

RightsLink[®] for Scientific Communications

Reporting Guide for Publishers

June 2020

RIGHTSLINK FOR SCIENTIFIC COMMUNICATIONS REPORTING

Since **Release 14 deployed on February 3, 2018**, a new **Invoice and Credits** report is available in Pub Portal. To support our new aggregated invoicing and APC approval workflow, the Pub Portal Invoice and Credits report encompasses aggregated invoice data rather than order-level invoice data that was previously available in the Pub Admin Invoice and Credits report.

To view detailed order-level data use the Pub Portal **Transaction Summary** report.

Please note: in addition to order, invoice and credits data, the Transaction Summary report will now also include distribution data.

As of R16, on August 14, 2018, Total Discount and Credit Distribution data has been added to the **Transaction Summary Report**.

In Summary:

- All invoice and transaction reports for Rightslink for Scientific Communications orders placed after 3 February 2018 are only available through the Pub Portal at oaportal.copyright.com; either from the new Invoice and Credits report or enhanced Transaction Summary report.
- Historical reports and data for any Rightslink for Scientific Communications orders dated before 3 February 2018 continue to be available in Pub Admin at <http://s100.copyright.com/publisheradmin/login.jsp>; either from the Invoice and Credits report or Transaction and Distribution reports.
- Reports specific to other RightsLink services (Permissions and/or Content Services) as well as Get It Now will not be impacted, and publishers using those services can continue to access reports as they have been.

PRODUCT & ORDER DATE	RL PUB ADMIN REPORTING	ROA PUB PORTAL REPORTING
ROA Orders		
Orders on or Before Feb 2	X	
Orders on or After Feb 3		X
RL Permissions		
Orders on or Before Feb 2	X	
Orders on or After Feb 3	X	
RL Content		
Orders on or Before Feb 2	X	
Orders on or After Feb 3	X	
GIN		
Orders on or Before Feb 2	X	
Orders on or After Feb 3	X	

What Happens Now?

Users who used to run invoice, transaction, and distribution reports in Pub Admin need to access Pub Portal to view this data. Please let your account manager know if any additional personnel need access granted to the Pub Portal in light of these changes.

Lastly, for your convenience, here is an exact list of fields available in the Pub Portal Reports:

Pub Portal Invoice and Credits Report (oportal.copyright.com)

RLSC INVOICE AND CREDITS REPORT FIELDS	DESCRIPTION
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.

RLSC INVOICE AND CREDITS REPORT FIELDS	DESCRIPTION
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. This could be multiple, divided by a comma where applicable.
Business Unit	The organization name associated with the transaction.

Pub Portal Transaction Summary Report (oaportal.copyright.com)

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.
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).

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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.
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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.
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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.
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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.
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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).
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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)
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
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) (either 0.00 or a negative value). If you conduct a search that encompasses exclusively the orders from your most recent distribution <u>distribution</u> , then you can use the sum of this column to match your most recent distribution check.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Business Unit	If there are multiple business entities defined in the publisher implementation, these will be reflected here.



[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.