RightsLink®
for Scientific Communications

Release Notes:

June 2021

Copyright Clearance Center

Table of Contents

What's New with RightsLink® for Scientific Communications?

We are pleased to announce the latest RightsLink® for Scientific Communications release, which released on 5 June 2021.

RightsLink® for Scientific Communications' June release introduces new **comprehensive eligibility settings**, which will allow publishers to better support authors whose manuscripts match to more than one funding source and to better support institutions and funders who have specific rules related to eligible publication charges. These new settings will enhance our current matching logic so that authors receive:

- The ability to prioritize funding sources first when articles match to multiple funding sources.
- Funding from different sources for different types of publication charges associated with their manuscripts. For example, an initial request may cover open access publication charges and an additional request may cover page charges.

Agreement Manager: Comprehensive Eligibility Settings

For a variety of reasons, including co-author eligibility and the eligible publication charges associated with open access agreements, it is possible for articles to match more than one funding source. Because the number of manuscripts with multiple matches has steadily increased, we are introducing a new "Profile Hierarchy" settings in Pub Portal to enable you to set your preferences for how RightsLink® should run matching logic. For example, if a manuscript matches a Funder profile and an institution profile, you may decide to have the logic always use the Funder profile first.

In addition, this release will fully support multiple rounds of funding requests per manuscript. This will accommodate scenarios where an initial funding source was denied but other sources are available, publication charges are added and can be funded after initial acceptance, and more. The system will initiate the appropriate secondary funding workflow – touch-free or author-led. Read more detailed notes about these new settings here.

New Resource Centers for Publishers, Institutions, and Authors

In addition, the RightsLink® for Scientific Communications team continues to support requests for accessible, easy-to-use tools and resources to support all stakeholders using the platform. All users will now be able to quickly access and find the appropriate content through three user-friendly resource centers that live within the application. Click here to learn more about these new resource centers.

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

Comprehensive Eligibility Settings for Your Agreements

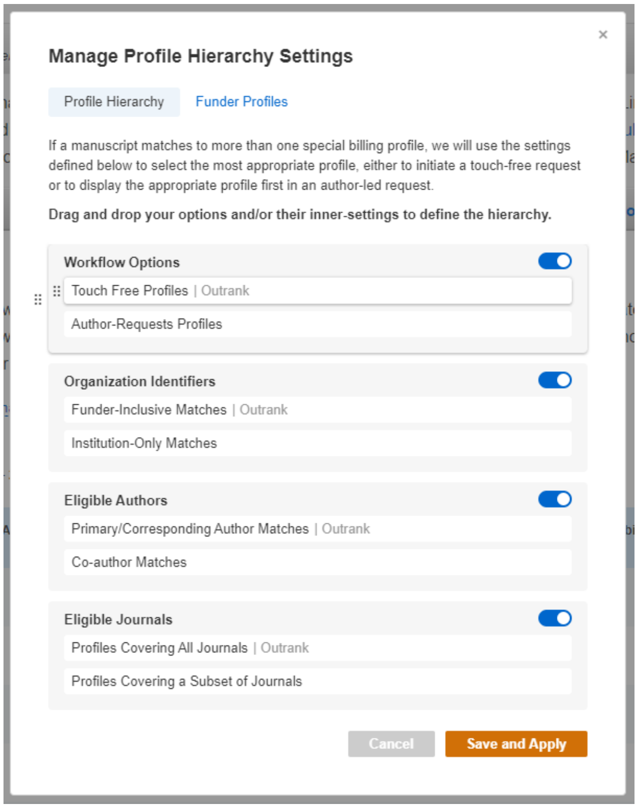
Note: Use of the agreement management suite is required to benefit from these new features.

Handling manuscripts that match to more than one funding source

When a manuscript matches more than one special billing profile, how should funding sources be prioritized?

- Is it the profile that is touch-free and requires no author involvement?
- Is it the match that was paid by a funder rather than an institution?
- Does one funder take precedence over another funder?
- Should the primary author's funding option always match before the co-authors?

Based on a series of conversations and a collaborative working session with several publishers, we concluded that there is not a one-size-fits-all approach. Based on this, the June release features configurable settings which enable each publisher to define their organization's rules for applying the RightsLink® matching logic. This will allow you to customize your rules based on criteria that best fits your current open access program.



These **Profile Hierarchy Settings** is available in the Publisher Portal for all publishers who use the agreement management suite and includes multiple settings that can be dragged and dropped into priority order, their inner-settings changed, or turned off entirely. Once saved, these settings will enable RightsLink® to make the best decision, as defined by the publisher, when a manuscript matches to multiple special billing profiles.

Enabling multiple funding requests per manuscript

When considering a new approach to manuscripts which are eligible for multiple funding sources, we also explored the possibility that multiple funding sources could be required to cover the full extent of APC charges for a manuscript.

Examples could include:

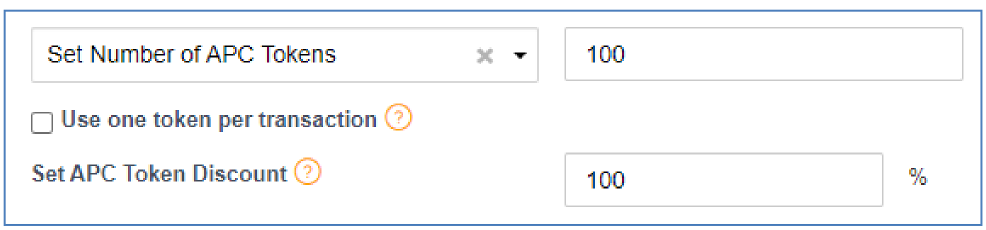
- Funding is denied by one funding option, but available from another.
- The first funding option only covers open access charges, while a secondary funding source covers additional fees.
- Charges are posted to RightsLink® at various points in the manuscript lifecycle, requiring multiple rounds of funding requests to one or multiple funding sources.

How will this work when allocating APC Tokens & Thresholds?

Since now a manuscript could request multiple rounds of funding through a single source/profile, we've built in a new setting to ensure your APC Tokens are used as desired.

- In most cases, if a manuscript requires more than one funding request from the same profile to cover all eligible charges, and the profile is token-based, all requests combined will result in the usage of just one APC Token for that manuscript. With the June release, all token-based profiles will adopt this approach by default.
- However, if you expect your tokens to be used up on every single funding request, regardless of whether a manuscript request has been partially funded, you will see a new flag in the APC Tokens area "Use one token per transaction". By checking this box, we will always apply a new token to every transaction/funding request.

APC Threshold balances will function as designed – all charges per each funding request, no matter how many funding requests are placed, will be deducted from the APC Threshold balance.



Updates to the External API Methods

Additional fields and methods detailed below are all non-breaking changes.

New Method: “Get Manuscript Status Changes”

The manuscript acceptance date in RightsLink® is created when a manuscript is first posted to us in the “Publisher Accept” status. We understand, however, that this is not always the editorial acceptance date of the manuscript, due to gaps in time between editorial acceptance and system posts to RightsLink®. We are often asked to provide our “acceptance date”, so the “Get Manuscript Status Changes” method was created a method for publishers and other systems to determine this date.

This method allows publisher to get manuscript status changes within a specified date range and/or by a specific manuscript ID. The way this method pulls status changes based on their manuscript ID and/or date range is the following:

- If manuscript ID is provided, then status changes are pulled for a specific manuscript.
- If dates (start and end) are provided then status changes are returned for all manuscripts that have their status within that timeframe.
- It’s possible to provide both manuscript id and start/end dates so both of them will be applied at the same time to filter the results.
- Either manuscript id or start/end dates are required.

EXAMPLE JSON


```
{
    "manuscriptsStatusChanges": [
        {
            "manuscriptId": "550e8400-e29b-41d4-a716-446655440000",
            "statusChanges": [
                {
                    "time": "1997-07-16T19:20:30.819+00:00",
                    "newStatus": "PUBLISHERACCEPT"
                },
                {
                    "time": "2007-09-16T19:20:30.819+00:00",
                    "newStatus": "QUOTE"
                }
            ]
    },
    {
            "manuscriptId": "556e8412-e29b-41d4-a716-446655440120",
```

"statusChanges": [
{
"time": "2008-07-16T19:25:30.819+00:00",
"newStatus": "READYFORPRODUCTION"
},
{
"time": "2017-02-18T11:30:30.819+00:00",
"newStatus": "PUBLISHED"
},
{
"time": "2020-02-19T08:30:30.822+00:00",
"newStatus": "WITHDRAWN"
}
]
}
],
"pageNumber": 1,
"itemsPerPage": 2,
"totalNumberOfPages": 33,
"totalNumberOfItems": 66
}

New Method: “Get Publisher Incomplete Profiles”

We have released a new API method called "Get Publisher Incomplete Profiles" to complement our existing method, “Get Publisher Profiles.” In November 2020, the RightsLink® team released the ability to start creating a special billing profile and finish it later. Today, these incomplete profile details are not available via API. Until a profile is complete, and all required fields entered, they are stored separately in our system. Therefore, in order to make them accessible via API, we are going to expose them as a separate method. “Get Publisher Incomplete Profiles” will return all available details of your incomplete profiles. It will be possible that many fields are not yet complete, and therefore not returned. The status of all profiles returned by this method is “Incomplete”.

Example JSON:

{
"profiles": [
{
"id": "550e2300-e29b-41d4-a716-446655444000",

…

}

],

"pageNumber": 1,

"itemsPerPage": 1,

"totalNumberOfPages": 5,

"totalNumberOfItems": 5

}

The existing “Get Profile Details” method will also be updated so that it is possible to get specific details about an incomplete profile via that method.

Updated Method: Eligibility Timeframe in “Get Current Profile Matches” Response

Also in November 2020, the RightsLink® team delivered new functionality around special billing profiles start and end dates. We expanded the functionality to support agreements where eligibility is based on manuscript acceptance date, submission date, or APC transaction date.

Our existing method, “Get Current Profile Matches” is intended to inform upstream systems of the details of profiles a manuscript may possibly match to once accepted. The method returns details which will inform those upstream systems enough to give authors a sense of what’s to come. We are adding the eligibility timeframe type, eligibility start, and eligibility end dates to these details in the June release.

Example JSON

{

"potentialMatches": [

{

"agreementId": "4c76cc9f-95fd-468b-ab90-7e1c68b74009",

"profileId": "89395f21-3b9a-45f0-832a-b3d3b086500d",

"profileName": "Profile Name",

"billingOrganizationName": "Billing Org Name",

"touchFree": "Yes",

"profileStartDate": "2018-10-31",

"profileEndDate": "2020-10-31",

"eligibilityDateType": "FUNDING_REQUEST",

"eligibilityStartDate": "2020-10-31",

"eligibilityEndDate": "2029-10-31",

"acceptanceDateRequired": "Yes",
"tokensRemaining": "Yes",
"thresholdFundsRemaining": "No",
"licenseType": "CC BY",
"eligibleProducts": [
"Open Access",
"Page",
"Color",
"Additional Services"
]
}

Resource Centers for Authors, Institutions, and Publishers

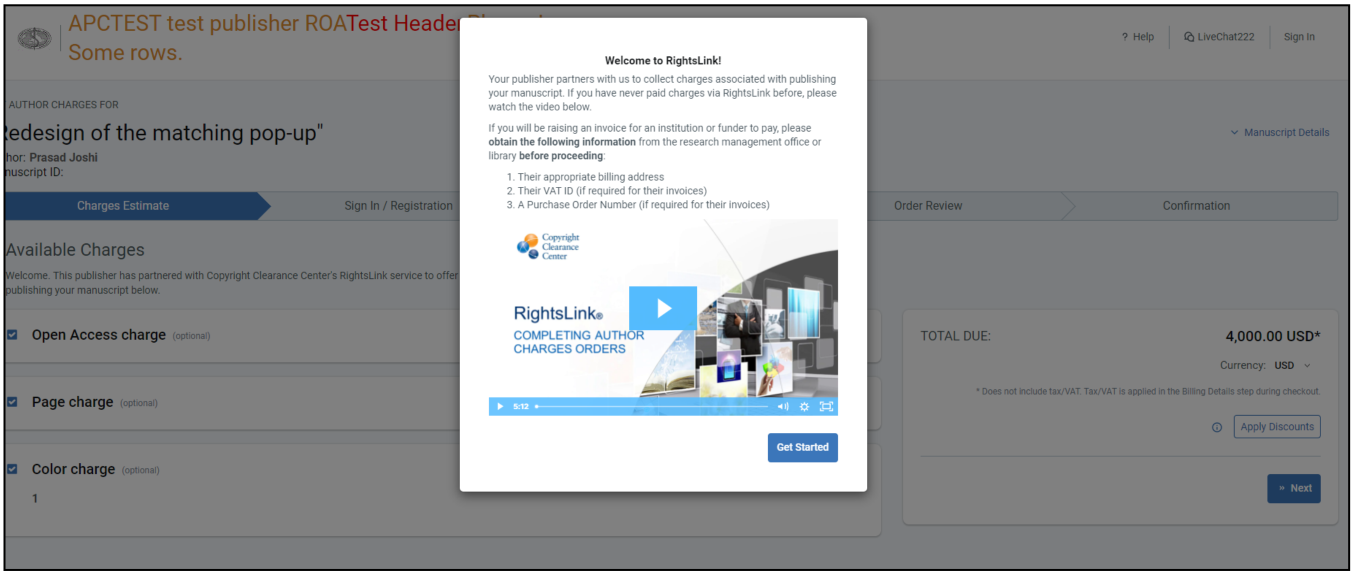
No implementation changes are required to take advantage of these new resource centers.

Author Resource Center

Available to the authors directly from the payment workflow, the Author Resource Center is an easy-to-access page that houses several videos, short user guides, and links out to FAQs. Combined with well-timed alerts in the payment workflow, which will direct the author to the resource center and FAQs at commonly tricky points, these new resources will aid in the successful completion of APC orders and funding requests and provide a user-friendly, educational experience to all authors.

Author Welcome Window

In addition, a new welcome video is included at the start of the APC workflow, informing authors about what to expect as they transact, and the information they will need to complete their orders successfully.

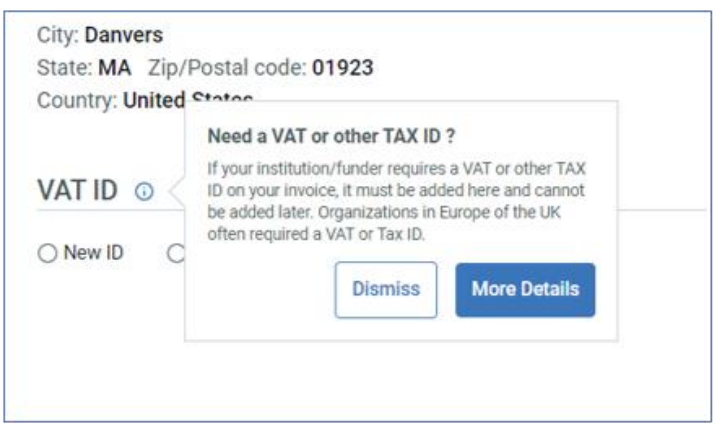


Author Workflow Contextual Help

There are also contextual help pop up messages displayed throughout the transaction workflow to point authors to the Resource Center or related FAQs at moments which are typically tricky or missed by authors today, often requiring order cancellations and replacements later on. This includes:

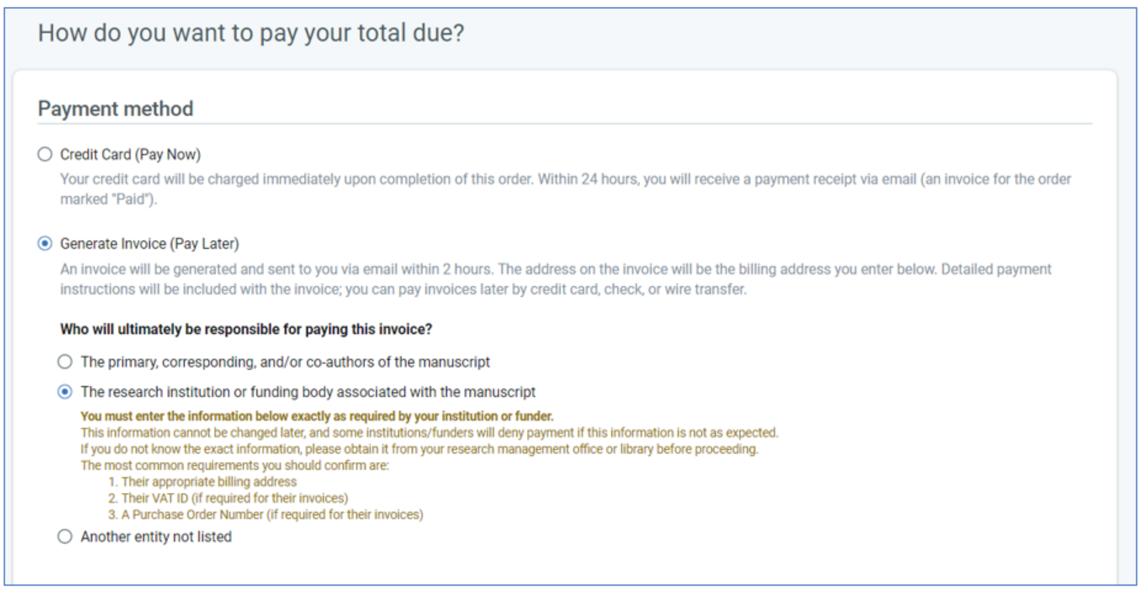
- Reminding users about the Apply Discounts option.
- Ensuring users enter the appropriate billing address for an invoice.
- Making sure users enter a VAT ID or Purchase Order Number, especially when an institution is the intended invoice-payer.

Here is an example:



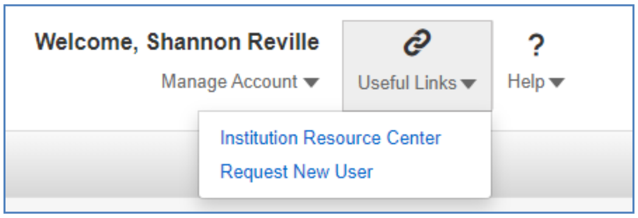
Author Workflow “Invoice Payer Question”

The final enhancement to the author experience we are making is the addition of an “invoice payer question.” When users choose the “invoice” payment option in the workflow, to-date it is not always clear whether they intend for that invoice to go to an institution, funder, other payer, or just want it sent to themselves. Often, authors who intend for the invoice to go to their institution will miss the place to enter their institution’s billing address, VAT ID, and Purchase Order Number. Since institutions, especially those in the UK and EU, often will not pay their invoices without these elements included, the new “invoice payer question” will enable RightsLink® to explicitly state these needs when appropriate:



Institution Resource Center

We have released an Institution Resource Center with helpful videos, as well as access to the Institutional Portal User Guide. We have also given institutions information about their author's experience in RightsLink®, and a dedicated page to request new Institutional Portal users for their organization. All of this will be available right from the header of the Institutional Portal.



Publisher Resource Center

Publishers will have a dedicated place to review all materials, guides, and previously recorded release webinars. Available from the welcome area of the Publisher Portal, this resource center will also have links out to the author and institution resource centers and the release notes page, which can be found at www.copyright.com/release-notes/

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)

Copyright Clearance Center | +1.978.750.8400 | info@copyright.com | www.copyright.com