

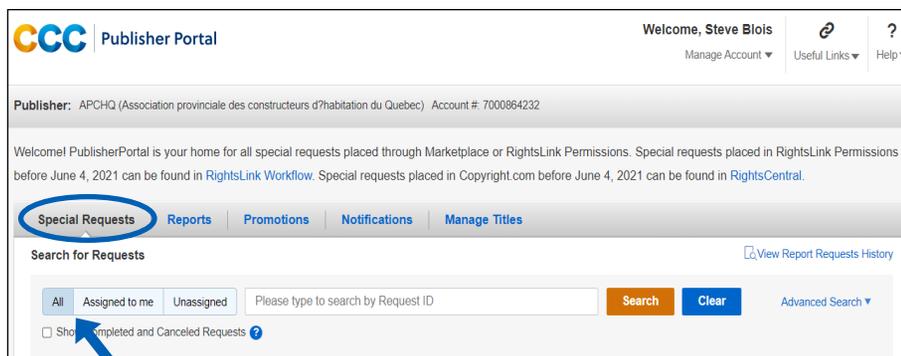
Publisher Portal: Managing the Special Request Workflow

Publisher Portal supports a workflow to view all special requests in a single environment with common tools and resources. This guide provides instructions on customizing searches, displays setting and notifications to help manage these requests.

Log on by visiting: pubportal.copyright.com

Locating Special Requests in Publisher Portal

- The Publisher Portal defaults to the Special Request tab.
 - Or the Permissions tab if your organization is enrolled in RightsLink for Scientific Communications.
- The Special Requests tab helps manage the special requests of; Academic Pay-Per-Use, Republication and RightsLink Permissions services.

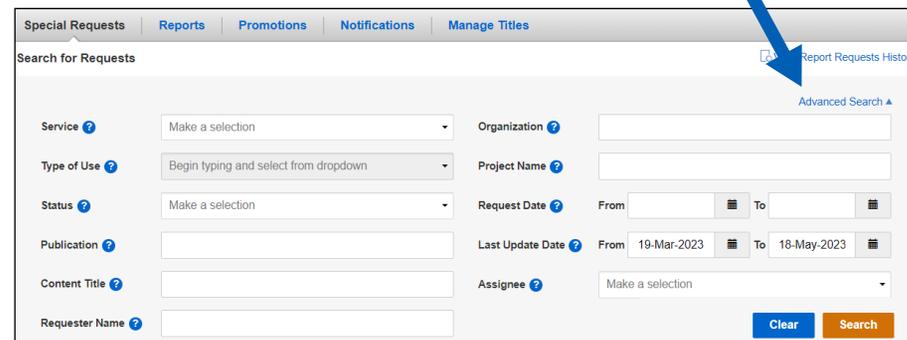


- The view defaults to 'All' requests displayed but, can also be filtered by 'Assigned to me' or 'Unassigned'.
- To show completed and cancelled requests in your results, select the check box provided.

Show Completed and Canceled Requests ?

Searching Special Requests

- To search by Request ID, use the search box to enter the ID and click **Search**
- To search using other order information, select 'Advanced Search' to see additional filter options.

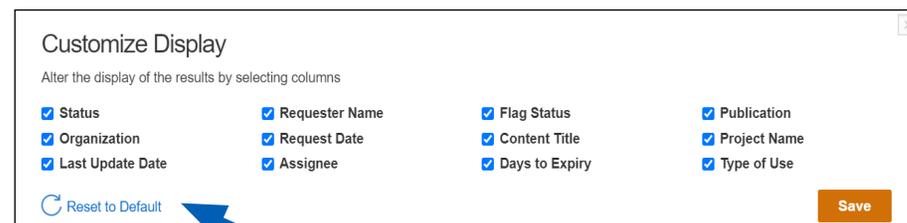


- Advanced Search parameters include; Service, Type of Use, Status, Publication, Content Title, Requestor Name, Organization, Project Name, Request Date, Last Update Date, and Assignee.



Customizing the Display

- To quickly sort and prioritize special requests, click, Customize Display.
- In the pop-up that appears, check the box next to the fields most useful to have included your display from the list of options.



- To clear any customizations, click the 'Restore to Default' option.
- After selecting all desired columns, click **Save**

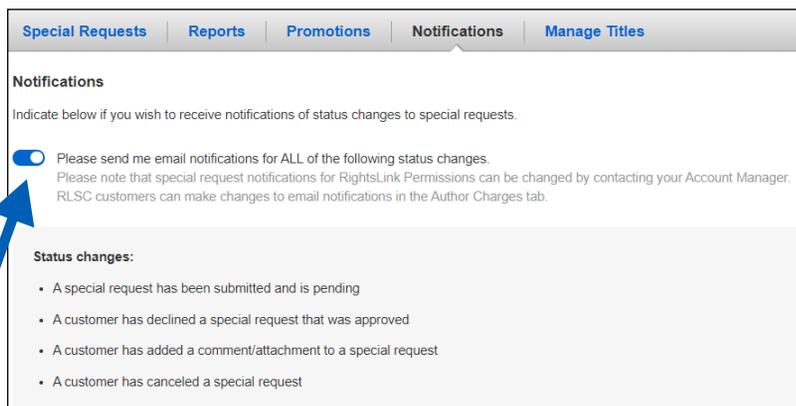
Cont. Customizing the Special Requests Display

- The window closes and the columns selected will be displayed on screen.
 - Note:** Customized displays are only applied to the organization the user is currently logged into.
 - Note:** Depending on the number of columns selected, it may be necessary to scroll left-to-right within the results.
- To reorder the display of aggregated results, click on the arrows in the column headers.



Managing Notifications:

- On the Notifications tab, you can opt-in to, or out, of email notifications.
 - Opting in will change only the notification preferences for that single user's account.



- To opt-in or opt-out of emails about status changes, click the slide button.
- When the notifications setting is turned 'on' the slide button will turn blue.

Special Request Status Chart

Special requests can be put into the following statuses in PubPortal.

Status:	Explanation:
Accepted	Customer accepted an approved/priced request.
Approved	The publisher approved the request and provided pricing and any applicable special terms.
Awaiting Customer Reply	The publisher has requested information and is waiting for the customer to respond.
Cancelled by Customer	Customer closed the request.
Closed-Expired	An approved/priced request has expired. Requests close after 60 days of inactivity.
Closed-Inactive	The request was closed due to inactivity. Requests close after 60 days of inactivity.
Complete	The customer has checked out/finished an accepted request.
Customer Responded	The customer has responded to the publisher and provided additional information.
Declined	The customer declined a priced request.
Denied	The publisher denied the request.
Pending	The request is pending review by publisher.

Questions:

- Contact Customer Service at RIGHTSHOLDERS@COPYRIGHT.COM
- 978-646-2800
- Live Chat option within the application

