RightsLink®
for Scientific Communications

Release Notes:

October 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 27 October 2021.

RightsLink® for Scientific Communications' October release introduces **improved payment model options for consortia deals** and an **updated process to request new institutional accounts**.

Updated, streamlined process to request institutional accounts

The October release introduces a completely new process for requesting new Institutional Accounts for access to the Institutional Portal and application on Special Billing Profiles. Publishers will have the ability to search for an institution or funder in the system prior to submitting a new request, and then follow a simple workflow to submit the new institution's details.

It is important that all publishers who use the agreement management tools become familiar with this new process, as this will be the supported workflow for submitting any new institutions for agreements/profiles. The new process will deliver several benefits to publishers, including:

- Reduction in turnaround time for new institutional accounts
- Immediate notification when requested accounts are ready for profile creation
- Visibility into pending requests other RightsLink publishers submitted, so that no one is duplicating work
- A real-time updated, searchable list of available institutions and their contact details

Improved payment model options for consortia deals

Currently when member institutions in a consortia are supposed to share prepaid funds or waivers on a first-come-first-served basis, all member institutions use a single dashboard with funding requests from these institutions mixed together. Based on feedback from publishers, consortia administrators, and member institution administrators, the October release addresses this through expanded attributes when creating an agreement that can enable a single, agreement-level pool of funds to share across many profiles. These new options will reduce confusion by allowing each member institution to be setup with its own Institutional Portal account, dashboard, and profile.

In addition to operational improvements for your member institution administrators, the ability to individualize funding request management will make it easier to see each member institutions' spend or quickly identify an institution that is using more prepaid funds or tokens than the others.

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

Agreement Management Updates

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

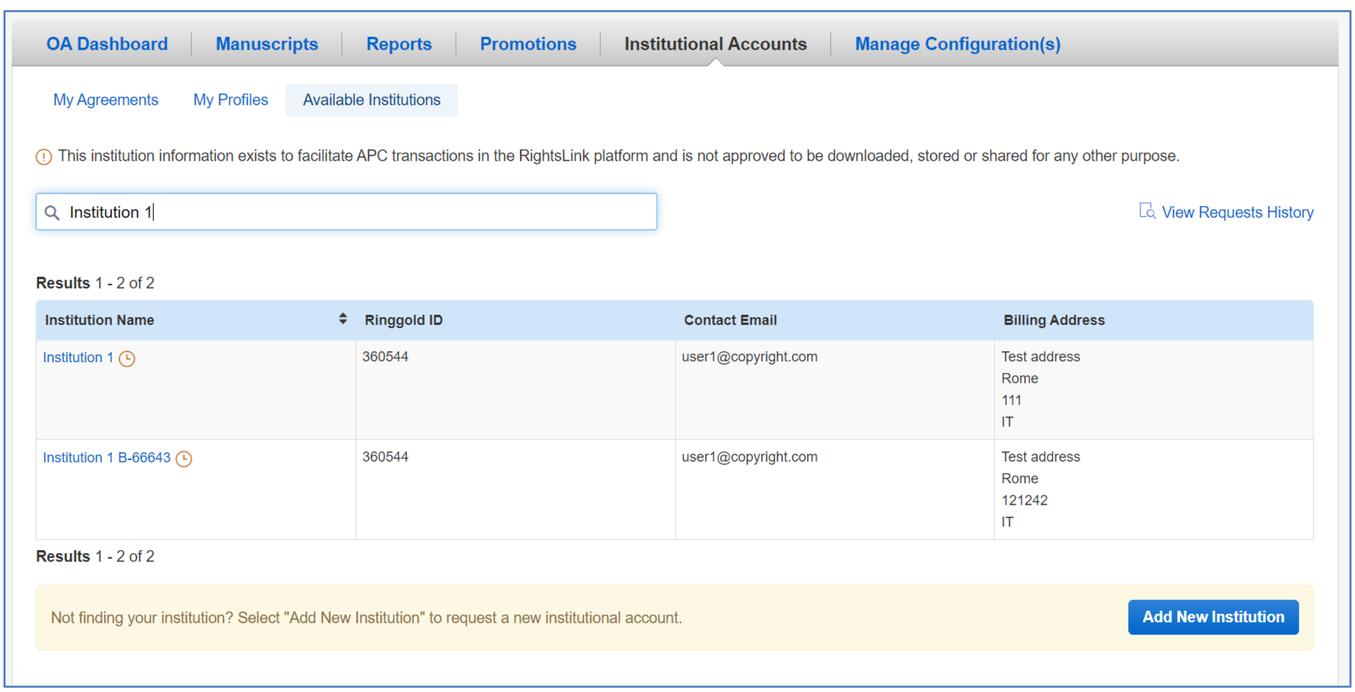
Updated, streamlined process to request institutional accounts

In the October release, you will find a new space in the Publisher Portal to search against all available institutions and funders prior to requesting the addition of a new one. The real-time updated list will surface all the organizations that have been set up for access to the Institutional Portal and are available for special billing profiles, as well as all pending institutional accounts other publishers have submitted, to avoid duplication.

If unable to find the institution via search, you will then be prompted to complete a simple two-part form to request a new institutional account. This form will replace the current process – working directly with client engagement manager to submit new institutions – and will allow you to quickly submit the billing details and institutional portal users needed to create a new institutional account.

The following is needed to submit the request:

- The organization's billing contact person & complete address
- The organization's parent level Ringgold ID
- The names and email addresses of any contacts who should have access to the Institutional Portal under the new account, and whether they should be able to approve funding requests



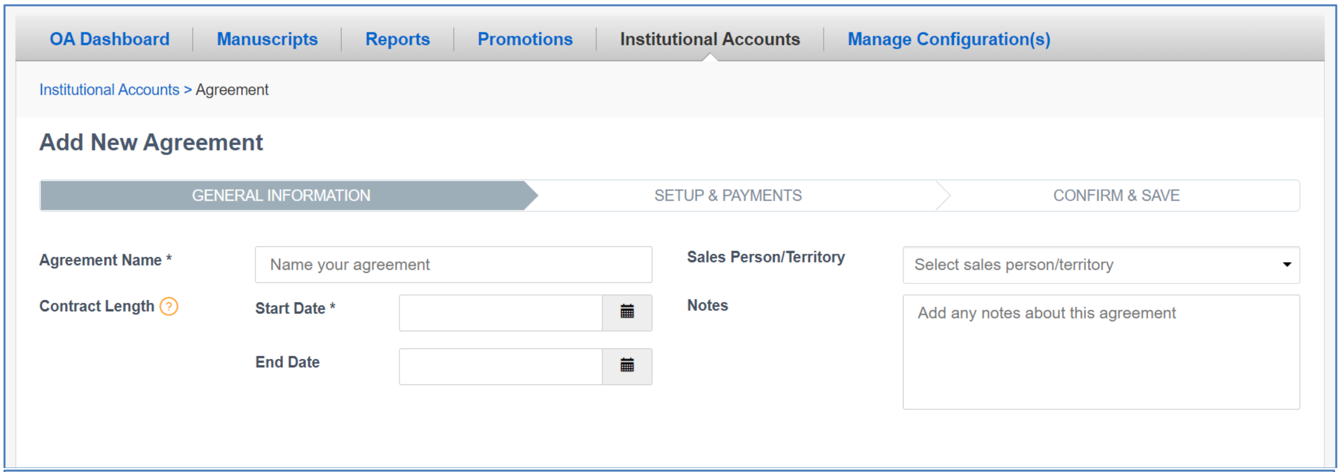
After submitting a request for a new institution, the CCC team will be alerted and will review the request (ensuring it is not a duplication and all fields are valid) and then create the new institution. With these updates, we anticipate the turnaround time for new institutions to improve and you will receive email notification once the account is complete and ready for special billing profile creation.

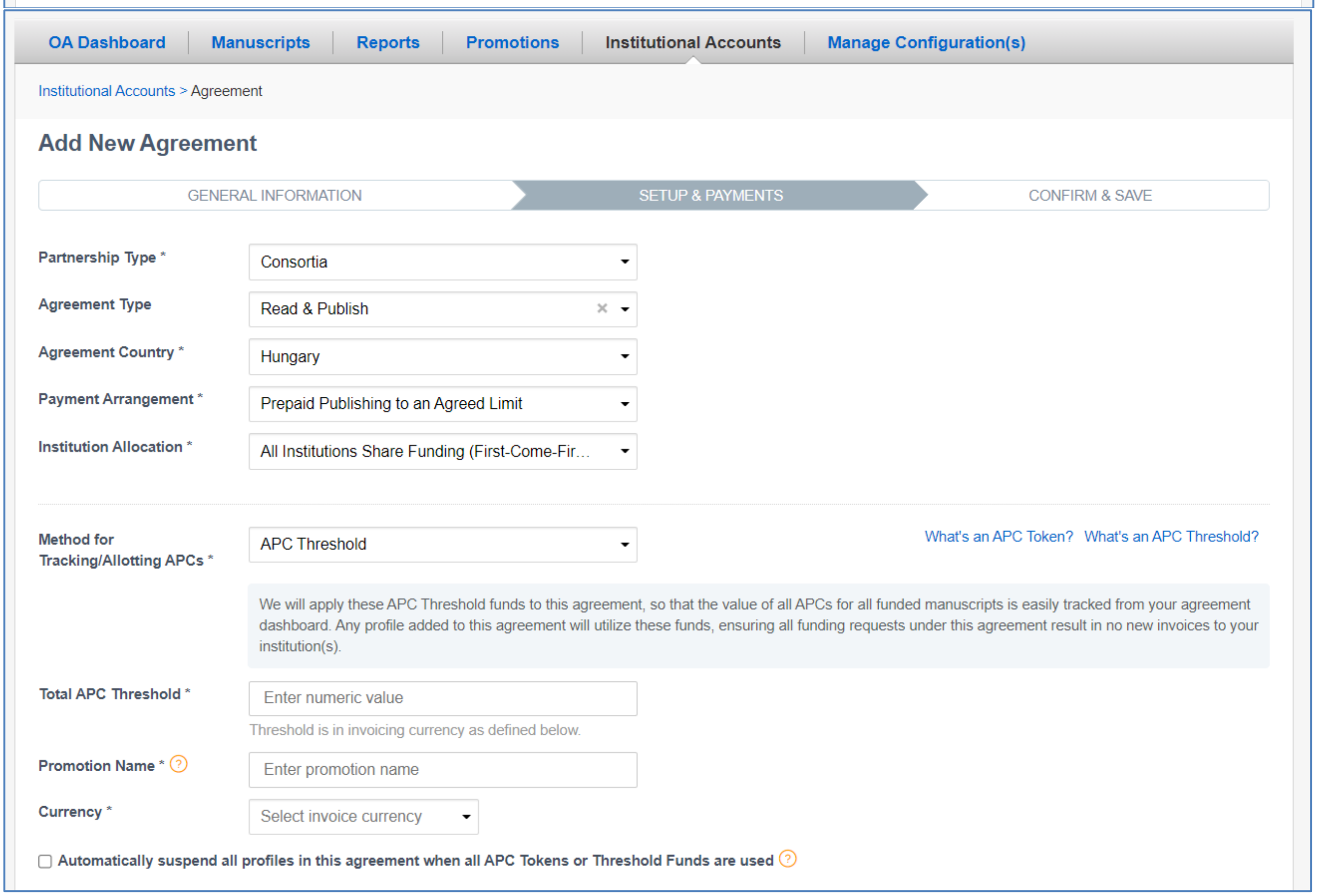
New settings and fields in the agreement creation process

The agreement creation process will be expanded significantly to become a stepped workflow and collect additional information to help us guide you to the ideal APC Token/Threshold setup. Although these fields are not part of any reports yet, we plan to add them to applicable reports in a future release:

- **Agreement Name** – This has always been collected and will continue to be required
- **Contract Length** – Optional, but if entered will prefill the start and end dates of any special billing profiles later added to the agreement. You will be able to change the profile dates if needed, but this should help in case you have to enter the same dates for every profile.
- **Sales Person/Territory** - Optional, list options are customizable and controlled by you and any other colleagues creating agreements
- **Notes** – Visible only to you and other colleagues creating/viewing your agreements
- **Partnership Type** – Consortia, Individual Institution, or Country-Wide
- **Agreement Type** – Read & Publish, Publish & Read, Membership, Collective Action, or Other
- **Agreement Country** – From the ISO standard list
- **Payment Arrangement** – Unlimited Publishing, Prepaid to an Agreed Limit, or Pay as Manuscripts are Accepted for Publication
- **Institution Allocation** – Only displayed when publishing is Prepaid to an Agreed Limit, select either “All institutions share funding (first-come-first-served)” or “Each Institution as a specific allocation of funds”

Note: These settings cannot yet be added to agreements that already exist in RightsLink, and for now are collected only for new agreements added after the October release. If you attempt to add them to historical agreements, you will see a system error. In a future release we will expand the agreement capabilities so that you may add these indicators to all your agreements, if you wish.





The combination of **Partnership Type, Payment Arrangement, and Institution Allocation will determine whether you should set any APC Tokens or Thresholds here on the Agreement**, or later on the Special Billing Profiles. Read the next section on consortia payment models for more information about this.

Improved payment model options for consortia deals

RightsLink's agreement management tools have been supporting large consortia deals for several years. Recently, more and more consortia deals require:

- All member institutions to draw down on a single bank of funds or tokens on a first-come-first-served basis, but also;
- Each member institution must triage their own funding requests (approve/deny).

Today when a consortia deal requires member institutions to approve or deny their own funding requests and draw from the same bank of funds or tokens, all member institutions use a single dashboard. As a result, funding requests from one institution are mixed with the requests of others. Member institutions have voiced concerns with this shared dashboard experience, and we listened.

As of October, our solution will allow publishers to:

1. Create an agreement with an expanded set of attributes (see screenshots above)
2. Setup a shared bank of funds at the agreement level (when attributes indicate necessary)
3. Add multiple special billing profiles to the agreement, representing each member institution
4. Have each member institution draw from the agreement-level funds, first-come-first-served
5. Get reports on both consortia-level and member-institution-level funding requests

And your member institutions will be able to:

1. See their own funding request dashboard to review and approve their researchers' requests
2. Get their own reporting for just those funding requests they have approved or denied

Additional notes about the new consortia setup option:

- **This setup is intended for use on deals beginning 1/1/2022**. The steps to implement it will take some time to complete, including requests for new institutional accounts, which is why we chose to release both this and the new account request workflow well before the new year.

- **Detailed setup instructions and implications will be provided to you soon.** In the meantime, you should consider and document which consortia you plan to work in 2022 and want to setup under this model.

API updates for new agreement fields, consortia payment models

Please review your use of the agreement-related API calls and let your client engagement manager know if you need guidance related to the changes below.

Several updates to our agreement-related API methods will be completed as part of the work to set up consortia deals with agreement level funding.

Get Agreement Details by Agreement ID

All fields collected on new agreements will be included in the response:

"agreementId": "65c0a140-7d26-258f-8a1c-3ab2d46c9d3a",

"name": "Research Profiles agreement",
"startDate": "2021-05-12T09:21:12.000+00:00",
"endDate": "2022-05-19T00:00:00.000+00:00",
"salesPersonOrTerritory": "Northeast",
"partnershipType": "INDIVIDUAL_INSTITUTION",
"agreementType": "READ_AND_PUBLISH",
"agreementCountry": "US",
"paymentArrangement": "PAY_AS_MANUSCRIPTS_ARE_ACCEPTED",
"institutionAllocation": "ALL_INSTITUTIONS_SHARE_FUNDING",
"notes": "Agreement Notes",
"status": "ACTIVE",
"createdOn": "2020-06-08T10:15:33.000+00:00",
"createdBy": "ahall@copyright.com",
"lastUpdatedOn": "2020-06-09T10:15:33.000+00:00",
"lastUpdatedBy": "ahall@copyright.com",
"profileIds": [
    "45d0a340-5d26-448f-8e1a-3ac2c47c9d3a",
    "5638df1f-95bc-4497-a87f-c9518f32edfc"

When APC tokens or thresholds are set at the agreement level, the Get Agreement Details method will also include a block called “discountDetails”, and this section will represent the full spend metrics for the agreement, including all associated profiles’ total spend activity:

"discountDetails": {
    "amountApproved": "5760.80",
    "promotionName": "Research Articles promotion",
    "promotionID": "120c24d0-a25b-41d4-a712-763651244230",
    "tokenPercent": "100",
    "currency": "USD",
    "numberOfTokensUsed": "5",
    "valueOfTokensUsed": "12456.00",
    "numberOfTokensRemaining": "4",
    "thresholdRemaining": "7850.00",
    "thresholdUsed": "8650.00",
    "thresholdApproved": "6000.00",
    "thresholdPending": "2650.00",
    "oneTokenPerFundingRequest": "false"
  }

Get Publisher Profiles and Get Profile Details by Profile ID

If APC tokens or thresholds continue to be set at the profile level (as they are today) the response will remain largely the same, with the “discountDetails” block showing the profile’s APC token or threshold information. But in the October release we will include three new fields, related to functionality added in June 2021:

```
  "discountDetails": {
      "amountApproved": "5760.80",
      "promotionName": "Research Articles promotion",
      "promotionId": "120c24d0-a25b-41d4-a712-763651244230",
      "tokenPercent": "100",
      "numberOfTokensUsed": "5",
      "valueOfTokensUsed": "12456.00",
      "numberOfTokensRemaining": "4",
      "thresholdRemaining": "7850.00",
      "thresholdUsed": "8650.00",
      "thresholdApproved": "6000.00",   <--- new field
      "thresholdPending": "2650.00"    <--- new field
      "oneTokenPerFundingRequest": "false"   <---- new field
```

When tokens or threshold funds are set at the agreement level, however, the “discountDetails” section for an associated profile will not show in the Profile Details response and an “agreementDiscountDetails” section will be returned instead. This section will represent the spend metrics for this individual profile against the total agreement-level balance:

```
"agreementDiscountDetails": {
      "amountApproved": "5760.80",
      "numberOfTokensUsed": "5",
      "valueOfTokensUsed": "12456.00",
      "thresholdUsed": "8650.00",
      "thresholdApproved": "6000.00",
      "thresholdPending": "2650.00"
```

Note: The “agreementDiscountDetails” block in the Get Profile Details method will only show the profile’s usage/spend, and not agreement-level balances. Total available tokens or threshold funds on the agreement-level is only accessible through the Get Agreement Details method (see above).

Get APC Tokens & Threshold Activity in a Date Range

Although the placement of tokens and threshold funds is now variable, this API method will not change. Any token or threshold activity related to agreement-level funds will still return in the response, and include the values currently returned, as documented in the RLSC API guide.

Reminder: New Resource Centers!

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

Since launch in June 2021, we have received positive feedback about our new author, institution, and publisher resource centers. Some publishers have embedded our videos and materials into their own author-facing websites, others have appreciated the ease of access to institution support materials, and we've noticed an increase in positive remarks from our author workflow survey. Please work with your client engagement manager if you see new ways to leverage the resource center materials.

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.

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.

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