

RightsLink for Scientific Communications

*Release Preview for Institutions:
June 2023*



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 20 June 2023.

The new features and functionality of the June 2023 RightsLink for Scientific Communications (RLSC) release help to strengthen the platform's reporting and alerts capabilities, with a special focus on the needs of consortia administrators. With the platform's new scheduled reports for agreements and profiles, publishers can now easily communicate with you and other stakeholders to monitor agreement performance more efficiently.

The June release will allow publishers to:

- Set up **scheduled reports** for any agreement or profile to provide consortia administrators with data on a monthly or quarterly basis. For consortia agreements made up of many individual institution profiles, these reports will keep admins informed of the publishing activity of all their member institutions. However, these reports can be sent to any stakeholder in need of aggregate reporting across an agreement.
 - Reports will be available in two formats including the RightsLink Transaction Summary Report and the new ESAC Article List report. The new ESAC Article List report was developed in cooperation with members of the ESAC initiative and over a dozen consortia administrators representing nine global consortia. Based on feedback from consortia administrators, RightsLink has added several fields to the article list template. These additions will be shared with the ESAC initiative for suggested inclusion in their agreement reporting standards.
- Set up **email alerts** to internal and/or external customers so that when profiles or agreements are low on tokens or threshold funds, all necessary stakeholders can be made aware and additional funds can be negotiated or consortia administrators can more carefully manage remaining balances with individual institutions.

We are excited to share these new features with you. Read the notes below for a more detailed look into the new features you will benefit from soon.

Questions? Contact Shannon Reville at sreville@copyright.com.

Scheduled Reports for Agreements & Profiles

With the June release, publishers will be able to schedule agreement- or profile-related reports on a new page in PubPortal. Reports can be created at either the agreement level, covering an array of institutions that may be part of the same consortium, or at the profile level, covering only a single institution.

These reports can be created by publishers in two formats, one of which is new to RightsLink. To schedule these reports, please contact your publisher:

- The **RightsLink Transaction Summary Report** This report will provide only a summary of the funding requests that have been placed under the agreement or profile selected.
 - **Note:** Institutions with access to the Institutional Portal can currently download this report themselves. Its inclusion in the Scheduled Reports area is to support consortia admins who do not have access to the Institutional Portal, or who need a single report that summarizes all institutions' funding requests. It could also support a need for automated reporting where an institution may be uninterested in accessing the Institutional Portal.
- The **ESAC Article List**, which was developed in cooperation with members of the ESAC initiative and consortia administrators around the world, contains more focused information than the RightsLink Transaction Summary Report. There are much fewer columns. The ESAC Article List also includes additional articles and their related APCs that are not available in the Transaction Summary Report. The following information was identified by consortia administrators as essential:
 - All funding requests placed under the agreement or profile being reported on.
 - Manuscript and any APC details when the manuscript would have matched to the agreement/profile for a funding request, but the agreement/profile was suspended automatically when the tokens or threshold funds were exhausted.
 - Manuscript and APC details when the author was eligible for funding under the agreement/profile but opted to self-pay.
 - Manuscript and APC details for the author-paid portion of a multi-payer deal.
 - Manuscript details for those manuscripts that will match to the agreement/profile, but funding has not been requested by the author.

Year-to-date reports can be scheduled on a **monthly or quarterly basis**, while reports with a single month of data are also available. To take advantage of these scheduled reports, please contact your publisher and request them, specifying whether you prefer to receive reports on a monthly or quarterly basis with year-to-date data or data only for the previous month.

Note: All fields that are populated using manuscript metadata are reliant on the publisher's upstream system passing that metadata to RightsLink. They will be left blank if the metadata is unavailable.

	A	B	C	D	E	F	G	H
	DOI	Article Title	Article Open Access Type (e.g. gold, closed)	Article License (where relevant, e.g. CC-BY)	Article Type (e.g. original paper, review article, etc.)	Article Type Relevant to Contract (yes/no, i.e. peer reviewed article)	Publication Date (first/online)	Date Type Relevant for Article Eligibility Under Agreement
1								
2	10.1021/acs.foc.2r2046	Force microscopy: a review		CC-BY	Review article	No		Acceptance Date
3	10.1021/jba.2c10588	Steric hindrance of NH ₃ diffusion on Pt(684) by co-adsorbed A-atoms		CC-BY	Original article	No		Submission date
4	10.1098/jrs.2271131	Quantifying the scientific approach to problem solving		CC BY	Research	No		Acceptance Date
5	10.1017/S03045570092200642	Hannah Arendt: a review of the literature		CC BY	research-article	Yes		Submission date

Sample of the new ESAC article list report

A full list of the fields and descriptions in the new ESAC Article List can be found below.

ESAC Report Field Name	ESAC Report Field Description
DOI	Digital object identifier (DOI) of the manuscript
Article Title	Title of the manuscript
Article Open Access Type (e.g. gold, closed)	<i>RightsLink does not receive the data necessary to populate this field, however, the column is included in our report and left blank to allow for manual addition if needed.</i>
Article License (where relevant, e.g. CC-BY)	Creative commons license type: either the product selected during checkout if licenses are chosen in RightsLink, or the license type provided in the article metadata if unavailable from product options.
Article Type (e.g. original paper, review article, etc.)	Article type from manuscript metadata.
Article Type Relevant to Contract (yes/no, i.e. peer reviewed article)	If a special billing profile is limited to specific article types, then this would be marked "Yes." Otherwise, it will be marked "No."
Publication Date (first/online)	Target publication date from article metadata.
*Date Type Relevant for Article Eligibility Under Agreement	Type of date relevant for article eligibility. Values can be acceptance date, submission date, order date, or date funding requested.
Relevant Date for Agreement (date of submission/acceptance/publication)	The date that was used to match the manuscript, either the acceptance date, submission date, order date, or date funding requested.
Discipline (e.g. HSS/STEM)	<i>RightsLink does not receive the data necessary to populate this field, however, the column is included in</i>

	<i>our report and left blank to allow for manual addition if needed.</i>
Publisher Name	Publisher name supplied in article metadata.
Journal Title	Publication name supplied in article metadata.
Journal ID (publisher-specific)	RightsLink publication code supplied in article metadata.
Print ISSN	Print ISSN supplied in article metadata.
Online ISSN	E-ISSN supplied in article metadata.
Journal Business Model (e.g. hybrid, fully OA, subscription)	Hybrid Open Access or Pure Open Access; set on the journal level in the RightsLink publisher portal and pulled at the time of the transaction.
Total APC List Price (where relevant)	Pre-discount APC
*Open Access Portion	Total product amount (original amount - discounts + taxes)
*Page Charges Portion	Total product amount (original amount - discounts + taxes)
*Color Charges Portion	Total product amount (original amount - discounts + taxes)
*Additional Services Portion	Total product amount (original amount - discounts + taxes)
Invoicing Channel (i.e. author, funder, agreement)	Author or profile name and agreement name; blank if funding has not been requested or no order placed
Total Discount/Surcharge Amount	Sum of all discounts applied
*Affiliation Discount Portion	Affiliation discount applied to charges
*Geographic Discount Portion	Geographic discount applied to charges
*Membership Discount Portion	Membership discount applied to charges
*Promotion Code Discount Portion	Promotion code discount applied to charges
Discount/Surcharge Category	List of discount types applied to the manuscript
Final Invoice Amount (where relevant)	Order total for the manuscript
Currency (where relevant)	Currency of the charges
Corresponding Author Name (or eligible author that counts under the agreement, i.e. submitting) (if multiple, list all)	Primary author from article metadata
Corresponding Author Email	Primary author email address from article metadata
Corresponding Author ORCID	Primary author ORCID from article metadata

Corresponding Institution Name (affiliation as on the VoR) (if multiple, list all)	Institution name from article metadata
*Corresponding Institution ID Type (e.g. Ringgold, ROR)	Institution identifier type for corresponding author from article metadata
Corresponding Institution ID Number (e.g. Ringgold, ROR)	Institution identifier for corresponding author from article metadata
*Funder ID Type	Funder ID types from article metadata - Ringgold, FundRef, etc.
Funder ID # (where relevant)	Funder IDs from article metadata
Funder Name (where relevant)	Funder names from article metadata
Grant ID (where relevant)	Grant IDs from article metadata
Funding Acknowledgement From The Article (if available)	<i>RightsLink does not receive the data necessary to populate this field, however, the column is included in our report and left blank to allow for manual addition if needed.</i>
Notes and Comments	<i>RightsLink does not receive the data necessary to populate this field, however, the column is included in our report and left blank to allow for manual addition if needed.</i>
*Profile Matched	Exact profile name this manuscript matched; populated regardless of whether funding was requested or paid by author
*Funding Situation	An identifier of the transaction type. Possibilities include: Funding Requested; Author Opted Out of Funding; Author-Paid Portion; Agreement Suspended at Time of Order; Funding Not Yet Requested
*Funding Decision	Approved, Denied, or blank
*Funding Decision User	Email address of user who approved or denied the funding request
*Funding Decision Date	Date of approval or denial of request
*Journal Eligible Under Agreement	A Yes/No indication of whether the journal is eligible under the special billing profile.
*Author Opted Out of Agreement	A Yes/No indication of whether the author opted out of funding.
*Token/Threshold Balance Exhausted at Time of Order	A Yes/No indication of whether the author was unable to request funding because the token/threshold balance was empty and therefore the profile was suspended. Blank if funding is not yet requested.

*Retrospectively Funded Under Agreement	A Yes/No indication of whether the author previously transacted OA outside the agreement and later replaced with a funding request under the agreement. Blank if funding is not yet requested.
*APC Refunded to Author	A Yes/No indication of whether the payment has been cancelled on the above-mentioned cancelled order. N/A if a payment was never made. Blank if the previous cell is "No" or funding is not yet requested.

*Based on feedback from consortia administrators, RightsLink has added several fields to the article list template. These additions will be shared with the ESAC initiative for suggested inclusion in their agreement reporting standards.

Email Alerts for Agreements & Profiles

Publishers will also be able to create email alerts to keep stakeholders aware of certain events. These can be set at either the agreement or profile level. To receive agreement-level alerts, please contact your publisher. Available alerts include:

- Amount approved for invoicing (when the spending approved on a profile reaches the specified level and is not covered by APC tokens or threshold funds, so will be invoiced)
- APC threshold funds remaining
- APC threshold funds approved
- Number of APC tokens remaining
- Number of APC tokens used
- Profile eligibility end date (recipients can be notified when a profile will reach its eligibility end date in X days, so that staff can extend the agreement if needed, or the sales team can confirm if a customer wishes to renew)

Institutional Portal users have long been able to create similar alerts for individual profiles in RightsLink. These users will continue to have this capability. However, to receive these alerts when funds are allocated on the agreement level, where multiple institutions may share a bank of tokens or funds, please contact your publisher.

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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