Copyright Clearance Center

RightsLink® for Scientific Communications

Agreement Management Guide for Institutions

June 2020

TABLE OF CONTENTS

OA AGREEMENT MANAGER WORKFLOW

With the help of publishers, research institutions and funders, Copyright Clearance Center has created in RightsLink® an efficient way of helping research and funding institutions to manage open access or article processing charges (APCs). Once set up, the OA Agreement Manager workflow either enables authors to request APC funding or automatically requests funding on their behalf without ambiguity or confusion, lets you see and approve or deny requests immediately, and gives you a clear way to track each manuscript and all funds that are allocated. The manual that follows describes how you work with publishers to establish the workflow and how to access and use the institutional portal to manage your open access business with RightsLink® publishers.

Note: The manual does not describe elements whose action and use are obvious. Rather, it helps you to understand the interaction with publishers along with your role in ensuring a smooth funding process for your researchers.

WHAT'S AN AGREEMENT?

These represent a transformative agreement that may have been signed with one or many institutions. The 'rules of engagement' still lie within the billing profile, but the agreement gives the publisher the opportunity to group these together so that the agreement can be reported upon as a whole. Sometimes there is a need to have many profiles representing each institution within an agreement, and sometimes there is only needed to have a 1:1 relationship with a profile and an agreement. In the Institution Portal you can view which agreement your profiles are part of.

WHAT'S A BILLING PROFILE?

Publishers can see and manage special billing profiles within an agreement that are set up with institutional customers. In this portal, the profiles can be viewed and after initial creation some aspects can be edited. These profiles can reflect legal contracts that might span one or more years or informal billing arrangements. The purpose of the profile is to capture the key attributes of your billing or offsetting arrangements so that the payment workflow is pre-populated with critical information, such as the billing address and contact for the invoice, your contact information for APC questions, the license required by the funding agency (if applicable), your VAT/Tax information if needed, and more.

NOTE

By using the metadata from the manuscript and the attributes from the profile, we remove elements of confusion for authors to request and promptly receive APC funding, allowing their research to be published as soon as possible.

GETTING STARTED: ORDER OF EVENTS

1. **The publisher sets up the basic attributes of an agreement and the profiles within them in the publisher-facing portal (their instance of the software).**
   At minimum, your publisher will need to confirm with you the following information that will be reflected in the profile:
   a) Complete **contact information** for the person who should receive your APC invoices, including:
      First and last names of invoice recipient
      Email address of invoice recipient
      Phone number of invoice recipient
      Full physical address

   b) **VAT country and VAT ID**
      If you want this information to be used on every transaction.

   c) **Purchase order number (PO#)**
      If there is a contract-level purchase order or reference number that should show up on every order.

   d) **Eligible products**
      Will you fund open access charges only or page or color charges as well?

   e) **Creative Commons License**
      Does your agreement require a specific license for manuscripts? If so, which Creative Commons licenses are eligible?

   f) **Author eligibility**
      Are only primary or corresponding authors eligible for funding or is any co-author eligible?

   g) **Invoice grouping & frequency**

      Do you want to receive invoices daily, semi-monthly, monthly, quarterly or semi-annually? Should the invoice be aggregated or be per transaction?

   h) The preferred transactional **currency** for APC orders that show up in the invoice.

   i) **Start and end date** of the contract.

   j) **Setting the initial APC Token or Threshold Balance** (if necessary)
      APC tokens are a set number of free or discounted transactions that may have been written into your agreements. Applying APC tokens to profiles will allow funding requests to come through at a reduced or $0 rate, until those tokens have all been used.

      An APC threshold represents an up-front deposit made by you to the publisher to cover APC fees up to a certain monetary value. It could also represent some sort of monetary OA spending cap on certain Read & Publish agreements. When an accepted manuscript is checked out and matches a profile with a threshold amount set, the system knows the total running value of all orders placed under the profile. If the current order will not put the profile over its threshold, we'll apply a 100% discount to the transaction and no fees will be due from the institution. If the current order would push the profile over the threshold, we will only apply the remaining available amount and anything leftover will be added to your invoice. If the total threshold has been met already, we will not apply a discount and fees will apply according to your journal and profile pricing implementation.

k) **Touch-Free Transactions**

Should the author be involved in creating the funding request or should we leave them out of the processs and just let them know if funding has been approved or denied at the end?

l) **Contact names and email addresses for notifications**
Notifications are sent to funders and / or institutions when a manuscript has been accepted and when an author has requested funding approval. These contacts will receive access to the Institutional Portal.

2. **You and your team will receive welcome emails to the Institutional Portal.** This is your invitation to log into the portal for the first time and to update your temporary password.

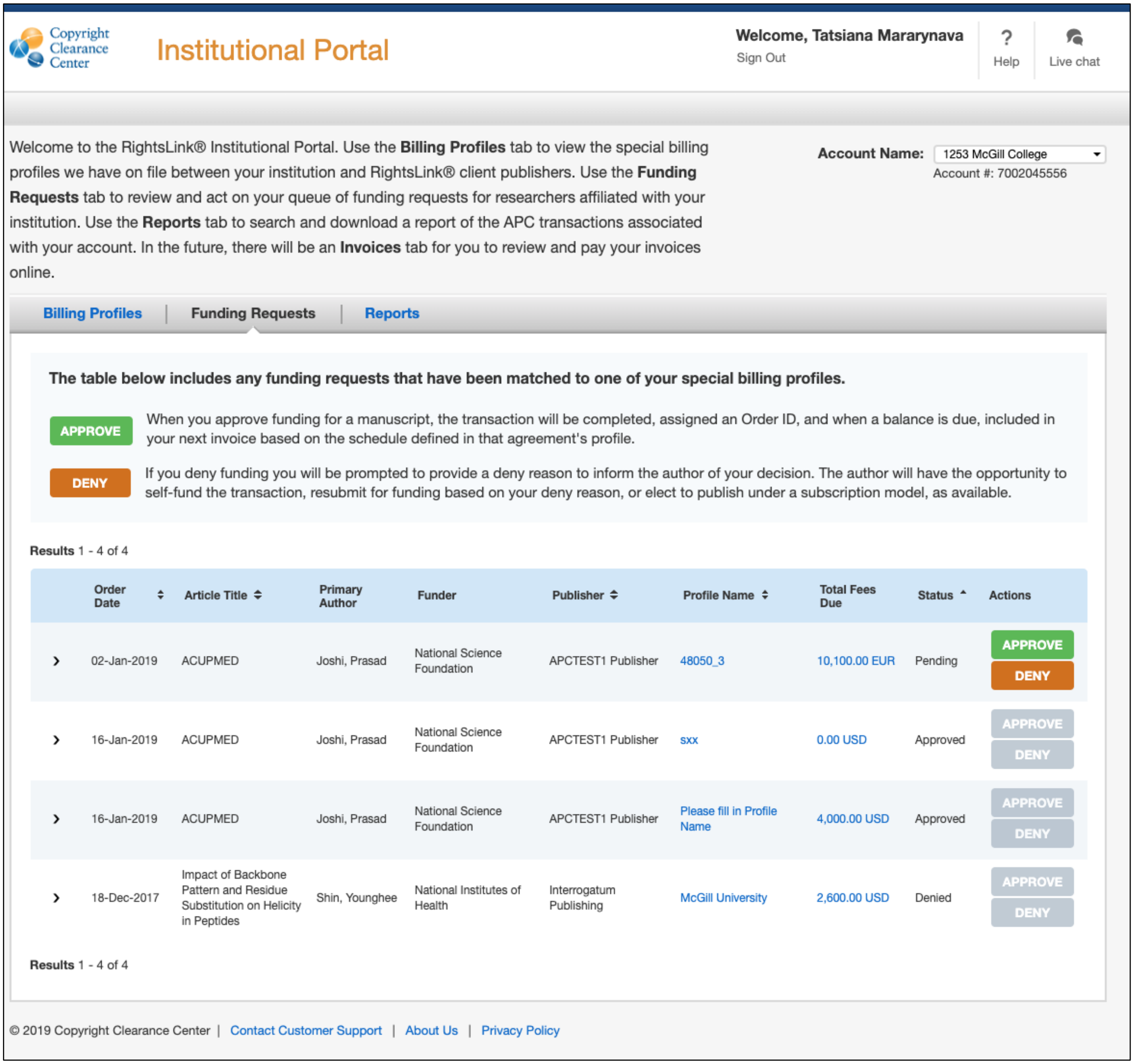
3. You can review the profile(s), add or update contact information**,** and specify rules related to purchase orders (see Funding Requests section below). Note: When you add additional users, we will need to set up special permissions in our backend. Please send an email to publicationservices@copyright.com to request setup for additional users.

4. Review and Approve funding requests as you receive notifications to do so.
(*see* Funding Requests section)

THE INSTITUTIONAL PORTAL

To access the institutional portal, go to https://apcfunding.copyright.com.

You should have received login in credentials from CCC. If not, or if you encounter difficulty, email publicationservices@copyright.com for immediate help.



When you first log into the Institutional Portal, the following landing page appears:

The landing page has three tabs, **Billing Profiles**, **Funding Requests**, and **Reports**. **Funding Requests** is the default page as you will use it most often.

Funding Requests

As the screen shows, the funding requests table will display all funding requests from your authors for articles accepted for publication by participating RightsLink® publishers.

Click on table headings to sort by **Order Date, Article Title, Publisher, Profile Name** (more on this follows), or **Status**.

- Sorting on **Status** enables you to bring to the top all articles that need your attention:
  – Requests that you have acted upon are greyed out.
  – Requests that require action, have an **Approve** or **Deny** option in the far-right "Actions" column.
- Click on a value in the **Total Fees Due** column to see the order details, including a breakdown of charges, discounts applied, and licenses chosen by the author.
- **Primary Author** is provided and when you hover over the author's name, their email address and the name and ID of the institution they are affiliated with appears, if available. Similarly, when a manuscript reflects funding and grant information, the **Funder** will also allow you to hover over the name and see the corresponding grant information.
- Click on the arrow to the left of the funding request to expand the view and see more information (where available) to help you make a funding decision, including **Secondary Author(s)** (including the hover functionality as per Primary Author), **Journal, DOI, License, Manuscript Type, Submission Date, Acceptance Date** and if a token or threshold discount was applied to the transaction **APC Token or Threshold Value**.

Results 1 - 4 of 4

	Order Date	Article Title	Primary Author	Funder	Publisher	Profile Name	Total Fees Due	Status	Actions
›	02-Jan-2019	ACUPMED	Joshi, Prasad	National Science Foundation	APCTEST1 Publisher	48050_3	10,100.00 EUR	Pending	APPROVE DENY
⌄	16-Jan-2019	ACUPMED	Joshi, Prasad	National Science Foundation	APCTEST1 Publisher	sxx	0.00 USD	Approved	APPROVE DENY

Secondary Author(s)	Joshi, Prasad
Journal	ACUPMED
Acceptance Date	16-Jan-2019
APC Token or Threshold Value	4,000.00 USD

	Order Date	Article Title	Primary Author	Funder	Publisher	Profile Name	Total Fees Due	Status	Actions
›	16-Jan-2019	ACUPMED	Joshi, Prasad	National Science Foundation	APCTEST1 Publisher	Please fill in Profile Name	4,000.00 USD	Approved	APPROVE DENY
⌄	18-Dec-2017	Impact of Backbone Pattern and Residue Substitution on Helicity in Peptides	Shin, Younghee	National Institutes of Health	Interrogatum Publishing	McGill University	2,600.00 USD	Denied	APPROVE DENY

Secondary Author(s)	Gellman, Samuel
Journal	EBMED
DOI	10.1000/OrgFundertest04
License	CC BY
Acceptance Date	18-Dec-2017

Results 1 - 4 of 4

FUNDING REQUEST STATUSES – Funding Requests tab

A user logged into the Institutional Portal will view all funding requests that have been matched to one of the special billing profiles. The funding request can be in one of three statuses as described in the table below:

STATUS	DESCRIPTION
Pending	The status of a funding request after it has been successfully submitted for review. It will remain in this state until a permissioned user takes action to either *Approve* or *Deny* the funding request in the Institutional Portal or unless a profile is set to auto-approval.
Approved	The status of a funding request once a user has selected to *Approve* the request and has completed the "approve" confirmation process.
Denied	The status of a funding request once a user has selected to *Deny* the request and has completed the "deny" confirmation process. The denial process includes the ability to provide feedback to the author as to why the request was denied – this feedback is displayed in the Funding Request Denial email.

AGREEMENT STATUS – PubPortal – Institutional Account tab

A user logged into PubPortal and on the Institutional Accounts landing page will view the list of agreements currently on file that group one or more Special Billing Profiles together to represent on transformative agreement. Agreements can be in one of two status:

STATUS	DESCRIPTION
Active	An agreement is considered active if one or more of the billing profiles associated with the agreement are currently active (see below)
Inactive	An agreement is considered active if none of the billing profiles associated with the agreement are currently active (see below) or there are no profiles associated with it.

PROFILE STATUSES – PubPortal – Institutional Accounts tab

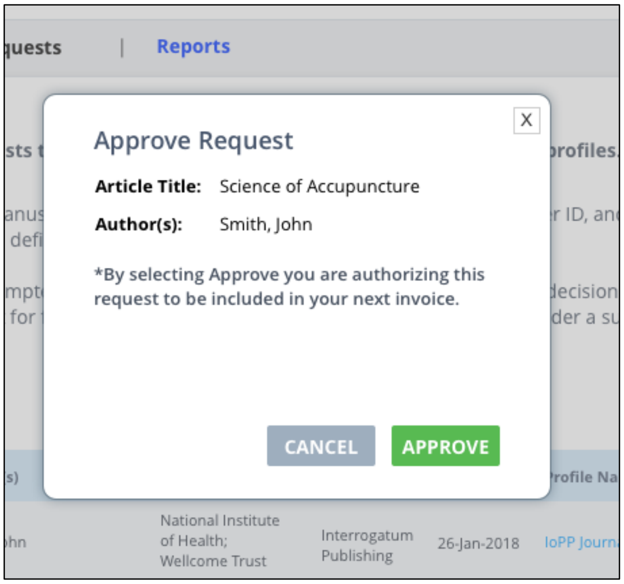
A user logged into PubPortal and on the Institutional Accounts tab can view the list of billing profiles currently on file between the organization and other institutions and funders under 'My Profiles'. The billing profiles can be in one of three states or statuses as described in the table below:

STATUS	DESCRIPTION
Active	The status of a billing profile when the profile is first created and the start date is in the present.
Suspended	The status of a billing profile after a permissioned user logs into PubPortal and clicks to open an *Active* billing profile in Update/Edit mode. The user clicks the "SUSPEND" button at the top right corner of the billing profile. Note: The "SUSPEND" button will be relabeled "REACTIVATE". A user can click this "Reactivate" button to return the selected billing profile to "Active" status.
Expired	A billing profile that has a specified "End Date" will reach this status once the *End Date* has passed. Once a billing profile has "expired", it cannot be reactivated.

**Billing profile status modification history is logged by the system.*

Approving Funding Requests

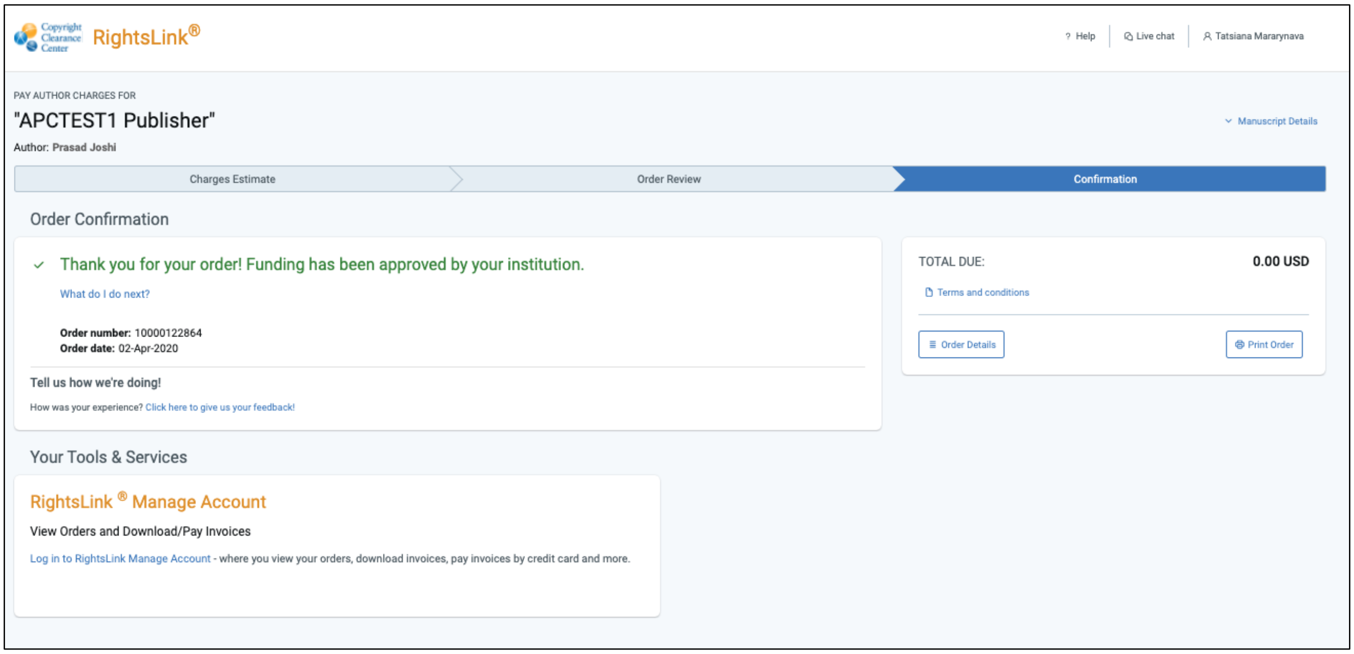
Click the green **Approve** button and the following pop-up will appear, asking you to confirm your intent to approve funding.



Once approved:

The order confirmation page is updated to reflect a **Funding Approved** message displayed above the charges table. Note: If the profile does not have Touch-Free transactions enabled, and therefore the author completed the funding request themselves, they can view the Order Confirmation from within their Manage Account portal, by clicking their original payment due link or, in many cases, by clicking an APC link from within their submission systems' author dashboard.

The transaction appears on the next eligible invoice per the billing profile's "Invoice Grouping" and "Invoice Frequency" settings.



As further confirmation, the author also receives a *Funding Approved* email.

Your APC funding request has been approved.

Dear Mr. John Smith,

Your APC funding request has been approved by University A.

Request Details
Request Date: 29-Jan-2018
Order Number: 29384710
Publisher: Interrogatum Publishing
Publication: Science Notes
Article Title: Science of Accupuncture
Organization Contact Name: Arthur Stickland
Organization Contact Email: astickland@educ.cam.ac.uk
Organization Contact Phone: +44 (0)1553 898600

For more details, please click here to view your order confirmation page.

Unless your order confirmation page indicates additional publication charges are available to you, you do not need to take any other action at this time. Your organization will be billed directly.

Sincerely,
Interrogatum Publishing

Tel.: +1-877-622-5543 / +1-978-646-2777
publicationservices@copyright.com
www.copyright.com

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If the profile has Touch-Free Transactions enabled, then this is the first contact to the author from CCC, so a slightly different template is triggered:

“Touch-Free” Approval Email

Your article has been accepted and will be published open access

Dear Prasad Joshi,

Congratulations on being accepted for publication in *APCTEST1 Publisher* for the following manuscript:

Manuscript DOI: N/A
Manuscript ID: c3f53148-e14b-4e24-a27b-e0f421928b28
Manuscript Title: APCTEST1 Publisher
Published by: APCTEST1 Publisher
Total Charges Covered: 21600.00 USD

Funding for your open access publication charges has been covered by UK_Company_1 based on an agreement between UK_Company_1 and APCTEST1 Publisher.

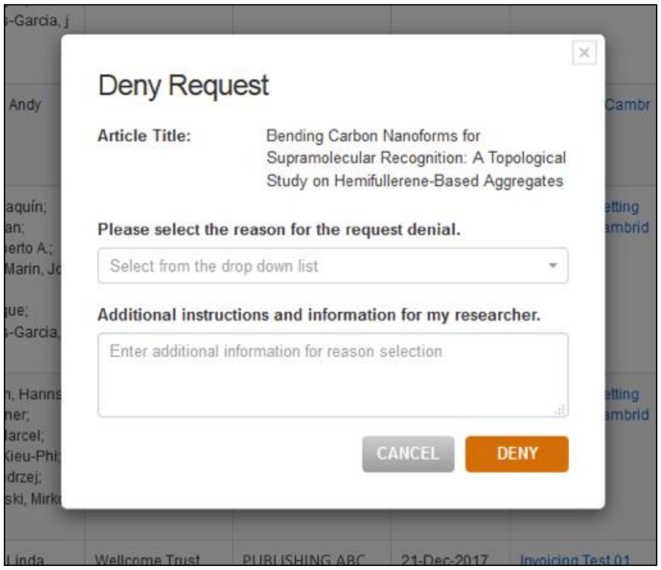
If there are any additional publication charges available to you, such as page or color charges, we will send a payment link for those charges under separate cover.

Sincerely,
APCTEST1 Publisher

Tel: +1-234-567-1235 / Fax: +12346789101012
Email: USER_services1@copyright.com / Pub!#$%&'*+=?^_`{|}~_ces@copyright.com
www.copyright.com

Denying Funding Requests

When you **Deny** a funding request, the following screen appears:



The drop-down list includes pre-defined reasons for denying a funding request:

- APC exceeds max fee limit
- Missing required Creative Commons license
- Funding no longer available
- Questioning Author Affiliation
- Other (note below).

If you select “Other (note below)”, then you will be prompted to supply your author with a supplementary note (i.e., additional instructions and information for my researcher) that appears in the *Deny* email that is automatically sent to the author upon submission of the denial pop-up.

Funding statuses, including deny reasons, appear in your **Reports** so that you can easily filter and analyze patterns.

Here is a sample of the **author-facing funding denied email**:

Your APC funding request has been denied.

Dear Mr. John Smith,

Your APC funding request has been denied by University A.

Denial Reason:
Other

Note From University A: We will not be able to approve your request in this calendar year. We have denied at this time so that you have the option to pay on your own now. Otherwise, you may resubmit your request after January 1, 2019.

Request Details
Request Date: 29-Jan-2018
Order Number: 29384710
Publisher: Interrogatum Publishing
Publication: Science Notes
Article Title: Science of Accupuncture
Organization Contact Name: Arthur Stickland
Organization Contact Email: astickland@educ.cam.ac.uk
Organization Contact Phone: +44 (0)1553 898600

If you would like to pay for the APC yourself, or from a different funding source, please click here to complete the transaction again.

Sincerely,
Interrogatum Publishing

Tel.: +1-877-622-5543 / +1-978-646-2777
publicationservices@copyright.com
www.copyright.com

Copyright Clearance Center | RightsLink®

If the profile has Touch-Free Transactions enabled, then this is the first contact to the author from CCC, so a slightly different template is triggered:

"Touch-Free" Denial Email

Please submit your author publication charge(s)

Dear Prasad Joshi,

Congratulations on being accepted for publication in *APCTEST1 Publisher* for the following manuscript:

Manuscript DOI: N/A
Manuscript ID: 25fba133-e4d0-4e1a-8245-6e26cc9f92b8
Manuscript Title: APCTEST1 Publisher
Published by: APCTEST1 Publisher

Funding for your open access publication charges has been denied by UK_Company_1.

Denial Reason:
Funding no longer available

Note From UK_Company_1:

Organization Contact Name: Shannon Reville
Organization Contact Email: sreville@copyright.com
Organization Contact Phone: 6039182365

If you would like to pay for the APC yourself, or from a different funding source, please click here to complete the transaction again.

Sincerely,
APCTEST1 Publisher

Tel: +1-234-567-1235 / Fax: +12346789101012
Email: USER_services1@copyright.com / Pub!#$%&'*+=?^_`{|}~_ces@copyright.com

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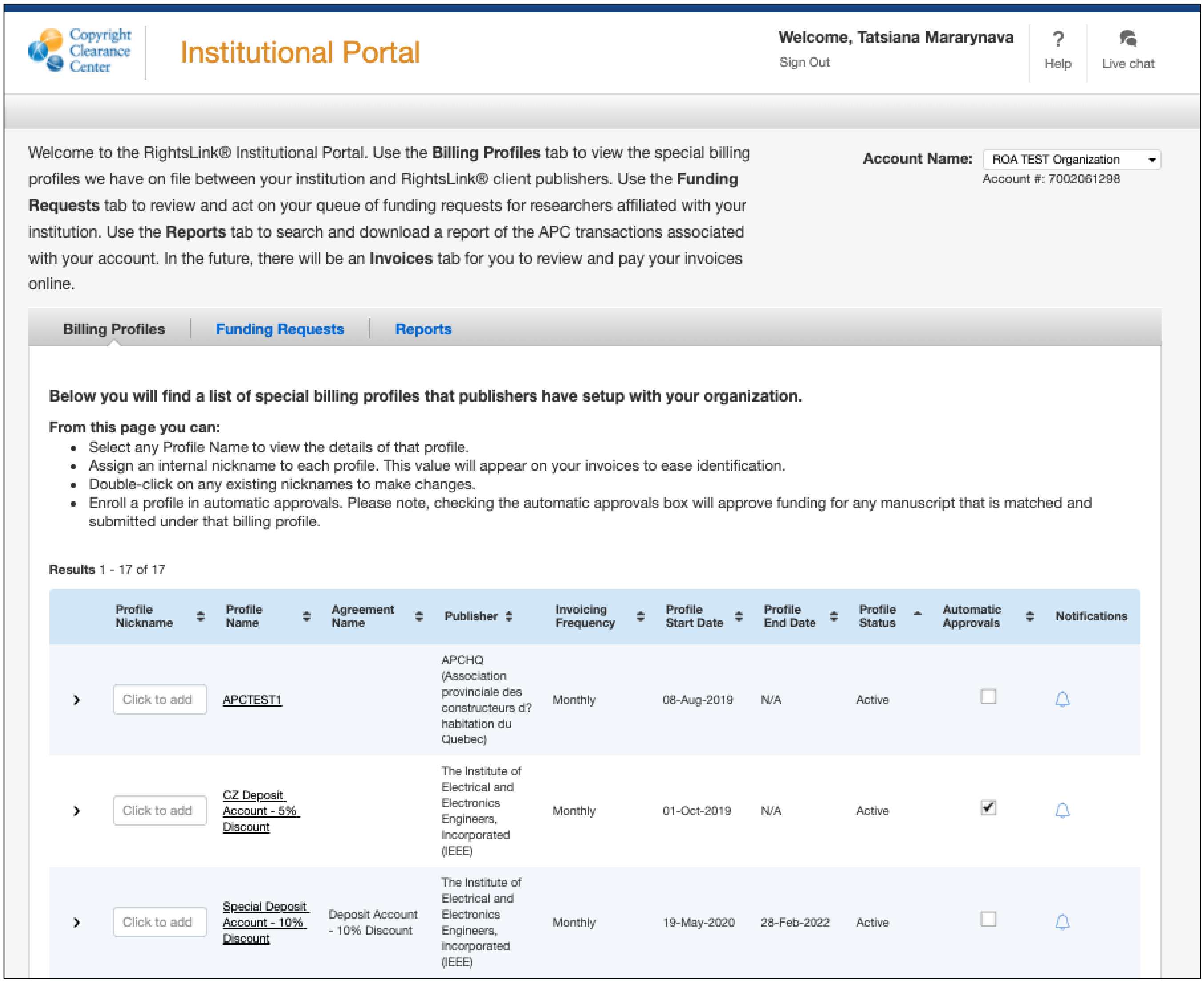
MANAGING BILLING PROFILES

The Billing Profiles tab enables you to view a dashboard of the billing profiles set up with one or more RightsLink® publishers.



What's in a Name?

OA continues to grow in complexity as universities and other institutions allocate more funds to OA publishing on behalf of their scholars. As they do, individual departments, colleges, laboratories, libraries, and philanthropic organizations may become sources of funds. Your OA work with any publisher may require several profiles to cover the range of funding possibilities. *Forethought on naming conventions will prove valuable in establishing profiles*.

Each publisher will define its own name, and that name will be shown in the **Profile Name** column.

Since different publishers will use different naming conventions to define their Profiles, the **Profile Nickname** field is provided so that your institution can add your own naming convention to suit your purposes**.**

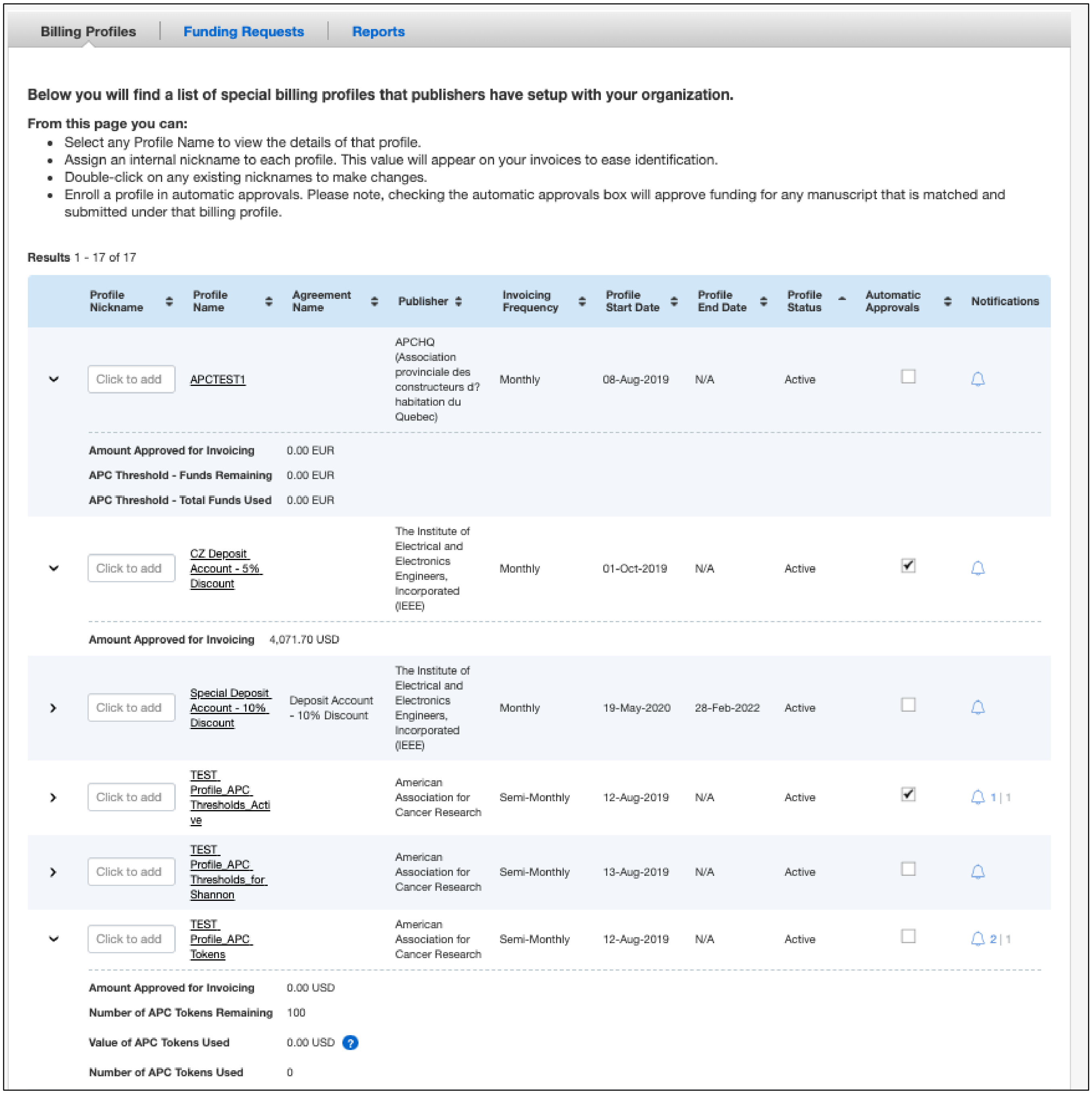
Where profiles may be linked by the same transformative agreement, they will be associated to the same Agreement Name.

NAVIGATING THE PROFILES

Profiles are the list of agreements that publishers have set up with a research organization.

From your version of this page, which appears under **Billing Profiles**, you can:

- Select any Profile Name to view its details
- Assign an internal nickname to each profile–if that is useful for you.
- Select the notifications icon to view notifications set up for that profile
- Turn on or off the automatic approval of all funding requests under that profile



Click the **nickname** or **name** of a profile you wish to review. Assigning a nickname is optional. The profile name shows up in your Funding Requests Dashboard.

- Clicking the **Profile Name** takes you directly to details for that profile (more on this below in the Drilling Down section). Many of the fields are read-only and only editable by the publisher.
  For those that are editable see the section below.
- Clicking the **Notifications** Icon takes you to the manage notifications page for that profile. Here you can view, create or edit notifications - alerting contacts via email when a value (APC tokens, APC threshold or a spending limit) has been reached.

- Clicking the arrow to the left of the profile will expand the information you can see about that profile, including (where applicable): **Amount Approved for Invoicing, Number of APC Tokens Used, Value of APC Tokens Used, Number of APC Tokens Remaining, APC Threshold – Funds Remaining, APC Threshold – Total Funds Used**
- Clicking the **Automatic Approvals** checkbox will cause all funding requests for that profile to be automatically approved without the need for someone to approve manually from the funding requests tab. NOTE: Funding requests from a Touch-Free transaction are not autoapproved unless the automatic approval checkbox is checked for that profile.

EDITING THE PROFILE

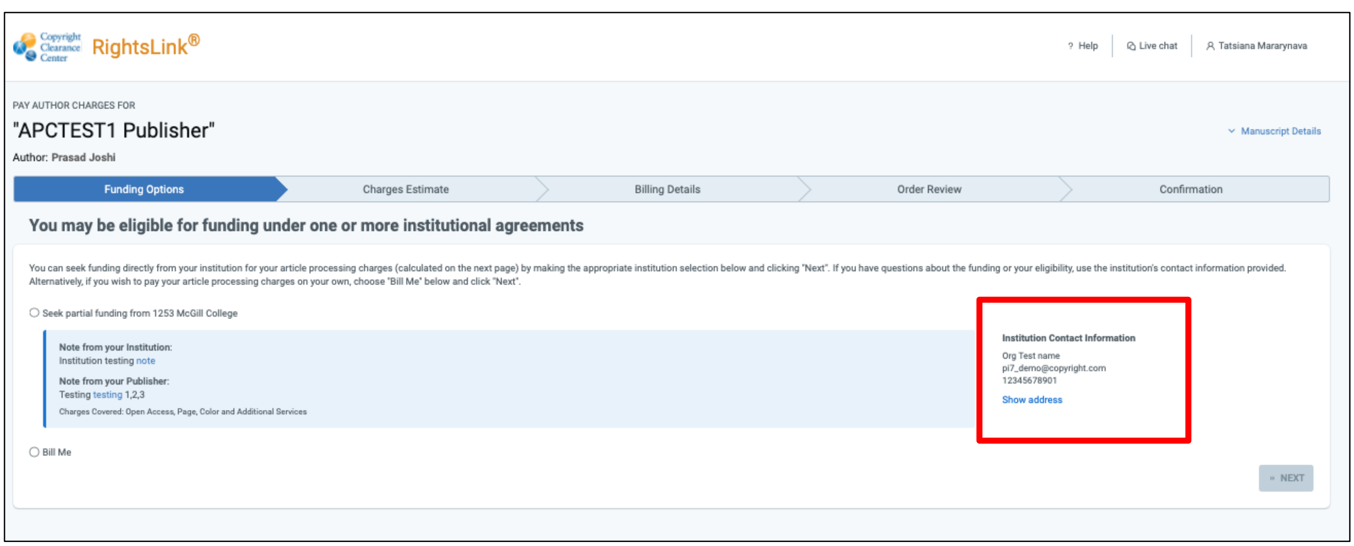
You can select to edit a section of the profile by selecting the edit icon:

The icon is only available where there are editable fields in that section. The fields that you may edit after the billing profile has been created by any publisher include:

Contacts

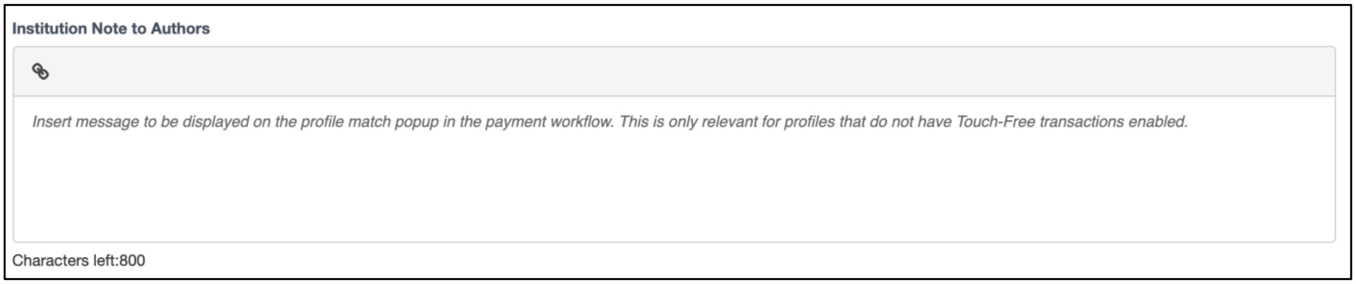
Contacts are the people in your institution who, typically, approve or deny funding requests and who should receive notice when your researchers have a manuscript accepted that needs funding approval. Make changes to the contacts as necessary. If you have indicated multiple contacts, you can designate one as the primary contact. If notifications become too frequent, you can suppress the notifications and log into the portal regularly.

PLEASE NOTE: when you specify contact information, the primary contact's name, email address, and phone number will be shared with your researchers throughout the APC funding request workflow, as highlighted below



Institution Note to Authors

Under the Workflow Options section, you can add a note that appears when authors begin the RightsLink® APC payment workflow AND their manuscript matches one of your profiles.
In the sample above you will see this field labeled “NOTE FROM YOUR INSTITUTION”.

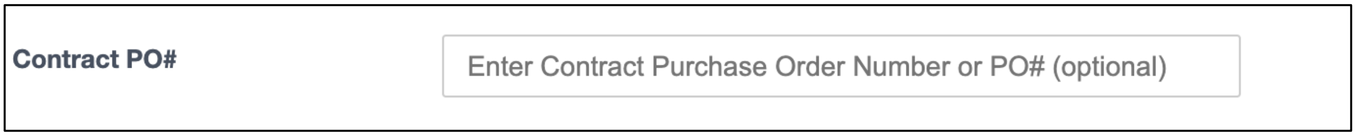


Your message appears when an author seeks funding approval for any manuscript that matches a billing profile.

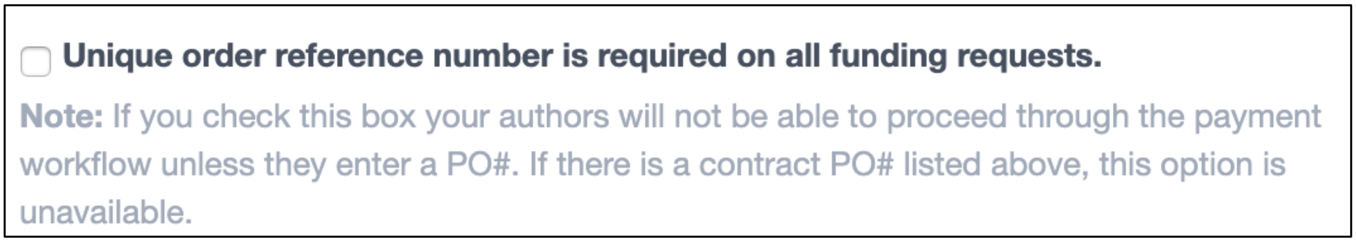
NOTE: If Touch-Free transactions are enabled on the profile, the author does not see the RightsLInk® APC payment workflow, so they will not see any message entered here.

Contract PO#

Use this field to update the PO that should automatically appear on every transaction and on your invoices:

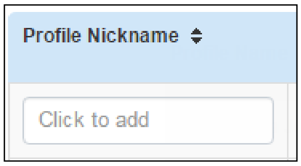


Note: For purchase orders, you can specify a contract-level Purchase Order (PO) that appears on every transaction or you can specify that a unique PO must appear on each transaction related to any profile.
If the latter, check “unique order reference number is required for all funding requests” box. If this checkbox is selected, authors who forget to enter a PO during the payment workflow will be prompted to do so before checking out.



BILLING PROFILES DASHBOARD

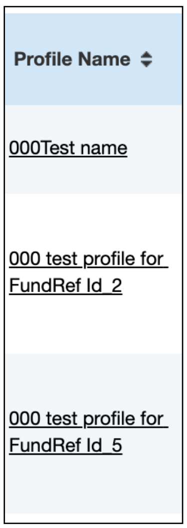
Profile Nickname



The first column in the profile dashboard is called Profile Nickname.

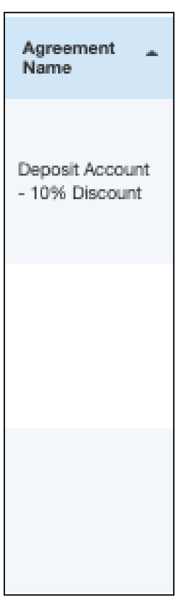
Clicking the **Profile Nickname** enables you to edit or change the nickname.

Profile Name



Profile Name shows the name that the publisher chose when they set the profile up. Clicking the **Profile Name** takes you to the profile details and allows you to make any necessary edits under your control (see *Editing the Profile*)

Agreement Name



Agreement Name shows the name that the publisher chose when they set the agreement up. An agreement allows the publisher to group profiles together. Usually because the profiles belong to the same consortium of institutions with one transformative agreement.

Publisher

Publisher
Bioscientifica Limited
APCHQ (Association provinciale des constructeurs d? habitation du Quebec)
APCHQ (Association provinciale des constructeurs d? habitation du Quebec)

Publisher shows the name of the publisher that this agreement is with.

Invoicing Frequency

Invoicing Frequency
Monthly
Monthly
Monthly
Monthly
Semi-Monthly
Semi-Monthly

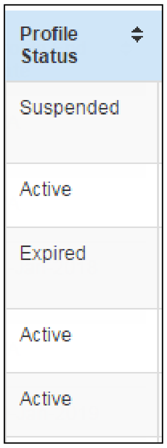
The **Invoicing Frequency** column shows the billing frequency of the invoice. You can choose to be invoiced daily, semi-monthly, monthly, quarterly or semi-annually. Daily invoices are billed in a nightly batch. Semi-monthly are billed on the first and the fifteenth of every month. Monthly invoices are billed on the first of every month. Quarterly are billed on the first of every quarter (Jan, Apr, Jul, Oct) and semi-annualy are billed on the first of every 6 months (Jan & Jul)

Start and End Dates

Profile Start Date	Profile End Date
21-Dec-2017	N/A
13-Dec-2017	N/A
19-Dec-2017	19-Jan-2019

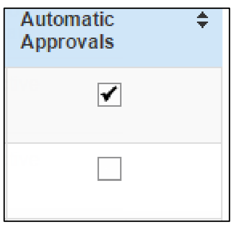
Any profile can be set to **start** and **end**. Alternatively, a profile that has no end date will show N/A in the **End Date** column and will run until the publisher suspends it.

Profile Status



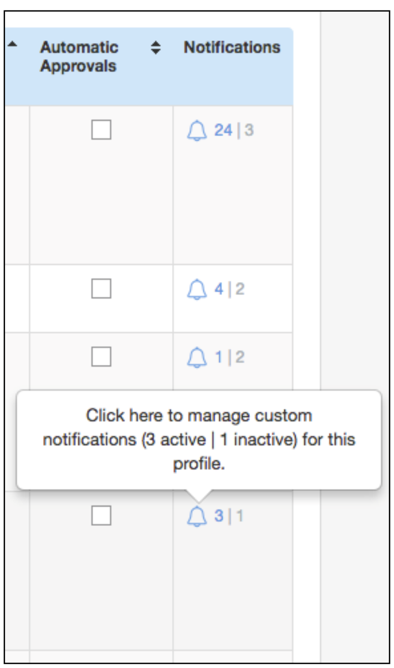
The **Status** of a profile will either be Active, Suspended or expired. A profile might be suspended, for example, if you are negotiating a new contract. When profiles are suspended, authors are still invited by their publishers to check out under the standard payment workflow in which the author pays directly or specifies manually where the invoice should be sent. None of these standard transactions will show up in the Funding Requests dashboard of this portal.

Automatic Approval



Automatic Approval means that when a funding request is submitted under a particular profile (by the author or automatically), you automatically approve the funds for publication. Upon submitting an invoice for approval, the author will immediately receive notice of approval by email. These transactions will be reflected in your next invoice and in your transaction reports available through the portal (see *Reports* tab).

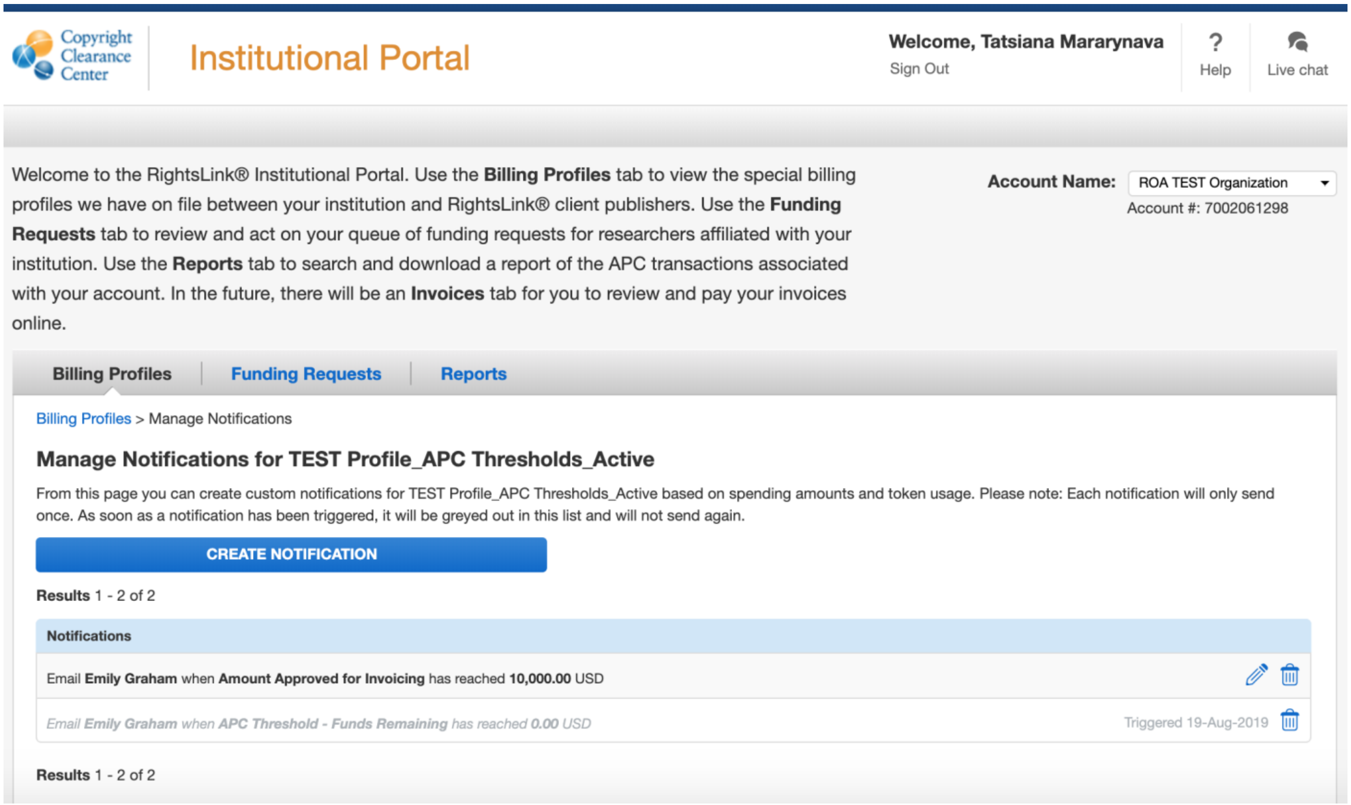
Notifications



Custom Notifications can be created so that a contact or contacts can be notified when a value has been met. Clicking on the icon will take you to a Manage Notifications page for that profile, where notifications can be viewed, created, edited or deleted. The icon shows how many active and inactive notifications each profile has.

CUSTOM NOTIFICATIONS

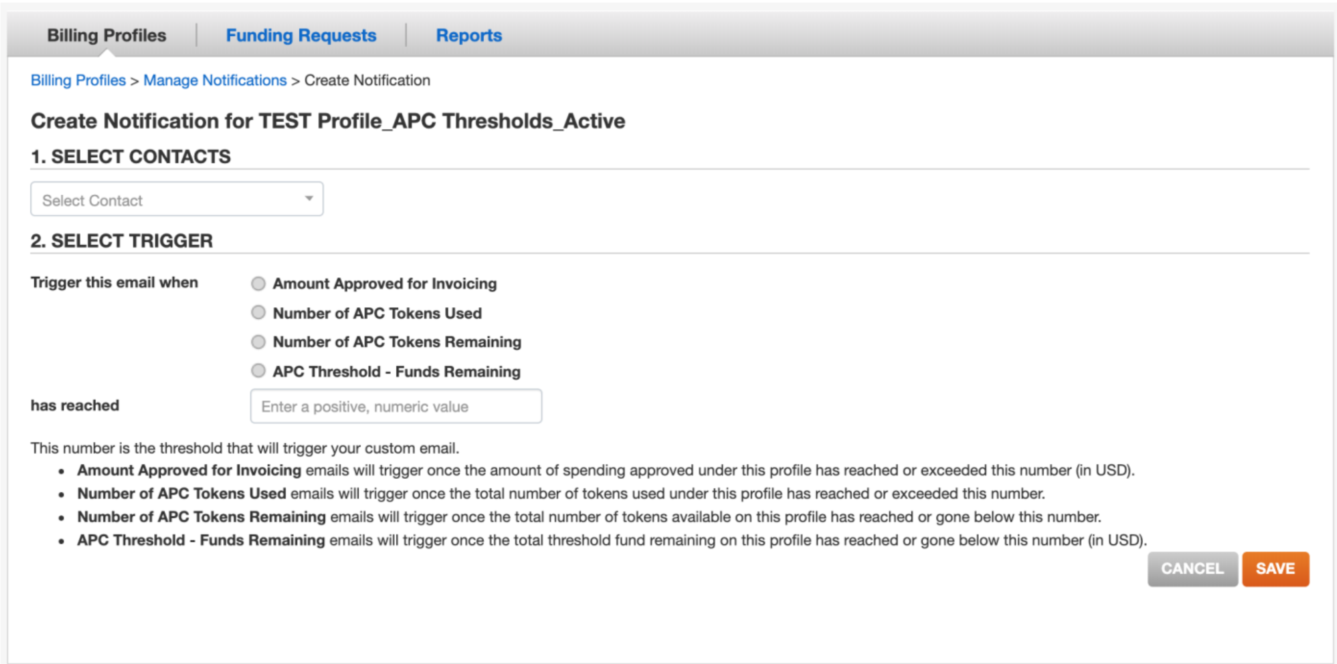
A notification will alert a contact or contacts by email that a value has been reached. This could be that there are only W number of APC tokens left, X number of APC tokens have been used, Y amount of APC threshold left or Z amount has been spent. You can view, create, edit or delete notifications via the Manage Notifications page, which can be found by clicking on the notifications icon on the Billing Profiles Dashboard.



From the Manage Notifications page, you can see a summary of each notification created for that profile and whether they have been triggered yet. If they have been triggered, they are regarded as inactive and a triggered date displays. If they have yet to be triggered, the notification is regarded as active.

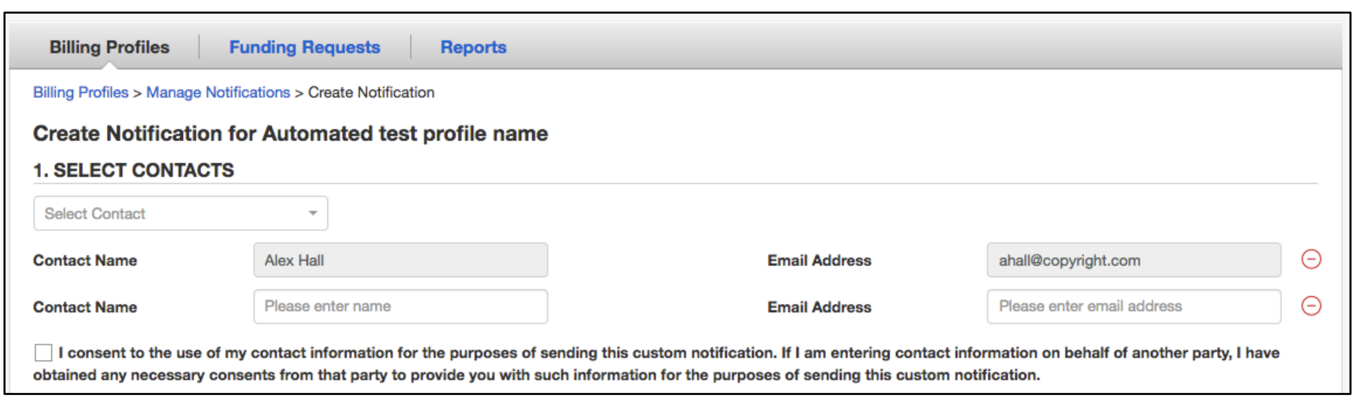
Creating a New Notification

Selecting the button to create a new notification from the Manage Notifications Page will load the create notification form where you can customize your notification



1. Select Contacts

You can add up to 5 unique email addresses to send the notification to. Your organization contacts, as listed in the profile, can be selected and their email address will be automatically populated, or you can choose to add a new contact. You can remove any contacts you have added.

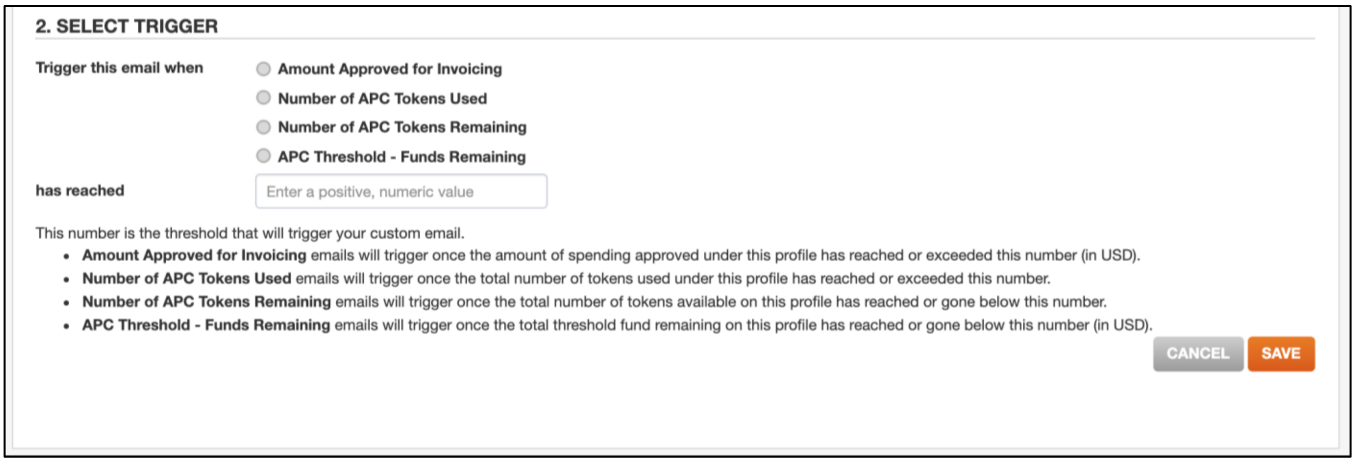


Don’t forget to obtain consent from anyone whose contact details you are adding and select the checkbox once you have done so.

2. Select Trigger

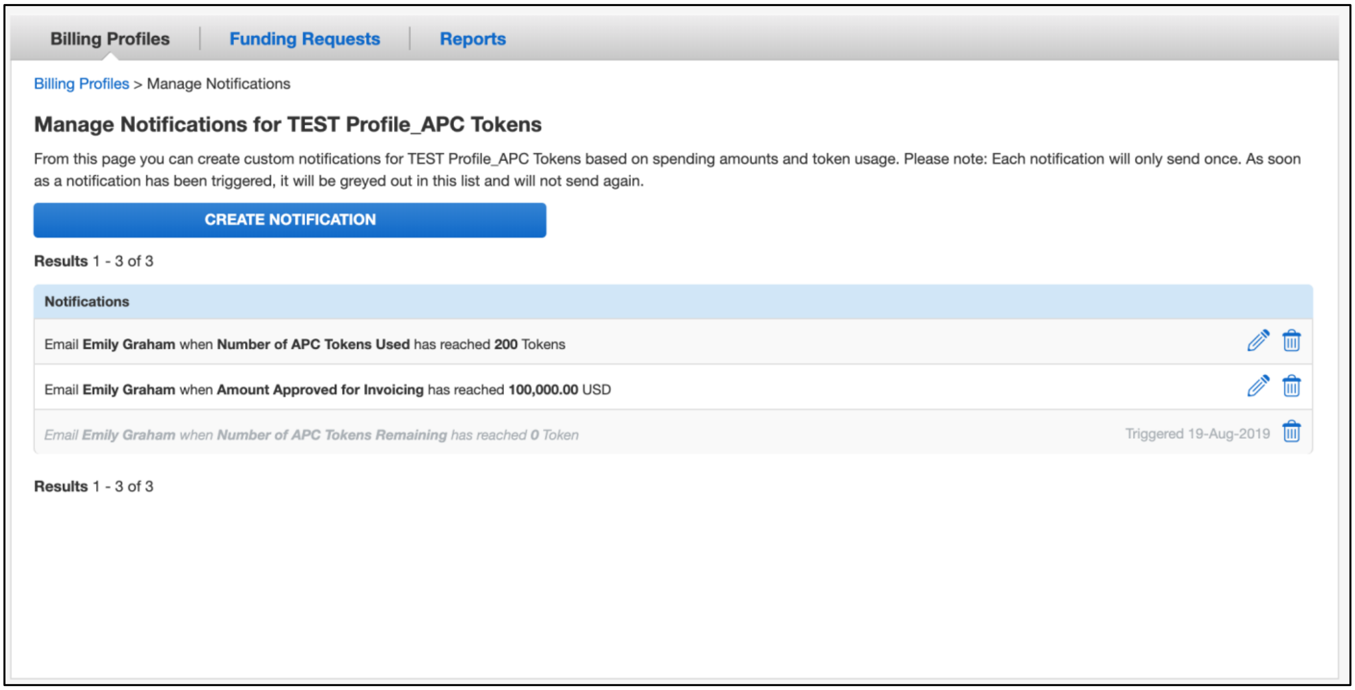
You can choose one of four trigger types for the notification to be sent

- Amount Approved for Invoicing: This is triggered once total spend for this profile has reached or exceeded the number entered. The currency will be the currency set up in the profile.
- Number of APC Tokens Used: This is triggered once the total number of APC tokens used on this profile has reached or exceeded the number entered.
- Number of APC Tokens Remaining: This is triggered once the total number of APC tokens still available on this profile has reached or is below the number entered.
- APC Threshold – Funds Remaining: This is triggered once the total remaining threshold balance has reached or is below the number entered. The currency will the currency set up in the profile.

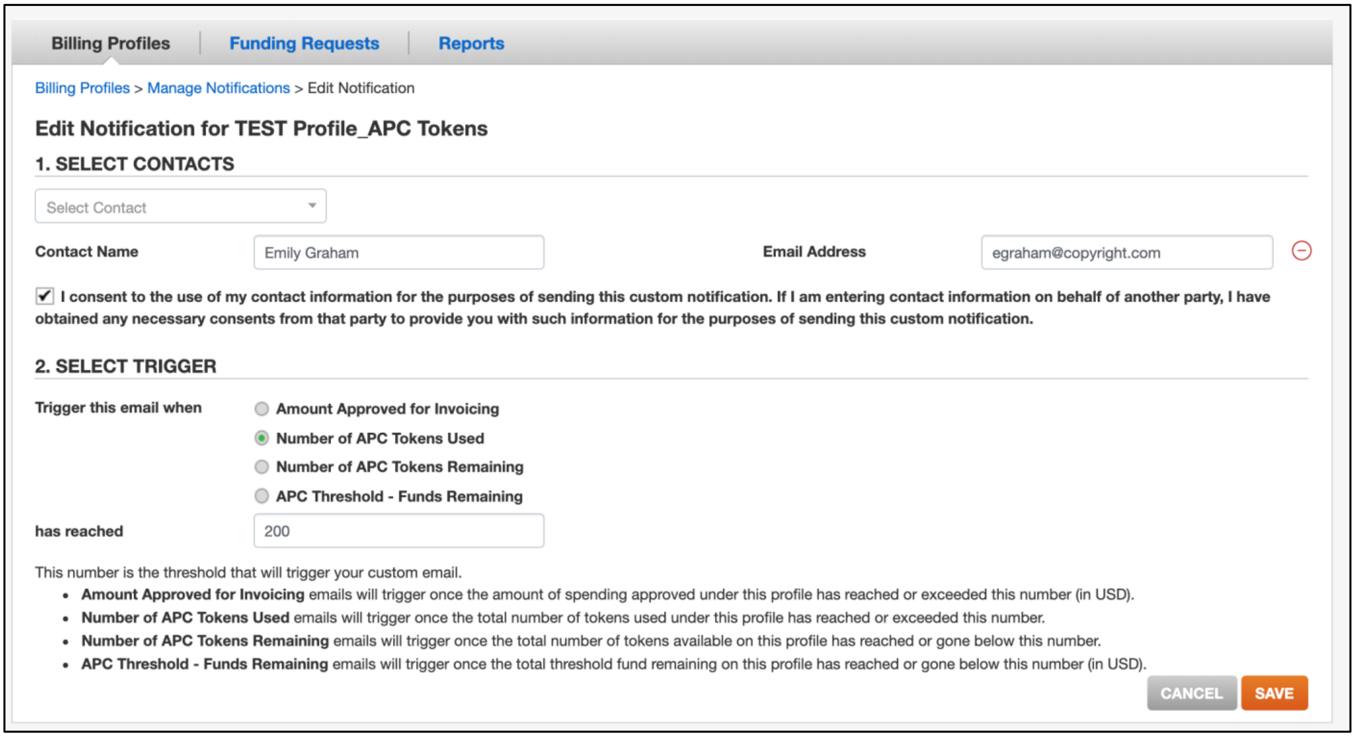


Saving the notification will make it visible on the Manage Notifications page for that profile.

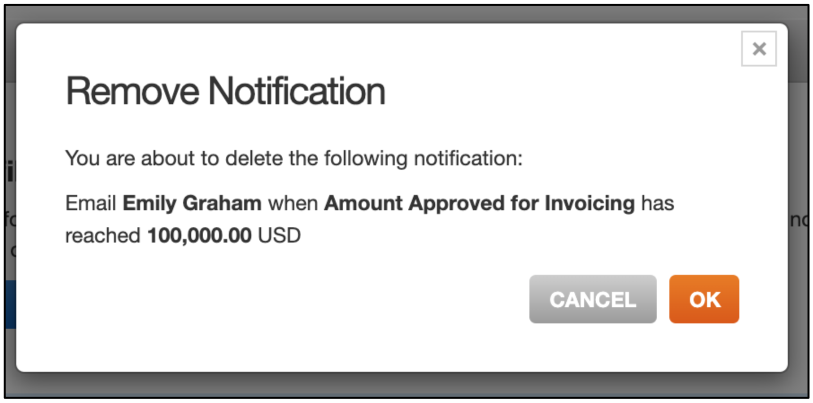
Editing or Deleting a Notification



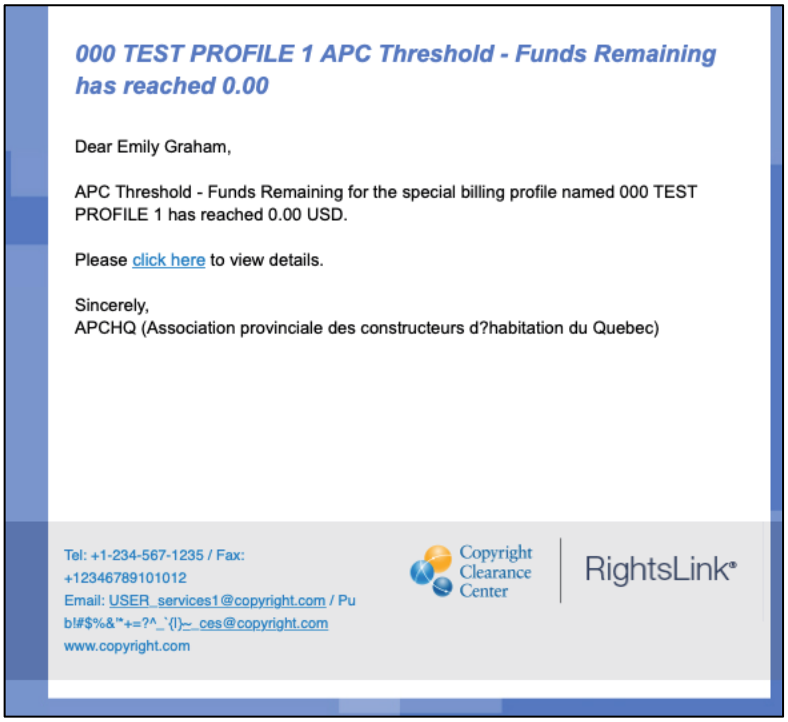
You can choose to edit a notification by selecting the pencil icon next to the notification summary on the Manage Notifications Page. You cannot edit a notification that has already been triggered. You can choose to edit any aspect of the notification:



Delete a notification by selecting the trash can icon next to the notification summary on the Notifications Page



When the defined threshold of a custom notification has been reached, the contact or contacts listed on the notification will receive the following email:



000 TEST PROFILE 1 APC Threshold - Funds Remaining has reached 0.00

Dear Emily Graham,

APC Threshold - Funds Remaining for the special billing profile named 000 TEST PROFILE 1 has reached 0.00 USD.

Please click here to view details.

Sincerely,
APCHQ (Association provinciale des constructeurs d?habitation du Quebec)

Tel: +1-234-567-1235 / Fax: +12346789101012
Email: USER_services1@copyright.com / Pub!#$%&'*+=?^_`{|}~_ces@copyright.com
www.copyright.com

STANDARD NOTIFICATIONS

1. Manuscript Acceptance Notice to Organization

When a manuscript matches one of your special billing profiles that has not got Touch-Free enabled and the manuscript has been accepted, the organizational contacts on the profile will receive the following email:

Barstow

One of your researchers has had a manuscript accepted for publication.

Dear Jennifer Goodrich,

A recently accepted manuscript has been matched to your special APC billing profile, University A. The author(s) will be notified of acceptance and given the opportunity through the RightsLink platform to request funding from you for applicable APC charges. If they do, you will have the opportunity to approve or deny the request from your RightsLink Funding Requests page.

Manuscript Details
Accept Date: 31-Jan-2018
Publisher: Interrogatum Publishing
Publication: Annals of the Rheumatic Diseases
Article Title: Test Article 01312018_04
Author(s): Andy Edwards aedwards@copyright.com

Please click here to preview the APC charges.

Sincerely,
Interrogatum Publishing

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publicationservices@copyright.com
www.copyright.com

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2. Request for Funding Notification

When one of your authors has had a manuscript accepted AND the author has either elected to seek funding approval or a funding request has been automatically created via a Touch-Free transaction, the organizational contacts on the profile will receive the following funding approval email.

Barstow

Your author has requested APC funding.

Dear Arthur Stickland,

Your author has requested funding from University A.

Request Details
Request Date: 29-Jan-2018
Publisher: Interrogatum Publishing
Publication: Science Notes
Article Title: Science of Accupuncture
Author(s): John Smith

Please click here to view details and respond.

Sincerely,
Interrogatum Publishing

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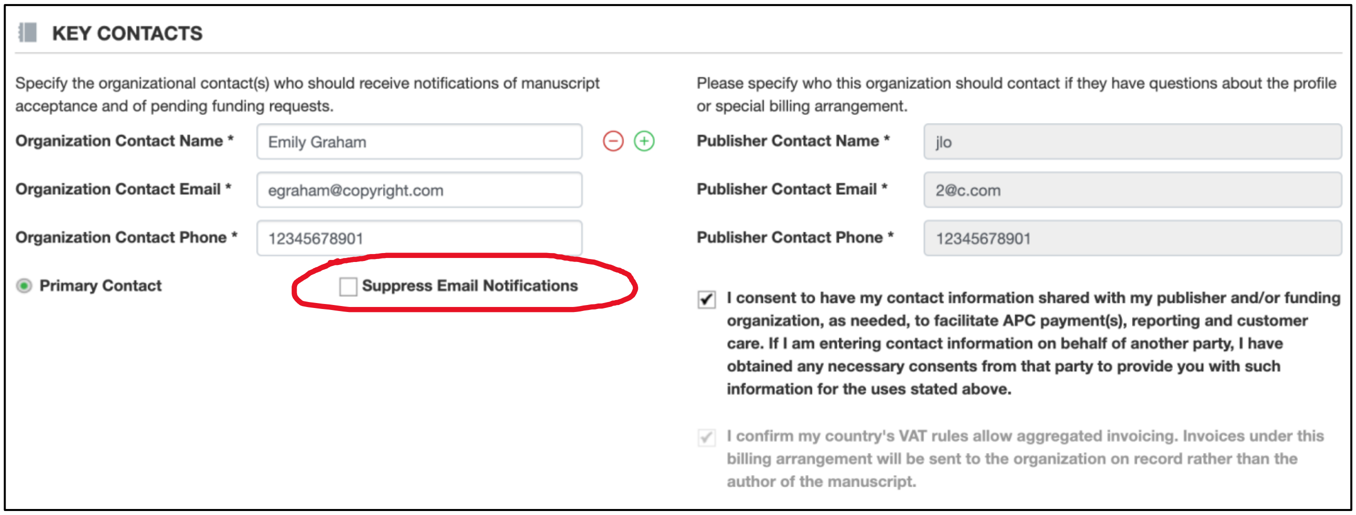
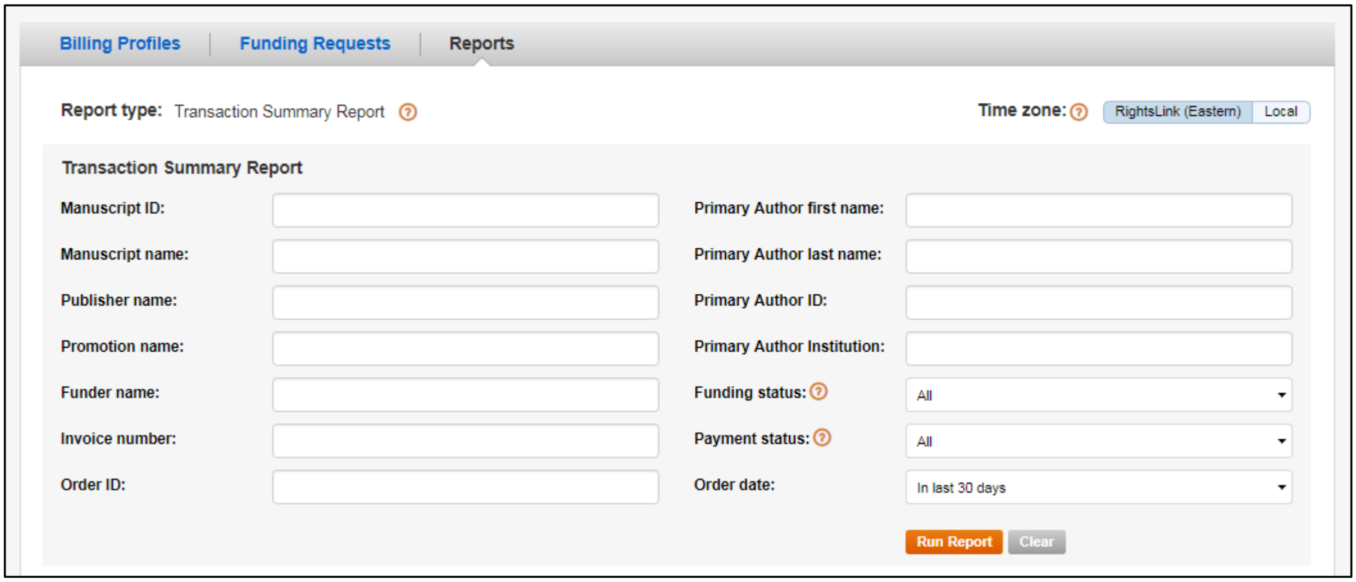
If you want to turn off these standard notifications, open the profile and scroll to the bottom of the page. Select the checkbox to suppress email notifications for one or more contacts. This will remain editable so you can return to the profile at a later date and "deselect" the checkbox so that the Organization contact will begin receiving email notifications. <u>This will not impact custom notifications</u>.

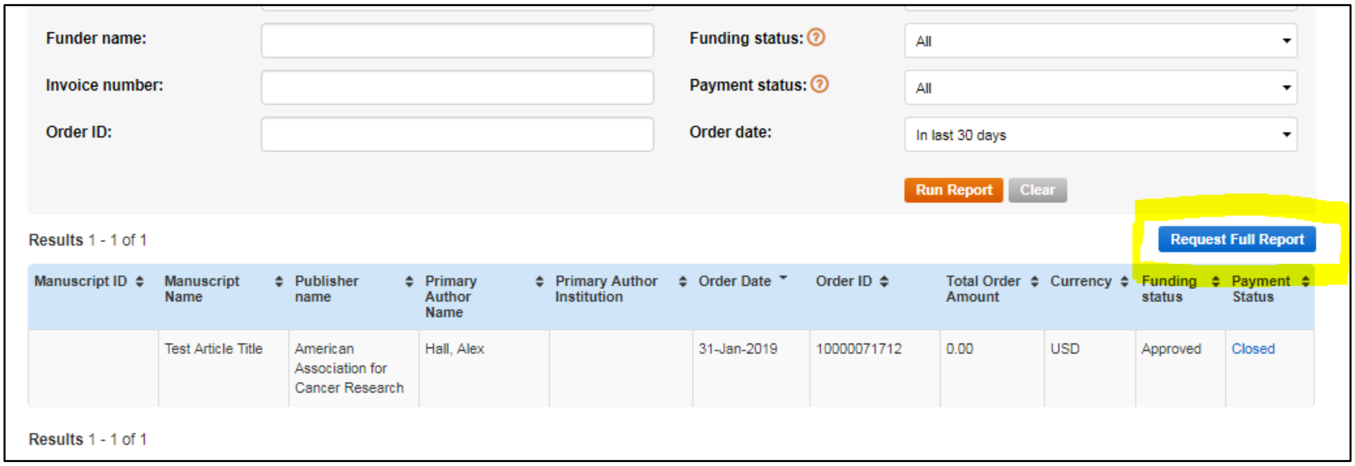


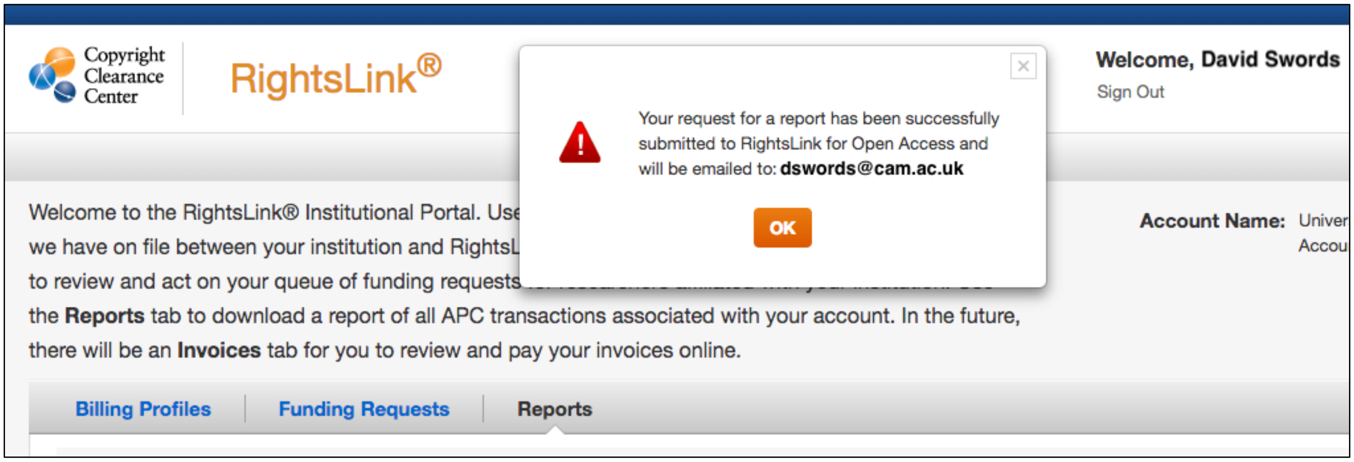
REPORTS

Go to the *Reports* tab and to generate a report which has hundreds of data points about your organization's transactions. The search and filtering functionality will apply to any transactions associated with your organization, whether they are funding requests submitted by authors or one-off transactions placed by a member of your team.

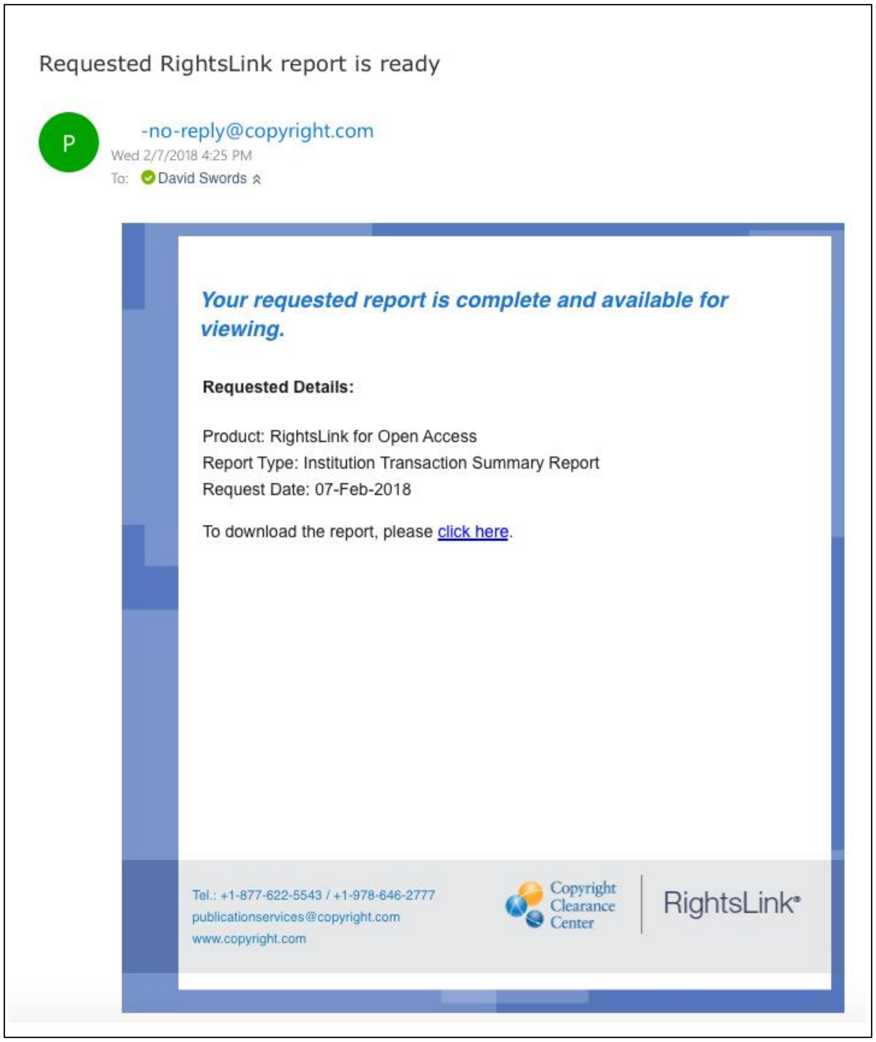


After filtering the report using the criteria of your choice, simply click “Run Report.” This will give you a list of results on screen. Then click “Request Full Report” to receive a full Excel report via email, with over 200 data points regarding the filtered transactions. You will receive confirmation that the system is generating your report.





Once your **Institution Transaction Summary Report** has generated you will receive confirmation via email. This email confirmation will contain a link so that you can download the report to your computer.


Requested RightsLink report is ready

P -no-reply@copyright.com
Wed 2/7/2018 4:25 PM
To: David Swords

Your requested report is complete and available for viewing.

Requested Details:

Product: RightsLink for Open Access
Report Type: Institution Transaction Summary Report
Request Date: 07-Feb-2018

To download the report, please click here.

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The downloaded file will be named “Institution Transaction Summary Report.xlsx” and, as the file extension shows, it will be in MS Excel format so that you can filter data and manipulate rows and columns as needed. The following is a list of all metadata available on these reports for each transaction:

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Manuscript Name	The title of the manuscript.
Manuscript DOI	The DOI for the article.
PII	The PII for the article.
Manuscript ID	The publisher's identifier for the manuscript.
CCC Manuscript ID	The unique identifier for the manuscript created by CCC.
Other Manuscript ID	Any other identifier for the manuscript provided by the publisher in the manuscript metadata.
External Reference ID	This is a unique identifier provided by the external system to uniquely identify a document using their identifier (may be the same value as the manuscript ID).
Manuscript Type	The type of manuscript (article type).

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Primary Author First Name	Populates with the author denoted as primary in the manuscript metadata.
Primary Author Middle Name	Populates with the author denoted as primary in the manuscript metadata.
Primary Author Last Name	Populates with the author denoted as primary in the manuscript metadata.
Primary Author Email Address	The email address of the author denoted as primary in the manuscript metadata.
Number of Pages	The total number of pages in the manuscript.
Number of Color Figures	The total number of color figures in the manuscript.
Publication Name	The journal/publication title in which manuscript will be published.
Publication ID	The identifier for the journal/publication in which the manuscript will be published.
Additional Publication ID	The optional, additional identifier for the journal/publication in which the manuscript will be published.
Publication DOI	The DOI of the journal/publication in which the manuscript will be published.
Author Country	The country listed in the primary author's address (from the manuscript metadata)
ORCID	The ORCID associated with the primary author.
RESEARCHERID	The RESEARCHERID associated with the primary author.
Membership Name	The membership name provided by the manuscript metadata API.
Membership ID	The membership id provided/confirmed by the author in the Apply Discounts window when placing their order.
Geographic Location - used for discount	The country provided/selected by the author in the Apply Discounts window when placing their order.
Institution Identifier - from manuscript metadata	The institution identifier of the institution the primary author is affiliated with (from the manuscript metadata).
Institution Name - from manuscript metadata	The institution name of the institution the primary author is affiliated with (from the manuscript metadata).
Institution Affiliation - Ringgold ID	The Ringgold ID of the institution captured in the Apply Discounts window when author was placing their order.
Institution Affiliation - Ringgold Name	The Ringgold name of the institution captured in the Apply Discounts window when author was placing their order.
Institution Affiliation used for discount - Ringgold ID	The Ringgold ID of the institution affiliation used to calculate affiliation discount.
Institution Affiliation used for discount - Ringgold Name	The Ringgold name of the institution affiliation used to calculate affiliation discount.
Creative Commons License Type	The Creative Commons license type passed via API.
Other License Type	Any other license type (besides Creative Commons) passed via API.
Volume	The volume of journal/publication in which manuscript is published.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Issue	The issue of journal/publication in which manuscript is published.
Publisher Name	The publisher of the manuscript.
Society Name	The publisher society of the manuscript.
Submission Date	The date manuscript was submitted to the publisher.
Date Manuscript Accepted	The date that publisher accepted manuscript for publication (PUBLISHERACCEPT date).
Target Publication Date	The target publication date for the manuscript.
Target OA Publication Date	The target open access publication date for the manuscript.
Order Date	The date the order was placed.
Order ID	The order number for the transaction.
Ordered By	The username (email address) of person who created the order.
Order Reference Number	The order reference number associated with the order.
Transaction Type	The product or product set associated with the order.
Total Tax / VAT %	The total tax and tax % of the order, by product, in transactional currency.
Total Order Amount	The final total amount of the order, after all discounts and taxes have been applied, in transactional currency.
Currency	The currency used to complete the order.
Product 1 Name	The first product name selected by the author when placing the order.
Product 1 Option 1	The first product dimension selected by the author when placing the order.
Product 1 Option 1 Value	The first product dimension value selected by the author when placing the order.
Product 1 Option 1 Amount Before Discounts	The first product dimension selected by the author when placing the order amount, in transactional currency.
Product 1 Option 2	The second product dimension selected by the author when placing the order.
Product 1 Option 2 Value	The second product dimension value selected by the author when placing the order.
Product 1 Option 2 Amount Before Discounts	The second product dimension selected by the author when placing the order amount, in transactional currency.
Product 1 Option 3	The third product dimension selected by the author when placing the order.
Product 1 Option 3 Value	The third product dimension value selected by the author when placing the order.
Product 1 Option 3 Amount Before Discounts	The third product dimension selected by the author when placing the order amount, in transactional currency.
Product 1 Original Amount - before discounts	The charge for product prior to any discounts and not including tax / VAT, in transactional currency.
Product 1 Geographic Discount	The geographic discount amount applied to charge, in transactional currency.
Product 1 Membership Discount	The membership discount amount applied to charge, in transactional currency.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Product 1 Affiliation Discount	The institution discount amount applied to charge, in transactional currency.
Product 1 Promo Code Discount	The discount amount for any promotion codes associated with product, in transactional currency.
Product 1 Subtotal - before taxes	The subtotal for product, in transactional currency.
Product 1 tax/VAT Percentage	The tax/VAT percentage for product.
Product 1 Tax Amount	The tax/VAT amount for product, in transactional currency.
Product 2 Name	The second product name selected by the author when placing the order.
Product 2 Option 1	The first product dimension selected by the author when placing the order.
Product 2 Option 1 Value	The first product dimension value selected by the author when placing the order.
Product 2 Option 1 Amount Before Discounts	The first product dimension selected by the author when placing the order amount, in transactional currency.
Product 2 Option 2	The second product dimension selected by the author when placing the order.
Product 2 Option 2 Value	The second product dimension value selected by the author when placing the order.
Product 2 Option 2 Amount Before Discounts	The second product dimension selected by the author when placing the order amount, in transactional currency.
Product 2 Option 3	The third product dimension selected by the author when placing the order.
Product 2 Option 3 Value	The third product dimension value selected by the author when placing the order.
Product 2 Option 3 Amount Before Discounts	The third product dimension selected by the author when placing the order amount, in transactional currency.
Product 2 Original Amount - before discounts	The charge for product prior to any discounts and not including tax / VAT, in transactional currency.
Product 2 Geographic Discount	The geographic discount amount applied to charge, in transactional currency.
Product 2 Membership Discount	The membership discount amount applied to charge, in transactional currency.
Product 2 Affiliation Discount	The institution discount amount applied to charge, in transactional currency.
Product 2 Promo Code Discount	The discount amount for any promotion codes associated with product, in transactional currency.
Product 2 Subtotal - before taxes	The subtotal for product, in transactional currency.
Product 2 tax/VAT Percentage	The tax/VAT percentage for product.
Product 2 Tax Amount	The tax/VAT amount for product, in transactional currency.
Product 3 Name	The third product name selected by the author when placing the order.
Product 3 Option 1	The first product dimension selected by the author when placing the order.
Product 3 Option 1 Value	The first product dimension value selected by the author when placing the order.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Product 3 Option 1 Amount Before Discounts	The first product dimension selected by the author when placing the order amount, in transactional currency.
Product 3 Option 2	The second product dimension selected by the author when placing the order.
Product 3 Option 2 Value	The second product dimension value selected by the author when placing the order.
Product 3 Option 2 Amount Before Discounts	The second product dimension selected by the author when placing the order amount, in transactional currency.
Product 3 Option 3	The third product dimension selected by the author when placing the order.
Product 3 Option 3 Value	The third product dimension value selected by the author when placing the order.
Product 3 Option 3 Amount Before Discounts	The third product dimension selected by the author when placing the order amount, in transactional currency.
Product 3 Original Amount - before discounts	The charge for product prior to any discounts and not including tax / VAT, in transactional currency.
Product 3 Geographic Discount	The geographic discount amount applied to charge, in transactional currency.
Product 3 Membership Discount	The membership discount amount applied to charge, in transactional currency.
Product 3 Affiliation Discount	The institution discount amount applied to charge, in transactional currency.
Product 3 Promo Code Discount	The discount amount for any promotion codes associated with product, in transactional currency.
Product 3 Subtotal - before taxes	The subtotal for product, in transactional currency.
Product 3 tax/VAT Percentage	The tax/VAT percentage for product.
Product 3 Tax Amount	The tax/VAT amount for product, in transactional currency.
Product 4 Name	The fourth product name selected by the author when placing the order.
Product 4 Option 1	The first product dimension selected by the author when placing the order.
Product 4 Option 1 Value	The first product dimension value selected by the author when placing the order.
Product 4 Option 1 Amount Before Discounts	The first product dimension selected by the author when placing the order amount, in transactional currency.
Product 4 Option 2	The second product dimension selected by the author when placing the order.
Product 4 Option 2 Value	The second product dimension value selected by the author when placing the order.
Product 4 Option 2 Amount Before Discounts	The second product dimension selected by the author when placing the order amount, in transactional currency.
Product 4 Option 3	The third product dimension selected by the author when placing the order.
Product 4 Option 3 Value	The third product dimension value selected by the author when placing the order.
Product 4 Option 3 Amount Before Discounts	The third product dimension selected by the author when placing the order amount, in transactional currency.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Product 4 Original Amount - before discounts	The charge for product prior to any discounts and not including tax / VAT, in transactional currency.
Product 4 Geographic Discount	The geographic discount amount applied to charge, in transactional currency.
Product 4 Membership Discount	The membership discount amount applied to charge, in transactional currency.
Product 4 Affiliation Discount	The institution discount amount applied to charge, in transactional currency.
Product 4 Promo Code Discount	The discount amount for any promotion codes associated with product, in transactional currency.
Product 4 Subtotal - before taxes	The subtotal for product, in transactional currency.
Product 4 tax/VAT Percentage	The tax/VAT percentage for product.
Product 4 Tax Amount	The tax/VAT amount for product, in transactional currency.
Taxable Address	The full taxable address for the order
Taxable Address Country	The country from the taxable address for the order
Taxable Address State	The state from the taxable address for the order (if available)
Shipping Address	The shipping address for the customer (if available)
Promotion Name	The promotion name(s) associated with the promotion codes applied to the order.
Promotion Code(s) Applied	The promotion code(s) applied to the order.
Promotion Code(s) from manuscript metadata	The promotion code(s) passed with the manuscript metadata.
Total Discount	The sum of all discounts applied across all products on the order.
Funding Request Profile Name	The special billing profile that was selected (by the author or automatically) to complete the funding request
Agreement Name	The agreement name that the funding request billing profile is associated to.
Funding Status	The current funding status (if institutional funding was requested).
Funding Status Update Date	The date that funding was either requested, approved, or denied (if institutional funding was requested).
Funding Deny Reason	The reason provided by the institution for denying the funding request (if institutional funding was requested).
Funding Deny Reason Details	The reason details and/or additional instructions provided by the institution for denying the funding request (if institutional funding was requested).
Invoice Number	The invoice number associated with the order.
Invoice Sequence Number	The invoice sequence number associated with the order.
Invoice Date	The create date of the invoice applicable to the order.
Invoice Link	Link to pdf of the invoice.
Account No.	The account number associated with the person or organization paying the invoice. This will always reflect the profile’s billing account number.
Transaction Status	The transaction status for the order.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Payment Method	How the user paid for the order (credit card or invoice or institutional account).
Payment Status	The current payment status of the manuscript. Manuscripts in this report may have a payment status of OPEN or CLOSED.
Payment Close Date	The date payment was applied.
Payment Close Reason	The associated reason for payment close (Paid or Cancelled).
Payment Close Reason Updated	The date payment status was last updated.
Order Confirmation	A link to the order confirmation page.
Funder 1 Name	The name of the funding organization (This column and the associated Funder ID and Grant Number columns will repeat in blocks for each additional funding organization, up to 4 funders total).
Funder 1 ID	The type of funder ID (eg Fundref, Ringgold, etc).
Funder 1 Grant 1	The identifier of the first grant associated with the funding Organization.
Funder 1 Grant 2	The identifier of the second grant associated with the funding Organization.
Funder 2 Name	The name of the funding organization.
Funder 2 ID	The type of funder ID (eg Fundref, Ringgold, etc).
Funder 2 Grant 1	The identifier of the first grant associated with the funding organization.
Funder 2 Grant 2	The identifier of the second grant associated with the funding organization.
Funder 3 Name	The name of the funding organization.
Funder 3 ID	The type of funder ID (eg Fundref, Ringgold, etc).
Funder 3 Grant 1	The identifier of the first grant associated with the funding organization.
Funder 3 Grant 2	The identifier of the second grant associated with the funding organization.
Funder 4 Name	The name of the funding organization.
Funder 4 ID	The type of funder ID (eg Fundref, Ringgold, etc).
Funder 4 Grant 1	The identifier of the first grant associated with the funding organization.
Funder 4 Grant 2	The identifier of the second grant associated with the funding organization.
Publisher Terms & Conditions	A link to Publisher's Terms & Conditions.
Days to transaction initiation	The number of days between the date when the manuscript was available for checkout and the date when the transaction occurred.
Days from transaction initiation to payment	The number of days between the date when the transaction occurred and the date when the transaction was marked as paid.
Billing First Name	Populates from customer billing address information.
Billing Last Name	Populates from customer billing address information.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Billing Company	Populates from customer billing address information.
Billing Country	Populates from customer billing address information.
Customer Tax ID	The customer tax ID associated with the order.
Publisher Tax ID	The publisher tax ID associated with the order. This could be multiple, divided by a comma where applicable.
Business Unit	If there are multiple business entities defined in the publisher implementation, these will be reflected here.

More Information

If you have any other questions or suggestions for improving these tools, please contact your account manager and/or Shannon Reville at sreville@copyright.com

Company description: Copyright Clearance Center (CCC) builds unique solutions that connect content and rights in contextually relevant ways through software and professional services. CCC helps people navigate vast amounts of data to discover actionable insights, enabling them to innovate and make informed decisions. CCC, with its subsidiary RightsDirect, collaborates with customers to advance how data and information is integrated, accessed, and shared while setting the standard for effective copyright solutions that accelerate knowledge and power innovation. CCC is headquartered in Danvers, Mass. with offices across North America, Europe and Asia. To learn more about CCC, visit www.copyright.com.

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