# RightsLink® for Scientific Communications

Institutional Portal - Reports
June 2021



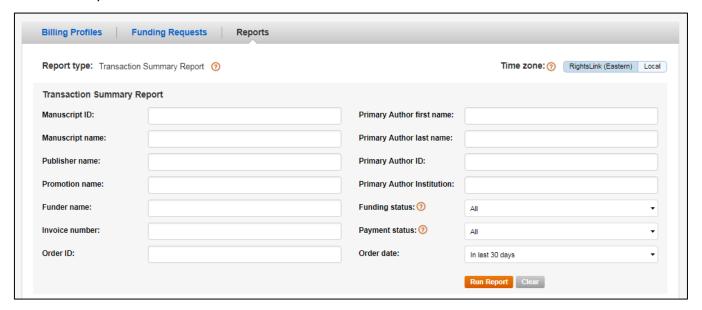
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# Reports

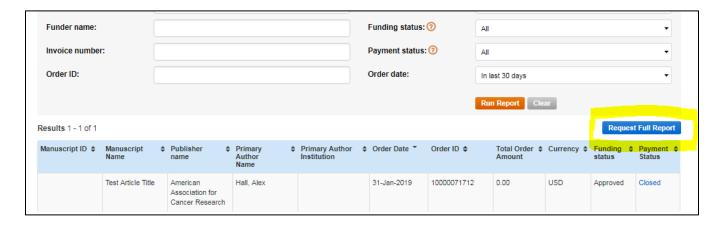
### Search & filter your funding requests

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

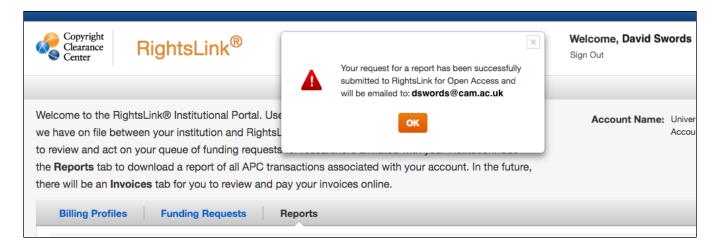


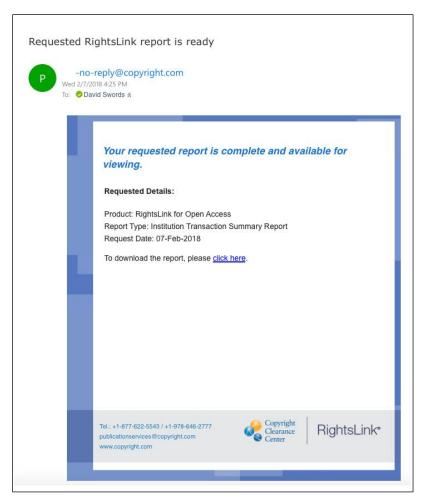
### **Download Complete Report Details**

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



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





## **Full Report Output**

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

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

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Geographic Location - used for discount	The country provided/selected by the author in the Apply Discounts window when placing their order.
Institution Identifier - from manuscript metadata	The institution identifier of the institution the primary author is affiliated with (from the manuscript metadata).
Institution Name - from manuscript metadata	The institution name of the institution the primary author is affiliated with (from the manuscript metadata).
Institution Affiliation - Ringgold ID	The Ringgold ID of the institution captured in the Apply Discounts window when author was placing their order.
Institution Affiliation - Ringgold Name	The Ringgold name of the institution captured in the Apply Discounts window when author was placing their order.
Institution Affiliation used for discount - Ringgold ID	The Ringgold ID of the institution affiliation used to calculate affiliation discount.
Institution Affiliation used for discount - Ringgold Name	The Ringgold name of the institution affiliation used to calculate affiliation discount.
Creative Commons License Type	The Creative Commons license type passed via API.
Other License Type	Any other license type (besides Creative Commons) passed via API.
Volume	The volume of journal/publication in which manuscript is published.
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.

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

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Product 4 Name	The fourth product name selected by the author when placing the order.
Product 4 Option 1	The first product dimension selected by the author when placing the order.
Product 4 Option 1 Value	The first product dimension value selected by the author when placing the order.
Product 4 Option 1 Amount Before Discounts	The first product dimension selected by the author when placing the order amount, in transactional currency.
Product 4 Option 2	The second product dimension selected by the author when placing the order.
Product 4 Option 2 Value	The second product dimension value selected by the author when placing the order.
Product 4 Option 2 Amount Before Discounts	The second product dimension selected by the author when placing the order amount, in transactional currency.
Product 4 Option 3	The third product dimension selected by the author when placing the order.
Product 4 Option 3 Value	The third product dimension value selected by the author when placing the order.
Product 4 Option 3 Amount Before Discounts	The third product dimension selected by the author when placing the order amount, in transactional currency.
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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Funding Request Profile Name	The special billing profile that was selected (by the author or automatically) to complete the funding request
Agreement Name	The agreement name that the funding request billing profile is associated to.
Funding Status	The current funding status (if institutional funding was requested).
Funding Status Update Date	The date that funding was either requested, approved, or denied (if institutional funding was requested).
Funding Deny Reason	The reason provided by the institution for denying the funding request (if institutional funding was requested).
Funding Deny Reason Details	The reason details and/or additional instructions provided by the institution for denying the funding request (if institutional funding was requested).
Invoice Number	The invoice number associated with the order.
Invoice Sequence Number	The invoice sequence number associated with the order.
Invoice Date	The create date of the invoice applicable to the order.
Invoice Link	Link to pdf of the invoice.
Account No.	The account number associated with the person or organization paying the invoice. This will always reflect the profile's billing account number.
Transaction Status	The transaction status for the order.
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 (e.g. 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.

RLSC TRANSACTION SUMMARY REPORT FIELDS	DESCRIPTION
Funder 3 Name	The name of the funding organization.
Funder 3 ID	The type of funder ID (e.g. 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 (e.g. 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.
Business Unit	If there are multiple business entities defined in the publisher implementation, these will be reflected here.

### **More Information**

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

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