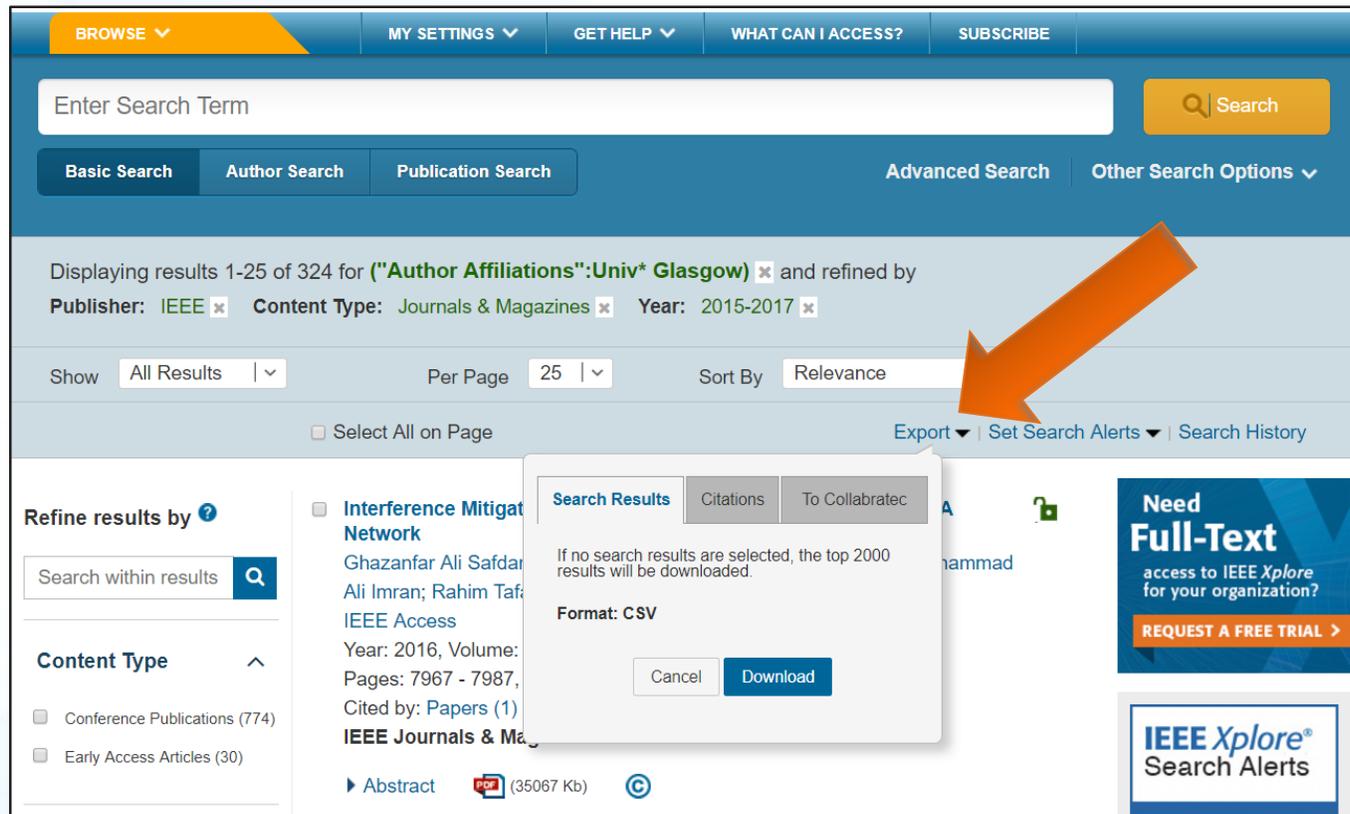
Search latest content update (07/19/2017)

Specify Year Range    From:     To:

All Available Years

- You can filter by OA status, publisher, content type, and year.
- Only articles published in IEEE journals are eligible to use institutional funds.

# Searching by affiliation



The screenshot displays the IEEE Xplore search results page. At the top, there are navigation links: BROWSE, MY SETTINGS, GET HELP, WHAT CAN I ACCESS?, and SUBSCRIBE. Below these is a search bar with the text "Enter Search Term" and a "Search" button. The search results are filtered by "Author Affiliations": Univ\* Glasgow, Publisher: IEEE, Content Type: Journals & Magazines, and Year: 2015-2017. The results are displayed in a table with columns for "Search Results", "Citations", and "To Collaborate". An orange arrow points to the "Export" button in the top right corner of the results area. A modal dialog box is open over the "Export" button, showing the "Format: CSV" option and a "Download" button. The dialog also includes a "Cancel" button and a message: "If no search results are selected, the top 2000 results will be downloaded." The main search results list includes a result for "Interference Mitigation Network" by Ghazanfar Ali Safdar, Ali Imran, and Rahim Tafar, published in IEEE Access in 2016.

- You can export the results from the search results page by clicking on “Export” in the top right.
- Exports are limited to 2,000 results.

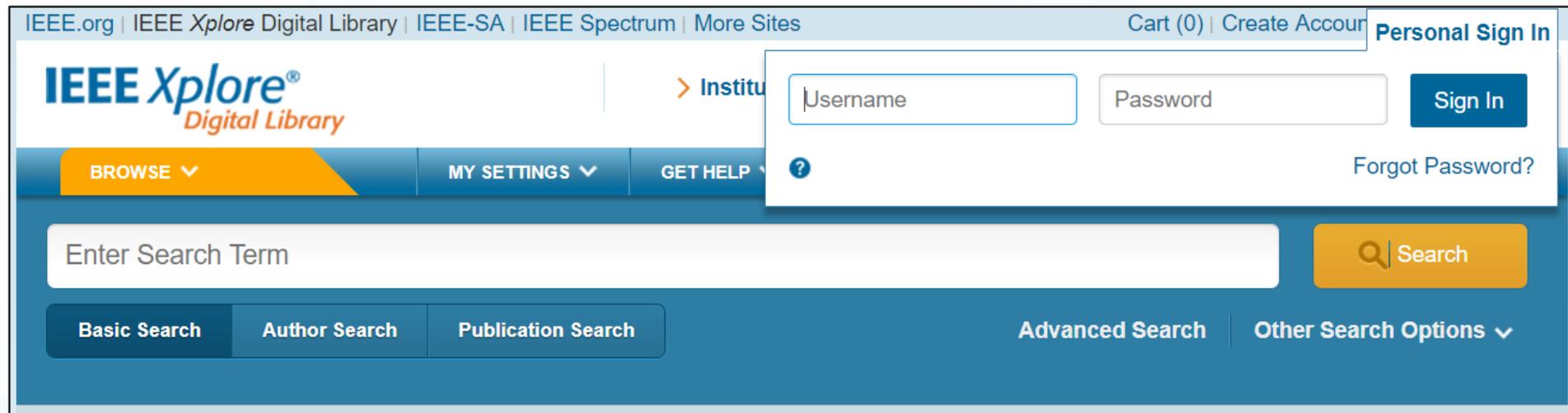
# Search by affiliation

Results will be exported in the specified format.

Document	Authors	Author Aff	Publication	Date Added	Year	Volume	Issue	Start Page	End Page	Abstract	ISSN	ISBNs	DOI	Funding In	PDF Link	Author Key	IEEE Term	INSPEC Co	INSPEC No	MeSH Term	Article Title	Patent	Cite Rec
1	Robust and G. P. Adam	Department of Electrical and Electronic Engineering, Glasgow	IEEE Trans	20151119	2015	30	6	2468	2476	This paper 0885-8977;08858977	10.1109/TPWRD.2015.24682476	0885-8977	10.1109/TPWRD.2015.24682476		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							18	
2	Power Frequency W. Zhou; Y. School of	IEEE Trans	20150320	2015	30	2	1016	1023	1023	Due to the 0885-8977;08858977	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							0	
3	Partial discharge M. A. Fard	Glasgow C IEEE Trans	20170629	2017	24	3	1494	1502	1502	Power cable 1070-9878;10709878	10.1109/TDEI.2017.0	10.1109/TDEI.2017.0	10.1109/TDEI.2017.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							6	
4	Distributed F. Adinolfi; Dipt. di Ing	IEEE Trans	20150306	2015	62	4	2593	2603	2603	The electric 0278-0046;02780046	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							6	
5	Fluorescer S. Li; I. V. T Department	IEEE Trans	20150811	2015	22	4	1856	1865	1865	It has been 1070-9878;10709878	10.1109/TDEI.2015.0	10.1109/TDEI.2015.0	10.1109/TDEI.2015.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
6	Online Two Y. Hu; J. Zh Dept. of El	IEEE Trans	20151008	2015	62	11	7237	7246	7246	Photovoltaic 0278-0046;02780046	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							8	
7	SDMF base X. Peng; J. State Key	IEEE Trans	20170307	2017	24	1	83	91	91	Partial discharge 1070-9878;10709878	10.1109/TDEI.2016.0	10.1109/TDEI.2016.0	10.1109/TDEI.2016.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							2	
8	Container R. Cziva; D Univ. of G	IEEE Comr	20170612	2017	55	6	24	31	31	In order to 0163-6804;01636804	10.1109/MCOM.2017	10.1109/MCOM.2017	10.1109/MCOM.2017		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
9	Phase Curr C. Gan; J. Coll. of El	IEEE Trans	20150408	2015	62	5	3265	3276	3276	Switched 0278-0046;02780046	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							15	
10	On the En Q. T. Vien; Sch. of Sci	IEEE Trans	20150113	2015	64	1	159	172	172	This paper 0018-9545;00189545	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
11	Linking Sta K. Harris; T School of I	Proceeding	20170216	2017	105	3	516	529	529	Neutral mi 0018-9219;00189219	10.1109/JI.2017	10.1109/JI.2017	10.1109/JI.2017		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							3	
12	Unstructur V. Caroten DIETI, Uni	IEEE Geosci	20150615	2015	12	8	1665	1669	1669	Coherent 1545-598X;1545598X	10.1109/L.10.13039/	10.1109/L.10.13039/	10.1109/L.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
13	A Survey o A. Todri-S Microelect	IEEE Circu	20170519	2017	17	2	47	62	62	This article 1531-636X;1531636X	10.1109/MCAS.2017	10.1109/MCAS.2017	10.1109/MCAS.2017		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							3	
14	Design anc Y. Zhang; I Departme	IEEE Micr	20151202	2015	25	12	826	828	828	A Brewster 1531-1309;15311309	10.1109/L.10.13039/	10.1109/L.10.13039/	10.1109/L.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							4	
15	Coordinati X. Y. Bian; Electric Po	IEEE Trans	20160415	2016	31	3	2371	2382	2382	A modified 0885-8950;08858950	10.1109/TPWRD.2015	10.1109/TPWRD.2015	10.1109/TPWRD.2015		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
16	IEDs on th G. Paul; J. Mobile Co	IEEE Const	20160411	2016	5	2	79	86	86	Almost eve 2162-2248;21622248	10.1109/MCE.2016.2	10.1109/MCE.2016.2	10.1109/MCE.2016.2		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							0	
17	Wideband R. A. Elliot Dept. of El	IEEE Trans	20170519	2016	63	1	24	28	28	For trans 1549-7747;15497747	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							11	
18	A Peak-Ca J. Sha; D. Key Lab. o	IEEE Trans	20160208	2016	63	3	1528	1538	1538	It is know 0278-0046;02780046	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
19	Analysis of M. A. Fard Glasgow C	IEEE Trans	20170307	2017	24	1	7	16	16	This paper 1070-9878;10709878	10.1109/TDEI.2016.0	10.1109/TDEI.2016.0	10.1109/TDEI.2016.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							23	
20	Interferen S. Bu; F. R. Sch. of En	IEEE Trans	20150310	2015	64	3	1036	1050	1050	Heterogen 0018-9545;00189545	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							11	
21	A Linear Id L. H. I. Lim Dept. of El	IEEE Trans	20150515	2015	62	7	4181	4193	4193	This paper 0278-0046;02780046	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							11	
22	Assesmer W. Zhao; V University	IEEE Trans	20170424	2017	24	2	1189	1196	1196	One of the 1070-9878;10709878	10.1109/TDEI.2017.0	10.1109/TDEI.2017.0	10.1109/TDEI.2017.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							63	
23	Quasi Two I. A. Gowda Dept. of El	IEEE Trans	20140826	2015	30	1	108	123	123	DC fault p 0885-8993;08858993	10.1109/TPEL.2014.2	10.1109/TPEL.2014.2	10.1109/TPEL.2014.2		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							63	
24	The impac V. M. Catt Institute f	IEEE Trans	20160111	2015	22	6	3505	3512	3512	Delivery of 1070-9878;10709878	10.1109/TDEI.2015.0	10.1109/TDEI.2015.0	10.1109/TDEI.2015.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							2	
25	Analytical L. G. W. R. Dept. of El	IEEE Journ	20150909	2015	5	3	465	476	476	An analyt 2156-3357;21563357	10.1109/JETCAS.2015	10.1109/JETCAS.2015	10.1109/JETCAS.2015		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							59	
26	Object Det J. Han; D. Sch. of Aut	IEEE Trans	20150205	2015	53	6	3325	3337	3337	The abund 0196-2892;01962892	10.1109/T.10.13039/	10.1109/T.10.13039/	10.1109/T.10.13039/		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	
27	A novel on B. Shen; C Glasgow C	IEEE Trans	20150811	2015	22	4	2087	2096	2096	This paper 1070-9878;10709878	10.1109/TDEI.2015.0	10.1109/TDEI.2015.0	10.1109/TDEI.2015.0		http://ieeexplore.ieee.org/xpl/articleDetails.jsp?arnumber=7269999							1	

# IEEE Xplore alerts

- To set a search alert, you will first need to sign in to IEEE Xplore.



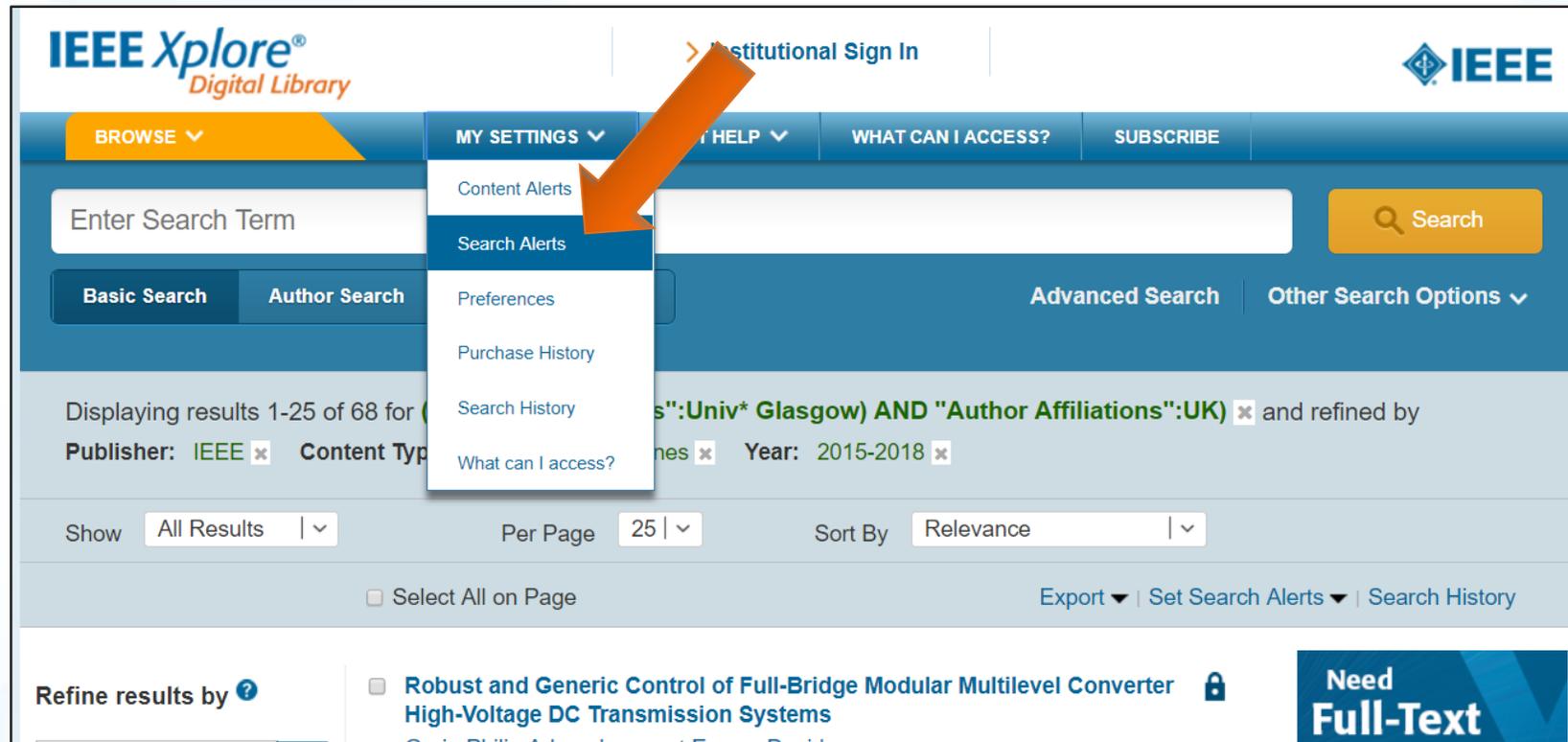
The screenshot displays the IEEE Xplore Digital Library website interface. At the top, there is a navigation bar with links for IEEE.org, IEEE Xplore Digital Library, IEEE-SA, IEEE Spectrum, and More Sites. On the right side of the navigation bar, there are links for Cart (0), Create Account, and Personal Sign In. The main header features the IEEE Xplore Digital Library logo and a navigation menu with options: BROWSE, MY SETTINGS, and GET HELP. A search bar is prominently displayed in the center, with the placeholder text "Enter Search Term" and a "Search" button. Below the search bar, there are buttons for "Basic Search", "Author Search", "Publication Search", "Advanced Search", and "Other Search Options". A sign-in modal is open, showing fields for "Username" and "Password", a "Sign In" button, and a "Forgot Password?" link.

# IEEE Xplore alerts

The screenshot shows the IEEE Xplore search interface. At the top, it displays search criteria: "Author Affiliations":Univ\* Glasgow) AND "Author Affiliations":UK) and refined by Publisher: IEEE, Content Type: Journals & Magazines, and Year: 2015-2018. Below this, there are controls for "Show" (All Results), "Per Page" (25), and "Sort By" (Relevance). A "Set Search Alerts" button is visible in the top right of the results area. A "Set Alert" dialog box is open, prompting for a "Search Alert Name\*" and an "Email Address" (krista\_thom3@hotmail.com). An orange arrow points from the "Set Search Alerts" button to the dialog box. Another orange arrow points from the "Set Alert" dialog box to a "Need Full-Text" banner on the right side of the page. The banner includes the text "Need Full-Text access to IEEE Xplore for your organization?" and a "REQUEST A FREE TRIAL" button. The main search results list includes a paper titled "Robust and Generic Control of Full-Bridge Modular High-Voltage DC Transmission Systems" by Grain Philip Adam and Innocent Ewean Davidson, published in IEEE Transactions on Power Delivery in 2015. The paper details include volume 30, issue 6, pages 2468-2476, and DOI 10.1109/TPWRD.2015.2394. It is cited by 18 papers and is available in IEEE Journals & Magazines. Links for Abstract, HTML, PDF (1848 Kb), and Creative Commons are provided.

- You will then need to conduct a search.
- Once the search results come up, click "Set Search Alerts" in the top right.
- Enter a name for the search.

# IEEE Xplore alerts



The screenshot displays the IEEE Xplore Digital Library interface. At the top left, the logo reads "IEEE Xplore® Digital Library". To the right, there is a link for "Institutional Sign In" and the IEEE logo. Below the header, a navigation bar contains "BROWSE", "MY SETTINGS", "HELP", "WHAT CAN I ACCESS?", and "SUBSCRIBE". A search bar with the placeholder "Enter Search Term" and a "Search" button is positioned to the right of the navigation bar. Below the search bar, there are tabs for "Basic Search" and "Author Search", and links for "Advanced Search" and "Other Search Options". The main content area shows search results with filters: "Publisher: IEEE", "Content Type", "Year: 2015-2018", and "Univ\* Glasgow) AND 'Author Affiliations':UK". A dropdown menu under "MY SETTINGS" is open, with an orange arrow pointing to the "Search Alerts" option. Other options in the menu include "Content Alerts", "Preferences", "Purchase History", "Search History", and "What can I access?". At the bottom, there is a "Refine results by" section and a "Need Full-Text" button.

- To access saved searches, click on "My Settings," and "Search Alerts."

# IEEE Xplore alerts

- A list of your saved searches will be displayed.

My Settings > Search Alerts

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## Search Alerts ?

Alerts will be sent to **krista\_thom3@hotmail.com** in **Plain Text** format. These settings can be updated within the Preferences feature.

1 <a href="#">Glasgow</a>	You Searched For "("Author Affiliations":Univ* Glasgow) AND "Author Affiliations":UK)" You refined by " Publisher[IEEE] Content Type[Journals & Magazines] Year[2015-2018] "	RSS	Rename	Delete	Disable Alert
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# We've covered

- Submission process
- Copyright transfer and billing
- Acknowledgement and approval emails
- Accepted article alerts
- Monthly usage reports
- Searching IEEE *Xplore* and setting alerts

# Additional resources

- IEEE Open site
  - <http://open.ieee.org/>
- Green OA posting policy
  - [http://www.ieee.org/publications\\_standards/publications/rights/paperversionpolicy.html](http://www.ieee.org/publications_standards/publications/rights/paperversionpolicy.html)
- IEEE Access homepage
  - <http://ieeaccess.ieee.org/>
- OA license options
  - [http://www.ieee.org/publications\\_standards/publications/oa\\_license\\_options.pdf](http://www.ieee.org/publications_standards/publications/oa_license_options.pdf)