

### **Open Access Publishing Workflow** Author Journey to Agreement Manager



### Before we begin...



This session is being recorded



Submit your questions anytime using the Q&A function. Questions will be answered at the end of the session

Please complete the exit survey





Introductions

**Benefits of Open Access** 

The author publishing journey

Rightslink OA Agreement Manager

Post sales support

Contact details





### More downloads

OA articles are downloaded three times more than non-OA articles, on average

### Higher citations

OA articles receive 30-50% more citations than their non-OA equivalents



### Wider reach

Freely available online globally, allowing anyone, anywhere to find, read, and benefit from research.



### Benefits of Open Access

OA content is freely available online, not hidden behind a paywall, meaning increased discoverability, usage, and the potential for higher citations for your work.





Gold OA articles receive three times the usage of subscription articles within their first year, on average.

Data shown for 18,000 CUP research articles published in 2019, showing accumulative usage over 12 months





Gold OA accounted for **22%** of our article publishing in 2020, and is steadily growing.





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### **Open Access Publishing Workflow**



All articles submitted to Cambridge University Press undergo the same **rigorous peer-review** to sustain the high quality of our journals.

The decision to publish an article is not affected by whether it will be published Open or behind a paywall.





### Journal homepages

- Information on manuscript preparation is available on the journal's homepage on
   Cambridge Core.
- Open Access information is signposted on these pages.

Pop ups appear on relevant gold OA and hybrid journal pages to invite authors to check their eligibility for an APC waiver / discount using our checker tool.





Home > Journals > Journal of Child Language		English   Français
Journal	of Child Language	
Search Journal of Child Lange	age content	
f Submit your article	mation Subscribe Recommend to librarian	
Journal home Child Bilinguals FirstView articles Latest issue	Open access articles Most cited Most read	

## Submit manuscript

The submission system – aka Online Peer Review System – can be accessed from the journal's homepage on Cambridge

Core.



### To submit:

Log in, using either a username and password or ORCID.

During this process, identify the corresponding author whose affiliation is used to determine eligibility





### Peer review

Manuscript then proceeds through editorial and peer review



- Ensures submitted article is suitable for journal
- Ensures article is sound and accurate
- Alerts to errors
- Provides constructive feedback



Possible outcomes:

- Accepted without any change
- Revise and resubmit
- Paper rejected





### Acceptance

### RE: <<JOURNAL NAME>> - Decision on <<MANUSCRIPT NAME>>

Dear <<AUTHOR NAME>>,

We're delighted to confirm that your manuscript entitled "ARTICLE NAME" has been accepted for publication in << JOURNAL NAME>> in its current form.

If you have not yet done so, please complete and return the Author Publishing Agreement (APA) as soon as possible: <<LINK>>.

As <<JOURNAL>> also offers Open Access (OA), you can now decide whether you would like to publish your article as OA. Publishing OA allows anyone, anywhere to find, read, and benefit from your research which will give you increased visibility, greater accessibility, and global impact. To help you decide, you can find out more about publishing OA on our information page. If you choose to publish OA, please ensure you select the appropriate form when completing the APA.

Publishing Open Access requires payment of an <u>article processing charge (APC)</u>, collected by our partner, CCC-Rightslink. However, to support OA publishing, we also offer a variety of waivers and discounts which means you may not have to pay an APC. To check your eligibility, please visit our <u>waivers and discounts</u> information page.

To find out more information about what will happen next, things you need to know, and a variety of resources to help you during the process, please visit our <u>publishing an accepted paper</u> information page.

You'll now be assigned a dedicated Content Manager, who you will hear from shortly.

Congratulations and thank you once again for your contribution to << JOURNAL NAME>>.

Kind regards, Editorial office

If an article is accepted, following the completion of any revisions required, authors will receive an acceptance email.



### Acceptance

Receive email with link to complete author publishing agreement (license to publish form)

 $\mathcal{O}$ 

**Complete Open Access agreement**, select a creative commons licence and return to Content Manager (production contact)

Record created in production tracking system

### Author publishing agreement

Before Cambridge University Press can publish a journal article (or any other journal content type) we need a signed licence to publish. To find the right form, start by considering whether or not your article will be published as open access or non-open access and then select the most appropriate option.

### **Open Access Articles**

So that we have the necessary rights to publish your article, we ask you to grant a non-exclusive licence to publish. (We do not ask you to transfer your copyright to us.) A non-exclusive licence means that the rights needed to publish the paper are granted to the journal owner on a non-exclusive basis and the ownership of the copyright remains unchanged. Select the correct form from the choice of two in the table below.

In open access there is a fundamental principle that content should not only be accessible but also be freely reusable for the good of research and humanity. We comply with this principle by asking you to select, within your form, a Creative Commons licence. The CC licence you choose will determine how readers can use your article.

Who are you and who owns the copyright?	Correct Forms	Who Signs?
I am the sole author and <b>I own</b> the copyright in the article OR I am one of two or more authors and <b>we jointly own</b> the copyright in the article	7	One author
I am the sole author and my <b>employer (government or non-government) owns</b> the copyright in the article OR I am one of two or more authors and one or more of our <b>employers (government or non- government) jointly own</b> the copyright in the article	7	Each author and each employer



# Improved digital licensing solution

Receive an information request form from **Ironclad**, prepopulated with information from submission system

Open Access publication and CC-BY are preselected. Specific messaging to authors recognized as eligible under an institutional Open Access agreement.

Contract generated automatically and signature signed digitally



### UNIVERSITY PRESS

### Information Request from Cambridge University Press

Please complete this information request form. We will use the information you provide to prepare a publishing agreement for review and signature.

Fields marked with an asterisk (\*) are required.

### Access Information

### Confirm Open Access (OA) publication

Your article is eligible for publication on an OA basis at no cost to you thanks to an agreement between Cambridge University Press and your institution. Your article will therefore be published OA, unless you choose to decline OA publication below.

Open Access (freely available online)

Decline Open Access (only available behind a subscription paywall)

### **Creative Commons Licence**

Please confirm the Creative Commons licence under which the article should be published for Gold Open Access. Please note that your funder or institution may require you to select a particular licence, e.g. CC-BY. To find out more, please visit: www.cambridge.org/creative-commons

CC BY (Attribution)

CC BY SA (Attribution - ShareAlike)

CC BY NC (Attribution - NonCommercial)

CC BY ND (Attribution - NoDerivatives)

CC BY NC SA (Attribution - NonCommercial - ShareAlike)

CC BY NC ND (Attribution - NonCommercial - NoDerivatives)

### Article Processing Charge

### Confirm the type of entity that will fund Open Access (OA) publication

OA publication usually incurs an article processing charge (APC). In this case, your article is eligible for funding by your institution. This means you can publish OA at no cost to you. If you have access to alternative funding, please select the relevant entity below.

My institution

125 titles currently live

## Convert your article to **Open Access**

### Dear Author Name,

This message is regarding your article, 'Article Name', in *Journal Name*. Through your affiliation with Institution Name and its <u>publishing agreement</u> with Cambridge University Press, you are eligible to make your article Open Access (OA) at no cost to you.

So that you don't miss out, we've made it easy for you to take advantage of this opportunity:

### Simply select a creative commons licence by completing this online form.

As the corresponding author, you must have full authority to execute this form on behalf of any co-authors. If you do not complete this form, we will not take any action to convert your article to OA.

If you have any questions, please read our FAQs or email OAqueries@cambridge.org.

### Why publish Open Access?

Publishing OA allows anyone, anywhere to find, read, and benefit from your research. OA articles:

(D) higher citations

- are downloaded three times more than non-OA articles, on average
- · receive 30-50% more citations
- · are freely available online globally

You can find out more on our Publishing OA information page

Kind regards OA Queries Cambridge University Press

**Open Access** 

more exposure 🛞 wider reach

## **Retroactive OA**

Authors who do not select the OA option and are identified as eligible under an agreement are informed of the opportunity via. a monthly outreach campaign.

A simple online form allow authors to select their creative commons licence. This form functions as an addendum to any existing agreement.

If a contract has been processed on Ironclad, authors will amend their original agreement.



### **APC Waiver Process**



### $\circ \circ \circ$

Affiliated authors of eligible articles do not interact with the APC transaction process. *Rightslink*<sup>®</sup> match the article with a publishing agreement and automatically discount the APC. \*Articles can be automatically approved, or institutions can approve or deny funding.

### Confirmation

Notification sent to the corresponding author to confirm that the APC waiver/discount has been approved and applied, and that the article will be published OA.

### Your article has been accepted and will be published open access

Dear

Congratulations on being accepted for publication in for the following manuscript:

Manuscript DOI: Manuscript ID: Manuscript Title: Published by: Cambridge University Press Total Charges Covered:

Funding for your open access publication charges has been covered by CCC University based on an agreement between CCC University and Cambridge University Press.

If there are any additional publication charges available to you, such as page or color charges, we will send a payment link for those charges under separate cover.

Sincerely, Cambridge University Press

Tel.: +1-877-622-5543 / +1-978-646-2777 CambridgeSupport@copyright.com www.copyright.com



RightsLink<sup>®</sup>

## Librarian Touch Points and Messaging



Messaging which may be received by your Agreement Manager administrator for the duration of your Transformative Agreement with Cambridge University Press

Message Received	Trigger	Action Required
"Welcome to RightsLink"	Sent after you have been granted access to the Agreement Manager Institutional Portal for the first time	Follow the instructions and complete the reset password process to log into Agreement Manager
"One of your researchers has had a manuscript accepted for publication"	If automatic approvals are off, the institution gets notified that an accepted manuscript is eligible for their funding	User invited to log in to Institutional Portal to review and act upon the request.

## Author Touch Points and Messaging



Message Received	Trigger	Action Required
"Manuscript decision" (from CUP)	Sent when an article has been accepted for publication	This is the key decision point for the author to make their article open access. Author must complete their author publishing agreement and choose Open Access
"Welcome e-mail from CUP production" (from CUP)	Sent after CUP production has updated the article record with the author publishing agreement	None required if author has already completed their author publishing agreement
"Your APC funding request has been approved/denied" (from Rightslink)	If automatic approvals are on: immediately on auto approval of the funding by RightsLink. If automatic approvals are off: once the librarian has approved or denied the funding in Agreement Manager	None. Information only





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## OA Agreement Manager

We work with *Rightslink*<sup>®</sup>-CCC to process article processing charges (APCs).

Institutions and authors participating in institutional Open Access agreements benefit from *Rightslink*<sup>®</sup>'s tool, OA Agreement Manager, which has been purpose-built to facilitate smoother financial transactions for authors and administrators.

This allows us to identify authors who are eligible for an APC discount/waiver and **automatically apply a waiver**, meaning an easier **journey for the author**.

Institutions may also review and authorise APC funding requests.



### Copyright Clearance Center Welcome, ? 5 Institutional Portal Sign Out Help Live chat Welcome to the RightsLink® Institutional Portal. Use the Billing Profiles tab to view the special billing Account Name: ROA TEST Organization profiles we have on file between your institution and RightsLink® client publishers. Use the Funding Account #: 7002061298 Requests tab to review and act on your queue of funding requests for researchers affiliated with your institution. Use the Reports tab to search and download a report of the APC transactions associated with your account. In the future, there will be an Invoices tab for you to review and pay your invoices online. Billing Profiles Funding Requests Reports Below you will find a list of special billing profiles that publishers have setup with your organization. From this page you can: · Select any Profile Name to view the details of that profile. · Assign an internal nickname to each profile. This value will appear on your invoices to ease identification. · Double-click on any existing nicknames to make changes. · Enroll a profile in automatic approvals. Please note, checking the automatic approvals box will approve funding for any manuscript that is matched and submitted under that billing profile. Results 1 - 14 of 14 Profile Nicknan **Profile Start** A Notifications Profile Name 0 0 Click to add 08-Aug-2019 > 1000 Monthly N/A Active - **1** Click to add 07-Aug-2019 23-Aug-2019 Active and the second \_\_\_\_

07-Aug-2019

29-Aug-2019

Active

Click to add

### Institutional Portal

Once on-board, administrators will receive log-in details.

Login: https://apcfunding.copyright.com/

### How to:

- 1. View and update your profile
- 2. Turn on automatic approvals
- 3. Set up alerts



## Updating your profile

## On the billing profiles tab you can see the institution(s) that you are set up to administer.

elow	ow you will find a list of special billing profiles that publishers have setup with your organization.														
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## Updating your profile

- To see details held on your billing profile click the Profile Name link.
- You can edit your contact information within this space.
- If you wish to change the email address that you use to log in to Agreement Manager, please get in touch with us.





## Updating your profile

You can also see information about your profile including the journals titles eligible under your deal, and the Institutional Identifiers we have associated with your account.

Institution Name *		CUP	
Identifier *		Other ID	grid.123.45
	OR	Author Email Domain	cambridge.org

PROFILE ATTRIBUTES	
Eligible Product(s) *	Open Access
Eligible Journal(s) *	Advances in Archaeological Practice, Africa:
	Journal of the International African Institute, African
	Studies Review, Ageing & Society, American
	Antiquity, American Political Science Review,
	Ancient Mesoamerica, Anglo-Saxon England,
	Annals of Actuarial Science, Annual Review of

### Turn on automatic approvals

Institutions can opt for articles to be approved automatically. We strongly recommend that you **turn on automatic approvals** for article publications by ticking the automatic approvals box.

We recommend this because:

- No delay in article publication for the author
- Reduced administration

Automatics approvals can be switched on or off at any time throughout the agreement

\*\*\*If you are renewing your agreement for 2022 you will need to turn on automatic approvals again as your 2022 agreement will default to having approvals off\*\*\*



Automatic Approvals



## Approvals

If automatic approvals are turned off, the administrator will need to go into Agreement Manager to approve or deny the funding.

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### Denials

If denying, a reason for denial must be given. This information is sent to the author in a denial notification email.





### Notifications

Irrespective of the automatic approval status, administrators will still receive emails notifications (for funding requests).

These email notifications can be suppressed from within the institutional profile.

KEY CONTACTS				
Specify the organizational contact acceptance and of pending fundin	(s) who should receive notifications of manusc g requests.	cript	Please specify who this organiz or special billing arrangement.	ation should contact if they have questions about the profile
Organization Contact Name *		$\ominus$ $\oplus$	Publisher Contact Name *	
Organization Contact Email *			Publisher Contact Email *	OAqueries@cambridge.org
Organization Contact Phone *			Publisher Contact Phone *	
Primary Contact	Suppress Email Notification	15		tact information shared with my publisher and/or funding to facilitate APC payment(s), reporting and customer





### Notifications

Agreement Manager administrators can set up notifications based on spending amounts or APC tokens used or remaining.

Click the bell to enter notification setup:

Profile Nickname	Profile Na	nme 🗢 🛛 Publisher 🗢	Invoicing Frequency	\$ Profile Start Date	Profile En Date	<sup>d</sup> \$	Profile Status	•	Automatic Approvals	\$ Notifications
Click to add	Andy Test	CAMBRIDGE UNIVERSITY PRESS (UK)	Monthly	26-Apr-2018	N/A		Active		$\checkmark$	4



### Notifications

Select the contact from your organisation who you want to receive the notification:

Set when you would like to be notified, either when APC tokens used/remaining reaches a certain threshold, or when funds used/remaining (GBP) reaches a certain threshold.

Remember to 'save'!







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 $\checkmark$ 



## Reporting

On a regular basis you will be sent a report by Cambridge which includes data for both Open Access and subscription based articles published by corresponding authors at participating institutions.

PII	Publication Status	DOI	Article Title	Article Type	OA Article	OA Licence Type	Journal Mne	Journal Title	Journal Subject
S0007123420000356	first-view	10.1017/S0007123420001234	Title 1	Research-Article	Yes	CC-BY	JPS	Journal title 1	Subject 1
S0963548320000358	first-view	10.1017/S0963548320001235	Title 2	Research-Article	Yes	CC-BY	CPC	Journal title 2	Subject 2
S0963548320000590	first-view	10.1017/S0963548320001236	Title 3	Research-Article	Yes	CC-BY	CPC	Journal title 3	Subject 3
S1755048320000644	first-view	10.1017/S1755048320001237	Title 4	Research-Article	Yes	CC-BY	RAP	Journal title 4	Subject 4
S1742170520000356	first-view	10.1017/S1742170520001238	Title 5	Review-Article	No		RAF	Journal title 4	Subject 5

Current OA Status	Enters to Prod Date	Online Publication Date	GRID ID	GRID Name	GRID Country	Affiliation Record	Affiliated Author
Hybrid OA	19/06/2020	18/11/2020	grid.34421.xx	University 1	United States	Departments of Physics, University 1	Author 1
Hybrid OA	08/07/2020	12/10/2020	grid.34421.xx	University 1	United States		Author 2
Hybrid OA	09/10/2020	10/11/2020	grid.34421.xx	University 1	United States		Author 3
Hybrid OA	16/11/2020	15/12/2020	grid.34421.xx	University 1	United States		Author 4
Hybrid OA	02/11/2020	27/11/2020	grid.34421.xx	University 1	United States	Departments of Agronomy and Horticulture, University 1	Author 5



### Resources

We have a range of resources to help support your agreement





### **Open Access** Waivers and Discounts

The costs of publishing Open Access (OA) are typically met through an Article Processing Charge (APC) that is paid by the author or author's funding body or institution. This APC might be waived or discounted if:

• Your institution has an Open Access publishing agreement with Cambridge, such as a Read and Publish agreement

• You are based in a low- and middle-income country on the Research4Life country list and publishing in our fully Gold Open Access journals

Use our tool to find out if you are eligible for an Open Access waiver or discount

United Kingdom	
lame of your institution:	
University of Cambridge	~

## OA Waiver & Discount Tool

Allows authors to easily check their eligibility for an Open Access publishing agreement.

- APC discount available under agreement
- Link to deal agreement page (for specific terms agreed)
- Journals included in agreement

### cambridge.org/oa-waivers-and-discounts



## Top tips



Contact details

Make sure we have your correct contact details



Automatic approvals

Reduce your administrative burden and optimize author experience

# Promote your agreement

Make sure authors are aware through your key channels





## FAQs



How does Cambridge identify an author's eligibility under an agreement?

An author will enter their
affiliation details into the Online
Peer Review System (OPRS) when
submitting their article. Details in
the 'affiliation string' that are
necessary to identify eligibility
under R&P include institution and
email domain. We rely on authors
to enter their correct affiliation
details and work on a system of
trust.

Once an article is accepted for publication, the metadata is fed into our Production system, where the affiliation string is automatically **assigned a GRID**, which allows us to match the institution to a R&P agreement.

If an article has an R&P eligible GRID, we assess the article under the criteria relevant to the agreement (article type, journal package, term of agreement). This allows us to confidently identify authors who are eligible for an APC waiver or discount through an OA publishing agreement.



# What is a GRID id?

The Global Research Identifier Database (GRID) is an openly accessible database of educational and research organisations worldwide, maintained by Digital Science & Research Solutions Ltd. A GRID is assigned to the article's metadata before it is sent to Rightslink<sup>®</sup>. The GRID assigned is based on the corresponding author's institutional affiliation. Institutions are not required to provide GRIDs as we take this information from the GRID database.



## Questions and Answers



## oaqueries@cambridge.org

