Read and Publish

Implementation & Administration Guide - Touch Free Transactions

cambridge.org/read-and-publish
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Open research at Cambridge University Press

At Cambridge University Press our mission is to unlock people’s potential with the best learning and research solutions.

This mission complements the goals of the open research movement, which seeks to unlock the potential in academic research, using open tools to drive collaboration and improve accessibility, efficiency and impact.

That vision, so closely aligned with our own, is why we believe that making open research work for our communities is so important.

Our service and workflow for authors and administrators

To support our Read and Publish agreements, we are continuously improving our publishing workflows, working in close collaboration with our customers to implement feedback and enhance the author and librarian experience.

We have an ongoing programme of technology and infrastructure improvement projects to ensure that we develop the best workflow for authors and customers with a focus on:

- Consistent article and author metadata to fully support Read and Publish programs
- Regular communications to authors across the publishing journey, flagging their eligibility to publish OA under a Read and Publish agreement at key decision points
- Streamlined processes for institutions to administer their Cambridge Read and Publish deal in an author-centric fashion

Have your say!

We welcome your contributions. Please send feedback, questions or suggestions to:

oaqueries@cambridge.org
The author experience

The following section outlines the steps that an author will take to publish their article Open Access under a read and publish agreement, from article submission, to the article processing charge (APC) transaction, and publication.

To be eligible for an APC waiver or discount, the corresponding author of the article must be affiliated with an institution participating in the agreement.

**The corresponding author:**

- Handles the manuscript and correspondence during the publication process
- Has the authority to act on behalf of all co-authors in all matters pertaining to publication of the manuscript including supplementary material
- Is responsible for informing co-authors of the manuscript's status throughout the submission, review, and publication process
- Acts as the point of contact for any enquiries after the paper is published.

**Guidance for authors**

Author-facing information is available at: cambridge.org/publishoa

**Open Access policies**

Find out more about our OA policies: cambridge.org/openaccess
1. Manuscript preparation

The author finds their chosen journal on Cambridge Core, reviews author instructions, and formats their manuscript accordingly. Information pages may also contain further information about Open Access options available in that journal.

2. Manuscript submission

The author navigates to the journal’s submission system (aka. online peer review system) via the ‘submit your article button’ on the journal homepage. The author then logs in, ideally using their ORCID iD. Institutional affiliation and email address should be used whenever prompted. Upon submitting their manuscript and any supplementary materials, the author will receive an email confirming their successful submission.

The majority of our journals use the online peer review system, ScholarOne. Other submission systems, such as Editorial Manager and EditFlow, are also used to better support the needs of our publishing communities.

3. Manuscript review

The author may check the status of their article in the online peer review system. The status shown may differ per journal, but most will say ‘under review’ or ‘awaiting decision’.
4. Manuscript decision

Following peer review, the journal’s editorial team will inform the author of their final decision. If accepted, and following the completion of any revisions required, the author must follow the link in the email and complete an **author publishing agreement**.

The completion of this form and selection of an appropriate licence indicates that the article is to be published Open Access. 

[Click here for guidance on Creative Commons licenses](#)

If an eligible author has not selected to publish OA, Cambridge will contact the author to inform them of their opportunity to publish OA via their institution’s Read and Publish deal. Authors will be contacted by [oaqueries@cambridge.org](mailto:oaqueries@cambridge.org), who provide a link to resupply the author publishing agreement and select an appropriate CC-BY licence.
5. Transaction process

When the completed author publishing agreement is returned, the article’s record will be updated in our production tracking system. This triggers the Rightslink®-CCC transaction process. Rightslink® work on Cambridge’s behalf to collect article processing charges (APCs).

An institution with a 100% unlimited R&P deal can opt for their authors to bypass the normal APC transaction workflow which would require them to seek funding. This ‘touch-free’ transaction process means that authors do not interact with Rightslink®.

Rightslink® match the GRID ID, corresponding affiliated email domain and journal of publication to a deal’s profile and automatically apply the appropriate discount to the APC. If librarian approvals are turned off, the article will also be approved automatically.

A final notification will still be sent to the author to confirm the APC discount has been approved/applied, and that their article will be published OA.

Institution approvals:

Touch-free functionality works with or without institution interaction. Institutions can either:

- Opt for articles to bypass verification and be approved automatically
- OR receive notifications to approve/deny funding

Notifications can be turned on/off from within the Rightslink® Institutional Portal, and all articles requiring OA funding approval can be viewed from within the Institutional Portal.
6. Article production

During production, the author may contact their dedicated production editor, who will be available to answer questions and offer support as their article progresses through the steps towards publication. The exact production workflow for each journal will vary to match its specific requirements.

7. Article publication

Upon publication, the author will receive an email stating that their article is published on Cambridge Core.

Guidance on how to promote the published article is available within the article publication email and on Cambridge Core.
Rightslink® OA Agreement Manager

What is Agreement Manager?

Cambridge works with Rightslink® - Copyright Clearance Center (CCC) to use their tool, OA Agreement Manager, which has been purpose-built to facilitate smoother financial transactions for Read and Publish deals.

What are the benefits?

The system offers a number of advantages for all stakeholders, including:

- Automatic identification of authors who are eligible for an APC discount/waiver
- Automatic discount and approval process, meaning a ‘touch-free’ journey for the author
- Functionality for institutions to review and authorise funding (optional)
- Visibility on APCs processed under agreement

Find out more about the features and benefits here:
OA Agreement Manager Product Sheet

Touch free transactions

For 100% discounted Read and Publish deals, OA Agreement Manager offers a ‘touch-free’ transaction workflow for both authors and administrators.

Under this process, authors do not have to interact with the payment process at all. Librarians may approve/deny articles, toggling these notifications on and off from within the institutional portal.

This configuration must be decided upon before the profile is created and is not editable once the profile is active, or throughout the agreement.

Tools and resources

The Agreement Management Module’s Institutional Portal is designed to support your work with RightsLink®.

You can also contact oqueries@cambridge.org for questions relating to your profile.
INSTITUTION PROFILE

The following section details the information that is set up on your behalf by our sales operations team, within the Publisher Portal.

Profile set-up

A profile for your read and publish agreement is created by our sales operations team within the Publisher Portal. This profile can either be at consortium or institution level. Profiles for different institutions can be linked by overarching billing organisations. These details form the basis of your profile view in the Institutional Portal.

Identification criteria

We currently use GRID ID and email domain to match eligible authors to profiles. Authors matched to a profile are then offered the appropriate APC discount for their article. These identifiers can be added, updated or removed throughout the agreement.

The Global Research Identifier Database (GRID) is an openly accessible database of educational and research organisations worldwide, maintained by Digital Science & Research Solutions Ltd. Our production editors add a GRID ID to the article’s metadata, based on the corresponding author’s institutional affiliation, before sending information to Rightslink®. Participating institutions are not required to provide GRID IDs as we take this information from the GRID database.
Agreement criteria

Various attributes are added to the profile by Cambridge’s sales operations team, including:

- **Start & End Date**: Dates profile active. The profile will automatically expire after this date.
- **Manuscript Acceptance Date must fall within this date range**: Not used.
- **Invoicing currency**: Will show the APC price in a single currency.
- **Eligible journals**: Selected journals in package that will match with the profile.
- **Eligible authors**: Set at Primary Author/Corresponding Author.
- **Creative Commons License Required**: The functionality to use this as a profile matching criteria is in development.
- **Touch-Free Transactions**: Must be decided upon before profile is created and is not editable once profile is active. The author is excluded from the APC payment process.

APC tokens and discounts

The mechanics of the automated discounts are driven by a background token system. Tokens can be added or subtracted at any time throughout the agreement.
INSTITUTIONAL PORTAL

Access

The Institutional Portal is accessible via: https://apcfunding.copyright.com/
Once your profile has been created, you will receive your login information.

Billing profile

The billing profile will be set up for you by Cambridge. To assist in this process you will be asked to provide the following details once your deal has been signed:

- Institution
- Contact Name
- Email address
- Telephone number
- Postal address
- VAT number
- PO number (optional)
- Associated email domains

Please use the billing details that would normally be used to pay an APC at your institution. We require these details for all users intending to use the profile to authorise OA articles, even if the organisation does not expect to receive any billing.

Important note:

These details need to be set up in RightsLink®’s financial systems before a profile can be made. Please ensure you provide this information when prompted by your Cambridge contact.

The ‘billing profiles’ tab within the institutional portal will show all profiles associated with your Cambridge Read and Publish agreement.

Automatic approvals and notifications

Checking the ‘Automatic approvals’ check box will bypass the need for institutions to verify funding requests - all articles will be automatically approved. Notifications can also be set up for token and deposit usage. These can be turned on or off throughout the deal.
Agreement criteria and key contacts

Institutions can view the criteria that Cambridge has used to set up your profile - the view is the same as the publisher portal view, with some additional features.

Organization contact details

These details are initially entered by our sales operations team, but can be updated by at any time upon request.

Up to three organization contacts may be added, with one primary contact. To create a new contact, please email oqueries@cambridge.org or your usual Cambridge contact.

A check box next to each contact allows you to suppress email notifications; this can be switched on and off at any time.

Organization contacts will be able to log into the Institutional Portal and approve or deny requests to use the agreement discount.
Reporting

On a monthly 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.

Fields include:

- Corresponding author name, affiliation and email domain
- Bibliographic metadata (journal title, abbreviation, and ISSN; article title and type)
- Date of acceptance and date of publication
- Article APC (GBP)
- Open Access status
- CC licence
- Rightslink institution affiliation used for discount (paying institution)

For questions about reporting, please contact oaqueries@cambridge.org or your Cambridge contact.