

RightsLink® for Scientific Communications

Release Notes: March 2020

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WHAT'S NEW WITH RIGHTSLINK FOR SCIENTIFIC COMMUNICATIONS

We are pleased to announce the latest RightsLink for Scientific Communications release, which released on 28 March 2020.

RightsLink for Scientific Communications' March release introduces a variety of enhancements and new features that further support transformative agreement management, extending the flexibility and offerings of our pricing and rules engine, and an ongoing commitment to enhancing usability across both the payment workflow and publisher portal.

Transformative agreement management

Based on terms of agreements and a desire to remove friction for authors, publishers are keen to notify authors about eligibility for APC funding as soon as possible in the submission process. To assist in this need, we will now provide an API method for upstream systems to access a manuscript's funding eligibility. This will allow the upstream system to display informational messaging to authors. For example, manuscript authors can be alerted, based on manuscript metadata, that they are eligible for funding under an agreement that is in place between their publisher and institution of record.

Expanded rules to support intersection of standard discounts with promo codes or APC tokens and thresholds

Our current pricing and rules engine supports APC Tokens and Thresholds, with discounting options available on special billing profiles. Publishers who are using these pricing rules provided feedback that the "greatest of one" and "compounding" discount configuration options currently only apply to geographic, affiliation, and membership discounts, and do not consider promotion codes when determining the final price for a manuscript. To make the system as dynamic as possible and applicable to the varying pricing needs of all of our publishers, we are expanding the discount configuration options so that publishers can choose whether or not they want those rules to also apply to promotion codes and APC tokens and thresholds.

Enhanced usability across the payment workflow and publisher portal

This release features many improvements to our user interface to better highlight critical information in the workflow, allow additional opportunity for communications, and provide an overall better user experience. These updates include redesigns of pop-up messages, including the profile match and payment UI pop-ups; customization of the funding option label to be per profile; new opportunities to add profile-specific messaging; and more.

Read through this release preview to learn more about additional release updates.

Questions? Contact Shannon Reville at sreville@copyright.com or your Account Manager.

CONTINUING SUPPORT FOR TRANSFORMATIVE AGREEMENTS

Note: Agreement management tools must be adopted for publishers to benefit from these changes. For more information about these tools, please contact your Account Manager.

New RightsLink API Method to Get OA Agreement Information

As transformative agreements increase in importance to RightsLink client publishers and their institutional partners, they now require the ability to notify authors of possible funding options for open access publication earlier in the process.

To that end, RightsLink has developed a new API method that will allow submission and other upstream systems to make a call to RightsLink when an author validates affiliation and funder information during manuscript submission. RightsLink will then return information about any profiles to which the manuscript would be a match. Using this information, the upstream system can display informational messaging to authors, alerting them that based on manuscript metadata they may be eligible for funding under an agreement that is in place between their publisher and institution of record for that manuscript.

The new method will require the same metadata data that is posted today when a manuscript is first posted to RightsLink using “Ingest manuscript”. Most important are fields such as journal or publication, author email, institution affiliation (required) and funder information (if available). Here is an example JSON request:

```
{
  "source":"PLATFORM",
  "platform":"ARIES",
  "publisherCode":"APCTEST1",
  "publisherDisplayName":"APC Test Publisher",
  "journalCode":"ACUPMED",
  "journalTitle":"Mechanical Engineering Journal",
  "articleTitle":"Dmitriy test",
  "authors":[
    {
      "primary":Yes,
      "firstName":"Dmitriy",
      "lastName":"Smith",
      "emailAddress":"dsmith@copyright.com",
      "address":{
        "address1":"222 Rosewood Drive",
        "country":"US",
        "city":"Danvers",
        "zip":"01923",
        "state":"MA"
      }
    }
  ]
}
```

```

    },
    "institutionIdentifiers":[
      {
        "type":"RINGGOLD",
        "value":"1234"
      },
      {
        "type":"RINGGOLD",
        "value":"6543"
      }
    ]
  },
  ],
  "grants":[
    {
      "funder":{
        "name":"National Science Foundation",
        "identifiers":[
          {
            "type":"OTHER",
            "value":"112233"
          }
        ]
      }
    }
  ]
}

```

Manuscripts can only be matched if there is a special billing profile housed in RightsLink's agreement manager module and if the manuscript's metadata matches the requirements of that profile. The following data will be returned if that match is identified. Please note: some fields are only returned if applicable, given the attributes of the agreement.

- Profile Name
- Billing Organization Name
- Touch-Free Transactions Enabled (Yes/No)
- Profile Start Date
- Profile End Date (if applicable)
- Manuscript Acceptance Date Required (Yes/No)
- APC Tokens Remaining (Yes/No)
- APC Threshold - Funds Remaining (Yes/No)
- License type/s forced by the profile (if applicable)
- Eligible Products

Here is an example JSON response:

```


{
  "potentialMatches":[
    {
      "name":"Profile Name",
      "billingName":"Billing Organization Name",
      "touchFree":"Yes",
      "profileStartDate":"10/01/2018",
      "profileEndDate":"10/01/2020",
      "acceptanceDateRequired":"Yes",
      "tokensRemaining":"Yes",
      "thresholdFundsRemaining":"No",
      "licenseType":"ccLicense"
      "eligibleProducts":"Open Access"
    }
  ]
}

```

Additional information and suggested UI messaging is available; please reach out to your account manager or Shannon Reville (sreville@copyright.com) if you would like to see additional documentation for this new API method.


Redesign of the Profile Match Pop Up

In response to publisher, institution, and author feedback, we have redesigned the look and feel of our profile match step in the workflow to better emphasize the most critical information and to make smoother the entryway into our funding request workflow. In this example of the new design, you will see that notes from the publisher and notes from the institution are well highlighted:


RightsLink®

Welcome, Tatsiana Mararyna
 Manage Account

?
 Help


 Live chat

Pay Author Charges

FUNDING OPTIONS
 CHARGES ESTIMATE
 PAYMENT OPTIONS
 ORDER REVIEW
 CONFIRMATION

You may be eligible for funding under one or more institutional agreements

You can seek funding directly from your institution for your article processing charges (calculated on the next page) by making the appropriate institution selection below and clicking "Next". If you have questions about the funding or your eligibility, use the institution's contact information provided. Alternatively, if you wish to pay your article processing charges on your own, choose "Bill Me" below and click "Next".

☒ Seek Funding From United States AQA

Note from your Institution:

We would ask that you read our [guidelines](#) before you select this option for funding

Note from your Publisher:

AQA and APC International have created a transformative agreement that will benefit the funding of your APCs. Please use this if you feel you cannot fund the APCs yourself. Please visit the [APC website](#) to find out more.

Charges Covered: Open Access, Page, Color and Additional Services

Institution Contact Information

Org Test name
 pi7_demo@copyright.com
 12345678901

[Hide address](#)

United States AQA
 379 Thornall Street3
 United States
 08837
 Edison
 NJ

☐ Bill Me

NEXT

Area for Publisher to Add Profile-Specific Messaging to the Pop Up


As you will see above in the new design of the profile match step in the workflow, there is now a method for publishers to add messaging to the UI that is specific to the terms of the agreement offered. Institutions have had this functionality since February 2018 and publishers requested an equivalent area for such messaging. This can be added in a new step of the profile creation process called “Workflow Options.”

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

[Institutional Accounts](#) > [Special Billing Profile](#)

Update Special Billing Profile

[BILLING](#) > [CONTACTS](#) > [ORG IDENTIFIERS](#) > [PROFILE ATTRIBUTES](#) > [TOKENS & THRESHOLDS](#) > **[WORKFLOW OPTIONS](#)** > [CONFIRM & SAVE](#)

Touch-Free Transactions * 

Select ▾

Touch-Free transactions support Pure Read & Publish, Deposit, and other agreement types where the author should be excluded from the APC payment process

Publisher Note to Authors

Insert message to be displayed on the profile match popup in the payment workflow. This is only relevant for profiles that do not have Touch-Free transactions enabled.


Institution Note to Authors

Contract PO#

Enter Contract Purchase Order Number or PO# (optional)

Note: When you specify a PO# this value will be reflected on the author's transaction.

Back

 Cancel

Next

Customization of the funding option label per each profile instead of all profiles

When we first released the agreement management tools, we made it possible for publishers to customize the label of the funding options presented to the author. However, this customization was possible at the “publisher-level” and applied to all profiles in a publisher’s configuration. As each institution with which a publisher works may have specific requirements when presenting their funding option, we have now added the funding option label to the “Workflow Options” portion of the profile setup. Labels can be configured per each profile as opposed to the “publisher-level.”

This is what is meant by “funding option label”:

Pay Author Charges

FUNDING OPTIONS CHARGES ESTIMATE PAYMENT OPTIONS ORDER REVIEW CONFIRMATION

You may be eligible for funding under one or more institutional agreements

You can seek funding directly from your institution for your article processing charges (calculated on the next page) by making the appropriate institution selection below and clicking "Next". If you have questions about the funding or your eligibility, use the institution's contact information provided. Alternatively, if you wish to pay your article processing charges on your own, choose "Bill Me" below and click "Next".

☒ Seek Funding From United States AQA

Note from your Institution:
We would ask that you read our [guidelines](#) before you select this option for funding

Note from your Publisher:
AQA and APC International have created a transformative agreement that will benefit the funding of your APCs. Please use this if you feel you cannot fund the APCs yourself. Please visit the [APC website](#) to find out more.

Charges Covered: Open Access, Page, Color and Additional Services

Institution Contact Information
Org Test name
pi7_demo@copyright.com
12345678901
[Hide address](#)
United States AQA
379 Thornall Street3
United States
08837
Edison
NJ

☐ Bill Me

NEXT

Tools for editing this will be added to the new “Workflow Options” step in the special billing profile form.

Static “Notes” section only viewable by publisher users

As of the March release, there will be a section in the publisher’s special billing profile form for static notes about the agreement. This is intended for internal publisher use and is not shown on the Institutional Portal side; just a place for publisher users to share information about the agreement that may not be collected in other fields and would be important for another publisher user to know. It will show on the first page of the special billing profile form:

Institutional Accounts > Special Billing Profile

Update Special Billing Profile

[BILLING](#) > [CONTACTS](#) > [ORG IDENTIFIERS](#) > [PROFILE ATTRIBUTES](#) > [TOKENS & THRESHOLDS](#) > [WORKFLOW OPTIONS](#) > [CONFIRM & SAVE](#)

BILLING DETAILS		BILLING ADDRESS	
Profile Name *	<input type="text" value="Name your contract or special billing arrangement"/>	Address Line 1 *	<input type="text"/>
Optional Profile Type	<input type="text" value="Select special profile type"/>	Address Line 2	<input type="text"/>
Organization *	<input type="text" value="Type to search for organization"/>	Address Line 3	<input type="text"/>
First Name *	<input type="text"/>	Country *	<input type="text"/>
Last Name *	<input type="text"/>	Zip/Postal Code	<input type="text"/>
Phone Number *	<input type="text"/>	City *	<input type="text"/>
Email Address *	<input type="text"/>	Province/Region	<input type="text"/>

[Need to update this billing information?](#)

Internal notes about this Special Billing Profile

Add any necessary notes you would like to make about this profile - this field is not visible to the Institution User.

Show author funding selection behavior in the Publisher's Transaction Summary Report

We are adding two new columns to the Publisher's Transaction Summary Report: Special Billing Profile(s) Matched and Special Billing Profile Used.

Special Billing Profile(s) Matched: This column will show all the names of special billing profiles a manuscript matched to at the time the author entered their transaction. If the manuscript matched to a "touch-free" profile and was pushed through the transaction process automatically upon acceptance, that profile name will also show here. If no profiles are matched, the column will be blank.

Special Billing Profile Used: Formerly called "Profile Name," this column will show the name of the special billing profile selected for the funding request. As of March, however, if there were profiles presented to the user, but they chose the "Bill Me" workflow instead, the column will read "Profile(s) Not Used," If no profiles were matched to begin with, this column will be blank.

Note: These columns will only be present in the publishers' transaction summary report and not the institution's transaction summary report, as the institution's transaction summary reports only include transactions which fell under one of their profiles. The "Profile Name" column in institutions' reports will remain intact.

BROAD ENHANCEMENTS IN THE PUBLISHER PORTAL

Note: No implementation changes are required to benefit from these enhancements

Direct Links to Manuscript Details & Order Confirmation Page from High Impact Reports

As of the March release, after completing a search against the Transaction Summary Report, the results on-screen will include direct links to the Manuscript Details page (from the Manuscript ID) and the Order Confirmation Page (from the Order ID). Similarly, running a Manuscript Status Report will also show direct links to Manuscript Details pages from the Manuscript ID in the on-screen results. We hypothesize that this will greatly benefit our publishers in terms of usability and locating some of the most common pages viewed in our system.

Manuscript Status Report:

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

[View Report Requests History](#)

Report type: Manuscript Status Report

Manuscript Status Report

Manuscript ID:

Manuscript name:

Publication name:

Target publication date: From To

Transaction type:

Author first name:

Author last name:

Manuscript status:

Manuscript status update date: From To

Manuscript acceptance date: From To

[Run Report](#) [Clear](#)

Request Full Report

Results per page: 25 **Results** 1 - 25 of 284

[Previous](#) [1](#) [2](#) [3](#) [4](#) [5](#) [Next](#)

Manuscript ID	Manuscript Name	Publication Name	Primary Author	Manuscript Acceptance Date	Manuscript Status Update Date	Manuscript Status	Transaction Type
testTETET			Aleksandr	03-Dec-2019	03-Dec-2019	Publisher accepted manuscript	Not Transacted
TEST-MANUSCRIPT ID link	Test Article Title_Please ignore	Advances in Mechanical Engineering	Charmanskaya, Alena		21-Dec-2019	In production	Open Access, page, color, additional services charges

Link will open Manuscript Details Page

Transaction Summary Report:

[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:	<input type="text"/>	Publication name:	<input type="text" value="make a selection"/>
Manuscript name:	<input type="text"/>	Volume:	<input type="text"/>
Author first name:	<input type="text"/>	Issue:	<input type="text"/>
Author last name:	<input type="text"/>	Transaction type:	Open Access, page, color, additional services charges
Author ID:	<input type="text"/>	Promotion code:	<input type="text"/>
Institution:	<input type="text"/>	Funding Status:	No Funding Requested
Funder name:	<input type="text"/>	Payment status:	Open
Order ID:	<input type="text"/>	Date range:	<input type="radio"/> Order date <input type="radio"/> Distribution date

[Run Report](#) [Clear](#)

[Request Full Report](#)

Results per page: 25 **Results** 1 - 25 of 1429 Previous 1 2 3 4 5 Next

Manuscript ID	Manuscript Name	Publication	Primary Author	Order Date	Order ID	Transaction Type	Total Order	Currency	Payment	Payment Close Reason
TEST-MAN Link	Title_Please			14-Jan-2020	10000061520	page, color, additional charges				

EXPANDING DISCOUNT RULES CONFIGURATION OPTIONS

Note: Contact your account manager if you are interested in learning more or taking advantage of these new options

Extended optional discount rules to incorporate promotions and APC tokens/thresholds

As we've built out the agreement management tools, we've created new layers to our pricing and rules engine for APC Tokens and Thresholds (discounting options available on special billing profiles). We've also listened to publisher feedback as to how our "greatest of one" and "compounding" discount configuration options currently only apply to our geographic, affiliation, and membership discounts, and do not consider promotion codes when determining the final price for a manuscript. To make our system as dynamic as possible and applicable to the varying pricing needs of all of our publishers, we are expanding our discount configuration options so that publishers can choose whether or not they want those rules to also apply to promotion codes and APC tokens and thresholds.

ENHANCEMENTS TO THE AUTHOR EXPERIENCE

Note: No implementation changes are required to benefit from these enhancements

Stop Reminders Functionality

In December we added a new feature for "continuous reminders" that enables publishers to keep sending the final reminder email to their authors until a transaction occurs. As a precaution, in the event there is a researcher who—for one reason or another—does not intend to transact and requests these emails cease, as of the March release there will be functionality available on the manuscript details page to stop reminders on their manuscript. If the "Stop Reminders" box is checked, then reminders will not be sent on the manuscript as scheduled. The reminders can later be turned back on if necessary, by unchecking the box, and this will reinstate the emails at their original cadence as defined in their publisher's implementation. *Note: The author will not be inundated with multiple emails if several were skipped between being turned off and turned back on; the emails will simply pick back up as if they never ceased.*

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	Order confirmation	14-Jan-2020	Sent	spopa@copyright.com
Open Access, page, color, additional services charges	Offer - initial	14-Jan-2020	Not delivered	sretegan1@copyright.com
<input type="checkbox"/> Stop Reminders ?				

Streamlining the Payment UI Pop Ups

There are two pop ups that appear in the payment workflow: one for when the author proceeds to complete their payment option before adding any available discounts (which we added because authors were often missing the opportunity to enter discounts) and again on the payment options page asking they confirm all information on this page is accurate before completing the order. As part of our March release, we are changing the action buttons presented on these pop ups to be more indicative of where they will take you next, in hopes authors will move through them much more quickly and easily.

CCC License Type:
CC BY

Certified deposit program:
Applied

Color charge:
Color:
Standard Color Fee

Additional Services:
Base Fee:
Base Service Fee 500.00 USD
Service:
Open Data 0.00 USD
Storage Amount:
100 GB

TOTAL:
* Does not include tax

Do you want to apply discounts to your charges so your pricing reflects all author discounts available to you?

If you want to apply discounts, select "Apply Discounts". If you want to proceed to Payment Options, select "Proceed".

☐ Don't show me this again

APPLY DISCOUNTS PROCEED

test

Publication: IEEE Tra
Publication ID:
Manuscript DOI:
Manuscript ID: test
Publication Date:
OA License(s): CC BY
View more

Please check your VAT ID and all address information to be sure it is correct before proceeding.

If your information is correct, select "Proceed" to proceed to the Order Review page. To review your information, select "Go Back" to return to the Payment Options Page.

☐ Don't show me this again

GO BACK PROCEED

NT OPTIONS

apply discount to your charges by apply

Customer location: 222 Rosewood Drive
4 Floor seat 12 near 4 North
Danvers, MA 01923
United States

VAT ID:

TOTAL DUE: 21,600.00 USD

View details

Review details to review a breakdown of charges, including any tax/VAT applied.

Depending on the publisher's tax rules, tax/VAT may be based on the customer location or shipping address. Please review the customer location or shipping address and VAT ID we have on file and update if necessary.

Do you want to pay your total due?

card Invoice Invoice payment instructions

iced 21,600.00 USD

Address:
mniauskaya Update
shi