

# RightsLink<sup>®</sup> for Scientific Communications

*Publisher Portal Detailed User Guide*

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June 2020

## WE'RE HERE TO HELP

In today's challenging environment, your business needs to be informed with detailed information about your customer's buying behaviors.

- Are your authors submitting their fees in a timely manner so that you can meet tight production deadlines?
- Are you on track to meet your revenue goals for the quarter?
- What impact does a pricing change have on your bottom line?
- Are your promotional offers effective?

RightsLink reporting is critical to providing the answers you need. We hope this guide is helpful, but rest assured that we are here if you need assistance. For help with a report, or to request a one-on-one demonstration, simply call or email your Account Manager.

**If you have any questions, please contact us at +1-978-646-2800.**

## TABLE OF CONTENT

WE'RE HERE TO HELP .....	2
INTRODUCTION .....	3
CREATE A PROMOTION IN RIGHTSLINK FOR SCIENTIFIC COMMUNICATIONS .....	4
Creating a Promotion Code .....	4
MANUSCRIPTS TAB .....	11
ROA PUB PORTAL REPORTS (For all ROA Transactions dated on or after 3 February 2018) .....	18
Request History Report.....	19
Manuscript Status Report.....	20
Promotion Status Report .....	24
Promotion Code Analysis by Total Use Report .....	26
Transaction Summary Report (Including distribution data for all ROA Transactions on or after 3 February 2018) .....	27
Invoice and Credits Report (For all ROA Transactions on or after 3 February 2018) .....	36
.....	39
RIGHTSLINK PUB ADMIN REPORTS (For Permissions, GIN, and all ROA Transactions before 3 February 2018) .....	40
Invoice Report.....	40
Transaction and Distribution Report .....	42

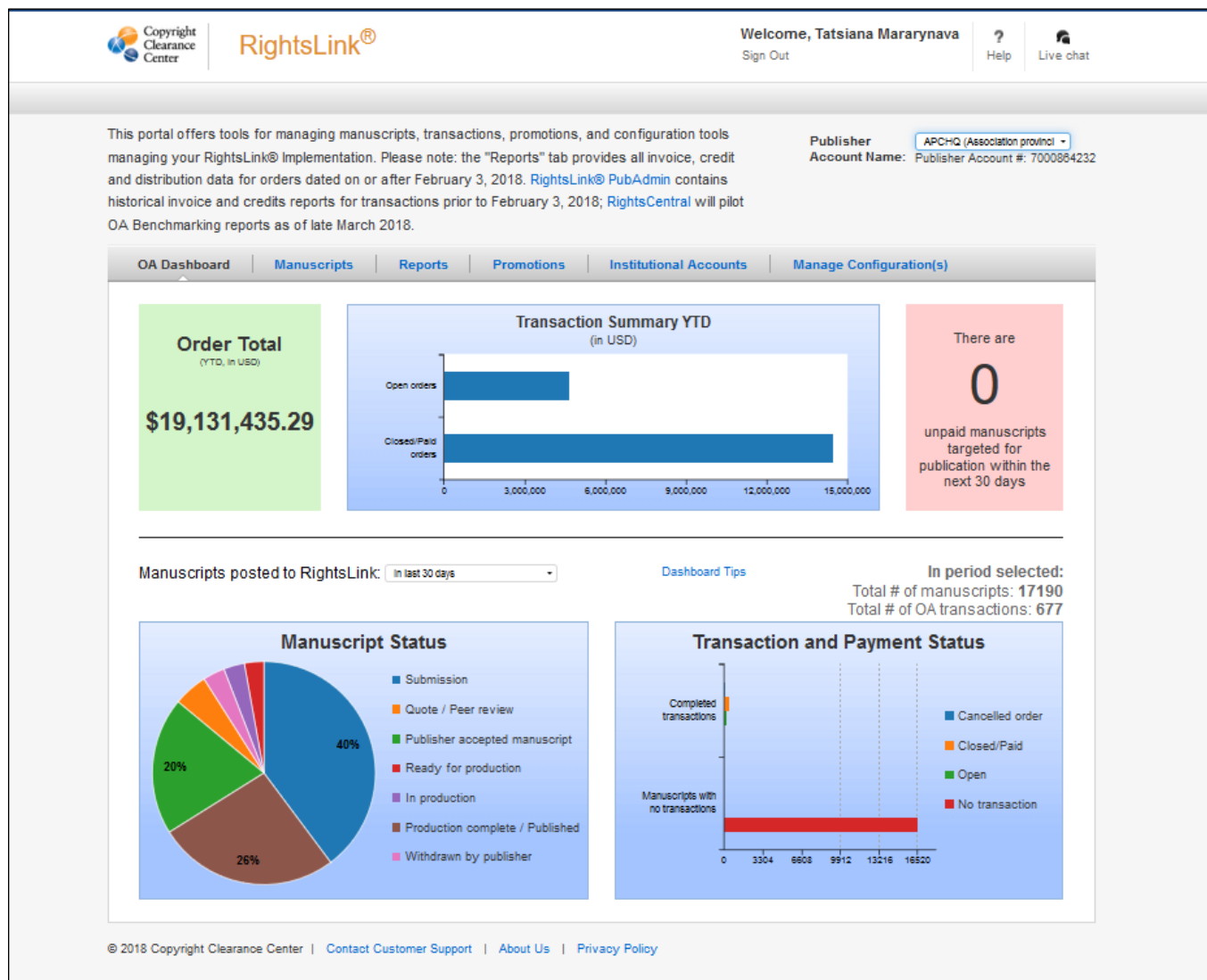
## INTRODUCTION

RightsLink® for Scientific Communications is a comprehensive, configurable platform for scientific and scholarly publishers to manage their Open Access, page, color and other author charges. The RightsLink Portal offers robust reporting features to check on the status of manuscripts and to analyze transaction details, as well as powerful promotional tools for providing authors with discounts, waivers, etc. This guide provides an in-depth view into using the Portal, including how to build and analyze reports and promotional codes.

### IMPORTANT LINK

RightsLink administrative user portal:

[oaportal.copyright.com](http://oaportal.copyright.com)



## CREATE A PROMOTION IN RIGHTSLINK FOR SCIENTIFIC COMMUNICATIONS

The RightsLink for Scientific Communications platform includes robust tools for creating, managing and tracking promotions.

Upon selecting the **Promotions** tab, a dashboard of recent promotions is immediately presented. Click on the promotion name for details.

### Creating a Promotion Code

To define a new promotion, select the **Create new promotion** link.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#)

[+ Create new promotion](#)

**Search for Promotions**

Promotion name:

Code:

Covered fee(s):

make a selection

Promotion Status:

All

Promotion start date:

From 01-Jul-2016 To 08-Jul-2016

Promotion end date:

From To

Search

Clear

Results per page: 25 Results 1 - 25 of 44 [Previous](#) [1](#) [2](#) [Next](#)

Next, name your promotion and select which fee(s) will be covered by the promotion.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#) | [Institutional Accounts](#) | [Manage Configuration\(s\)](#)

Promotions > Create Promotion

**CREATE PROMOTION**

Promotion name:

Covered fee(s): ?

make a selection

Discount type:

☒ Percentage

%

Start date:

End date:

(optional)

Enter restriction:

(optional)

make a selection

Add another restriction

Allowed uses per code:

☒ Limited

1

Create code(s):

☒ Auto-generate codes ?

Enter # of codes needed

1

Unlimited

☐ Create single custom code ?

Enter reader-friendly code

Example: PUBFall2014

☒ Create promotion restricted to organization

CANCEL

SAVE

- Select **Percentage** and enter the desired discount or select **Fixed fee** and the specific amount as well as the desired currency(ies) for the discount.
- Specify the **Start date** and/or **End date**.
- **Enter restrictions.** You may restrict promotions by the following parameters (one or more options can be combined):
  - a. Country of Primary Author
  - b. Funder ID
  - c. Submission Date Range
    - Apply the code to already-submitted manuscripts by selecting a code creation date in the past.
  - d. Primary Author's Email Address
  - e. Publication Name
  - f. Role
- Indicate whether the promotion code can be used for a **Limited** number of times and for how many times or on an **Unlimited** basis. For example, if you wish to generate a single code with a hundred unique uses, select "limited," 100 uses, and then 1 code needed.
- **Create code(s)** for your promotion. You may have the system **Auto-generate** codes or you can **Create single custom code** (allowing one or multiple uses) with a reader-friendly name such as Fall2017.
- **Share promotion with affiliated account(s).** Publishers with multiple divisions (such as a US and a UK division) may share promotions among divisions. To take advantage of this functionality, please provide your account manager with a list of the organizations/accounts that are eligible to share your promotions so that we can configure this list in the backend.
- Select **Save**, and see the promotion code details for the "block(s)" of codes you've just created.

**CREATE PROMOTION**

Promotion name:

Discount type: ☒ Percentage  %  
☐ Fixed Fee

**CREATE PROMOTION**

Promotion name:

Discount type: ☐ Percentage  
☒ Fixed Fee

USD   
[Add another currency](#)

**Covered fee(s):**

**Start date:**    
**End date:**    
(optional)

**Enter restriction:** (optional)

Funder ID  123456   
Submission Date  From:  To:    
[Add another restriction](#)

**Allowed uses per code:**

☒ Limited  1  
☐ Unlimited

**Create code(s):**

☒ Auto-generate codes Enter # of codes needed  1  
☐ Create single custom code Enter reader-friendly code  Example:PUBFall2014

- You can elect to only allow ONE promo code to be applied to orders across the platform
  - This is a configuration update
  - You must specify whether you want the highest or lowest value promo code applied
  - On-screen messaging will alert the user to which promo codes have not been applied

After you've created a new block of promotion codes, you can:

- Download full list of codes
- Review previously created blocks of codes
- Generate a new block of codes for the same promotion
- Cancel an individual's user code or an entire block of codes
- Cancel or extend the date of the entire promotion
- Specify a reason for cancelling a promotion or code
- Duplicate promotion
  - The duplicated promotion will automatically inherit the attributes of the copied promotion, which can then be edited as necessary and saved in the Create Promotions window. The number of codes and custom name will need to be updated for the duplication.

The screenshot shows a modal window titled "Apply Discounts" with a close button (X) in the top right corner. Below the title is a brief instruction: "Be sure to review and update your information provided below and/or enter promo codes. Once you **Apply Discounts**, your charges will reflect any author discounts applied."

The form contains four sections, each with a "No Discount" link on the right:

- Country Discount:** Includes a label "Country Discount" and a dropdown menu with the text "Select your country".
- Membership Discount:** Includes a label "Membership Discount (Number)" and a text input field with the placeholder "Enter membership number".
- Affiliation Discount:** Includes a label "Your Institution" and a text input field with the placeholder "Type and select your institution". Below this input is a link that says "Can't find your institution?".
- Promotion Code Discount:** Includes a label "Promotion Code/Waiver" and a text input field with the placeholder "Enter a promo code". To the right of this input is a blue button labeled "Enter".

At the bottom right of the dialog are two buttons: a "Close" button and a blue "Apply Discounts" button.

Promotion Details

Promotions > Promotion details

PROMOTION DETAILS - schattauer reviewer discount

Duplicate Promotion

Cancel Promotion

Creation date: 21-Jul-2016

Covered fee(s): Open Access Charges

Start date: 21-Jul-2016

Created by: APC TestUser

Discount type: Percentage - 30%

End date: 30-Nov-2019 [Edit](#)

Status: Active

Allowed uses per code: Unlimited

Restrictions: [View](#)

Promotion shared with: N/A

Promotion Codes

Download Full List

Generate new block of codes: 

No. of codes

Generate

View block of codes: 

schattauer reviewer discount - 1

Date generated: 21-Jul-2016

Download Block

Cancel Block

Search for a code: 

Enter code

Search for code

Clear

Results 1 - 1 of 1

Code ↕	No. of Actual Uses ↕	Last Usage Date ▾	Status ↕	Cancellation Reason ↕
REVIEWER DISCOUNT	0		Active	<div>Cancel</div>

Results 1 - 1 of 1



- You can elect to only allow ONE promo code to be applied to orders across the platform.
  - This is a configuration update.
  - You must specify whether you want the highest or lowest value promo code applied.
  - On-screen messaging will alert the user to which promo codes have not been applied.

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**Promotion Details (showing Cancellation Reason column)**

[Promotions](#) > Promotion details

### PROMOTION DETAILS - schattauer reviewer discount

[Duplicate Promotion](#) [Cancel Promotion](#)

Creation date:	21-Jul-2016	Covered fee(s):	Open Access Charges	Start date:	21-Jul-2016
Created by:	APC TestUser	Discount type:	Percentage - 30%	End date:	30-Nov-2019 <a href="#">Edit</a>
Status:	Active	Allowed uses per code:	Unlimited		
Restrictions:	<a href="#">View</a>	Promotion shared with:	N/A		

### Promotion Codes

[Download Full List](#) | Generate new block of codes:  [Generate](#)

View block of codes:  Date generated: 21-Jul-2016 [Download Block](#) [Cancel Block](#)

Search for a code:  [Search for code](#) [Clear](#)

Results 1 - 1 of 1

Code	No. of Actual Uses	Last Usage Date	Status	Cancellation Reason
REVIEWER DISCOUNT	0		Active	<a href="#">Cancel</a>

Results 1 - 1 of 1

## MANUSCRIPTS TAB

To better serve our publishers and internal support teams, the platform added a tab to the Publisher Portal at [oportal.copyright.com](http://oportal.copyright.com) called '**Manuscripts**'. The **Dashboard** tab has been renamed the **OA Dashboard** because it reflects data related to OA/Page and Color orders only.

- Users can access the Manuscripts tab, update manuscript statuses, or reactivate manuscript links, depending on permissions set up in the RLSC backend.
- Publishers and internal teams who have existing permissions to view the Reports tab can automatically view the Manuscripts tab.
- Visitors can easily search and retrieve information on one or multiple manuscripts.
- Visitors see a quick snapshot of manuscripts posted to RightsLink and then click on any CCC Manuscript ID to view:
  - Offer links by Product Set
  - A snapshot of orders and their statuses
  - A snapshot of any emails sent related to the manuscripts
  - A history of manuscript statuses and who drove the update

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#)

### Search for Manuscripts

CCC Manuscript ID:

Manuscript ID:

DOI:

Manuscript name:

Publication name:

Author first name:

Author last name:

Manuscript status:

Manuscript status update date: From  To

Manuscript acceptance date: From  To

[Search](#) [Clear](#)

To view additional detail for a manuscript, select CCC Manuscript ID. [Run Downloadable Report](#)

Results 1 - 17 of 17

CCC Manuscript ID	Manuscript ID	DOI	Manuscript Name	Primary Author Name	Publication Name	Manuscript Status	Manuscript Status Update Date	Manuscript Acceptance Date
78768464-932e-4535-98b7-ef0d372cde24	222	DOI1	Title/Rem	Hall, Alex	Journal of Nanotechnology Research	Publisher accepted manuscript	26-Dec-2015	26-Dec-2015
b2ba13a1-35cc-4289-b424-1be2881f1eb6	222	DOI1	Title/Rem	Hall, Alex	Journal of Nanotechnology Research	Publisher accepted manuscript	23-Dec-2015	23-Dec-2015
531f5fac-afd9-4a80-80d6-1fd03dbd5f42	222	DOI1	Title/Rem	Hall, Alex	Journal of Nanotechnology Research	Publisher accepted manuscript	16-Dec-2015	16-Dec-2015

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#)

### Search for Manuscripts

CCC Manuscript ID:

Manuscript ID:

DOI:

Manuscript name:

Publication name:

Author first name:

Author last name:

Manuscript status: Publisher accepted manuscript

Manuscript status update date: From  To

Manuscript acceptance date: From  To

To view additional detail for a manuscript, select CCC Manuscript ID. [Run Downloadable Report](#)

Results 1 - 17 of 17

CCC Manuscript ID	Manuscript ID	DOI	Manuscript Name	Primary Author Name	Publication Name	Manuscript Status	Manuscript Status Update Date	Manuscript Acceptance Date
<a href="#">78768464-932e-4535-98b7-ef0d372cde24</a>	222	DOI1	Title/Rem	Hall, Alex	Journal of Nanotechnology Research	<a href="#">Publisher accepted manuscript</a>	26-Dec-2015	26-Dec-2015
<a href="#">b2ba13a1-35cc-4289-b424-1be2881f1eb6</a>	222	DOI1	Title/Rem	Hall, Alex	Journal of Nanotechnology Research	<a href="#">Publisher accepted manuscript</a>	23-Dec-2015	23-Dec-2015
<a href="#">531f5fac-afd9-4a80-80d6-1fd03dbd5f42</a>	222	DOI1	Title/Rem	Hall, Alex	Journal of Nanotechnology Research	<a href="#">Publisher accepted manuscript</a>	16-Dec-2015	16-Dec-2015

- 
- After clicking on a CCC Manuscript ID, users will arrive on the Manuscript Details page. From this page you can:
    - **Update a manuscript status.** If a Publisher Portal user has the appropriate permissions, he can update a manuscript status (for example, from Publisher Accept to Withdrawn).
    - **Cancel a transaction and reactivate a link.** Similarly, if a Publisher Portal user has appropriate permissions, he can cancel a transaction and reactivate a link if the Credit Memo has been previously issued in RightsLink PubAdmin. In a later phase, we will enable the credit memo to be generated from the manuscripts dashboard as well.
    - **Trigger an offer and reminder email.** If a manuscript status is flipped to PublisherAccept, the offer and reminder emails will be triggered.
    - **Stop reminders.** You can now set reminders to be recurring until a transaction takes place. This is a configuration setting that should be set by contacting your account manager. If a customer contacts you or CCC to opt out of any further reminders, this checkbox can be selected to stop these.
    - **View the actual email sent.** Clicking on email type will display the html version of the actual email sent. This can be used to resend, if required.

## Links

This section provides offer links for RightsLink for Open Access. Please note: not all links will be applicable to this manuscript.

Link Type	Link
Open Access, page, color, additional services charges	<a href="https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c">https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c</a>
Reprint, ePrint charges	<a href="https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c&amp;chargeset=REPRINTS">https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c&amp;chargeset=REPRINTS</a>
Submission charges	<a href="https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c&amp;chargeset=SUBMISSION">https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c&amp;chargeset=SUBMISSION</a>
Cover charges	<a href="https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c&amp;chargeset=AUTHORTOOLS">https://oa.prec1.copyright.com/apc-payment-ui/overview?id=e70a3a45-85b0-4a5f-8cc0-30a77f49051c&amp;chargeset=AUTHORTOOLS</a>

## Orders

This section provides more information about orders associated to this manuscript, including payment status. Please note: updates on this page are provided in real time, but with a slight delay on the downloadable report.

[Request Downloadable Report](#)

Results 1 - 1 of 1

Order Date	Order ID	Transaction Type	Total Order Amount	Currency	Transaction Status	Payment Method	Payment Status	Payment Close Date	Payment Close Reason	Payment Close Reason Updated	Cancel Order and Reactivate Link
04-Mar-2020	10000119815	Open Access, page, color, additional services charges	4,000.00	USD	Finished	Credit Card	Closed	04-Mar-2020	Paid	04-Mar-2020	<a href="#">Cancel</a>

## Manuscript Status History

This section provides information about the manuscript status history for this manuscript, including system and administrative user updates.

Results 1 - 1 of 1

Manuscript Status	Manuscript Status Update Date	Updated by
<a href="#">Publisher accepted manuscript</a>	03-Mar-2020	hmatsiushonak@copyright.com

[Change Status](#)

## Emails

This section provides information about emails sent by RightsLink for Open Access for this manuscript.

Results 1 - 2 of 2

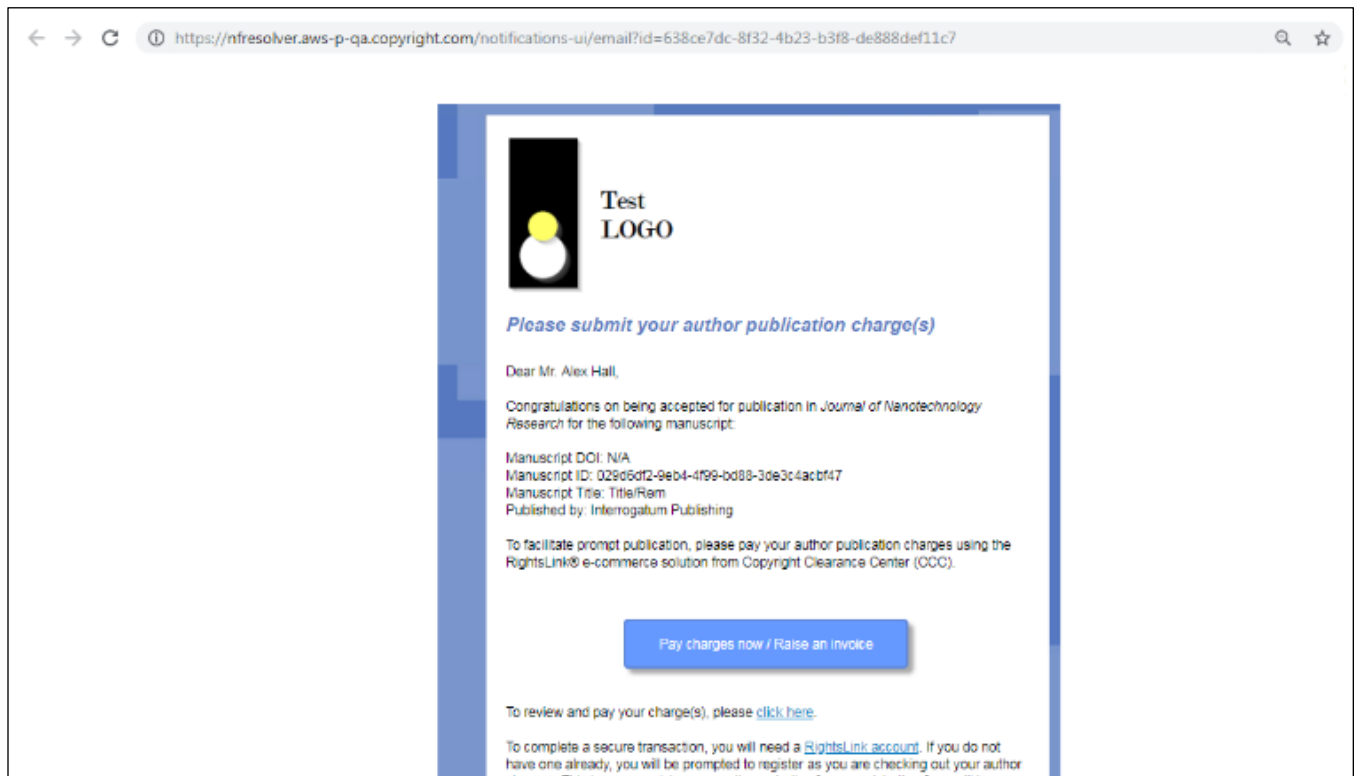
Transaction Type	Email Type	Date Sent	Email Status	Recipient Email
Open Access, page, color, additional services charges	<a href="#">Order confirmation</a>	04-Mar-2020	<a href="#">Sent</a>	tmararynava@copyright.com
Open Access, page, color, additional services charges	<a href="#">Offer - initial</a>	03-Mar-2020	<a href="#">Sent</a>	jsmith@google.com

☐ Stop Reminders [?](#)

## JSON view

This section reflects how this manuscript is currently represented in the RightsLink JSON payload.

[Show](#)



- From the Manuscript Details page, you can also review the JSON payload associated with this manuscript to view how your metadata is being posted to RightsLink and troubleshoot any issues.

### JSON view

This section reflects how this manuscript is currently represented in the RightsLink JSON payload.

 Hide

```
{
  "id": "884d4c2b-d8ba-4b5e-9ecd-7899a8f86b07",
  "source": "PLATFORM",
  "platform": "BENCHPRESS",
  "status": "PUBLISHERACCEPT",
  "publisherCode": "ASPET",
  "publisherDisplayName": "American Society for Pharmacology and Experimental Therapeutics",
  "journalCode": "0026-895X",
  "journalTitle": "Molecular Pharmacology",
  "externalManuscriptId": "MOLPHARM/2017/004812",
  "externalReferenceId": "884d4c2b-d8ba-4b5e-9ecd-7899a8f86b07",
  "articleIdentifiers": [
    {
      "type": "DOI",
      "value": "10.1124/mol.117.004812"
    }
  ],
  "articleTitle": "testing EM",
  "manuscriptType": "Article",
  "submissionDate": "2017-04-18",
  "licenses": [
    {
      "type": "CC",
      "value": "CC BY"
    }
  ],
  "authors": [
    {
      "primary": true,
      "firstName": "Evelyn",
      "lastName": "McCool",
      "emailAddress": "emccool@highwire.org",
      "institutionName": "Belfast Office",
      "address": {
        "address1": "123 Main Street",
        "country": "GB",
        "city": "Belfast",
        "zip": "BT1 ABC",
        "phone": "0044 1231231234",
        "fax": "0044 1231231234"
      }
    }
  ]
}
```



# RightsLink® for Scientific Communications PubPortal Reports

FOR ALL RLSC TRANSACTIONS  
DATED ON OR AFTER 3 FEBRUARY 2018

The RLSC Pub Portal is designed to provide client publishers with a full suite of tools for running transaction, invoice and promotion reports. To track RightsLink for Scientific Communications transactions, distributions, invoices and credits, clients should visit the RightsLink for Scientific Communications portal at [oportal.copyright.com](http://oportal.copyright.com). These reports will only include information related to your RightsLink for Scientific Communications implementation.

## RLSC PUB PORTAL REPORTS

(For all RLSC Transactions dated on or after 3 February 2018)

As more and more publishers join the platform, we want to ensure that your transaction reports are delivered without issue. Thus, we have moved to an asynchronous report model for excel-based, downloadable reports. HTML reports will still show immediately on-screen as they do today. A “Request Full Report” link will be available to request Excel versions of the complete reports.

When you click the “Request Full Report” link, a pop-up message will show you that your request was submitted successfully.

### IMPORTANT LINK



RightsLink administrative user  
portal:

[oaportal.copyright.com](http://oaportal.copyright.com)

The screenshot shows the RightsLink administrative user portal interface. A pop-up message with a red warning icon states: "Your request for a report has been successfully submitted to RightsLink for Open Access and will be emailed to: jgoodrich@copyright.com". The background shows a form with fields for "Manuscript name:", "Publication name:" (with a dropdown menu), and "Target publication date:" (with "From" and "To" date pickers). There are "Run Report" and "Clear" buttons, and a "Request Full Report" button at the bottom right.

As soon as your report is ready, which should be within minutes, you will receive an email with a link to the report.

The screenshot shows an email notification from RightsLink. The header includes the date and time "Tue 11/29/2016 12:36 PM" and the email address "ps-no-reply@copyright.com". The subject line is "Requested RightsLink report is ready". The body of the email states: "er Goodrich are problems with how this message is displayed, click here to view it in a web browser." Below this, there is a large blue box with the text: "Your requested report is complete and available for viewing." followed by "Requested Details:" and the following information: "Product: RightsLink for Open Access", "Report Type: Manuscript Status Report", and "Request Date: 29-Nov-2016". At the bottom, it says "To download the report, please [click here](#)."

## Request History Report

There is a 'View Report Requests History' link on all Pub Portal Report Search and Results Screens. Use the View Report History Requests to view reports requested in the past 30 days.

[View Report Requests History](#)

**Report type:** Transaction Summary Report **Time zone:** RightsLink (Eastern) Local

**Transaction Summary Report**

**Manuscript ID:**

**Manuscript name:**

**Author first name:**

**Author last name:**

**Author ID:**

**Institution:**

**Agreement name:**

**Funder name:**

**Order ID:**

**Publication name:**

**Volume:**

**Issue:**

**Transaction type:** All

**Promotion code:**

**Funding Status:** All

**Payment status:** All

**Date range:** ☐ Order date ☐ Distribution date

**Run Report** **Clear**

**Request Full Report**

**RightsLink®**

Welcome, Tatsiana\_updated  
Mararynava\_updated  
[Sign Out](#)

[Help](#) [Live chat](#)

This portal provides you with tools for managing manuscripts and transactions unique to your RightsLink® Author Services Implementation. These transactions are included in monthly RightsLink distributions and thus supporting information is available in invoice, credit and distribution reports in [RightsLink PubAdmin](#).

**Account name:** APCHQ (Association provin: ...)  
Account #: 7000864232

[OA Dashboard](#) [Manuscripts](#) [Reports](#) [Promotions](#) [Manage Configuration\(s\)](#)

[Reports](#) > Report Requests History

The table below reflects reports that have been requested for your publisher. Please note: reports expire within 30 days and expired reports no longer appear within the table.

Results per page: 25 Results 1 - 25 of 34 Previous 1 2 Next

Request Date	Report Type	Requester	Status	Link to Report
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
16-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
15-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>
14-Feb-2017	Promotion Code Analysis by Order	tmararynava@copyright.com	Complete	<a href="#">Click here</a>
14-Feb-2017	Transaction Summary Report	tmararynava@copyright.com	Complete	<a href="#">Click here</a>
14-Feb-2017	Manuscript Status Report	tmararynava@copyright.com	Complete	<a href="#">Click here</a>
14-Feb-2017	Transaction Summary Report	hmatsiushonak@copyright.com	Complete	<a href="#">Click here</a>
03-Feb-2017	Transaction Summary Report	itsiarenia@copyright.com	Complete	<a href="#">Click here</a>

## Manuscript Status Report

To check on the payment status of a manuscript, run the **Manuscript Status Report**. Manuscript searches are fast and intuitive and can be initiated by a variety of factors (author name, manuscript status, ID, publication date range, date when CCC offer link sent, manuscript acceptance date and more).

In the downloadable report, we added dates for when 'offer' and reminder emails were sent from the RightsLink platform as well as the date each transaction (submission, open access/page/color/additional services or reprints) was initiated so that you can quickly track authors who have received 'offer' and reminder emails but who have not yet transacted.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#)

Report type: Manuscript Status Report ?

**Manuscript Status Report**

Manuscript ID:

Manuscript name:

Publication name:

Target publication date: From  To

Author first name:

Author last name:

Manuscript status:

Manuscript status update date: From  To

Manuscript acceptance date: From  To

Run Report

Clear

Results 1 - 4 of 4

[Request Full Report](#)

Manuscript ID	Manuscript Name	Publication Name	Target Publication Date	Primary Author Name	Manuscript Acceptance Date	Manuscript Status Update Date	Manuscript Status
Test_manuscript_please_ignore	Test_manuscript_please_ignore	Disease Models & Mechanisms	15-Aug-2015	Klimchanka, Pavel	03-Nov-2016	03-Nov-2016	Publisher accepted manuscript
Test_manuscript_please_ignore	Test_manuscript_please_ignore	Disease Models & Mechanisms	15-Aug-2015	Klimchanka, Pavel	03-Nov-2016	03-Nov-2016	Publisher accepted manuscript

## Manuscript Status Report Output

An abbreviated version of the report results display immediately on screen. The full report output may also be downloaded to Excel. The following is a complete list of the fields included in the full report output:

FIELD	VALUE
Manuscript ID	Publisher's unique identifier for the manuscript/document
CCC Manuscript ID	Unique identifier for the manuscript/document generated by RightsLink
Manuscript Name	Manuscript title
Article Identifier Type	If DOI is present, report displays type DOI. If no DOI, displays type PII; if no PII, field left blank.
Article Identifier	If DOI is present, report displays DOI value. If no DOI, displays PII value; if no PII, field left blank.
Copyright Year	Format is YYYY
Target Publication Date	Target publication date for the manuscript. Format is DD-MON-YYYY (example: 01-Aug-2017).
Publication ID	Displays E-ISSN; if no E-ISSN, then ISSN; if neither, display Other Publication ID; if none, field left blank
Publication Name	Displays journal/publication title in which manuscript is being published
Publication DOI	Displays DOI of journal/publication in which manuscript is published
Volume	Displays journal/publication volume
Issue	Displays journal/publication issue
Source	Identifies if the request came from a platform (such as Aries or ScholarOne) or from direct integration with publisher
Platform	Indicates the platform that triggered the author workflow and shared data with RightsLink, such as Aries or ScholarOne
Primary Author First 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 Middle Name	Populates with the author denoted as primary in the manuscript metadata
Primary Author Email Address	Populates with the email address of the author denoted as primary in the manuscript metadata
Primary Author Identifier Type	Displays only one. List of type values is in hierarchy order - if ORCID is present, report displays ORCID; if no ORCID, displays ISNI; if no ISNI, displays SCOPUS, etc.
Primary Author Identifier	Displays only one. Follow hierarchy order identified for Primary Author Identifier Type above: if ORCID is present, report displays ORCID ; if no ORCID, displays ISNI; if no ISNI, displays SCOPUS, etc.
Institution Identifier Type	Displays only one. Values could be Ringgold, ISNI or Other.
Institution Identifier	Displays only one. If Ringgold ID is present, display Ringgold. If no Ringgold, display ISNI. If no ISNI display Other.
Institution Name	Displays only one affiliation name
Manuscript Acceptance Date	Date the publisher accepted the manuscript. Format is DD-MON-YYYY (example: 01-Aug-2017).
Manuscript Status Update Date	Date indicating when the manuscript status was last updated. Format is DD-MON-YYYY (example: 01-Aug-2017).
Manuscript Status	At Submission, at Peer Review, Publisher Accepted Manuscript, Ready for Production, In Production, Production Complete/Published, Withdrawn by Publisher

FIELD	VALUE
Quote Status	Reflects the status of a price quote for publishers configured with this option. Possible values: Accepted, Discarded, Expired, Disabled, or blank if no action to date.
Quote – Last Update Date	This field indicates the date when the status was last updated. Format is DD-MON-YYYY
Quote – Updated By	This field reflects the username (the email login) of the user who last updated the quote status.
Submission - Date Offer Email Sent	Displays date when initial offer link was sent by CCC for submission charge set. Format is DD-MON-YYYY
Submission - Date First Reminder Email Sent	Displays date when first reminder email was sent by CCC for submission charge set. Format is DD-MON-YYYY
Submission - Date Final Reminder Email Sent	Displays date when final reminder email was sent by CCC for submission charge set. Format is DD-MON-YYYY
Submission Offer Link	Displays offer link sent to author for submission charge set. If author has not yet transacted, link will take user to the Charges Estimate page. If author has completed transaction, link will take user to Order Confirmation page in its “order complete” state.
Submission - Date Transaction Initiated	Displays date when the transaction was initiated for submission charge set. If empty, no transaction has occurred. Format is DD-MON-YYYY
OA, Page, Color, Additional Services - Date Offer Email Sent	Displays date when initial offer link was sent by CCC for OA charge set. Format is DD-MON-YYYY
OA, Page, Color, Additional Services - Date First Reminder Email Sent	Displays date when first reminder email was sent by CCC for OA charge set. Format is DD-MON-YYYY
OA, Page, Color, Additional Services - Date Final Reminder Email Sent	Displays date when final reminder email was sent by CCC for OA charge set. Format is DD-MON-YYYY
OA, Page, Color, Additional Services Offer Link	Displays offer link sent to author for OA charge set. If author has not yet transacted, link will take user to the Charges Estimate page. If author has completed transaction, link will take user to Order Confirmation page in its “order complete” state.
OA, Page, Color, Additional Services - Date Transaction Initiated	Displays date when the transaction was initiated for OA charge set. Format is DD-MON-YYYY
Reprints - Date Offer Email Sent	Displays date when initial offer link was sent by CCC for reprints charge set. Format is DD-MON-YYYY
Reprints - Date First Reminder Email Sent	Displays date when first reminder email was sent by CCC for reprints charge set. Format is DD-MON-YYYY
Reprints - Date Final Reminder Email Sent	Displays date when final reminder email was sent by CCC for reprints charge set. Format is DD-MON-YYYY
Reprints Offer Link	Displays offer link sent to author for reprints charge set. If author has not yet transacted, link will take user to the Charges Estimate page. If author has completed transaction, link will take user to Order Confirmation page in its “order complete” state.
Reprints - Date Transaction Initiated	Displays date when the transaction was initiated for reprints charge set. Date should be for either reprints or ePrints transaction initiated (whichever happens first). Format is DD-MON-YYYY

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FIELD	VALUE
Author Tools and Services - Date Offer Email Sent	Date initial offer link was sent by CCC for Author Tools and Services charge set.
Author Tools and Services - Date First Reminder Email Sent	Date first reminder email was sent by CCC for Author Tools and Services charge set.
Author Tools and Services - Date Final Reminder Email Sent	Date final reminder email was sent by CCC for Author Tools and Services charge set.
Author Tools and Services Offer Link	Offer link sent to author for Author Tools and Services charge set.
Author Tools and Services - Date Transaction Initiated	Displays date when the transaction was initiated for Author Tools and Services charge set. Format is DD-MON-YYYY

## Promotion Status Report

To analyze the total discounts redeemed for a campaign, run the **Promotion Status Report**.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#)

**Report type:** Promotion Status Report ?

**Promotion Status Report**

Promotion name:

Promotion start date: From  To

Promotion status: ? All

Promotion end date: From 01-Oct-2016 To 10-Dec-2016

Run Report Clear

Results 1 - 2 of 2 [Request Full Report](#)

Promotion Name ^	Promotion Status ⇅	Promotion Start Date ⇅	Promotion End Date ⇅	Total Amount of Discounts Applied ⇅	Currency ⇅
OA_fixed11.0.12	Active	01-Dec-2016	02-Dec-2016	181.01	GBP
OA_fixed_2.0.9	Expired	24-Nov-2016	25-Nov-2016	33.20	GBP

### Promotion Status Report Output

An abbreviated version of the report results display immediately on screen. The full report output may also be downloaded to Excel. The following is a complete list of the fields included in the full report output:

FIELD	VALUE
Promotion Name	Name of campaign set by publisher
Promotion Status	Active, Cancelled, Expired
Start Date	Promotion start date. Format is DD-MON-YYYY (example: 01-Aug-2017).
End Date	Promotion end date. Format is DD-MON-YYYY (example: 01-Aug-2017). If no end date is specified, then value should be "N/A."
Covered Fee	Covered fee(s) for each promotion. Multiple values separated by commas. (example: Additional Services, Color, Open Access, Page Charges)
Discount Type	Fixed fee or percentage
Currency	Currency the discount was offered in. Report returns one row for each currency. Displays 3 character ISO code.
Total Amount of Discounts Applied	Total amount of discounts applied to the transaction



## Promotion Code Analysis by Order Report

To analyze promotion code redemption by author and related manuscript, run the **Promotion Code Analysis by Order Report**.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#)

**Report type:** Promotion Code Analysis by Order ?

**Promotion Code Analysis by Order**

Promotion code:

Manuscript ID:

Order ID:

Order date:

In last 30 days

Promotion name:

Manuscript name:

Publication name:

make a selection

Run Report

Clear

Results 1 - 1 of 1 Request Full Report

Order ID	Order Date	Manuscript ID	Manuscript Name	Used By	User Email	Promotion Name	Promotion Code
3981250495942	03-Nov-2016	Test_manuscript_please_ignore	Test_manuscript_please_ignore	Pavel Klimchanka	pklimchanka@copyright.com		

### Promotion Code Analysis by Order Report Output

An abbreviated version of the report results display immediately on screen. The full report output may also be downloaded to Excel. The following is a complete list of the fields included in the full report output:

FIELD	VALUE
Order ID	Order number of the transaction the promotion was used against
Submission Date	Date manuscript submitted to publisher. Format is DD-MON-YYYY (example: 01-Aug-2017).
Order Date	Date of transaction. Format is DD-MON-YYYY (example: 01-Aug-2017).
Manuscript ID	Publisher's manuscript identifier
CCC Manuscript ID	Unique identifier for the manuscript/document generated by RightsLink
Manuscript Name	Manuscript (article) name
Publication Name	Displays journal/publication title in which manuscript is being published
Used By	Name of person who redeemed the promotion code
User Email	Email address for the person who redeemed the promotion code
Promotion Name	Name of campaign set by publisher
Promotion Code	Unique ID
Total Amount of Discounts Applied	Total amount of the discount applied to the transaction
Order Total	Total amount of the transaction
Currency	Currency used to place the transaction

## Promotion Code Analysis by Total Use Report

To analyze the overall activity related to a promotion code campaign, run the **Promotion Code Analysis by Total Use Report**.

Promotion Code	Promotion Code Status	Promotion Name	Promotion Start Date	Promotion End Date	Covered Fee(s)	Discount Type	Number of Allowed Uses	Number of Actual Uses	Usage %
Y4HYAMM9BX3 OORY7E5T6	Revoked	OA_fixed_2.0.9	24-Nov-2016	25-Nov-2016	Open Access Charges	Fixed Fee	1	0	0 %
WD0DNTZ3Y3Q	Active	OA_fixed11.0.12	01-Dec-2016	02-Dec-2016	Open Access	Fixed Fee	1	0	0 %

## Promotion Code Analysis by Total Use Report Output

An abbreviated version of the report results display immediately on screen. The full report output may also be downloaded to Excel. The report displays a separate row for each currency associated with a promotion code. The following is a complete list of the fields included in the full report output:

FIELD	VALUE
Promotion Code	Unique ID
Promotion Code Status	Active, Revoked
Promotion Name	Name of campaign set by publisher
Promotion Start Date	Date the promotion begins (first date promotion code is valid)
Promotion End Date	Date the promotion ends (last date the promotion code is valid). Format is DD-MON-YYYY (example: 01-Aug-2017). If no end date is specified, then value would be "N/A."
Covered Fee	Fee(s) to which the promotion code can be applied, based on the promotion rules.
Discount Type	Fixed fee or percentage
Number of Allowed Uses	Number of allowed uses for the promotion code, specified by the publisher during creation of the promotion
Number of Actual Uses	Reflects actual number of times the promotion code has been used
Usage Percentage	Percent of actual vs. allowed uses. Number of actual uses divided by the number of allowed uses.
Fixed Discount Amount	Discount set for the covered fee, by currency, when promotion was created (report returns a separate row for each currency associated with a promotion code)
Percentage Discount	Percentage discount set for the covered fee when the promotion was created
Total Amount of Discounts Applied	Total amount of promotional discounts applied, by currency (report returns a separate row for each currency associated with a promotion code)
Currency	Currency specified for the discount (report returns a separate row for each currency associated with a promotion code)

## Transaction Summary Report (Including distribution data for all RLSC Transactions on or after 3 February 2018)

To view a summary of completed author transactions, view the Transaction Summary report.

As of 3 February 2018, several columns have been added to this report to provide more complete funding status, invoicing, credits, and distribution information. For orders dated on or after 3 February 2018, this report is the primary source for distribution data. For orders dated prior to 3 February 2018, distribution data is retrieved from Pub Admin (see “Transaction and Distribution Report”).

Use a combination of Payment Status (Closed), Payment Close Reason (Cancelled) and Order Date to run a report of cancelled orders.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#) | [Institutional Accounts](#) | [Manage Configuration\(s\)](#)

[View Report Requests History](#)

Report type: Transaction Summary Report Time zone: RightsLink (Eastern) Local

### Transaction Summary Report

Manuscript ID:

Manuscript name:

Author first name:

Author last name:

Author ID:

Institution:

Agreement name:

Funder name:

Order ID:

Publication name:

Volume:

Issue:

Transaction type:

Promotion code:

Funding Status:

Payment status:

Date range:

make a selection

All

All

All

☐ Order date ☐ Distribution date

Run Report

Clear

[Request Full Report](#)

Results per page: 25 Results 1 - 25 of 1003 Previous 1 2 3 4 5 Next

Manuscript ID	Manuscript Name	Publication Name	Primary Author	Order Date	Order ID	Transaction Type	Total Order Amount	Currency	Payment Status	Payment Close Reason
	Title/Rem	Test Title Journal	Hall, Alex	22-May-2020	10000122941	Open Access, page, color, additional services charges	773.46	CAD	Open	
	Title/Rem	Test Title Journal	Hall, Alex	22-May-2020	10000122940	Open Access, page, color, additional services charges	3,775.00	USD	Closed	Paid

## Transaction Summary Report Output

An abbreviated version of the report results display immediately on screen. The full report output may also be downloaded to Excel. Results include only those manuscripts for which a transaction has been completed. The following is a complete list of the fields to be displayed in the full report output:

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).
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.

RLSC Transaction Summary Report Fields	Description
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.
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.

RLSC Transaction Summary Report Fields	Description
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.
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.

RLSC Transaction Summary Report Fields	Description
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.
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.

RLSC Transaction Summary Report Fields	Description
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.
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.
Special Billing Profile(s) Matched	The names of the Special Billing Profiles that matched with the manuscript, multiple profiles are sperated by a comma. If blank, there were no funding matches found.



RLSC Transaction Summary Report Fields	Description
Special Billing Profile Used	The name of the Special Billing Profile that the user chose to seek funding from. Displays 'Profile(s) Not Used' if the user selected 'Bill Me'. If blank, there were no funding matches found.
Agreement Name	The name of the agreement that the Special Billing Profile Used is associated with.
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 org paying the invoice (always single value whether one-off or aggregated invoice). For an aggregated invoice it will be the profile billing account number.
Transaction Status	The transaction status for the order.
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).

RLSC Transaction Summary Report Fields	Description
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.
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.
Exchange Rate	The currency exchange rate (transaction currency to USD) applicable to the order.
Order Total (USD)	The sum of the following four columns: CCC Service Fee (USD), Distribution (USD), Tax Amount (USD), Price Adjustment (USD)
CCC Service Fee (USD)	The CCC Service Fee amount (in USD) applicable to the order.
Distribution (USD)	The distribution amount (in USD) applicable to the order.
Tax Amount (USD)	The total tax amount (in USD) applicable to the order.
Price Adjustment (USD)	The price adjustment amount (in USD) applicable to the order.
Payable Subtotal (USD)	The total payable subtotal of the order (in USD) at the time of original distribution after fees, taxes and adjustments.
Credit Memo No.	The credit memo number for the order (if applicable)
Credit Memo Sequence No.	The credit memo sequence number for the order (if applicable)

RLSC Transaction Summary Report Fields	Description
Credit Create Date	The date the credit was issued for the order.
Credit Reason	The reason a credit was applied to the order.
Credit Memo Link	Link to pdf of credit memo.
Distribution Name	The name of the distribution applicable to the order.
Distribution Date	The date of the distribution applicable to the order.
Period End Date	The period end date of the distribution applicable to the order.
CCC Event ID	The CCC event ID of the distribution applicable to the order.
Check Number	The check number of the distribution applicable to the order.
Check Date	The date of the check of the distribution applicable to the order.
Publisher Equivalency Currency	The currency code associated with your equivalent currency.
Transactional Currency Exchange Rate to Publisher Equivalency	The equivalent currency exchange rate at the time of the transaction.
Publisher Equivalency Sub-Total Amount	Subtotal of all order line item amounts, excluding tax, multiplied by the equivalency currency exchange rate.
Publisher Equivalency Tax Amount	Vat/Tax amount multiplied by equivalency currency exchange rate.
Publisher Equivalency Total Order Amount	Sum of Publisher Equivalency Sub-Total and Tax Amounts.
Credit Distribution Date	The date the credit was distributed.
Credit Distribution Timing	This is a description of the timing of the credit in relation to the original distribution. It will either be "Credited Before Distribution" or "Credited After Distribution"
Credit Distribution Check Number	The check number which included this credit distribution.
Credit Distribution CCC Event ID	The CCC internal ID for the credit distribution event.
Credited CCC Service Fee (USD)	If "Credited After Distribution" this will show the original CCC Service fee as a negative amount. If "Credited Before Distribution" then it will be 0.00.
Credited Distribution (USD)	If "Credited After Distribution" this will show the original distribution as a negative amount. If "Credited Before Distribution" then it will be 0.00.
Credited Tax (USD)	If "Credited After Distribution" this will show the original tax as a negative amount. If "Credited Before Distribution" then it will be 0.00.
Credited Price Adjustment (USD)	If "Credited After Distribution" this will show the original price adjustment as a negative amount. If "Credited Before Distribution" then it will be 0.00.
Credited Payable Subtotal (USD)	If "Credited After Distribution" this will show the original payable subtotal as a negative amount. If "Credited Before Distribution" then it will be 0.00.
Current Payable Subtotal (USD)	If the order was originally distributed as part of the most recent distribution, then the column will show the Payable Subtotal (USD) for that order. If the order had a credit distributed in that most recent check, however, then this column will display the Credited Payable Subtotal (USD)

RLSC Transaction Summary Report Fields	Description
	(either 0.00 or a negative value). If you conduct a search that encompasses exclusively the orders from your most recent distribution then you can use the sum of this column to match your most recent distribution check.
Business Unit	If there are multiple business entities defined in the publisher implementation, these will be reflected here.

## Invoice and Credits Report (For all RLSC Transactions on or after 3 February 2018)

For a high-level report of invoices and any related credits dated on or after 3 February 2018, run the Invoice and Credits Report. You can narrow your search using several parameters, including invoice number, credit memo number, invoice currency, and invoice date. For invoices dated before 3 February 2018, visit the RightsLink Pub Admin Reports section of this guide.

Note: Order-level detail associated with these invoices is available in the Transaction Summary Report.

[OA Dashboard](#) | [Manuscripts](#) | [Reports](#) | [Promotions](#) | [Institutional Accounts](#) | [Manage Configuration\(s\)](#)

Report type: Invoice and Credits Report [View Report Requests History](#)

Invoice and Credits Report

Invoice number:

Credit memo number :

Invoice currency:

USD

Invoice date:

In last 30 days

Run Report

Clear

Results 1 - 3 of 3 [Request Full Report](#)

Invoice Date	Invoice Number	Credit Memo Number	Original Invoice Amount	Credit Amount	Invoice Currency	Past Due Days	Billing Name	Billing Attention
05-Mar-2014	<a href="#">APC123456</a>	4567893918, 3457986598	330.00	120.00	USD	15	Alex Hall	Endy Edwards
06-Mar-2014	<a href="#">APC654123</a>	3457986598	200.00	110.00	USD	30	Alex Hall	Test Test
11-Apr-2014	<a href="#">APC981</a>	1567893918, 3457986598, 1457986598	310.00	90.00	USD	15	Test Test	Endy Edwards

Results 1 - 3 of 3

## Invoice and Credits Report Output

After searching, the on-screen report will provide a snapshot of information related to the returned invoices and credits. By downloading the full report, you can access a variety of information to quickly understand and even view the invoice and credit statements. The following is a complete list of the fields to be displayed in the full report output:

FIELD	VALUE
Invoice No.	The invoice number assigned to order.
Invoice Sequence No.	The sequence number assigned to order, if applicable.
Invoice Date	The date the invoice was created.
Invoice Link	Link to pdf version of the invoice.
Account Number	The users CCC account number.
Credit Memo No.	The credit number for the order, if applicable.
Credit Sequence No.	The credit sequence number associated with the credit for compliance with tax regulations.
Credit Create Date	The date the credit was issued for the order.
Credit Reason	The reason a credit was applied to this order.
Credit Memo Link	A link to pdf version of the credit memo.
Payment Method	The payment method requested (credit card or invoice). (This was not available in the PubAdmin report).
Submission Charges	The total submission charges associated with a RightsLink order, in transactional currency.
Submission Charges VAT/ Sales Tax Amount	The amount of tax for a submission charge associated with a RightsLink order, in transactional currency.
Open Access Charges	The total open access charges for all RightsLink orders included in the invoice, in transactional currency.
OA Charges VAT/ Sales Tax Amount	The total amount of tax for the open access charges for all RightsLink orders included in the invoice, in transactional currency.
Pub/Page Charges	The total publication charges for all RightsLink manuscript orders included in the invoice, in transactional currency.
Pub/Page Charges VAT/ Sales Tax Amount	The total amount of tax for the publication charges for all RightsLink orders included in the invoice, in transactional currency.
Color Charges	The total color charges for all RightsLink orders included in the invoice, in transactional currency.
Color Charges VAT/ Sales Tax Amount	The total amount of tax for color charges for all RightsLink orders included in the invoice, in transactional currency.
Additional Services	The total additional services charges associated with a RightsLink order, in transactional currency.
Additional Services VAT/ Sales Tax Amount	The amount of tax for additional services charges associated with a RightsLink order, in transactional currency.
Author Tools and Services Charges	The total of cover charges associated with a RightsLink order, in transactional currency.
Author Tools and Services Charges VAT/Sales Tax Amount	The amount of tax for cover charges associated with a RightsLink order, in transactional currency.
Reprint/ePrint Charges	The total reprint/ePrint charges associated with a RightsLink order, in transactional currency.

Reprint/ePrint VAT/ Sales Tax Amount	The amount of tax for a reprint/ePrint associated with a RightsLink order, in transactional currency.
Shipping/Handling Charges	The shipping/handling amount associated with a reprint order, in transactional currency.
Shipping/Handling VAT/ Sales Tax Amount	The shipping VAT/sales tax amount associated with a reprint order, in transactional currency.
Sub Total Amount	The sub total amount for all orders included in the invoice, in transactional currency.
Sub Total VAT/Sales Tax Amount	The sub total VAT/sales tax amount for all orders included in the invoice, in transactional currency.
Original Invoice Amount	The final total order amount for all orders included in the invoice in transactional currency.
Credit Amount	The total amount of all credit amounts issued against orders in the invoice, in transactional currency.
Order Currency	The currency code applied to the transactions in the invoice.
Payment Date	The date payment was received.
Past Due Days	The number of days the invoice is past due.
Customer Billing Name	For corporation account types, this populates with the corporation name. For individual account types, this populates with the users first and last name.
Customer Billing Attention	The attention information associated with the customer.
Customer Billing Street Address	The billing street address associated with the customer.
Customer Billing City	The billing city associated with the customer.
Customer Billing State/Province	The billing state/province associated with the customer.
Customer Billing Zip/Postal Code	The billing zip/postal code associated with the customer.
Customer Billing Country	The billing country associated with the customer's account.
Customer VAT ID	The VAT ID associated with the customer.
Publisher VAT/Tax ID	The publisher's Tax ID. Where there are multiple IDs, these will be separated by a comma.
Business Unit	The organization name associated with the transaction.

# RightsLink Pub Admin Reports

FOR FOR PERMISSIONS, GIN, AND ALL  
RLSC TRANSACTIONS BEFORE 3 FEBRUARY 2018

RightsLink Pub Admin is designed to provide client publishers with robust tools for tracking and managing orders for their Permissions, Content, and Commercial Reprint Offerings. Historically, RightsLink for Scientific Communications orders were included in select Transaction, Distribution and Invoicing reports in Pub Admin. After the 3 February 2018 release, however, RightsLink for Scientific Communications transactions completed after 3 February 2018 will not flow into these reports. To track these RightsLink for Scientific Communications transactions, distributions, invoices and credits, clients should visit the RightsLink for Scientific Communications portal at [oportal.copyright.com](http://oportal.copyright.com).

## RIGHTSLINK PUB ADMIN REPORTS

(For Permissions, GIN, and all RLSC Transactions before 3 February 2018)

All RightsLink invoice, transaction and distribution details are reflected in the PubAdmin Invoice, Order and Distribution Reports. Publishers can access PubAdmin either by selecting the RightsLink PubAdmin link from within the RightsLink administrative user portal (shown below) or by entering the web address for PubAdmin into your browser ([pubaccount.copyright.com](http://pubaccount.copyright.com)). Your CCC Account Manager will ensure that you have the proper credentials during implementation.

**IMPORTANT LINK**

[s100.copyright.com/publisheradmin/login.jsp](http://s100.copyright.com/publisheradmin/login.jsp)

Copyright Clearance Center RightsLink®

Welcome, John Smith  
Sign Out

? Help Live chat

This portal provides you with tools for managing manuscripts, transactions, promotions, and the author-facing messaging unique to your RightsLink® Author Services Implementation. For orders dated February 3, 2018 and later, invoice, credit and distribution data is available from this portal in the Transaction Summary report and the Invoice and Credits report. All historical order data remains available from the invoice, credit and distribution reports in [RightsLink® PubAdmin](#).

Publisher Account Name 1  
Account Name: Publisher Account #: 1234567899

### Invoice Report

In PubAdmin, select the **Reports** tab and then the **Invoice** tab to access the report screen.

**Please note:** For orders dated on or after 3 February 2018, the invoice and credits data is available in the Pub Portal Invoice and Credits Report.

Copyright Clearance Center

Publisher Admin  
Logged in as: John Smith

Help Logout

Customers Orders / Invoices **Reports** Administration

MyLibrary Orders/Distribution **Invoice** Promo Codes Report Requests

**Invoice Report**

Please select from the details below to customize the report. [Go to Orders/Invoices tab for HTML.](#)

Inclusive Start Date (mm/dd/yyyy) 11/01/2017 Maximum of 12 months.

Exclusive End Date (mm/dd/yyyy) 12/01/2017

Email Address jsmith@123.com

BACK CONTINUE



## Invoice Report Output

To view invoice details, run the Invoice Report. Reports include links to the PDFs of the invoices and are available in HTML, CSV and EXCEL formats. The following is a complete list of the fields that are displayed in the full report output:

FIELDS		
Credit Memo No.	Pub / Page Charges VAT / Sales Tax Amount	Shipping VAT / Sales Tax Percent
Credit Sequence No.	Pub / Page Charges VAT / Sales Tax Percent	Shipping / Handling
Credit Create Date	Color Charges	Total Amount Due
Credit Reason	Color Charges VAT / Sales Tax Amount	Payment Date
Invoice No.	Color Charges VAT / Sales Tax Percent	Order Currency
Invoice Sequence #	Additional Services	Order Exchange Rate
Invoice Date	Additional Services VAT / Sales Tax Amount	Tax Remit Country
Invoice Status	Additional Services VAT / Sales Tax Percent	Publisher VAT ID
Order Status	Membership Charges	Publisher Tax ID
Account Number	Membership Charges VAT / Sales Tax Amount	Past Due Days
Order No.	Membership Charges VAT / Sales Tax Percent	Customer Name
Order Date	Author Tools and Services	Customer Attention
New Work ID	Author Tools and Services Tax Amount	Customer Street Address
Order Ref / PO No.	Author Tools and Services Tax Percent	Customer City
Customer Ref No.	Open Data Charges	Customer State / Province
Order Type	Open Data Charges VAT / Sales Tax Amount	Customer Zip / Postal Code
Publication	Open Data VAT / Sales Tax Percent	Customer VAT ID
External Manuscript ID	Excess Page Charges	Country of Customer
Original Work ID	Excess Page VAT / Sales Tax Amount	Taxable Customer Address
Title	Excess Page VAT / Sales Tax Percent	Taxable Customer Address City
Author	Cover Charges	Taxable Customer Address State / Province
Submission Charges	Cover Charges VAT / Sales Tax Amount	Taxable Customer Address Zip / Postal Code
Submission Charges VAT / Sales Tax Amount	Cover Charges VAT / Sales Tax Percent	Taxable Customer Address Country
Submission Charges VAT / Sales Tax Percent	Order Amount	Eq. Sub Total VAT / Sales Tax Amount
Open Access Charges	VAT / Sales Tax Percent	Eq. Sub Total Amount
OA Charges VAT / Sales Tax Amount	Discount	Eq. Shipping / Handling
OA Charges VAT / Sales Tax Percent	Sub Total VAT / Sales Tax Amount	Eq. Total Amount Due
Pub / Page Charges	Sub Total Amount	Original Order Number


## Transaction and Distribution Report

In the **Orders** tab, you may run RightsLink for Scientific Communications specific reports by selecting “RightsLink for OA”

in the Product field.

**Please note:** For orders dated on or after 3 February 2018, the transaction and distribution data is available in the Pub Portal Transaction Summary Report.

Logged in as: John Smith

 **Copyright Clearance Center**

[Help](#) [Logout](#)

[Customers](#) [Orders / Invoices](#) [Reports](#) [Administration](#)


**Order Search**


Search results provided in HTML. [Go to the Reports tab for Excel.](#)

**Order / Invoice / Credit Memo Number**

OR

**Product\***

**Inclusive Start Date**   **Maximum of 12 months.**

**Exclusive End Date**  

**Type of Use**

**License Status**


**Content ID**

**Licensed Publication**

**Licensed Title**

**Use % as a wild card. For example:**  
i) %123 would find elements ending with 123.  
ii) 456% would find elements beginning with 456.  
iii) 123%345 would find elements beginning with 123 and ending with 345.

By clicking on the **Distribution** tab, you can see your distribution by time period. To get started, enter the month in which you received payments. For example, if you received a payment in June 2017, enter 06/01/2017 as the Inclusive Start Date and 07/01/2017 as the Exclusive End Date. Click on Continue.

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**Orders/Distribution Report**

Excel and CSV reports are generated offline. The completed report will be emailed to the address listed below.

**Product**

**Select Report**

**Inclusive Start Date**   **Maximum of 12 months.**

**Exclusive End Date**  

**Email Address**

## Transaction and Distribution Reports Output

To view detailed transactions, run a Transaction Report. To view distribution details, run a **Distribution Report**.

Reports are available in HTML, CSV and EXCEL formats.

Below you will find a set of common fields related to author transactions in the Transaction and Distribution Reports. If a publisher also has RightsLink Permissions or other implementation, additional fields may be applicable. Please note that publishers may select a subset of all available fields, but cannot add custom fields to the reports.

FIELDS (Please note: These fields are specific to RLSC orders)		
Manuscript Name	State / Province	Reprint Charge
Manuscript ID	Zip / Postal Code	Number of Reprints
CCC Manuscript ID	Country	ePrints Charge
DOI	First Name	Shipping Amount
PII	Last Name	Shipping Country
Other Article Identifier	Tax ID	Word Count
Publication Name	Telephone	Number of Pages
ISSN	Email Address	Start Page
EISSN	Order Date	End Page
Issue	Order ID	Promotion Code
Volume	Order Reference Number	Total Discount Amount
Primary Author	Order Source	Total Tax Applied
ORCID	Platform	Publisher Tax ID
Author ISNI	Order Type	Currency
SCOPUS	Payment Status	Exchange Rate
PubMed	Author's Selections	Total Order Amount
Researcher ID	Submission Charge	CCC Service Fee
Other Author ID	Open Access Charge	Distribution
Institution ISNI	Page Charge	Invoice Number
Ringgold	Color Charge	Payment Date
Author Institution	Number of Color Figures	Payment Method
Author Department	Membership Charge	Price Adjustment
Author Membership ID	Additional Services	Credit Reason
Order By	Author Tools and Services	Credit Create Date
Address 1	Open Data Charge	
Address 2	Cover Charges	



[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](http://www.copyright.com).