RightsLink®
for Scientific Communications

Release Preview:

March 2022

Copyright Clearance Center

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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 is targeted for March 2022.

After three large releases in 2021, that all included robust feature sets and complex requirements, the RightsLink team is dedicating time in early 2022 to ensure key author, institution, and publisher enhancement requests are addressed. Over the last year we've listened to and aggregated feedback from all RightsLink stakeholders.

- Our January release focused on updates that help authors better understand their potential OA funding options at submission. Authors are now able to preview funding options within the RightsLink agreement management module at submission, whether with a single institution, a consortium, or a single funder.
- The June release introduced new comprehensive eligibility settings, which allows 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. In addition, RLSC now features three user-friendly resource centers that live within the application to help provide easy-to-use tools and resources for all stakeholders using the platform. As of January 2022, two of our most popular guides on the Author Resource Center have been translated into Chinese.
- Lastly, the October release focused on updates that helped publishers implement their 2022 institutional agreements (e.g., Read and Publish), including expanded support for consortia deals and a simplified process for onboarding institutional customers.

Our March release will deliver value through targeted messaging, dashboard and report enhancements, improvements to our most utilized workflows, and more. One theme for 2022 will be scalability and workflow optimization and the March release will be the first of several 2022 releases where scalability and workflow needs, as requested by publishers and their customers, will be the focus.

Through continued conversations and workshops with our top publisher users, we plan on addressing additional user-driven enhancements in our 2022 releases. Streamlining agreement and profile setups as well as supporting new agreement and renewal negotiations are examples of features that will be highly valuable to release before the end of summer 2022. In addition, we plan on researching and prioritizing supporting diversity, equity, and inclusion initiatives as well as simplifying compliance and revenue analysis towards the end of the year.

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

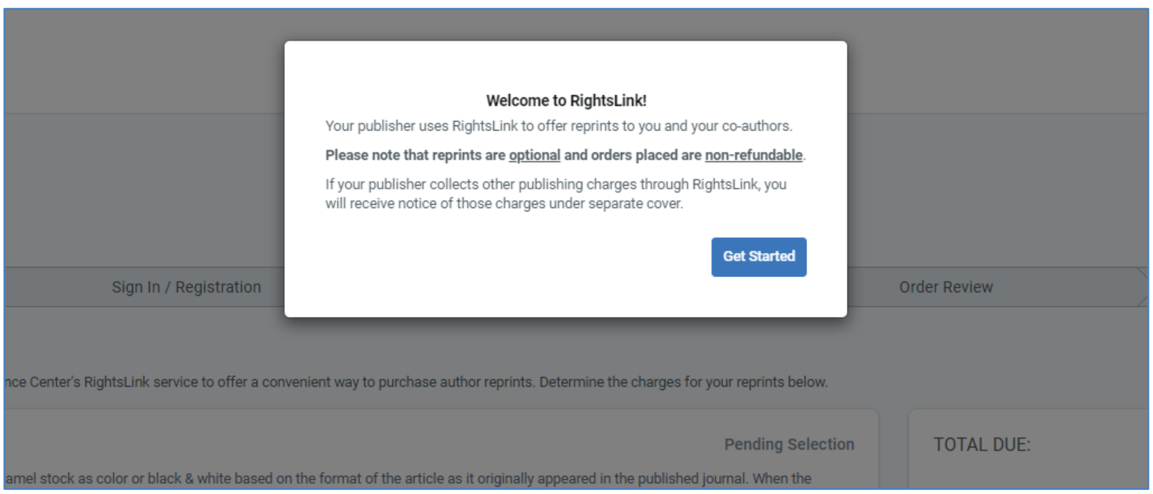
Author Workflow Enhancements

Note: No implementation changes are required for your authors to benefit from these enhancements.

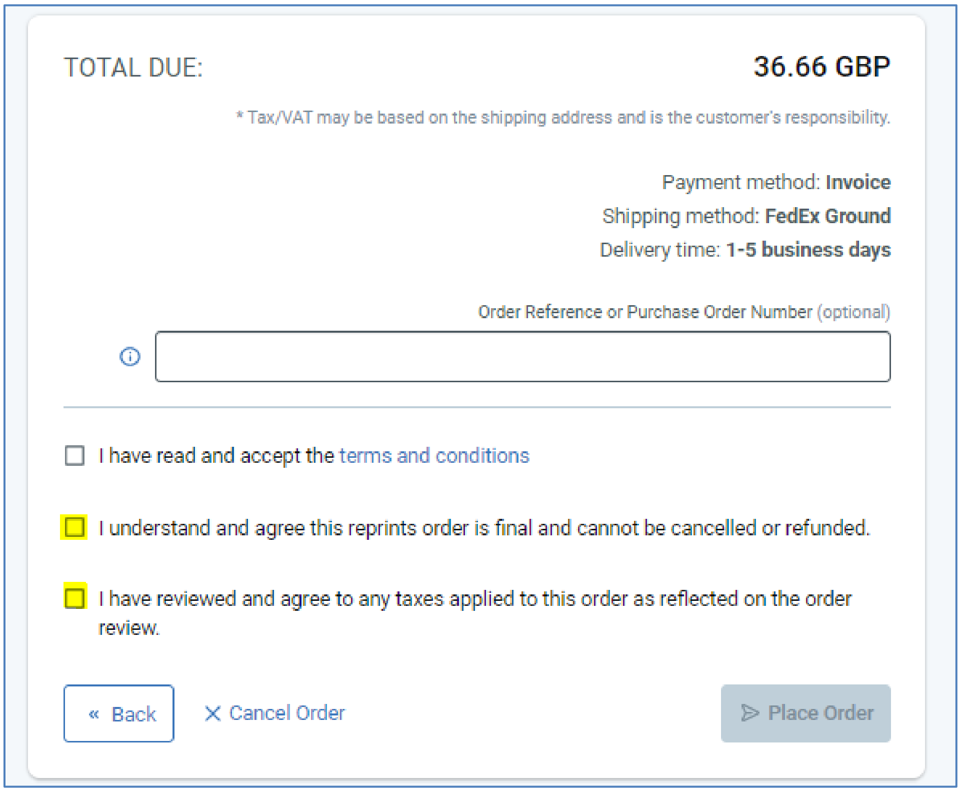
Add instructive messaging and tax confirmations to the reprints module

The reprints/ePrints module has recently been adopted by several new and existing RightsLink publishers hoping to diversify revenue and offer new services to researchers. As use of this module has increased, we've identified and are addressing two points of author confusion:

- **Authors mistake the reprints transaction for OA fees:** Publishers who use RightsLink to collect both reprints and article processing charges and happen to initiate the offer for these charges at the same time, have noticed some authors confusing reprints for OA fees. Since reprints are completely optional and non-refundable, it is essential that authors do not mistakenly place Reprints orders. We are adding a UI alert to the start of the reprints workflow to communicate this to authors.



- **Authors miss the tax amount applied to the order:** Sales tax is often incurred on reprints charges, and cannot be re-calculated after the order is placed, so we are adding additional order confirmation requirements to ensure authors have reviewed and agree to the taxes applied to their order. Since reprints production begins immediately upon order placement, it is critical that authors agree to the full amount to-be-charged/invoiced and understand the order is non-refundable.



Alert relevant users of the tax-exempt certificate process

When an author registers for a RightsLink account, and is located in the US or Canada, we currently give them the opportunity declare tax exemption. If they indicate they have a tax-exempt certificate, we will initiate a certificate collection & validation workflow through our tax automation provider, Avalara. After successfully registering, the author will receive an email from Avalara to collect their tax-exempt certificate.

However, Avalara's tax-exempt certificate process can take up to a few days from certificate collection to validation. This means that if the author who declared tax-exemption simply continues with their transaction right after registering, their RightsLink account has not yet been marked as tax exempt and taxes may be applied to their order.

In March, we will launch new messaging after this author completes registration, asking them to complete the Avalara workflow before coming back to complete their APC transaction. We expect this will significantly reduce order issues related to misapplied taxes.

Institutional Portal Updates

Note: No implementation changes are required for your Institutional Portal users to benefit from these enhancements.

Update institution emails to include publisher name and journal OA type

As requested by a key funding body who works with multiple RightsLink publishers, we will be updating all institutional emails as follows:

- **Adding Publisher Name** related to the manuscript as a prefix to each email's subject line
- **Adding Journal OA Type** (Pure or Hybrid) to the body of the email with other manuscript details

Provide better definition of "Acceptance Date" on the funding dashboard

The "Acceptance Date" for manuscripts in RightsLink is not necessarily the editorial acceptance date. RightsLink defines the acceptance date as the date which the manuscript was updated to an "accepted" status. Although this is often occurring on the same day as editorial acceptance, for some publishers there can be a lag time between editorial acceptance and updates/posts of manuscripts to RightsLink.

Since this acceptance date is provided on the funding dashboard in the Institutional Portal, we will start to provide clear description of this nuance as follows:

- The "Acceptance Date" label will be changed to "Date Accepted in RightsLink"
- A help icon will be added next to this date and state: "This is the date when RightsLink received notification that the manuscript was accepted. This may not be the exact editorial acceptance date."

We understand from institution/funder conversations that this will support them when training new administrators to use the Institutional Portal and review multiple publishers' funding requests.

Publisher Experience Improvements

Note: No implementation changes are required for you to benefit from these enhancements, however, some features are related to use of our Agreement Management tools.

Add the OA transaction link to the "Accepted Manuscripts Without an APC Order" report

Launched in January 2021, the "Accepted Manuscripts Without an APC Order" report is being used by many publishers to identify and reach out to authors who still need to place their open access transaction. In response to user feedback, we are adding a new column to the report with the OA transaction link, so that publishers have easy access to this link when re-sharing with the author.

Enable a wildcard/catch-all function for email domains on profiles

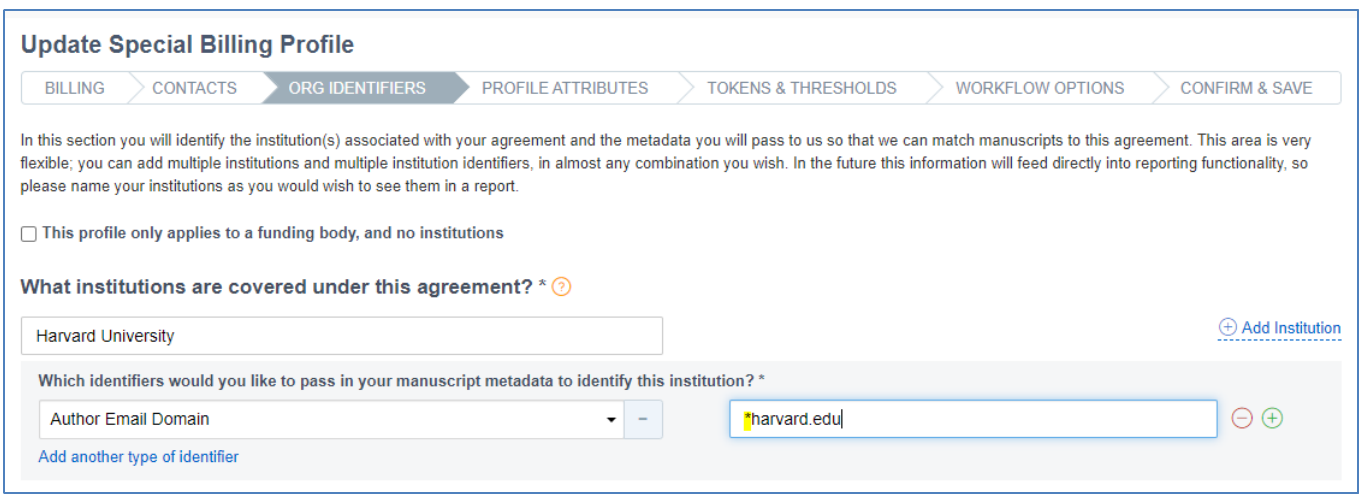
When onboarding their transformative and other open access agreements, publishers often use email domains as a supplementary affiliation identifier. Using email domains helps catch more manuscripts as eligible for funding from an institutional deal.

With the increased creation of consortia deals in RightsLink, we are seeing an increase in email domains added to profiles. Institutions often have sub-domains that should be considered eligible for funding, and as consortia deals can include many institutions, there are cases where hundreds of institutional email domains need to be added to profiles today.

To minimize this operational overheard, this release will launch a first phase of "wildcard" capabilities where publishers will be able to add an asterisk (*****) in the email domain field as a catch-all for any sub-domain. For example:

- Publisher enters *****.harvard.edu as the eligible author email domain on the profile
    - Manuscript with primary author email domain of **science**.harvard.edu WILL match
    - Manuscript with primary author email domain of **legal**.harvard.edu WILL match

The asterisk can be placed anywhere within the domain where the publisher wishes to achieve a catch-all sub-domain terms.



Relax select required fields in Agreements, Institution Account Requests

In response to customer feedback after the October 2021 release, we are updating a few areas within the agreement management tools to make sure publishers can file their agreements and institutional accounts correctly.

- **Agreement Country** will no longer be a required field when creating agreements.
- **Ringgold ID** will no longer be a required field when requesting a new institutional account.

In both cases, however, we encourage publishers to still enter these values, if possible. Including them whenever possible/applicable will support future reporting and author workflow enhancements.

Allow Agreement fields added in October 2021 to be set on older profiles

In October we expanded the Agreements section to collect additional business model indicators. This was needed in October to guide users in the setup of APC tokens and threshold funds; however, we intend to use these indicators in the development of new features and potential product offerings.

In March, publishers will be able to update their older Agreements to set all the new fields. This will create a complete Agreement dashboard and enable effective use of features we build in the future. **We recommend publishers allocate time in 2022 to complete these fields across all their agreements.**

When editing historical agreements, the following fields will be required:

- Contract Length Start Date
- Partnership Type
- Payment Arrangement
- Institution Allocation (depending on Payment Arrangement selected)

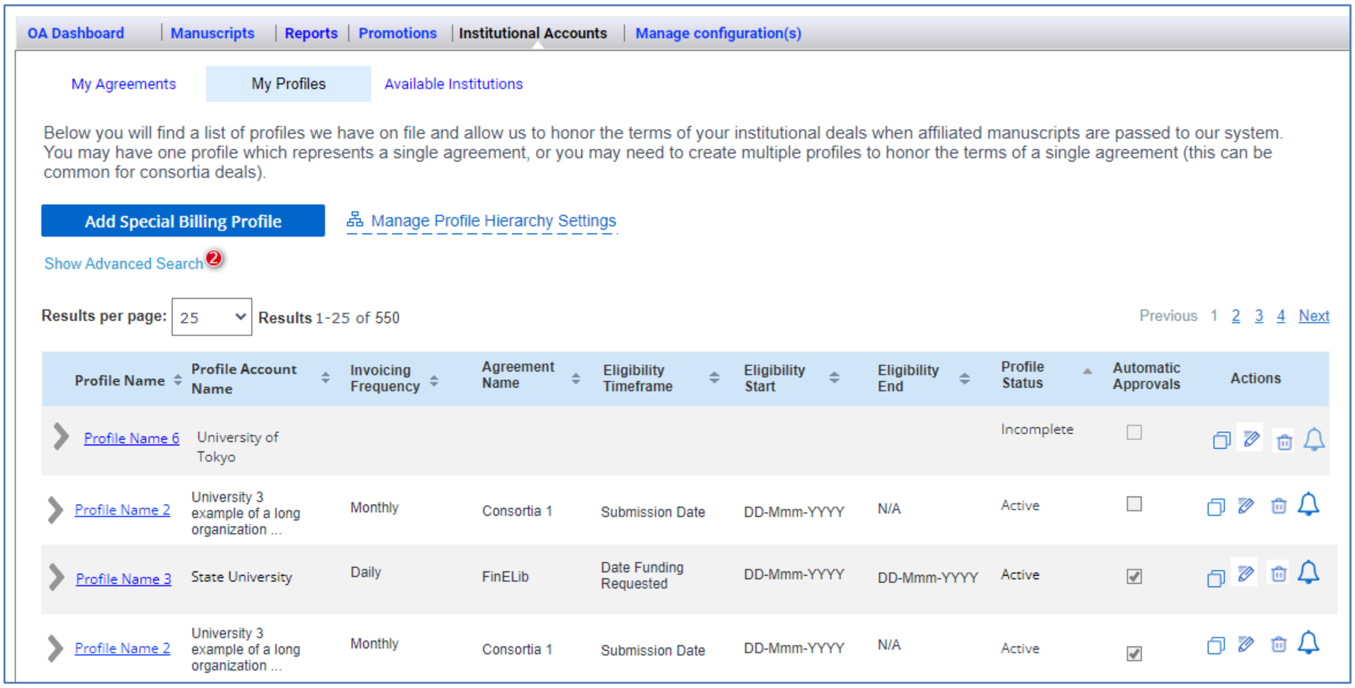
The following fields will be optional, but we still recommend assigning where appropriate:

- Sales Person/Territory
- Agreement Type
- Agreement Country

Show the "Automatic Approvals" setting on the publisher's profile list

Publishers will gain visibility into which institutions have set their profiles to "automatic approvals". This setting will still be maintained by the institutions from the Institutional Portal, and publishers will not have the ability to turn it on or off on their behalf. The column will be read-only and show a simple check box per each special billing profile.

The example image below is just a prototype.



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