Welcome to EEMUG 2017

13th Annual European Editorial Manager® User Group Meeting

Aries systems

Fee Processing

Betsy Hopkins
13 January, 2017

13th Annual European Editorial Manager® User Group Meeting

Aries systems

Agenda

- Fee Processing Overview
  - What is it?
  - Why would you need it?
  - How would you do it?
- Commerce Manager
  - Submission Fee
  - Ad Hoc Fees
- Article Processing Charges (APCs)
  - Integration with RightsLink by Copyright Clearance Center
- Conclusion

Fee Processing

An Overview

What is it?

- Fee Processing – way of handling fees as part of the workflow in a seamless way

- These may include:
  - Submission Fee
  - Ad Hoc Fees
  - Publication Charges
  - Page Charges
  - Color Charges

Why would you need it?

- Accommodate changing business models
  - Open Access

- Increased pressure to boost and/or diversify revenue streams
  - Publication Fees
  - Submission Fees

How would you do it?

- Points to consider:
  - Integrated way to charge fees that isn't disruptive for authors
  - Easy to use (authors and staff)
  - High level of security
  - Compatible with accounting systems
  - Configurable to suit your needs

How would you do it?

- Commerce Manager – Editorial Manager product
  - Submission Fee
  - Ad Hoc Fees
- Article Processing Charges (APCs)
  - Integration with RightsLink by Copyright Clearance Center
  - Publication Charges
  - Production-related charges

An Overview

Commerce Manager

- Integrated and easy way to charge author fees
- Multiple payment options, e.g. credit cards
- Easy Author Tracking with Editorial Manager
- Ability for staff to easily run reports on all pending, late or completed charges
- Ability to export data to integrate with your accounting system
- Highly configurable by staff administrators

Integrated and easy way to charge fees

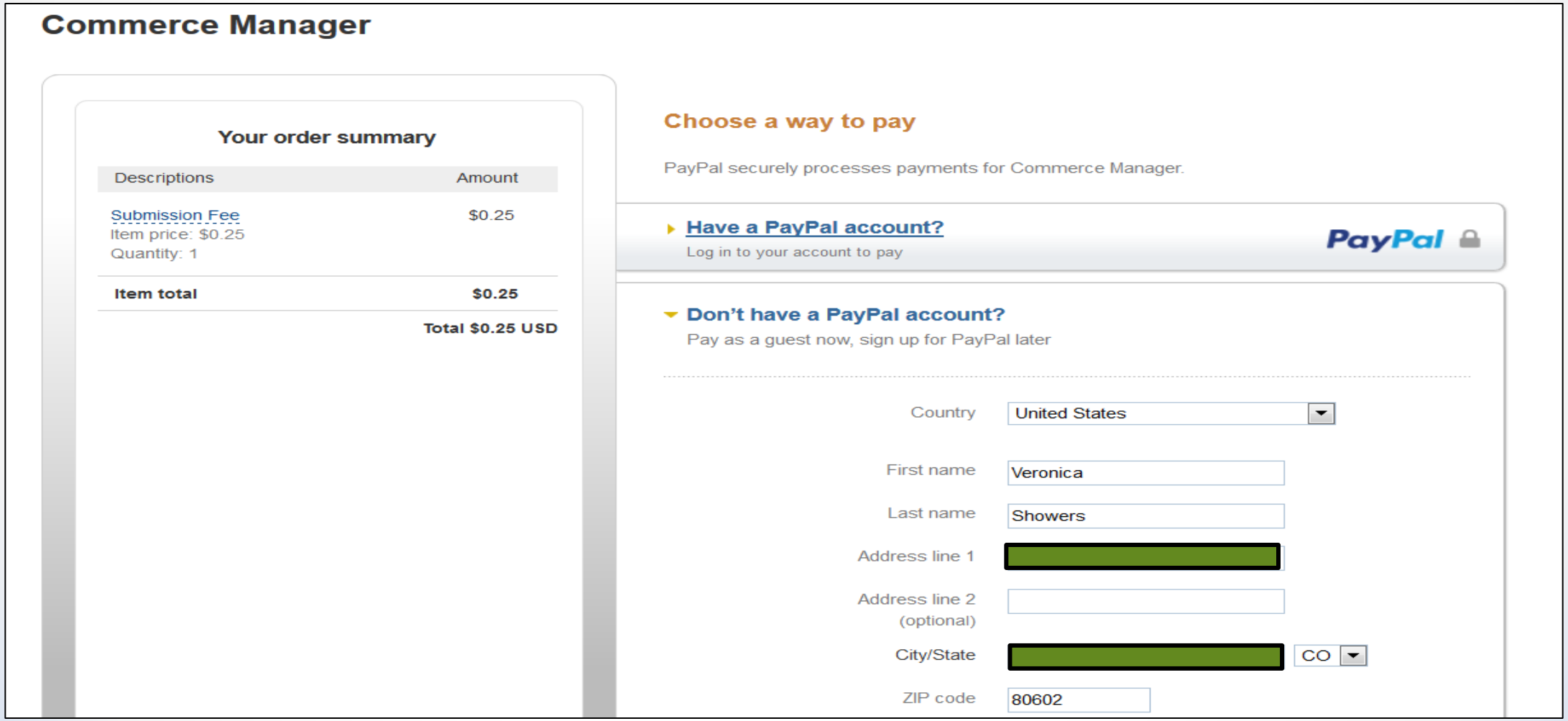
Multiple payment options

Multiple payment options

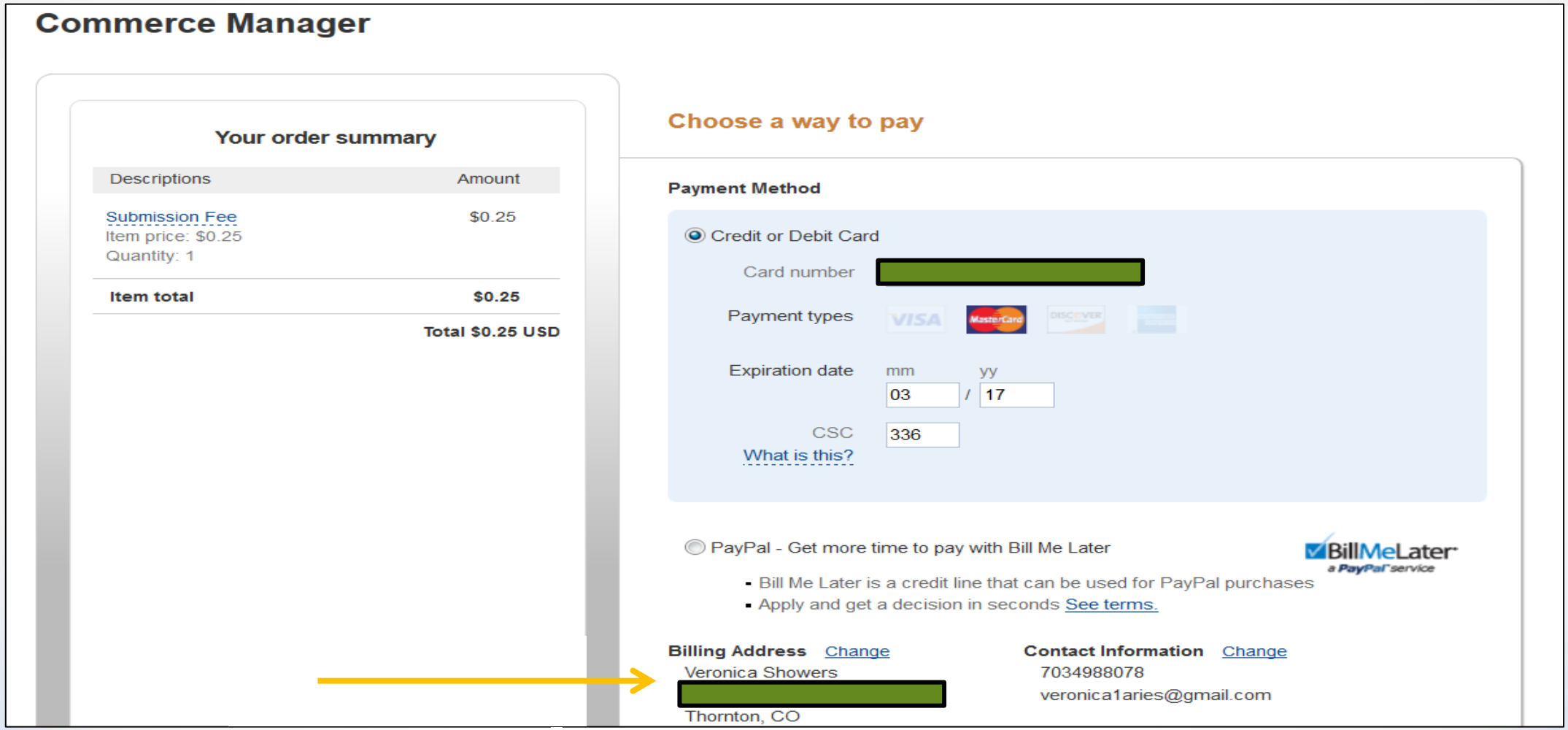
- Each fee can be configured to include different payment options:
  - Credit Card
  - “Bill Me”
  - Request Waiver
  - Request Institutional Waiver

- Example: Credit Card

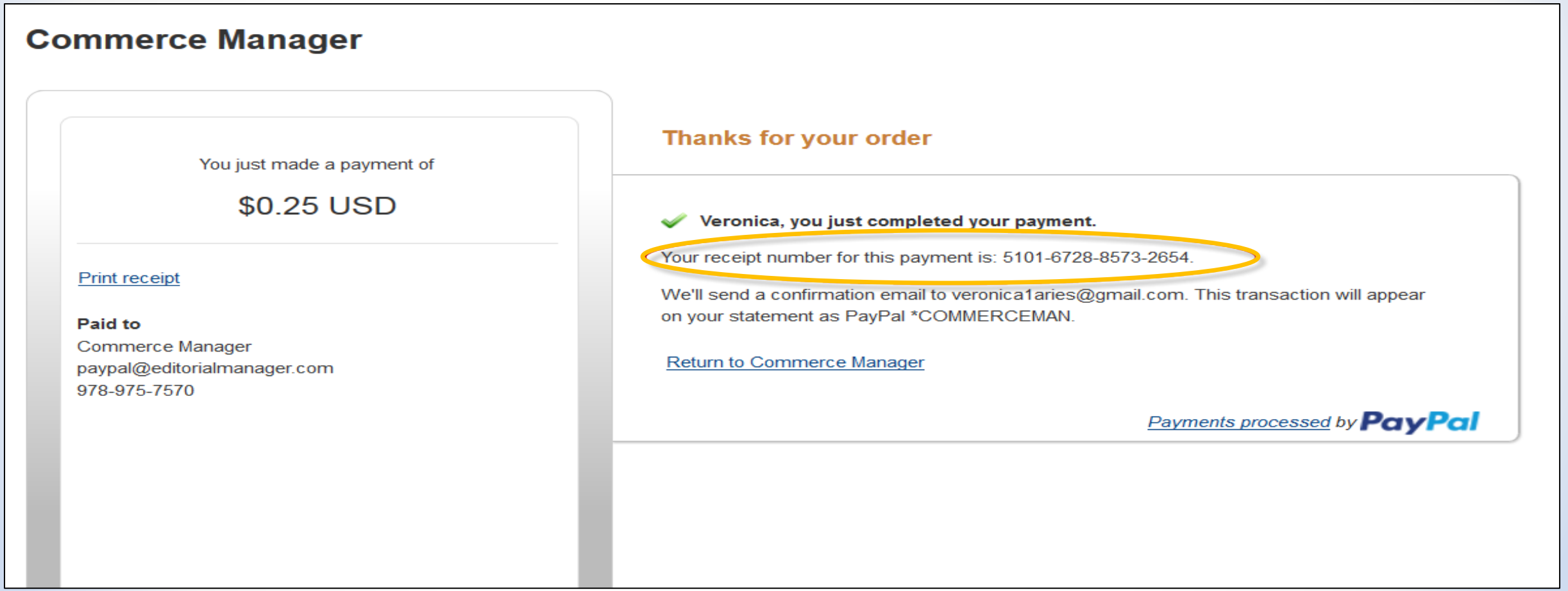
Multiple payment options



Multiple payment options



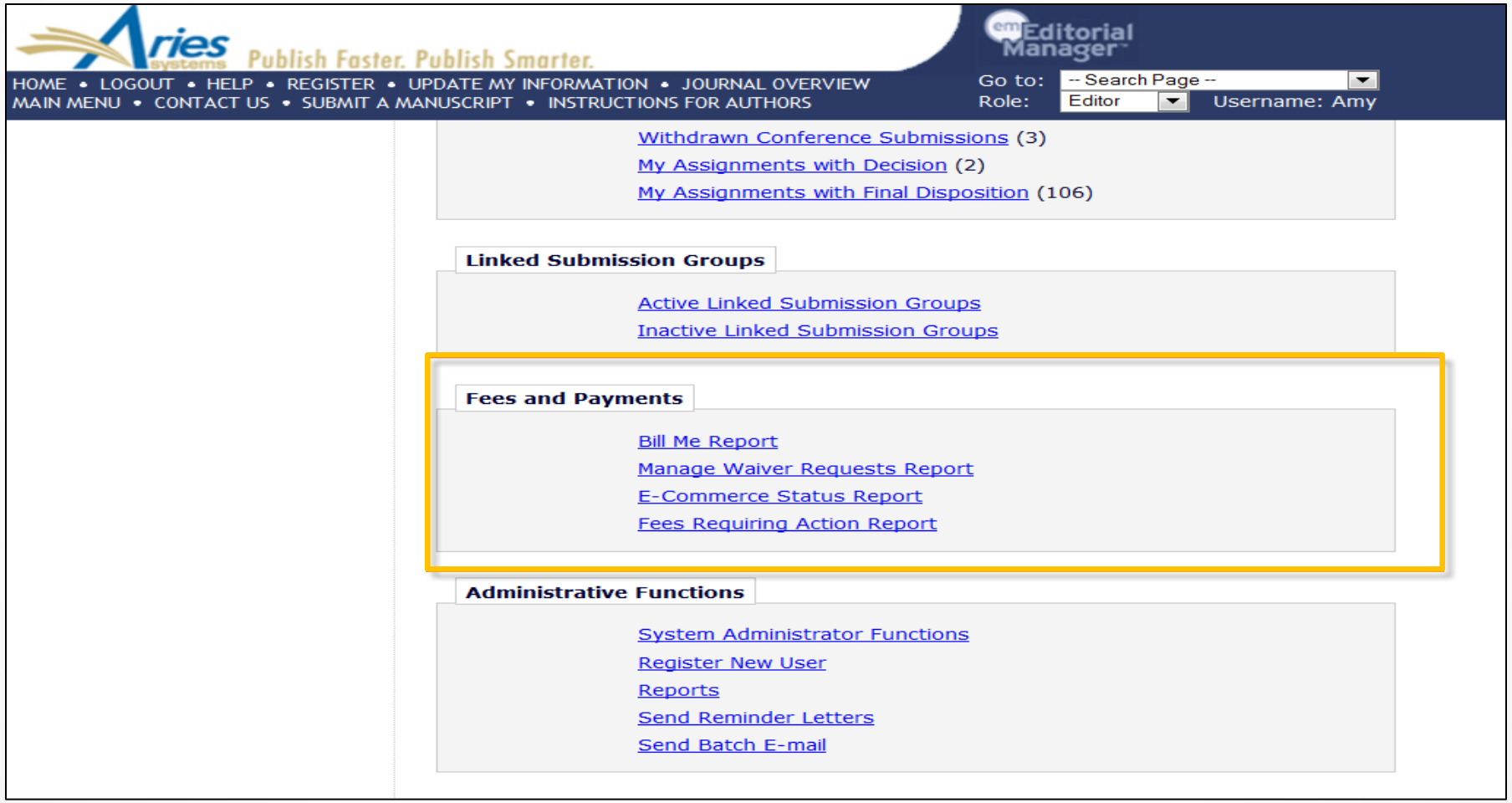
Multiple payment options



Easy Author Tracking

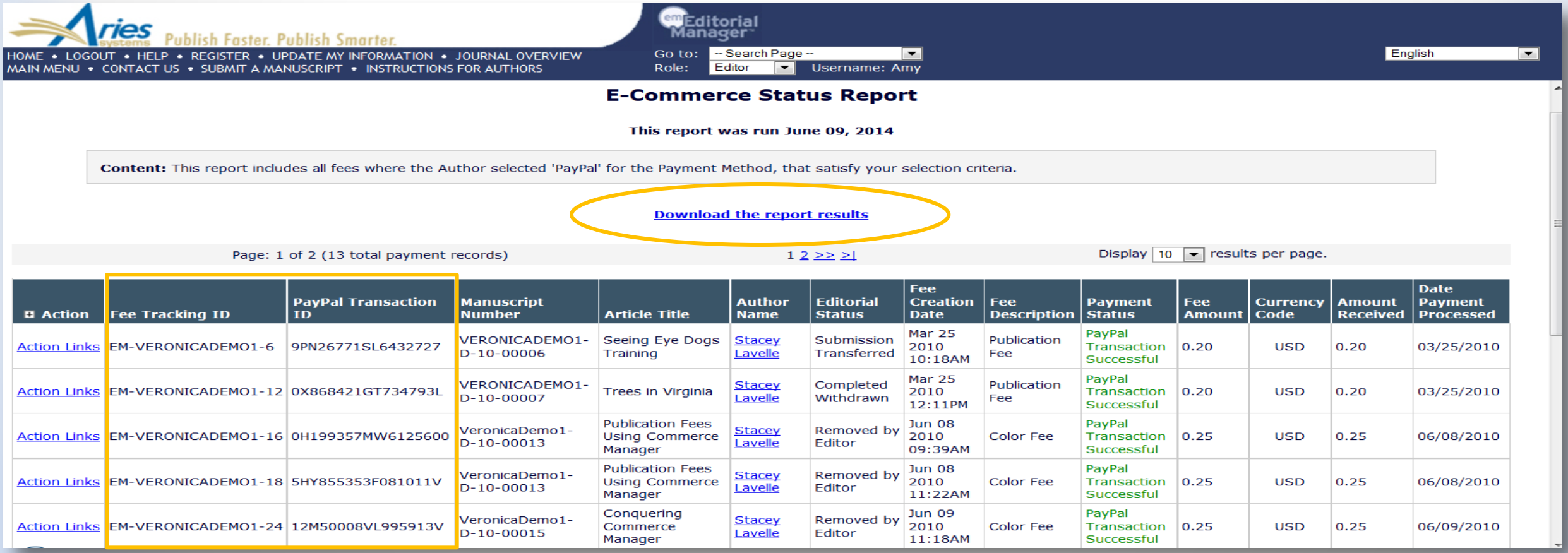
Easy Author Tracking

Ability to easily run reports



Ability to easily run reports

Ability to export data



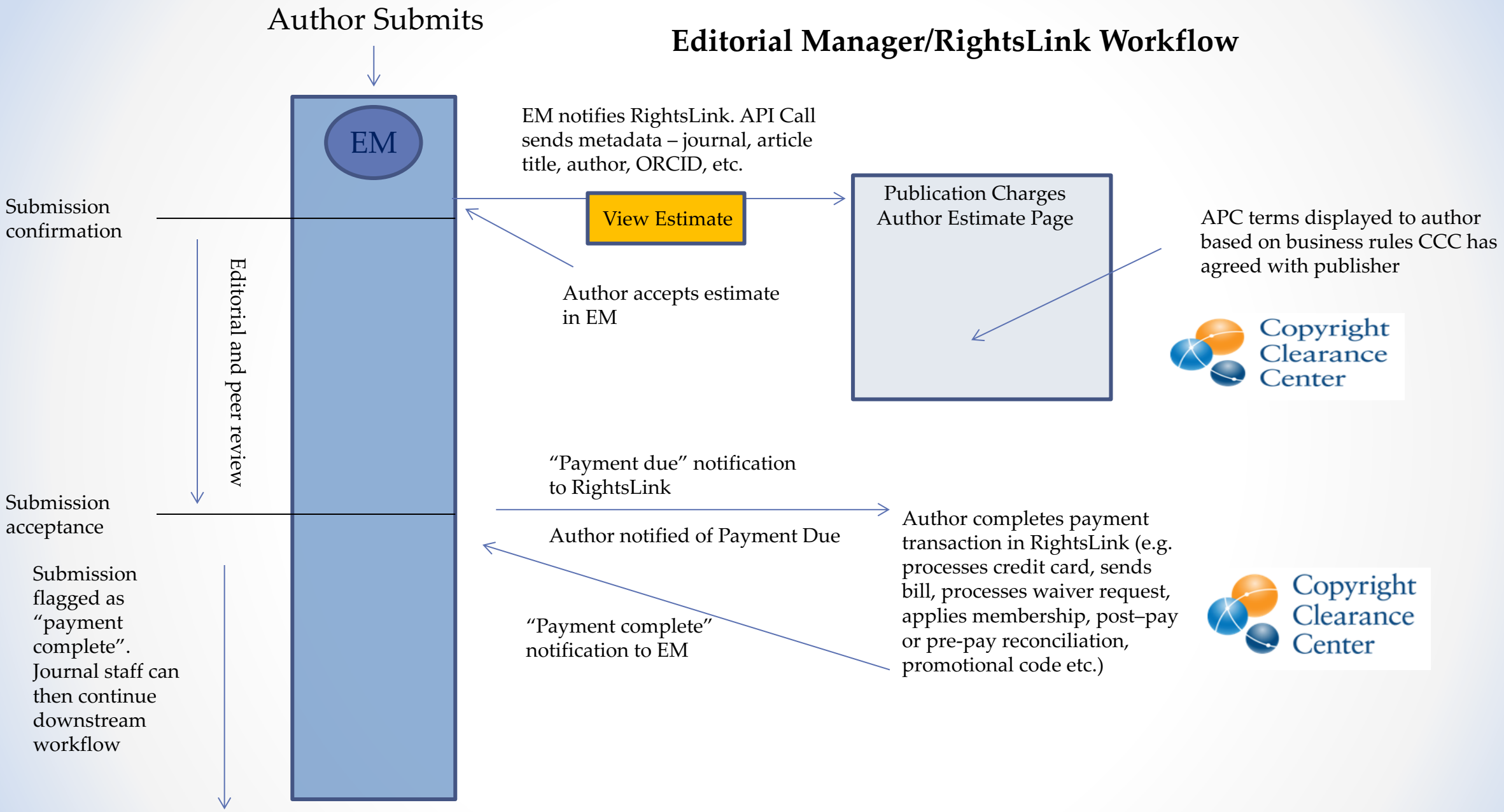
Action	Fee Tracking ID	PayPal Transaction ID	Manuscript Number	Article Title	Author Name	Editorial Status	Fee Creation Date	Fee Description	Payment Status	Fee Amount	Currency Code	Amount Received	Date Payment Processed
Action Links	EM-VERONICADEMO1-6	9PN26771SL6432727	VERONICADEMO1-D-10-00006	Seeing Eye Dogs Training	Stacey Lavelle	Submission Transferred	Mar 25 2010 10:18AM	Publication Fee	PayPal Transaction Successful	0.20	USD	0.20	03/25/2010
Action Links	EM-VERONICADEMO1-12	0X868421GT734793L	VERONICADEMO1-D-10-00007	Trees in Virginia	Stacey Lavelle	Completed Withdrawn	Mar 25 2010 12:11PM	Publication Fee	PayPal Transaction Successful	0.20	USD	0.20	03/25/2010
Action Links	EM-VERONICADEMO1-16	0H199357MW6125600	VeronicaDemo1-D-10-00013	Publication Fees Using Commerce Manager	Stacey Lavelle	Removed by Editor	Jun 08 2010 09:39AM	Color Fee	PayPal Transaction Successful	0.25	USD	0.25	06/08/2010
Action Links	EM-VERONICADEMO1-18	5HY855353F081011V	VeronicaDemo1-D-10-00013	Publication Fees Using Commerce Manager	Stacey Lavelle	Removed by Editor	Jun 08 2010 11:22AM	Color Fee	PayPal Transaction Successful	0.25	USD	0.25	06/08/2010
Action Links	EM-VERONICADEMO1-24	12M50008VL995913V	VeronicaDemo1-D-10-00015	Conquering Commerce Manager	Stacey Lavelle	Removed by Editor	Jun 09 2010 11:18AM	Color Fee	PayPal Transaction Successful	0.25	USD	0.25	06/09/2010

Highly configurable

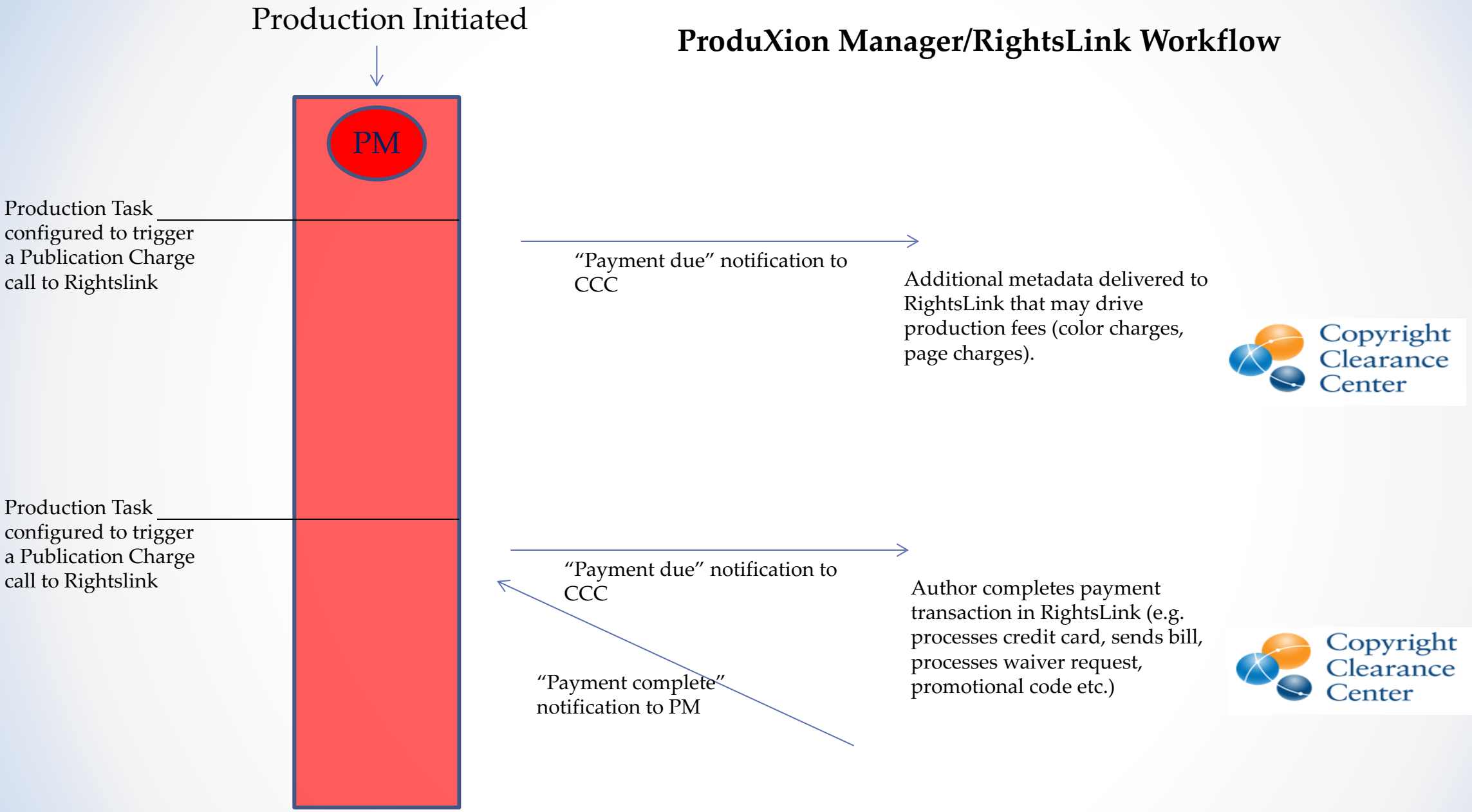
EM and Article Processing Charges

Copyright
Clearance
Center

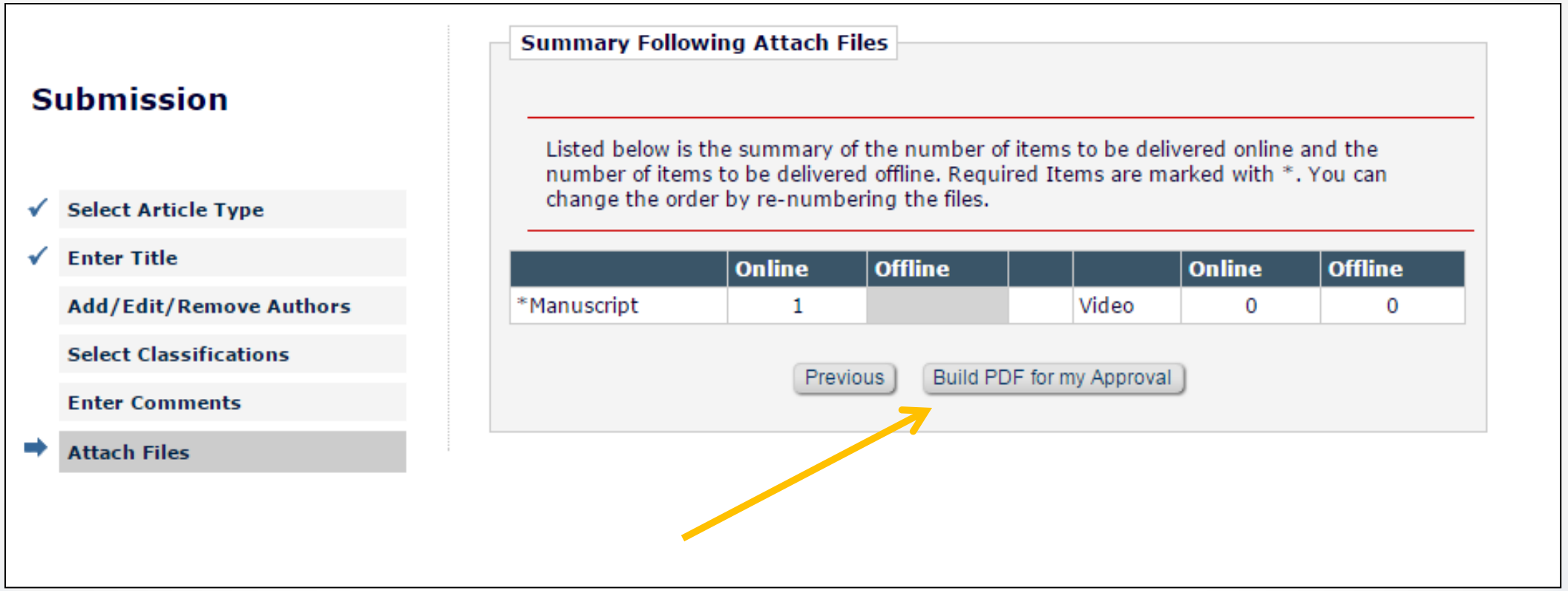
Editorial Manager/RightsLink Workflow



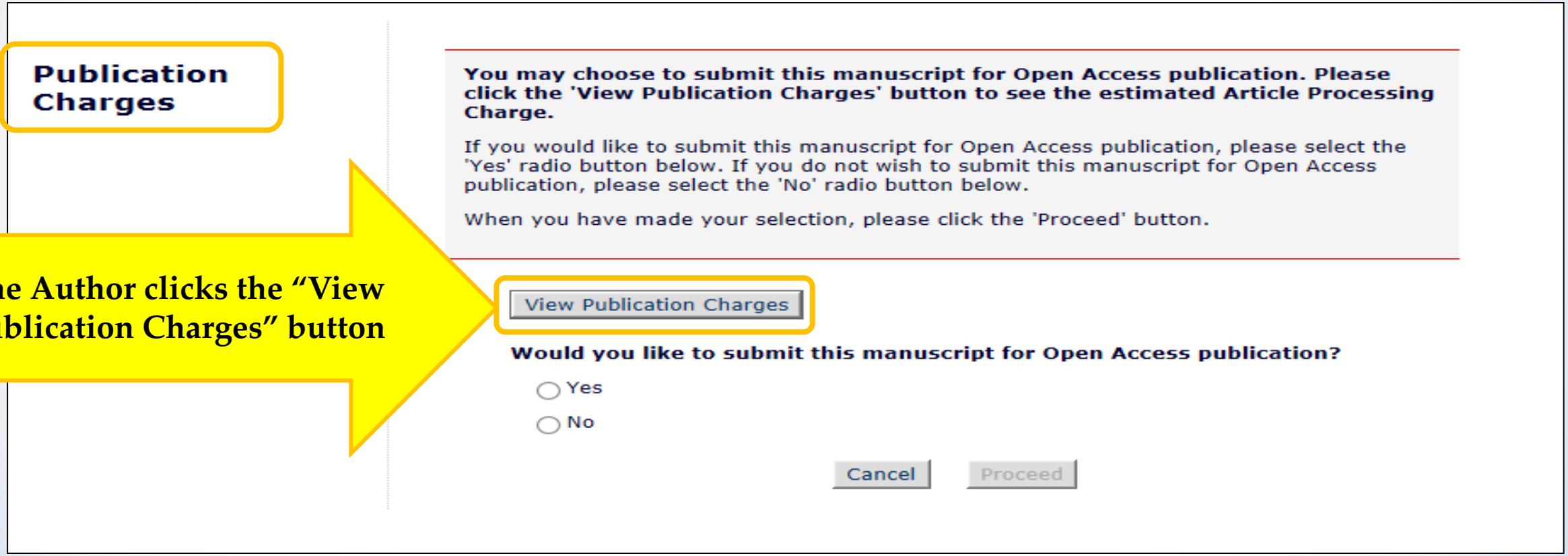
ProduXion Manager/RightsLink Workflow



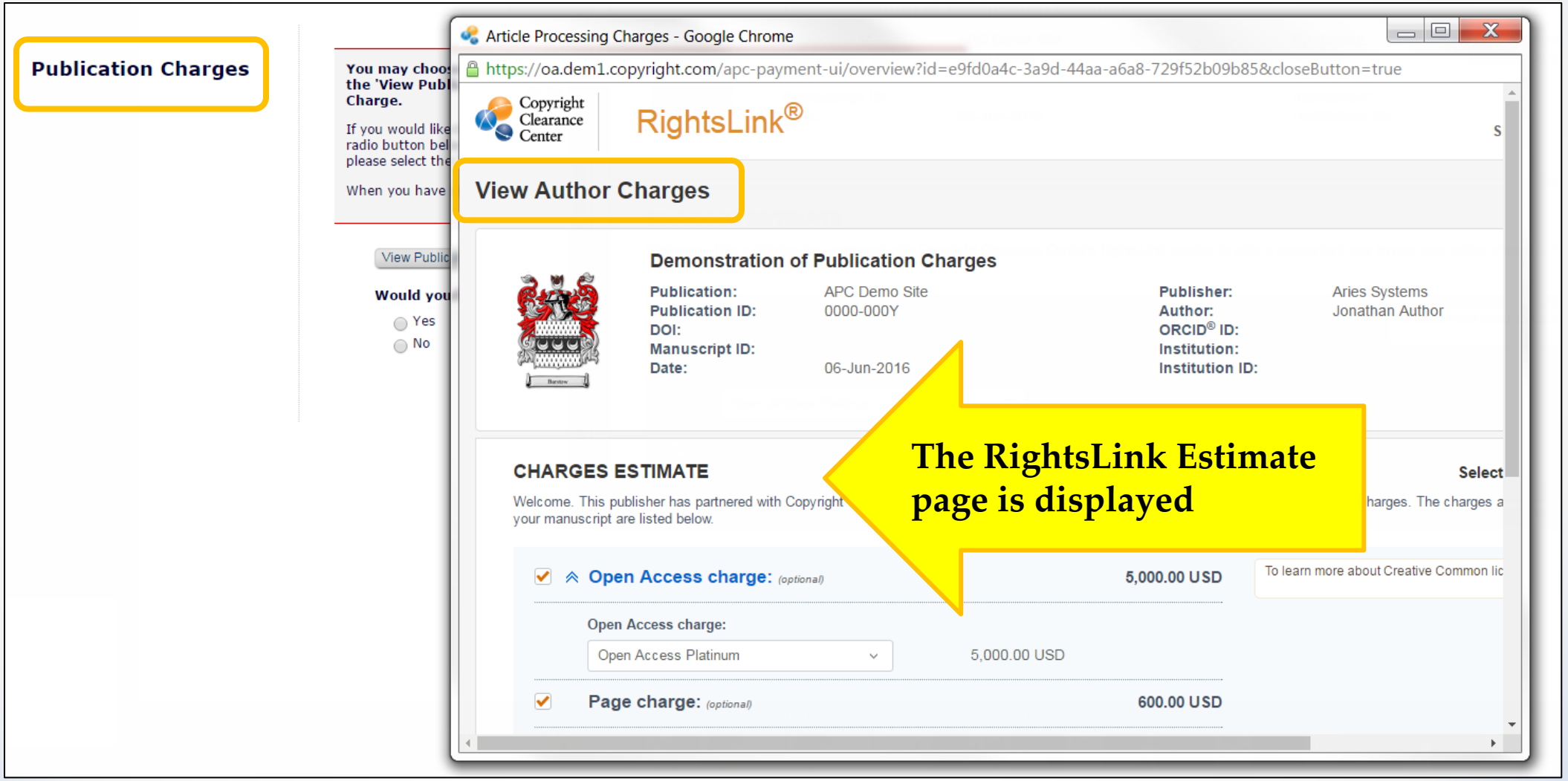
Author Experience



Author Experience



Author Experience



Copyright Clearance Center | RightsLink®

Sign In | Help | Live chat

View Author Charges

Demonstration of Publication Charges

Publication:	APC Demo Site	**Publisher:**	Aries Systems
Publication ID:	0000-000Y	**Author:**	Jonathan Author
DOI:		**ORCID® ID:**	
Manuscript ID:		**Institution:**	
Date:	06-Jun-2016	**Institution ID:**	

CHARGES ESTIMATE

Select currency: USD

Welcome. This publisher has partnered with Copyright Clearance Center's RightsLink service to offer a convenient way to pay your author charges. The charges associated with publishing your manuscript are listed below.

☑ **Open Access charge:** *(optional)*	**5,000.00 USD**
Open Access charge: Open Access Platinum	5,000.00 USD
☑ **Page charge:** *(optional)*	**600.00 USD**
☑ **Color charge:** *(optional)*	**400.00 USD**
TOTAL:	**6,000.00 USD***

View details

* Does not include tax/VAT. Tax/VAT is applied in the Payment Options step during checkout.

To learn more about Creative Common licenses, click here.

The Author can view the estimated charges

APPLY DISCOUNTS

Select **Apply Discounts** to enter promo codes and any other information needed to ensure your pricing reflects all author discounts available to you. When discounts are applied, they are reflected in your charges estimate below. To complete your transaction, proceed to **Payment Options**

CLOSE

These are your estimated charges. Upon acceptance, you will be prompted to return here to pay any final charges due.

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Author Experience

Publication Charges

You may choose to submit this manuscript for Open Access publication. Please click the 'View Publication Charges' button to see the estimated Article Processing Charge.

If you would like to submit this manuscript for Open Access publication, please select the 'Yes' radio button below. If you do not wish to submit this manuscript for Open Access publication, please select the 'No' radio button below.

When you have made your selection, please click the 'Proceed' button.

View Publication Charges

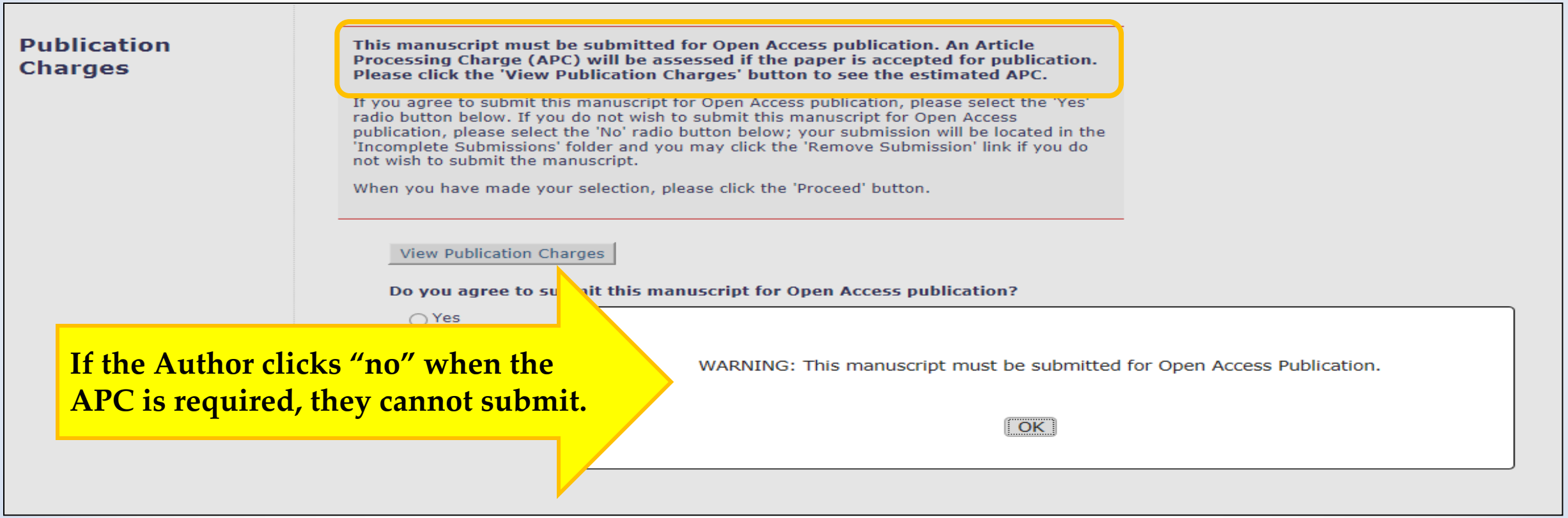
Would you like to submit this manuscript for Open Access publication?

- (•) Yes
- ( ) No

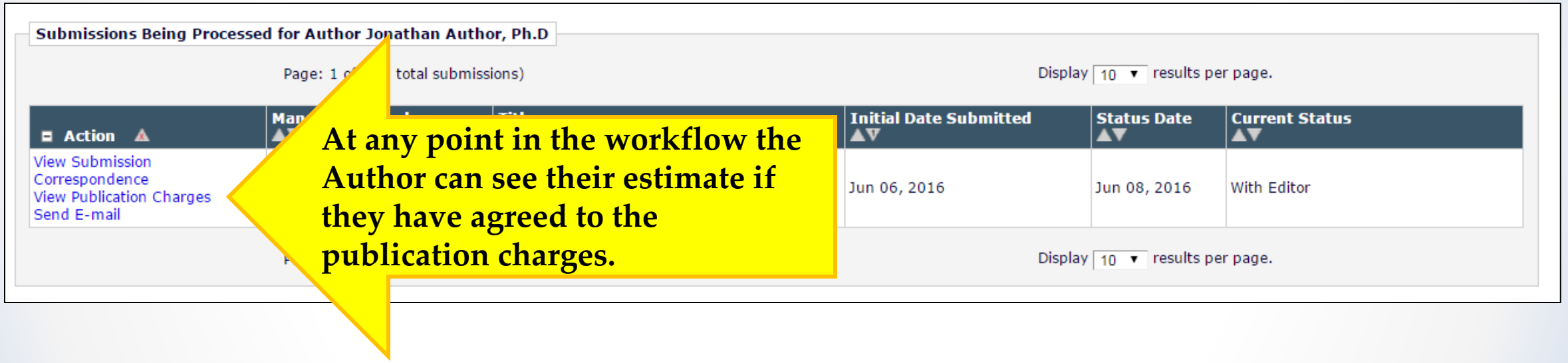
Cancel Proceed

The Author selects the 'Yes' or 'No' button and clicks [Proceed]

Author Experience



Author Experience



APC Payment

- Payment Due call to RightsLink can be triggered at one of two points in **Editorial** process:
  - Author Notification of any decision in the “Revise” or “Accept” decision family
  - Final Disposition of Accept
- Author can be notified via Decision Letter or a letter triggered by “Publication Charges Payment Requested” event
- Merge field %APC_EXTERNAL_LINK% can be used in either letter

Ref.: Ms. No. APCDEMO-D-16-00012
Demonstration of Publication Charges
APC Demo Site

Dear Dr. Author,

congratulations on the acceptance of your paper. Please pay the agreed upon fees via this link:
https://oa.dem1.copyright.com/apc-payment-ui/overview?id=e9fd0a4c-3a9d-44aa-a6a8-729f52b09b85&closeButton=true

Regards,
The Journal

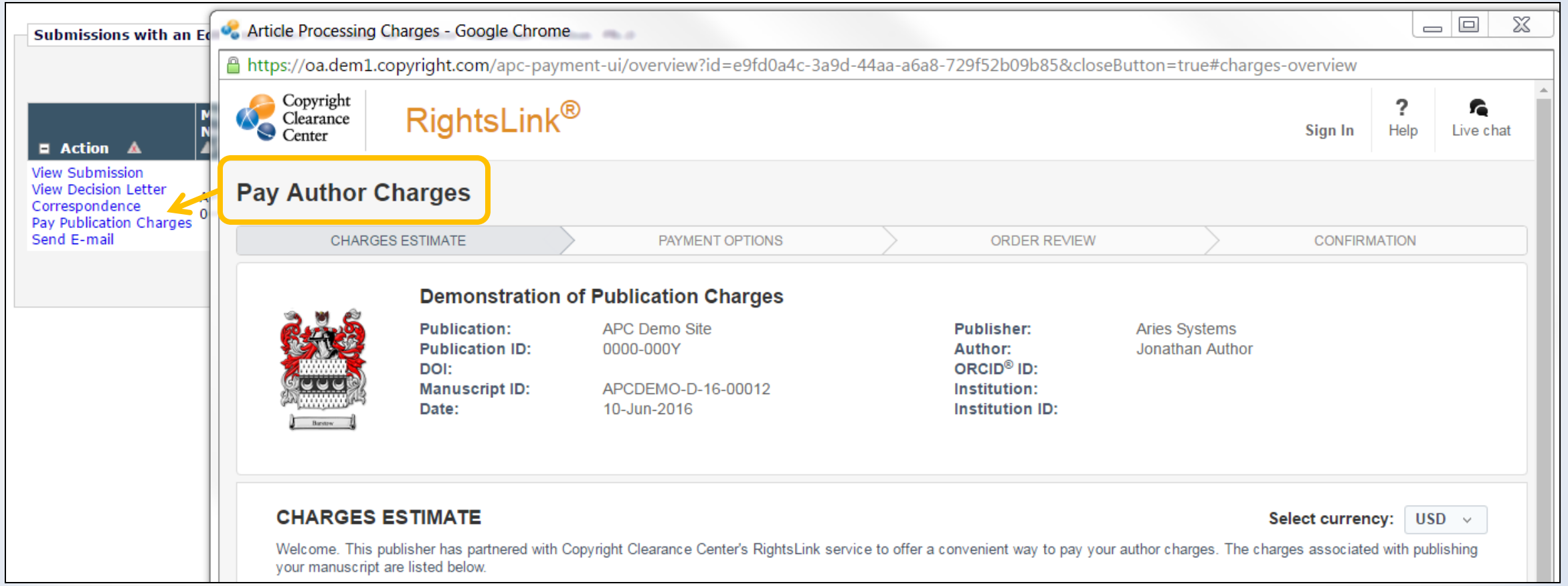
The Author clicks the link in the letter or the link in a folder to access the RightsLink for Open Access Payment page

Submissions with an Editorial Office Decision for Author Jonathan Author, Ph.D

Page: 1 of 1 (1 total completed submissions) Display 10 results per page.

Action	Manuscript Number	Title	Initial Date Submitted	Status Date	Current Status	Date Final Disposition Set	Final Disposition
View Submission View Decision Letter Correspondence Pay Publication Charges Send E-mail	APCDEMO-D-16-00012	Demonstration of Publication Charges	Jun 06, 2016	Jun 10, 2016	Completed Accept	Jun 10, 2016	Accept

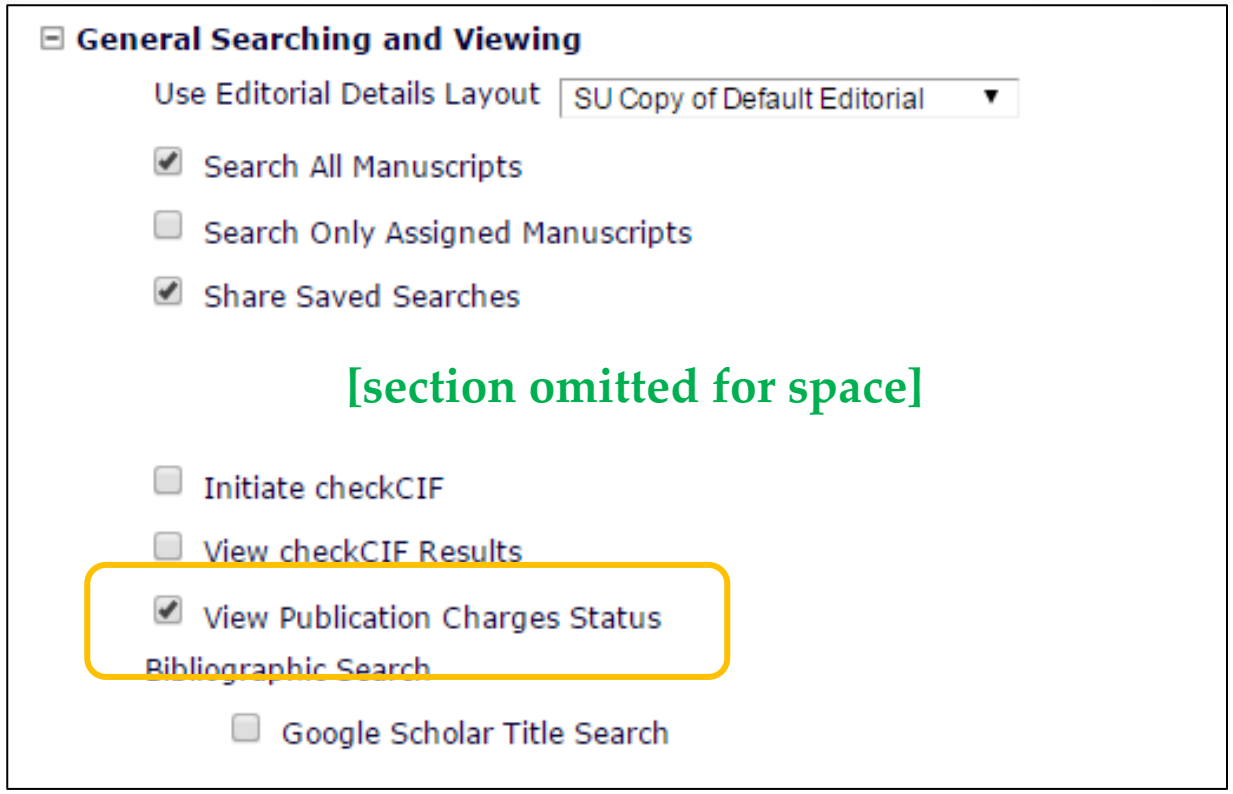
Page: 1 of 1 (1 total completed submissions) Display 10 results per page.


Submissions with an Ed
Action
View Submission
View Decision Letter
Correspondence
Pay Publication Charges
Send E-mail
Article Processing Charges - Google Chrome
https://oa.dem1.copyright.com/apc-payment-ui/overview?id=e9fd0a4c-3a9d-44aa-a6a8-729f52b09b85&closeButton=true#charges-overview
Copyright Clearance Center
RightsLink®
Sign In
Help
Live chat
Pay Author Charges
CHARGES ESTIMATE
PAYMENT OPTIONS
ORDER REVIEW
CONFIRMATION
Demonstration of Publication Charges
Publication: APC Demo Site
Publication ID: 0000-000Y
DOI:
Manuscript ID: APCDEMO-D-16-00012
Date: 10-Jun-2016
Publisher: Aries Systems
Author: Jonathan Author
ORCID® ID:
Institution:
Institution ID:
CHARGES ESTIMATE
Select currency: USD
Welcome. This publisher has partnered with Copyright Clearance Center's RightsLink service to offer a convenient way to pay your author charges. The charges associated with publishing your manuscript are listed below.

Editorial

- Editors and Reviewers have no visibility in EM on whether the Author has agreed to charges (in case of hybrid journal).

- Once “Payment Due” has been triggered, flags in EM show the status of the payment.
  - Visibility to flags is determined by RoleManager permission.



Payment In Process

Payment Complete – Successful

Payment Complete - Unsuccessful

APC Configuration

Configure Publication Charges Processing

Select the event that will trigger a Payment Request for Publication Charges.

If 'None' is selected, a Submission Production Task must be configured to trigger the 'Payment Due' call. If an Editorial event is selected to trigger the initial call, subsequent Payment Due calls may be triggered as Submission Production Tasks. The task may be assigned manually or automatically.

The instructions to Authors that is displayed on the optional and required 'Publication Charges' pages may be customized.

Either 'Optional' or 'Required' must be selected in the 'Apply Publication Charges' dropdown menu on the 'Edit Article Type' page in order for the Author to see either the optional or required 'Publication Charges' page.

Select an Editorial Event to Trigger the Publication Charges Payment Due Event

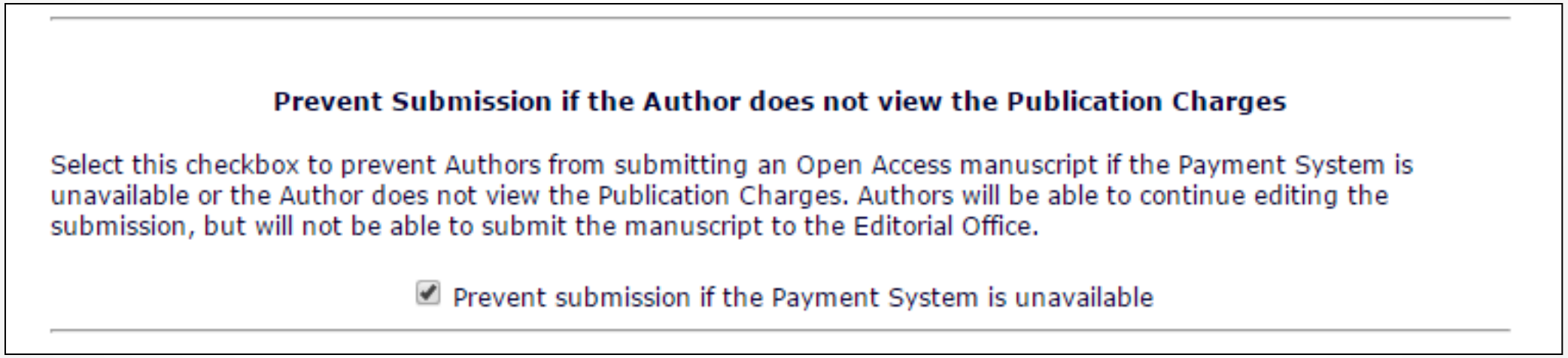
○ Notify Author of selected decision(s):

Please select Decision Term(s)
Accept
Revise
Super Editor Decision

◉ Set the Final Disposition to 'Accept', 'Accept and Transmit' or 'Accept for Extraction'

○ None (Publication Charges Payment Due must be triggered by assigning a Submission Production Task)

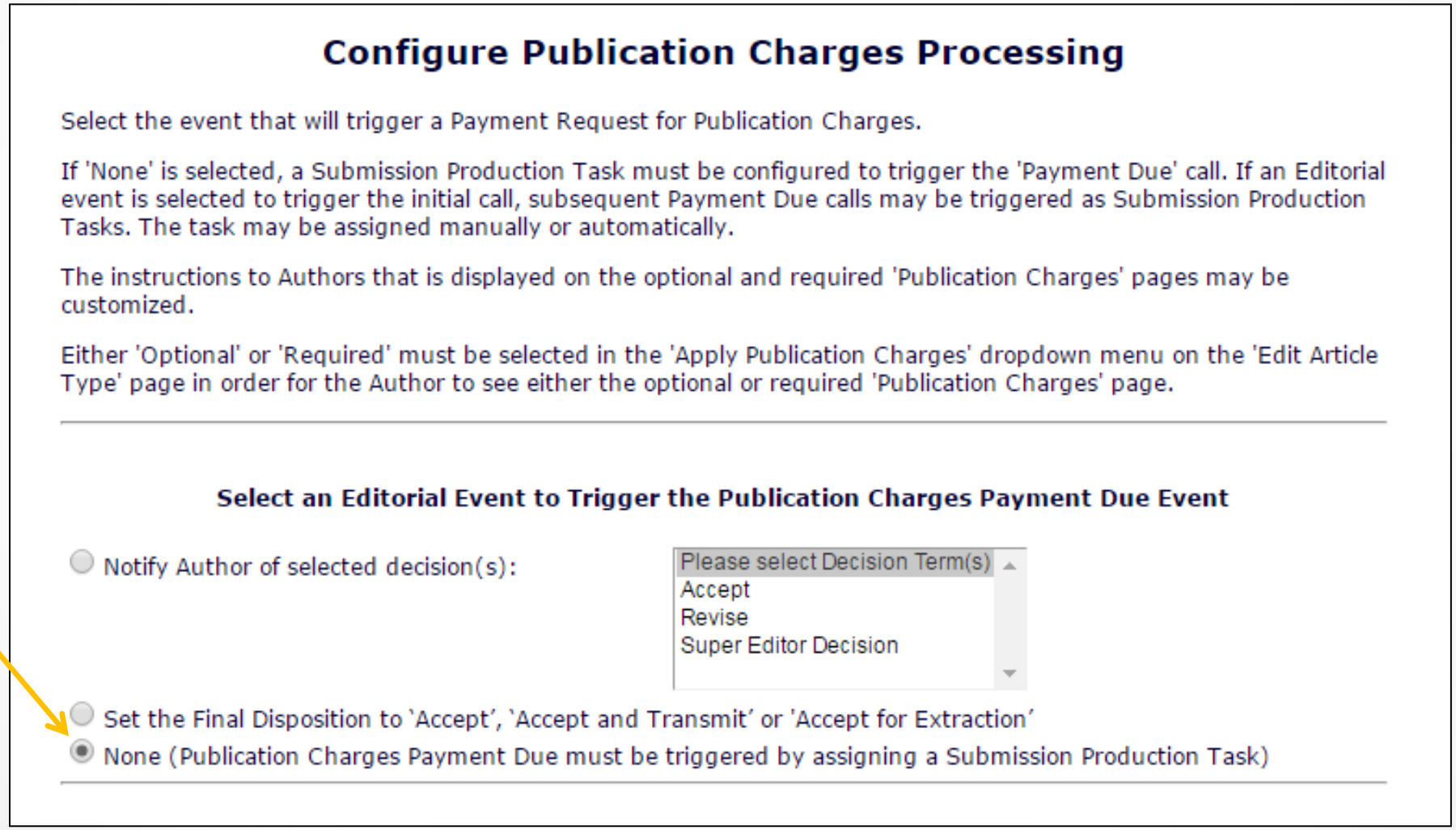
APC Configuration



Customize Publication Charges Instructions for the Author

Area	Instructions
Optional 'Publication Charges' Page Instructions	Insert Special Character `<b>You may choose to submit this manuscript for Open Access publication. Please click the 'View Publication Charges' button to see the estimated Article Processing Charge.</b><p>If you would like to submit this manuscript for Open Access publication, please select` View Default Instructions — Revert to Default Instructions
Optional 'Publication Charges' Page Question	Insert Special Character `Would you like to submit this manuscript for Open Access publication?` View Default Instructions — Revert to Default Instructions
Required 'Publication Charges' Page Instructions	Insert Special Character `<b>This manuscript must be submitted for Open Access publication. An Article Processing Charge (APC) will be assessed if the paper is accepted for publication. Please click the 'View Publication Charges' button to see the estimated APC.</b><p>If you agree to submit` View Default Instructions — Revert to Default Instructions
Required 'Publication Charges' Page Question	Insert Special Character `Do you agree to submit this manuscript for Open Access publication?` View Default Instructions — Revert to Default Instructions

APC Configuration



APC Configuration

- For PM users:
  - Author Notification of payment due is triggered by a Production Task
- Author can be notified via letter triggered by "Publication Charges Payment Requested" event, or a selected letter for that task
- Merge field %APC_EXTERNAL_LINK% can be used in either letter

Add Submission Production Task

Cancel Submit

Insert Special Character

New Production Task Name: Composition - details complete

Maximum Production Task Name is 100 characters

Assignment Options

Automatic Assignment can be triggered by the actions listed below. Because this process occurs automatically you must select a specific user to be identified as the assignor and a specific user to receive the task. You should also configure one or more File types to be automatically selected, unless this task is not used to process files.

- ☐ Assign Automatically when Production is initiated (if this is the first task in the workflow)
- ☐ Assign Automatically when all Trigger Tasks are completed (if configured in the workflow)

Automatic End Production when the Task is Completed and there are No Other Open Tasks in the Workflow.

- ☐ End Production Automatically after this task is Completed

Batch Assignment can be triggered on either a set of submissions selected from the Search Submissions Results Production view, or all Submissions in a Schedule Group selected from the Manage Schedule Groups folder. Only tasks that are specifically configured to allow batch assignment can be used in these cases. Tasks that are configured for Assignment to 'Corresponding Author Only' cannot also be configured to Allow Batch Assignment.

- ☐ Allow Batch Assignment

Production Task Assignment can be configured to also trigger a Publication Charges Payment Due letter and associated status change; this may be in addition to the initial trigger that occurs when the Author is notified of a selected decision or when the Final Disposition is set to Accept.

- ☑ Trigger 'Publication Charges Payment Due'

  Letter Options:

  - ◉ Trigger all ActionManager 'Publication Charges Payment Requested' letters
  - ○ Send following letter to the Corresponding Author only Please Choose a Letter ▾
  - ☐ Do not trigger if APC Status is already 'In Process' or 'Complete'
  - ☐ Do not trigger on repeated assignment of this Task

Production Task Assignment can be configured to also trigger a Publication Charges Payment Due letter and associated status change; this may be in addition to the initial trigger that occurs when the Author is notified of a selected decision or when the Final Disposition is set to Accept.

- [x] Trigger 'Publication Charges Payment Due'

  Letter Options:

  - (•) Trigger all ActionManager 'Publication Charges Payment Requested' letters
  - ( ) Send following letter to the Corresponding Author only [Please Choose a Letter ▾]

- [ ] Do not trigger if APC Status is already 'In Process' or 'Complete'
- [ ] Do not trigger on repeated assignment of this Task

APCs and PM

- Article Processing Charges
  - Publication Charge
  - Page Charges
  - Color Charges

- Pricing Options
  - Membership discount?
  - Conference Code Discount?

New Submission

- ✓ Select Article Type
- ✓ Enter Title
- Add/Edit/Remove Authors
- Select Classifications
- ➡ **Additional Information**
- Enter Comments
- Attach Files

Insert Special Character

Please Enter the Following

Please respond to the questions/statements below.

Do you have a membership number?

- [x] Yes
- [ ] No

Select All Clear All

Please enter your membership number here.

Character Count: 0

Limit 200 characters

Enter a Conference Offer Code, if applicable:

Character Count: 0

Limit 200 characters

Previous Next

Edit Custom Question

Enter the question/statement, default response text (if required), and any instructions to be displayed as part of a Questionnaire. Questionnaires may be configured to be presented as part of submission, author verification or production task completion.

Cancel | Save and Close | Save and Add Another Question

Open Special Character Palette

Question text:

Enter a Conference Offer Code, if applicable:

Instructions for Author Response:

"Text" and "Notes"
"Decimal" responses

Response Type:

Integration Options

- [ ] Include in Editorial Transmittal
- [ ] Include in Production Task Transmittal
- [ ] Transmit as Author Note/Footnote
- [x] Include in Publication Charges Metadata *(Please enter a Custom Metadata ID below)*

Custom Metadata ID:

CONF-1234

In addition to being displayed as part of a questionnaire, the question and response may be included in the additional locations configured below. If Help Text is entered, it will be available via a 'Help' link displayed on the appropriate page.

Integration Options

- [ ] Include in Editorial Transmittal
- [ ] Include in Production Task Transmittal
- [ ] Transmit as Author Note/Footnote
- [x] Include in Publication Charges Metadata *(Please enter a Custom Metadata ID below)*

Custom Metadata ID:

CONF-1234

Edit Additional Manuscript Detail Field

Cancel Submit

Field Description: Insert Special Character

Is this an Open Access paper?

Maximum 256 characters

☐ Include in Publication Charges Metadata *(Please enter a Custom Metadata ID below)*

Field Type: List ▾ View/Edit Values for Drop-down List

◉ Display Field for All Article Types

○ Display Field for Selected Article Types

Optional APC Article
Required APC Article
Hidden APC Article

Select All
Clear All

On a PC, multiple values may be selected by holding down the 'Ctrl' key on your keyboard, while using the mouse to select the desired items in the selection box. On a Mac, hold down the 'Command' key while using the mouse to select the desired items.

Options

Select the 'Hide' checkbox to suppress the field on a particular screen. For example, you may want a field to be displayed on the Additional Manuscript Details page, but not on the Transmittal Form. If a field is Editable, users with appropriate RoleManager permission can change the value on the page. If the 'Required' box is checked for the Transmittal Form, a value must be filled in before the submission can be released to production. If Help Text is entered, a 'Help' link is displayed on the appropriate page, which opens a pop-up containing the Help Text. Fields displayed for a submission or proposal may also be displayed for invited Authors whose invitations are generated from them. Select the 'Hide' checkbox for the 'Display for Invited Submissions' setting to suppress the field for invited Authors.

Page	Hide	Editable	Required	Help Text
Additional Manuscript Details	☐	☑	**N/A**	
Manuscript Details	☐	☑	**N/A**	
Transmittal Form	☐	☐	☐	

Help

Custom Metadata ID:

Conclusion

Commerce Manager

- Ability to create different submission fee types
- Ability to gate submission workflow until fees are paid
- Multiple payment options, e.g. credit cards
- Ability to grant waivers
- Ability to run reports on all pending, late or completed charges for journal

APC with RightsLink

- Ability to create different publication fee types
- Ability to configure multiple pricing rules at Publisher Level
- Ability to process through peer review and collect fees for publication
- Multiple payment options through RightsLink, e.g. credit cards
- Ability to run reports at Publisher Level within RightsLink

Either way…

Enjoy the rest of EEMUG 2017

13th Annual European Editorial Manager® User Group Meeting

Aries systems