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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The author publishing journey

Rightslink OA Agreement Manager

Post sales support

Contact details
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.
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.

Journal homepages

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

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)

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

Record created in production tracking system
Improved digital licensing solution

Receive an information request form from Ironclad, pre-populated 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.

125 titles currently live
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 allows authors to select their creative commons license. This form functions as an addendum to any existing agreement.

If a contract has been processed on Ironclad, authors will amend their original agreement.
Affiliated authors of eligible articles do not interact with the APC transaction process. Rightslink® 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.
**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

<table>
<thead>
<tr>
<th>Message Received</th>
<th>Trigger</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Welcome to RightsLink”</td>
<td>Sent after you have been granted access to the Agreement Manager Institutional Portal for the first time</td>
<td>Follow the instructions and complete the reset password process to log into Agreement Manager</td>
</tr>
<tr>
<td>“One of your researchers has had a manuscript accepted for publication”</td>
<td>If automatic approvals are off, the institution gets notified that an accepted manuscript is eligible for their funding</td>
<td>User invited to log in to Institutional Portal to review and act upon the request.</td>
</tr>
</tbody>
</table>
# Author Touch Points and Messaging

<table>
<thead>
<tr>
<th>Message Received</th>
<th>Trigger</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Manuscript decision”</td>
<td>Sent when an article has been accepted for publication</td>
<td>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.</td>
</tr>
<tr>
<td>(from CUP)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Welcome e-mail from CUP production”</td>
<td>Sent after CUP production has updated the article record with the author publishing agreement</td>
<td>None required if author has already completed their author publishing agreement.</td>
</tr>
<tr>
<td>(from CUP)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“Your APC funding request has been approved/denied”</td>
<td>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</td>
<td>None. Information only.</td>
</tr>
<tr>
<td>(from Rightslink)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Introductions

Benefits of Open Access

The author publishing journey

Rightslink OA Agreement Manager

Post sales support

Contact details
We work with Rightslink®-CCC to process article processing charges (APCs).

Institutions and authors participating in institutional Open Access agreements benefit from Rightslink®'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.
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.
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.
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***
Approvals

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

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Post sales support

Contact details
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.

<table>
<thead>
<tr>
<th>Title</th>
<th>Article Type</th>
<th>OA Article</th>
<th>OA Licence Type</th>
<th>Journal Mne</th>
<th>Journal Title</th>
<th>Journal Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title 1</td>
<td>Research-Article</td>
<td>Yes</td>
<td>CC-BY</td>
<td>JPS</td>
<td>Journal title 1</td>
<td>Subject 1</td>
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<tr>
<td>Title 2</td>
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<td>CC-BY</td>
<td>CPC</td>
<td>Journal title 2</td>
<td>Subject 2</td>
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<tr>
<td>Title 3</td>
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<td>Yes</td>
<td>CC-BY</td>
<td>CPC</td>
<td>Journal title 3</td>
<td>Subject 3</td>
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<tr>
<td>Title 4</td>
<td>Research-Article</td>
<td>Yes</td>
<td>CC-BY</td>
<td>RAP</td>
<td>Journal title 4</td>
<td>Subject 4</td>
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<tr>
<td>Title 5</td>
<td>Review-Article</td>
<td>No</td>
<td></td>
<td>RAF</td>
<td>Journal title 4</td>
<td>Subject 5</td>
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</table>

<table>
<thead>
<tr>
<th>Current OA Status</th>
<th>Enters to Prod Date</th>
<th>Online Publication Date</th>
<th>GRID ID</th>
<th>GRID Name</th>
<th>GRID Country</th>
<th>Affiliation Record</th>
<th>Affiliated Author</th>
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<tr>
<td>Hybrid OA</td>
<td>19/06/2020</td>
<td>18/11/2020</td>
<td>grid 34421 xx</td>
<td>University 1</td>
<td>United States</td>
<td>Departments of Physics, University 1</td>
<td>Author 1</td>
</tr>
<tr>
<td>Hybrid OA</td>
<td>08/07/2020</td>
<td>12/10/2020</td>
<td>grid 34421 xx</td>
<td>University 1</td>
<td>United States</td>
<td></td>
<td>Author 2</td>
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<td>Hybrid OA</td>
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<td>10/11/2020</td>
<td>grid 34421 xx</td>
<td>University 1</td>
<td>United States</td>
<td></td>
<td>Author 3</td>
</tr>
<tr>
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<td>15/12/2020</td>
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<td>University 1</td>
<td>United States</td>
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<td>Author 4</td>
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<tr>
<td>Hybrid OA</td>
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<td>27/11/2020</td>
<td>grid 34421 xx</td>
<td>University 1</td>
<td>United States</td>
<td>Departments of Agronomy and Horticulture, University 1</td>
<td>Author 5</td>
</tr>
</tbody>
</table>
Resources
We have a range of resources to help support your agreement

For authors
Guidance on publishing OA
[link]
cambridge.org/publishoa
Webinars
[link]
cambridge.org/oa-videos

For you
OA Information
[link]
cambridge.org/oa-lib-hub
Read & Publish promotional resources
[link]
cambridge.org/rapresources
Rightslink Institution Resource Center

Training
Regular sessions to support your understanding of the author workflow and how to use Agreement Manager
Training requests can be made via
[link]
academictraining@cambridge.org
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

[link to cambridge.org]
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®. 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