



*Welcome to*  
**EMUG 2016**

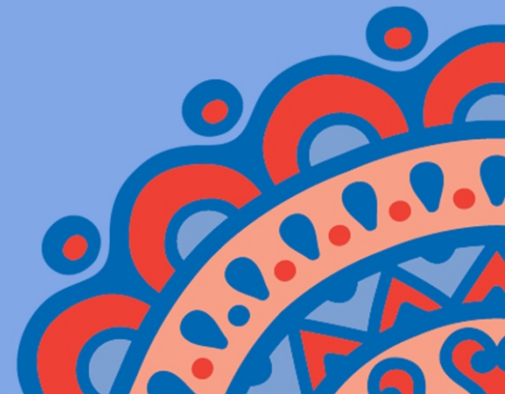
 Editorial Manager®  ProduXion Manager®

[www.ariessys.com](http://www.ariessys.com)

  
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# Fee Processing

**Betsy Hopkins**, Client Services Project Manager  
bhopkins@ariessys.com



# 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

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MAIN MENU • CONTACT US • SUBMIT A MANUSCRIPT • INSTRUCTIONS FOR AUTHORS

Role: **Author** Username: Amy English

### Submissions Waiting for Approval by Author Amy Smith, Ph.D.

If no Actions appear for your submission, please wait a few minutes for your PDF to be built. The Actions appear automatically when your PDF is available.

The 'Edit Submission' link allows you to fix or alter your submission. Please use Edit Submission to make changes to the meta-data and to remove and upload new files that make up your submission.

The 'Remove Submission' link removes your submission from the system. Please use this ONLY if you would like to permanently remove this submission from the system.

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

Action ▲	Manuscript Number ▲▼	Title ▲▼	Date Submission Began ▲▼	Status Date ▲▼	Current Status ▲▼
<a href="#">View Submission</a> <a href="#">Edit Submission</a> <a href="#">Approve Submission</a> <a href="#">Remove Submission</a> <a href="#">Google Scholar Title Search</a> <a href="#">View Artwork Quality Results</a> <a href="#">View Reference Checking Results</a> <a href="#">Correspondence</a> <a href="#">Send E-mail</a>		An Amphisbaenian Skull from the European Miocene and the Evolution of Mediterranean Worm Lizards	Jun 9 2014 10:57AM	Jun 9 2014 10:59AM	Needs Approval

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

<< Author Main Menu

# Multiple payment options

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Role: **Author** Username: Amy English

## Fees and Payments

### "An Amphisbaenian Skull from the European Miocene and the Evolution of Mediterranean Worm Lizards"

To provide this publication service, this journal uses a business model in which our expenses - including those of peer review, of journal production, and of online hosting and archiving - are recovered in part by imposing a publication fee on the authors or research sponsors for each article they publish. All articles published by this journal are subject to submission and publications fees.

**Submission Fee**

<b>Payment Status:</b>	Payment Due
<b>Amount Due:</b>	0.25 USD
<b>Choose Payment Method:</b>	<input type="checkbox"/> Credit Card <input type="checkbox"/> Bill Me <input type="checkbox"/> Request Waiver
<b>Comments to Publication:</b>	<input type="text"/>

[Insert Special Character](#)

Cancel Proceed

# 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

## Commerce Manager

### Your order summary

Descriptions	Amount
<a href="#">Submission Fee</a> Item price: \$0.25 Quantity: 1	\$0.25
<b>Item total</b>	<b>\$0.25</b>
<b>Total \$0.25 USD</b>	

### Choose a way to pay

PayPal securely processes payments for Commerce Manager.

#### ▶ [Have a PayPal account?](#)

Log in to your account to pay



#### ▼ [Don't have a PayPal account?](#)

Pay as a guest now, sign up for PayPal later

Country

First name

Last name

Address line 1

Address line 2 (optional)

City/State

ZIP code

# Multiple payment options

## Commerce Manager

### Your order summary

Descriptions	Amount
<u>Submission Fee</u> Item price: \$0.25 Quantity: 1	\$0.25
<b>Item total</b>	<b>\$0.25</b>
	<b>Total \$0.25 USD</b>

### Choose a way to pay

#### Payment Method

Credit or Debit Card

Card number

Payment types



Expiration date

mm / yy  
03 / 17

CSC

[What is this?](#)

PayPal - Get more time to pay with Bill Me Later



- Bill Me Later is a credit line that can be used for PayPal purchases
- Apply and get a decision in seconds [See terms.](#)

**Billing Address** [Change](#)

Veronica Showers

Thornton, CO

**Contact Information** [Change](#)

7034988078

veronica1aries@gmail.com



# Multiple payment options

## Commerce Manager

You just made a payment of

**\$0.25 USD**

[Print receipt](#)

**Paid to**

Commerce Manager  
paypal@editorialmanager.com  
978-975-7570

### Thanks for your order

✓ **Veronica, you just completed your payment.**

Your receipt number for this payment is: 5101-6728-8573-2654.

We'll send a confirmation email to veronica1aries@gmail.com. This transaction will appear on your statement as PayPal \*COMMERCEMAN.

[Return to Commerce Manager](#)

Payments processed by **PayPal**



# Easy Author Tracking

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Role: **Author** Username: Amy English

**Submissions Being Processed for Author Amy Smith, Ph.D.**

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

Action	Manuscript Number	Title	Initial Date Submitted	Status Date	Current Status
<a href="#">View Submission</a> <a href="#">View QC Results</a> <a href="#">View Reference Checking Results</a> <b><a href="#">Fees and Payments</a></b> <a href="#">Correspondence</a> <a href="#">Send E-mail</a>		An Amphisbaenian Skull from the European Miocene and the Evolution of Mediterranean Worm Lizards	Jun 9 2014 11:10AM	Jun 9 2014 11:10AM	Submitted to Journal

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

[<< Author Main Menu](#)

# Easy Author Tracking



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Role:  Username: Amy

English

## Fees and Payments

### "An Amphisbaenian Skull from the European Miocene and the Evolution of Mediterranean Worm Lizards"

To provide this publication service, this journal uses a business model in which our expenses - including those of peer review, of journal production, and of online hosting and archiving - are recovered in part by imposing a publication fee on the authors or research sponsors for each article they publish. All articles published by this journal are subject to submission and publications fees.

#### Submission Fee

Fee Tracking ID:	EM-VERONICADEMO1-72
Payment Status:	PayPal Transaction Successful
PayPal Transaction ID:	64U217225K039911P
Amount Paid:	0.25 USD
Date Payment Processed:	Jun 09 2014 11:10AM

[Return to Submissions Being Processed](#)

# Ability to easily run reports

The screenshot displays the Editorial Manager interface. At the top left is the Aries Systems logo with the tagline "Publish Faster. Publish Smarter." and a navigation menu including HOME, LOGOUT, HELP, REGISTER, UPDATE MY INFORMATION, JOURNAL OVERVIEW, MAIN MENU, CONTACT US, SUBMIT A MANUSCRIPT, and INSTRUCTIONS FOR AUTHORS. At the top right is the Editorial Manager logo and user information: "Go to: -- Search Page --", "Role: Editor", and "Username: Amy".

The main content area is organized into several sections:

- Withdrawn Conference Submissions (3)**
  - [My Assignments with Decision \(2\)](#)
  - [My Assignments with Final Disposition \(106\)](#)
- Linked Submission Groups**
  - [Active Linked Submission Groups](#)
  - [Inactive Linked Submission Groups](#)
- Fees and Payments** (highlighted with a yellow border)
  - [Bill Me Report](#)
  - [Manage Waiver Requests Report](#)
  - [E-Commerce Status Report](#)
  - [Fees Requiring Action Report](#)
- Administrative Functions**
  - [System Administrator Functions](#)
  - [Register New User](#)
  - [Reports](#)
  - [Send Reminder Letters](#)
  - [Send Batch E-mail](#)

# Ability to easily run reports

**Aries**  
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em Editorial  
Manager

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Go to: -- Search Page --  
Role: Editor Username: Amy

English

## E-Commerce Status Report

This report displays all fees that were paid (or attempted to be paid) with PayPal.

**Transaction Criteria**

Please choose the transactions you wish to view.

Incomplete PayPal Transactions  
 PayPal Transaction Successful (payment is complete)  
 Fee Cancelled (PayPal transaction failed, publication subsequently cancelled the fee)

**Additional Criteria**

You may further refine your result set with the criteria below.

<b>Fee Type:</b>	All Fee Types
<b>Fee Tracking ID:</b>	
<b>PayPal Transaction ID:</b>	
<b>Manuscript Number (contains):</b>	<input type="checkbox"/> Show submissions with no manuscript number assigned
<b>Article Title (contains):</b>	
<b>Author Last Name (contains):</b>	
<b>Fee Creation Date:</b>	from <input type="text"/> to <input type="text"/> (mm/dd/yyyy)

# Ability to export data



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Go to: -- Search Page --  
Role: Editor Username: Amy

English

## E-Commerce Status Report

This report was run June 09, 2014

**Content:** This report includes all fees where the Author selected 'PayPal' for the Payment Method, that satisfy your selection criteria.

[Download the report results](#)

Page: 1 of 2 (13 total payment records)

1 2 >> >|

Display 10 results per page.

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
<a href="#">Action Links</a>	EM-VERONICADEMO1-6	9PN26771SL6432727	VERONICADEMO1-D-10-00006	Seeing Eye Dogs Training	<a href="#">Stacey Lavelle</a>	Submission Transferred	Mar 25 2010 10:18AM	Publication Fee	PayPal Transaction Successful	0.20	USD	0.20	03/25/2010
<a href="#">Action Links</a>	EM-VERONICADEMO1-12	0X868421GT734793L	VERONICADEMO1-D-10-00007	Trees in Virginia	<a href="#">Stacey Lavelle</a>	Completed Withdrawn	Mar 25 2010 12:11PM	Publication Fee	PayPal Transaction Successful	0.20	USD	0.20	03/25/2010
<a href="#">Action Links</a>	EM-VERONICADEMO1-16	0H199357MW6125600	VeronicaDemo1-D-10-00013	Publication Fees Using Commerce Manager	<a href="#">Stacey Lavelle</a>	Removed by Editor	Jun 08 2010 09:39AM	Color Fee	PayPal Transaction Successful	0.25	USD	0.25	06/08/2010
<a href="#">Action Links</a>	EM-VERONICADEMO1-18	5HY855353F081011V	VeronicaDemo1-D-10-00013	Publication Fees Using Commerce Manager	<a href="#">Stacey Lavelle</a>	Removed by Editor	Jun 08 2010 11:22AM	Color Fee	PayPal Transaction Successful	0.25	USD	0.25	06/08/2010
<a href="#">Action Links</a>	EM-VERONICADEMO1-24	12M50008VL995913V	VeronicaDemo1-D-10-00015	Conquering Commerce Manager	<a href="#">Stacey Lavelle</a>	Removed by Editor	Jun 09 2010 11:18AM	Color Fee	PayPal Transaction Successful	0.25	USD	0.25	06/09/2010

# Highly configurable

## PolicyManager Main Menu

---

[Expand All](#)   [Collapse All](#)

- ⊕ **Registration and Login Policies**
- ⊕ **Status Policies**
- ⊕ **Submission Policies**
- ⊕ **Questionnaire Policies**
- ⊕ **Additional Data Policies**
- ⊕ **Editor Assignment Policies**
- ⊕ **Reviewer and Editor Form Policies**
- ⊕ **E-mail and Letter Policies**
- ⊕ **General Policies**
- ⊕ **Discussion Forums**
- ⊕ **Linked Submissions Policies**
- ⊕ **Conference Submission Policies**
- ⊕ **Transmittal Policies**
- ⊕ **ProduXion Manager**
- ⊖ **Commerce Manager**
  - [Configure Author Submission Fees](#)
  - [Configure Pricing Options](#)
  - [Create Fee Templates](#)
  - [Edit Fees and Payments Instructions](#)
  - [Set Author Payment Deep Link Expiration Policy](#)

# EM and Article Processing Charges

...

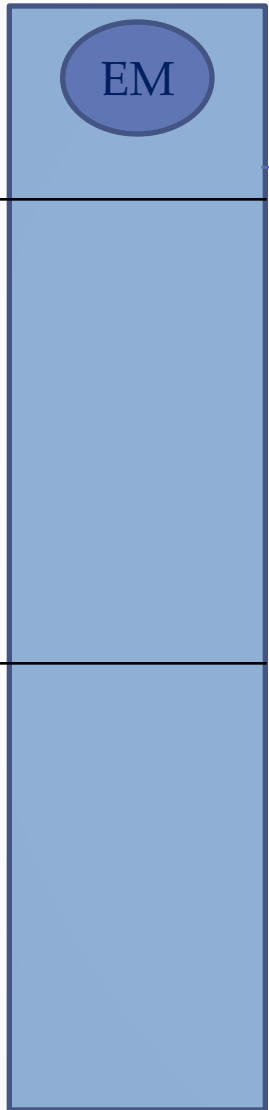


Copyright  
Clearance  
Center



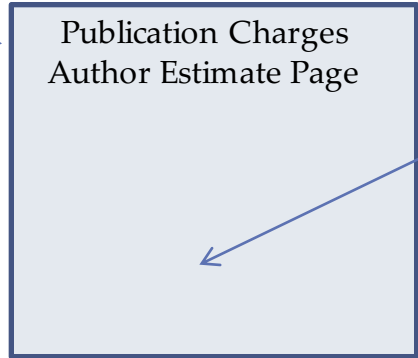
Author Submits

# Editorial Manager/RightsLink Workflow



EM notifies RightsLink. API Call sends metadata – journal, article title, author, ORCID, etc.

View Estimate



APC terms displayed to author based on business rules CCC has agreed with publisher



Author accepts estimate in EM

“Payment due” notification to RightsLink

Author notified of Payment Due

Author completes payment transaction in RightsLink (e.g. processes credit card, sends bill, processes waiver request, applies membership, post-pay or pre-pay reconciliation, promotional code etc.)

“Payment complete” notification to EM



Submission confirmation

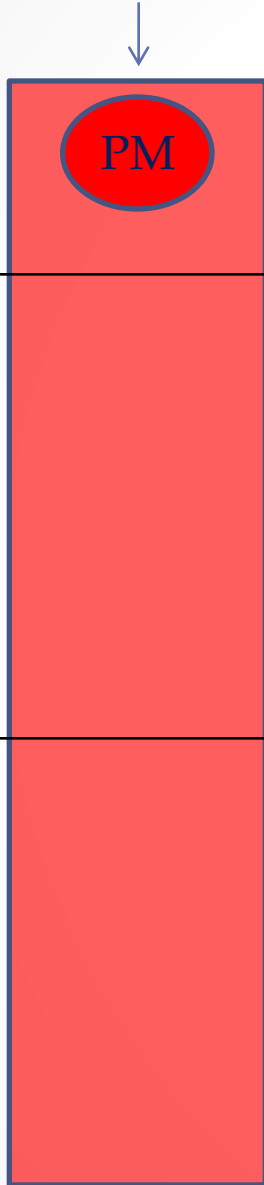
Editorial and peer review

Submission acceptance

Submission flagged as “payment complete”. Journal staff can then continue downstream workflow

# Production Initiated

# ProduXion Manager/RightsLink Workflow



Production Task configured to trigger a Publication Charge call to Rightslink

Production Task configured to trigger a Publication Charge call to Rightslink

"Payment due" notification to CCC

Additional metadata delivered to RightsLink that may drive production fees (color charges, page charges).



"Payment due" notification to CCC

Author completes payment transaction in RightsLink (e.g. processes credit card, sends bill, processes waiver request, promotional code etc.)



"Payment complete" notification to PM

# Author Experience

## Submission

✓ Select Article Type

✓ Enter Title

Add/Edit/Remove Authors

Select Classifications

Enter Comments

➔ Attach Files

### Summary Following Attach Files

Listed below is the summary of the number of items to be delivered online and the number of items to be delivered offline. Required Items are marked with \*. You can change the order by re-numbering the files.

	Online	Offline		Online	Offline
*Manuscript	1		Video	0	0

Previous

Build PDF for my Approval



# 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 clicks the "View Publication Charges" button

# Author Experience

## Publication Charges

You may choose the 'View Publication Charge'.

If you would like to select a radio button below, please select the appropriate option.

When you have selected an option, click the 'View Publication Charge' button.

View Publication Charge

Would you like to view the charges for your manuscript?


- Yes  
 No

Article Processing Charges - Google Chrome  
https://oa.dem1.copyright.com/apc-payment-ui/overview?id=e9fd0a4c-3a9d-44aa-a6a8-729f52b09b85&closeButton=true

Copyright Clearance Center RightsLink®

### View Author Charges

**Demonstration of Publication Charges**

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

**CHARGES ESTIMATE**

Welcome. This publisher has partnered with Copyright Clearance Center. The charges for your manuscript are listed below.

<input checked="" type="checkbox"/>	<b>Open Access charge:</b> (optional)	5,000.00 USD	To learn more about Creative Commons Licenses
	Open Access charge:		
	Open Access Platinum	5,000.00 USD	
<input checked="" type="checkbox"/>	<b>Page charge:</b> (optional)	600.00 USD	

The RightsLink Estimate page is displayed

View Author Charges



Demonstration of Publication Charges

Publication: APC Demo Site  
Publication ID: 0000-000Y  
DOI:  
Manuscript ID:  
Date: 06-Jun-2016

Publisher: Aries Systems  
Author: Jonathan Author  
ORCID<sup>®</sup> 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.

**Open Access charge:** *(optional)* 5,000.00 USD

To learn more about Creative Common licenses, click [here](#).

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](#)

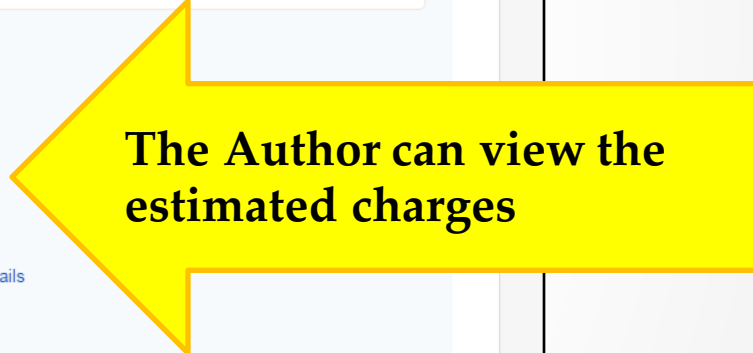
\* Does not include tax/VAT. Tax/VAT is applied in the Payment Options step during checkout.

APPLY DISCOUNTS

CLOSE

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**

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



# 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

## Publication Charges

**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.**

If you agree 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; your submission will be located in the 'Incomplete Submissions' folder and you may click the 'Remove Submission' link if you do not wish to submit the manuscript.

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

[View Publication Charges](#)

Do you agree to submit this manuscript for Open Access publication?

Yes

**If the Author clicks "no" when the APC is required, they cannot submit.**

WARNING: This manuscript must be submitted for Open Access Publication.

[OK](#)



# Author Experience

Submissions Being Processed for Author Jonathan Author, Ph.D

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

Action ▲	Man ▲	Initial Date Submitted ▲▼	Status Date ▲▼	Current Status ▲▼
<a href="#">View Submission</a> <a href="#">Correspondence</a> <a href="#">View Publication Charges</a> <a href="#">Send E-mail</a>		Jun 06, 2016	Jun 08, 2016	With Editor

Display 10 results per page.

**At any point in the workflow the Author can see their estimate if they have agreed to the publication charges.**

# 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
<a href="#">View Submission</a> <a href="#">View Decision Letter</a> <a href="#">Correspondence</a> <a href="#">Pay Publication Charges</a> <a href="#">Send E-mail</a>	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 E 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**

	<b>Publication:</b> APC Demo Site	<b>Publisher:</b> Aries Systems
	<b>Publication ID:</b> 0000-000Y	<b>Author:</b> Jonathan Author
	<b>DOI:</b>	<b>ORCID® ID:</b>
	<b>Manuscript ID:</b> APCDEMO-D-16-00012	<b>Institution:</b>
	<b>Date:</b> 10-Jun-2016	<b>Institution ID:</b>

**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.

**Action**

- View Submission
- View Decision Letter
- Correspondence
- Pay Publication Charges
- Send E-mail

# 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.

**General Searching and Viewing**

Use Editorial Details Layout

Search All Manuscripts

Search Only Assigned Manuscripts

Share Saved Searches

**[section omitted for space]**

Initiate checkCIF

View checkCIF Results

View Publication Charges Status

Bibliographic Search

Google Scholar Title Search

 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

---

## **Prevent Submission if the Author does not view the Publication Charges**

Select this checkbox to prevent Authors from submitting an Open Access manuscript if the Payment System is unavailable or the Author does not view the Publication Charges. Authors will be able to continue editing the submission, but will not be able to submit the manuscript to the Editorial Office.

Prevent submission if the Payment System is unavailable

---



**Customize Publication Charges Instructions for the Author**

Area	Instructions
<p><b>Optional 'Publication Charges' Page Instructions</b></p>	<p><a href="#">Insert Special Character</a></p> <div data-bbox="1268 158 1921 382" style="border: 1px solid gray; padding: 5px;"> <p>&lt;b&gt;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.&lt;/b&gt;&lt;p&gt;If you would like to submit this manuscript for Open Access publication, please select</p> </div> <p align="right"> <a href="#">View Default Instructions</a> <span style="float: right;"><a href="#">Revert to Default Instructions</a></span> </p>
<p><b>Optional 'Publication Charges' Page Question</b></p>	<p><a href="#">Insert Special Character</a></p> <div data-bbox="1268 478 1921 702" style="border: 1px solid gray; padding: 5px;"> <p>Would you like to submit this manuscript for Open Access publication?</p> </div> <p align="right"> <a href="#">View Default Instructions</a> <span style="float: right;"><a href="#">Revert to Default Instructions</a></span> </p>
<p><b>Required 'Publication Charges' Page Instructions</b></p>	<p><a href="#">Insert Special Character</a></p> <div data-bbox="1268 798 1921 1022" style="border: 1px solid gray; padding: 5px;"> <p>&lt;b&gt;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.&lt;/b&gt;&lt;p&gt;If you agree to submit</p> </div> <p align="right"> <a href="#">View Default Instructions</a> <span style="float: right;"><a href="#">Revert to Default Instructions</a></span> </p>
<p><b>Required 'Publication Charges' Page Question</b></p>	<p><a href="#">Insert Special Character</a></p> <div data-bbox="1268 1118 1921 1342" style="border: 1px solid gray; padding: 5px;"> <p>Do you agree to submit this manuscript for Open Access publication?</p> </div> <p align="right"> <a href="#">View Default Instructions</a> <span style="float: right;"><a href="#">Revert to Default Instructions</a></span> </p>

# 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

- 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

New Production Task Name:

[Insert Special Character](#)

*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

- 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.

Trigger 'Publication Charges Payment Due'

Letter Options:

- Trigger all ActionManager 'Publication Charges Payment Requested' letters
- Send following letter to the Corresponding Author only
- 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?

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" responses  
"Decimal" responses

Response Type:

### Integration Options ?

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

Custom Metadata ID: ?

CONF-1234

### Integration Options ?

- Include in Editorial Transmittal
- Include in Production Task Transmittal
- Transmit as Author Note/Footnote
- 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.



## 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](#) 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.

[Clear All](#)

### 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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Manuscript Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	
Transmittal Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
				<input type="text"/> <a href="#">Help</a>

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...





**Thank You!**

Enjoy the rest of EMUG 2016

**Betsy Hopkins**, Client Services Project Manager  
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