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RightsLink® for Scientific Communications

Release Notes for Institutions: March 2020

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WHAT'S NEW WITH RIGHTSLINK FOR SCIENTIFIC COMMUNICATIONS

We are pleased to announce the latest RightsLink for Scientific Communications release, which released 28 March 2020.

RightsLink for Scientific Communications' March release introduces a variety of enhancements and new features that further support transformative agreement management and an ongoing commitment to enhancing usability in the payment workflow.

Based on terms of agreements and a desire to remove friction for authors, publishers are keen to notify authors about eligibility for APC funding as soon as possible in the submission process. To assist in this need, we will now provide an API method for upstream systems to access a manuscript's funding eligibility. This will allow the upstream system to display informational messaging to authors. For example, manuscript authors can be alerted, based on manuscript metadata, that they are eligible for funding under an agreement that is in place between their publisher and institution of record.

We are also enhancing the authors experience with funding identification in the RightsLink workflow by providing more tools for messaging customization—while the new features are mostly controlled by the publishers, we've listed them here for institutional awareness.

These are just some of the changes that you will see this release. Read through this release preview to learn details about this release's updates.

Questions? Feel free to contact Shannon Reville at sreville@copyright.com

CONTINUING SUPPORT FOR TRANSFORMATIVE AGREEMENTS

New RightsLink API Method to Get OA Agreement Information

Note: We have included this feature in your release preview because want you to know it is in development, will be adopted by some publishers soon, and could impact your researchers by notifying them earlier in the publishing process of funding availability. There is nothing needed from you in regard to this feature.

As transformative agreements increase in importance to RightsLink client publishers and their institutional partners, they now require the ability to notify authors of possible funding options for open access publication earlier in the process.

To that end, RightsLink has developed a new API method that will allow submission and other upstream systems to make a call to RightsLink when an author validates affiliation and funder information during manuscript submission. RightsLink will then return information about any profiles to which the manuscript would be a match. Using this information, the upstream system can display informational messaging to authors, alerting them that based on manuscript metadata they may be eligible for funding under an agreement that is in place between their publisher and institution of record for that manuscript.

Manuscripts can only be matched if there is a special billing profile housed in RightsLink's agreement manager module and if the manuscript's metadata matches the requirements of that profile. The following data will be returned if that match is identified. Please note: some fields are only returned if applicable, given the attributes of the agreement.

- Profile Name
- Billing Organization Name
- Touch-Free Transactions Enabled (Yes/No)
- Profile Start Date
- Profile End Date (if applicable)
- Manuscript Acceptance Date Required (Yes/No)
- APC Tokens Remaining (Yes/No)
- APC Threshold - Funds Remaining (Yes/No)
- License type/s forced by the profile (if applicable)
- Eligible Products

Additional information and suggested UI messaging is available; please reach out to Shannon Reville (sreville@copyright.com) if you would like to see additional documentation for this new API method.

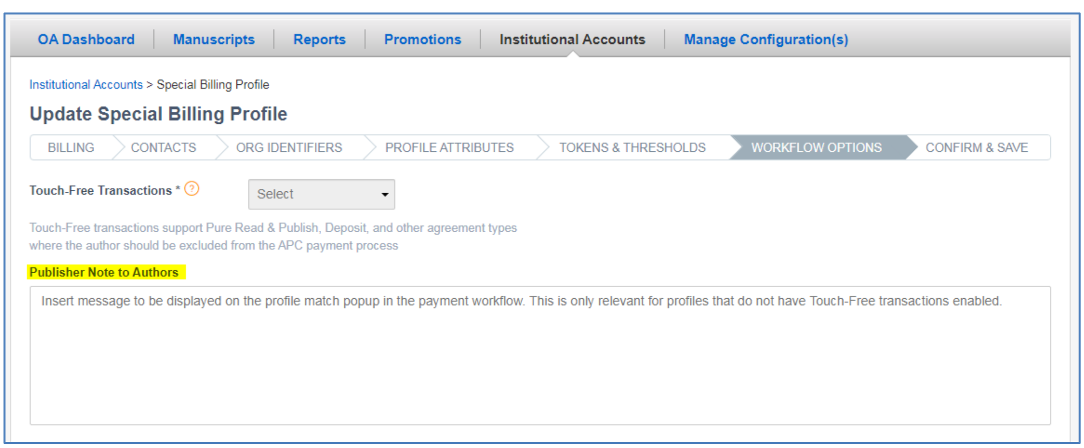
Redesign of the Profile Match Pop Up

In response to publisher, institution, and author feedback, we have redesigned the look and feel of our profile match step in the workflow to better emphasize the most critical information and to make smoother the entryway into our funding request workflow. In this example of the new design, you will see that notes from the publisher and notes from the institution are well highlighted:

Please excuse spelling and grammar errors as this page is still in development.

Area for Publisher to Add Profile-Specific Messaging to the Pop Up

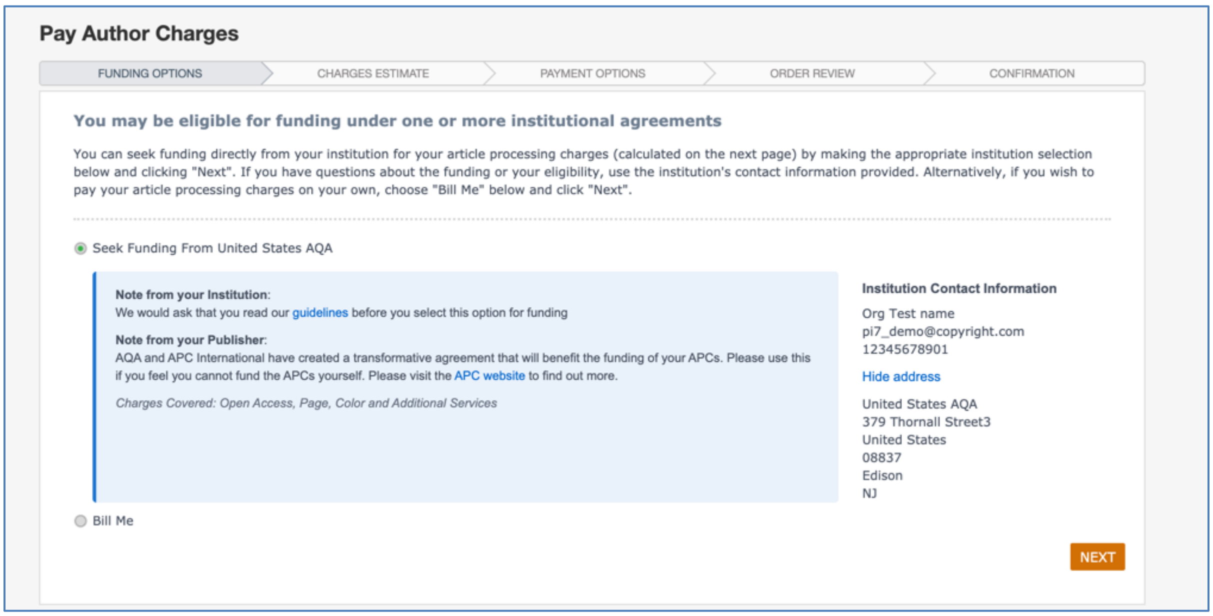
As you will see above in the new design of the profile match step in the workflow, there is now a method for publishers to add messaging to the UI that is specific to the terms of the agreement offered. Institutions have had this functionality since February 2018 and publishers requested an equivalent area for such messaging. This can be added in a new step of the profile creation process called "Workflow Options."



Customization of the funding option label per each profile instead of all profiles

When we first released the agreement management tools, we made it possible for publishers to customize the label of the funding options presented to the author. However, this customization was possible at the "publisher-level" and applied to all profiles in a publisher's configuration. As each institution with which a publisher works may have specific requirements when presenting their funding option, we have now added the funding option label to the "Workflow Options" portion of the profile setup. Labels can be configured per each profile as opposed to the "publisher-level."

This is what is meant by "funding option label":



Show author funding selection behavior in the Publisher's Transaction Summary Report

We are adding two new columns to the Publisher's Transaction Summary Report: Special Billing Profile(s) Matched and Special Billing Profile Used.

> **Special Billing Profile(s) Matched:** This column will show all the names of special billing profiles a manuscript matched to at the time the author entered their transaction. If the manuscript matched to a "touch-free" profile and was pushed through the transaction process automatically upon acceptance, that profile name will also show here. If no profiles are matched, the column will be blank.
> **Special Billing Profile Used:** Formerly called "Profile Name," this column will show the name of the special billing profile selected for the funding request. As of March, however, if there were profiles presented to the user, but they chose the "Bill Me" workflow instead, the column will read "Profile(s) Not Used," If no profiles were matched to begin with, this column will be blank.

Note: These columns will be present in publishers' transaction summary reports but not institutions' transaction summary reports. Due to data privacy challenges, the institutions' transaction summary report only includes transactions placed under one of their profiles and where they are payee. We imagine publishers will share this information with institutions directly when appropriate.