



# Open Access at IEEE

Workflow for Authors and Institutions - 2023

# Purpose of the presentation

This presentation is meant for current or prospective open access account administrators. It will show the process of open access (OA) publication from submission to post-publication reporting.

# Covered in this presentation

- Author Process
  - Submission process
  - Post acceptance
  - RightsLink for Scientific Communications (RLSC)
- Administrator Process
  - Notifications
  - Responding to funding requests
  - Reports
  - Searching IEEE *Xplore* and setting alerts

# Author Process: Submission

# Submission – Step 1

<https://publication-recommender.ieee.org/home>

IEEE Publication Recommender helps authors find the most suitable journal and displays journal's OA Status with submission URL

Note: Open Access status clearly displayed in results.

**IEEE Publication Recommender™**  
*Find the best match for your scholarly article*

- Search 190+ periodicals and 1800+ conferences
- Compare critical points such as Impact Factor and Submission-To-Publication Time
- Get all the key data about IEEE publications at a glance
- Download the results of your search

**Choose a search type and let Publication Recommender do the work!**

- Both Periodicals and Conferences
- Periodicals only
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**Narrow by date:** (Optional)

**Or, find details for a specific**

Enter the name of a periodical or conference

Enter keywords, key phrases, or article title  
Electron Devices

Extract keywords  
Enter your abstract here (PDF, DOC, D

**PERIODICALS**

- Electron Devices, IEEE Transactions on
- Electron Devices Society, IEEE Journal of the
- Electron Device Letters, IEEE

**CONFERENCES**

- 2020 IEEE International Electron Devices Meeting (IEDM)
- 2021 IEEE International Electron Devices Meeting (IEDM)
- 2023 International Electron Devices Meeting (IEDM)
- 2022 International Electron Devices Meeting (IEDM)
- 2024 IEEE International Electron Devices Meeting

**IEEE Publication Recommender™**  
*Find the best match for your scholarly article*

**Periodical: Electron Devices Society, IEEE Journal of the**

<b>Impact Factor:</b>	2
<b>Eigenfactor:</b>	0.00259
<b>Article Influence Score:</b>	0.764

<b>Open Access Availability:</b>	Open Access Only
<b>Submission to Publication in Xplore:</b>	Not yet available
<b>Issues per year:</b>	1

**Aims & Scope:**  
The IEEE Journal of the Electron Devices Society (J-EDS) is an open-access, fully electronic scientific journal publishing papers ranging from fundamental to applied research that are scientifically rigorous and relevant to electron devices. The J-EDS publishes original and significant contributions relating to the theory, modelling, design, performance, and reliability of electron and ion integrated circuit devices and

**Published By:** Not yet available

**Go to Periodical home page:** <https://ieeexplore.ieee.org/xpl/RecentIssue.jsp?punumber=6245494>

**Contact:** Not yet available

# Submission – Step 1 – in IEEE Xplore

## Browse Journals & Magazines

<https://ieeexplore.ieee.org/browse/periodicals/title?refinements=Publisher:IEEE&showActiveTitlesOnly=true>

By Title

By Topic

Virtual Journals

Search by keywords



Browse Titles 

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | 0 - 9 | All



Displaying Results 1-25 of 223



▼ Filters Applied: IEEE x 


Refine results by

Show

All Results

Open Access Titles Only  

Titles with Some Open Access  

Show active titles only 

### IEEE Access

Publisher: IEEE Years: 2013 - Present Most Recent Issue

### IEEE Aerospace and Electronic Systems Magazine

Publisher: IEEE Years: 1986 - Present Most Recent Issue


### IEEE Transactions on Aerospace and Electronic Systems


Publisher: IEEE Years: 1965 - Present Most Recent Issue




# Submission – Step 1 – in IEEE Xplore

## IEEE Open Journal of Antennas and Propagation

 Submit Manuscript

 Add Title To My Alerts

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The IEEE Open Journal of Antennas and Propagation covers antennas, including analysis, design, development, measurement, standards, and testing; radiation, propagation, and the interaction of electromagnetic waves with discrete and continuous media; and applications and systems pertinent to antennas, propagation, and sensing, such as applied optics, millimeter-and sub-millimeter-wave techniques, antenna signal processing and control, radio astronomy, and propagation and radiation aspects of terrestrial and space-based communication, including wireless, mobile, satellite, and telecommunications at all frequencies.

*The IEEE Open Journal of Antennas and Propagation (IEEE OJAP) welcomes contributions covering aspects from theory and design to applied engineering innovations, topical review, and perspective articles. The journal publishes papers on mature topics as well as on emerging fields, including those at the nexus of other engineering and science disciplines that are dependent upon antennas and propagation. IEEE OJAP is committed to supporting open and transparent research exchange and enabling authors to embrace best practices in data and code sharing.*

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rigorous peer review | rapid publication

*This journal is 100% open access, which means that all content is freely available without charge to users or their institutions. All articles are*



# Submission process

- The corresponding author will complete the submission process.
- Authors submitting to fully OA journals will be asked to accept OA terms and charges during Step 1.
- Authors submitting to hybrid journals will not be asked to select OA until after acceptance.



# Submission – Step 1 – Fully OA journal

ScholarOne Manuscripts™

Alison Larkin | Instructions & Forms | Help | Log Out

IEEE Power and Energy Technology Systems Journal

Home | Author | Review | Manage | Support

Author Dashboard / Submission

### Submission

- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 1: Type, Title, & Abstract >
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- Step 2: Attributes >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 3: Authors & Institutions >
- Step 4: Reviewers >
- Step 5: Details & Comments >
- Step 6: File Upload >
- Step 7: Review & Submit >

## Step 1: Type, Title, & Abstract

Select your manuscript type. Enter your title and abstract into the appropriate boxes below. If you need to insert a special character, click the "Special Characters" button. When you are finished, click "Save and Continue." [Read More...](#)

\* = Required Fields

\* Type:  Edit

CHOICE	TYPE
<input type="radio"/>	Journal paper

\* Title  Edit

Write or Paste Title

0 OUT OF 300 CHARACTERS

\* Abstract  Edit

Write or Paste Abstract

0 OUT OF 200 WORDS

### Open Access Agreement

\* I have read and agree to the terms below.

By submitting this manuscript to the IEEE Open Journal of Antennas and Propagation, I agree that if accepted, it will be published as open access and that I am responsible for the open access publication fee of US \$1,950.

Some institutions offer assistance for open access funding. Check our [institutional partners list](#) to see if yours is one.

Save Save & Continue >

## Open Access Agreement

\* I have read and agree to the terms below.

By submitting this manuscript to the IEEE Open Journal of Antennas and Propagation, I agree that if accepted, it will be published as open access and that I am responsible for the open access publication fee of US \$1,950.

Some institutions offer assistance for open access funding. Check our [institutional partners list](#) to see if yours is one.

The institutional partners list goes to <https://open.ieee.org/for-institutions/institutional-partners/>



IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites

## IEEE OPEN

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Search for Institution

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Aalto University | AGH | Anhui Normal University | Anhui Polytechnic University

# Submission – Step 1 – Hybrid journal

**Submission**

- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 2: Authors & Institutions >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 2: Authors & Institutions >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 2: Authors & Institutions >
- Step 1: Type, Title, & Abstract >
- Step 2: Attributes >
- Step 3: Authors & Institutions >
- Step 4: Reviewers & Editors >
- Step 5: Details & Comments >
- Step 6: File Upload >
- Step 7: Review & Submit >

## Step 1: Type, Title, & Abstract

Select your manuscript type. Enter your title, running head, and abstract into the appropriate boxes below. If you need to insert a special character, click the "Special Characters" button. When you are finished, click "Save and Continue." [Read More ...](#)

\* = Required Fields

\* Type [Edit](#)

CHOICE	TYPE
<input type="radio"/>	Regular paper
<input type="radio"/>	Letter to the Editor

\* Title [Edit](#)

Preview [Special Characters](#) 0 OUT OF 250 CHARACTERS

\* Abstract [Edit](#)

Write or Paste Abstract

Preview [Special Characters](#) 0 OUT OF 250 WORDS

[Save](#) [Save & Continue >](#)

Open Access question is not present at submission for hybrid publications



# Submission – Steps 2 and 3

**Step 2:** the author will upload their manuscript files

## Step 2: File Upload

Please only upload Word files, TIFF files and JPEG files for images. [Read More ...](#)

\* = Required Fields

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Files

0.00 OUT OF 50.59 MB

ORDER	ACTIONS	FILE	* FILE DESIGNATION	UPLOAD DATE	UPLOADED BY
No files uploaded					

[Update Order](#)

---

File Upload

SELECTION	FILE DESIGNATION
<a href="#">Select File 1 ...</a>	* Main Document
<a href="#">Select File 2 ...</a>	Choose File Designation ...
<a href="#">Select File 3 ...</a>	Choose File Designation ...

[Upload Selected Files](#)

[Previous Step](#) [Save](#) [Save & Continue >](#)

**Step 3:** the author will upload their attributes, or keywords

## Step 3: Attributes

To enter your manuscript attributes/keywords, you may do it in two different ways:

- Search the journal's list of keywords, by typing in a term and clicking **Search**, or
- Select your keywords from the list (Control-Click to select multiple words), and click **Add**.

When you are finished, click **Save and Continue**.

[Read More ...](#)

\* = Required Fields

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\* Keywords

[+ Add](#)

[- Hide Full List](#)

- Memory
- Midbrain
- Molecular Biology
- Adolescent Patient Care
- Article
- html
- paper

[+ Add from List](#)

# Submission – Step 4

## Step 4: author enters metadata

Corresponding author adds affiliation data for all authors.

The institution entered will be used to match the author with an institutional OA agreement with Ringgold API.

**Submission**

- Step 1: Type, Title, & Abstract >
- Step 2: File Upload >
- Step 3: Attributes >
- Step 4: Authors & Institutions >**
- Step 5: Reviewers & Editors >
- Step 6: Details & Comments >
- Step 7: Review & Submit >

Enter your co-authors' information in the boxes below, then click "Add to My Authors." To check if an author already exists in the journal's database, enter the author's e-mail address and click "Find." If the author is found, their information will be automatically filled out for you. When you are finished, click "Save and Continue."

\* = Required Fields

### Authors

\* Selected Authors [Edit](#)

ORDER	ACTIONS	AUTHOR	INSTITUTION
1	Select...	<b>Larkin, Alison</b> a.larkin@ieee.org 0000-0001-6438-6457 ✓	1. IEEE, Publishing Operation 405 Hoes Lane Piscataway, NJ, USA 08854 732-562-6536 2. IEEE

**Add Author**

Find using Author's email address

[← Previous Step](#)

Ringgold is integrated in submission system

### Create New Author [Edit](#)

Institution 1

Quick Fill [Edit](#)

Institution Number: 1

\* Institution: [Edit](#) IEEE

\* Department: IEEE  
New York, NY, US, other/learned

\* Country / Region: INEE  
Paris, Île-de-France, FR, academic/govt

State/Province: IEIE  
Chicago, IL, US, academic/hospital

\* City: IESEG School of Management  
Lille, Nord-Pas-de-Calais, FR, academic/bus

**\*\*Authors should use their institutional email address\*\***



# Submission – Step 5 & 6

**Step 5:** the author enters funder info (when applicable)

**Submission**

- Step 1: Type, Title, & Abstract >
- Step 2: File Upload >
- Step 3: Attributes >
- ✓ Step 4: Authors & Institutions >
- Step 5: Details & Comments >**
- Step 6: Review & Submit >

**Write Cover Letter**

Preview Ω Special Characters

0 OUT OF 32768 CHARACTERS

**Funding** Edit

\* Is there funding to report for this submission?

Yes  No

**Funders** Edit

ACTIONS	FUNDER	GRANT / AWARD NUMBER
No Funders Entered		

Add Funder

**Step 6:** the author reviews and submits

**Submission Confirmation**

Thank you for your submission

**Submitted to** ScholarOne University Training Workflow 1

**Manuscript ID** MCU1-201803-0001-OA

**Title** The process of documentation

**Authors** Baker, Gwen  
Bryant, Luke

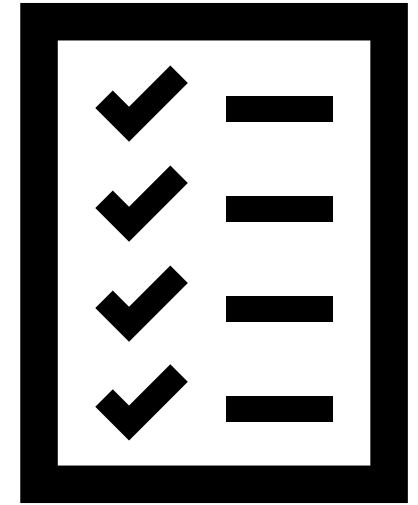
Articles can match a RLSC profile based on funder in addition to institutional affiliation



# **Author Process:** Acceptance and Copyright

# Acceptance

- If the manuscript is accepted, the author will be prompted to upload the final files and choose a copyright license.
- Hybrid journal authors will choose to publish open access or traditional (closed).



# Post acceptance – upload final files in ScholarOne

Most IEEE Publications use ScholarOne for submission of final files.

**Author Dashboard**

- 1 Unsubmitted and Manuscripts in Draft >
- 1 Awaiting Final Files >**
- Start New Submission >
- Legacy Instructions >
- 5 Most Recent E-mails >

## Awaiting Final Files

**ATTENTION:** As part of your final file submission you *MUST* upload:

1. A source file for your manuscript in Word or LaTeX format AND
2. A final version of your manuscript in PDF format named "FINAL VERSION.PDF"

Your source files can be uploaded in a zip file, but you *MUST* upload your final PDF as an individual file.

ACTION	STATUS	ID	TITLE	SUBMITTED	DECISIONED
	ADM: Plaza, Antonio ADM: Larkin, Alison	TGRS--2023 00761	This is a test paper	1-Jan-2023	1-Jan-2023

[Submit Final Files](#)

- Accept

[Graphics Checker](#)

- Accept for Final Submission

[view decision letter](#)



# Post acceptance – hybrid review

## Open Access

\* This publication is a hybrid journal, giving authors the choice of making their article freely accessible to users by paying an open access article processing charge (APC), or choosing traditional article publication, allowing access to users through subscription and other purchasing options. Now that your article has been accepted for publication you may enable unrestricted public access by selecting "yes" below. If you select yes, you commit to pay the US \$2,350 APC.

Although voluntary page charges do not apply to open access article submissions, other applicable charges (such as over-length paper charges or a charge for the use of color in print format) will be billed separately once article formatting is complete (but prior to publication). Over-length paper charge details can be found [here](#).

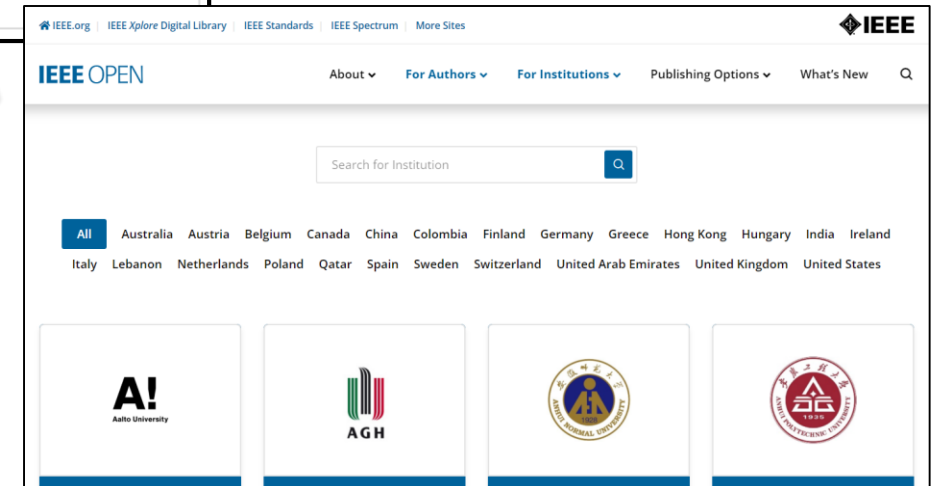
For any questions regarding IEEE open access policies, please refer to our [Frequently Asked Questions on open access](#).

- Yes** - please make my article Open Access. I understand that there is a \$2,350 APC associated with Open Access publication. Some institutions offer assistance for open access funding. Check our [institutional partners list](#) to see if yours is one.
- No** - my article is a traditional submission. I understand that over-length paper charges or color charges may still apply, as outlined above.

IEEE supports author choice when publishing in a hybrid journal.

Hybrid journal authors are asked to select open access or traditional (closed) after acceptance.

The institutional partners list goes to <https://open.ieee.org/for-institutions/institutional-partners/>



# Post acceptance – upload final files in Author Portal

Some IEEE Publications have migrated to the IEEE Author Portal, a new and streamlined interface for authors.

Main Landing Page (what an author sees when they login to Author Portal and have a submission awaiting Final Files.

IEEE Author Portal My Submissions Samantha

My Submissions

Journal: All Journals Submission Status: All Submission Statuses

Start a new submission for IEEE Testing Journal Start submission →

IEEE Testing Journal Original Article

Identifying Key Reasons to Use the IEEE Author Portal

Submission Status	Accepted (Final Files)
Manuscript ID	PT2-02-0015-2023
Last Modified	23 February 2023 by Editorial Office
Submitted On	22 February 2023 by Samantha Jacobs

Due by 2 March 2023

Submit Final Files →

Need help choosing a journal? We've put together some resources and tools to help you find the right journal for your research. Find a Journal

Complete Final Files

After submitting final files you will be directed to the Publication Agreement System

Complete the publication agreement immediately to avoid publication delays

Submit Final Files ✓

Once they submitted final files, the author is met with a screen that gives them a prompt to click and sign off on the Publishing Agreement.

Final Files sent

Next: Complete Publication Agreement

Your final files have been submitted and transferred to the journal's production team. You will be contacted shortly with instructions for accessing the IEEE Author Gateway, where you can track the progress of your manuscript through the publication process.

Next Step: Publication Agreement →



# Post acceptance – copyright selection

After acceptance, authors will be prompted to choose a copyright license using the IEEE Electronic Copyright Form (eCF).

- Authors publishing in hybrid journals may choose between:
  - **CC-BY**: author retains copyright and the article is published open access
  - **CC-BY NC-ND**: author retains copyright in a more restrictive license than CC-BY in that the article may not be reused for commercial purposes, nor may the article be changed in any way
  - **Traditional** license in which copyright is transferred to the publisher and the article is published behind a paywall
- Authors publishing in gold journals may choose between **CC-BY** or **CC-BY NC-ND**.
- Authors should confirm any license restrictions set by the institution.

# IEEE Electronic Copyright Form (eCF)

1. Confirm that the article details are correct.
2. Confirm the paper's originality
3. OA Authors must agree "to pay" an APC (Article Processing Charge)
4. Select and sign CC-BY license type
5. Download a copy of the agreement

## IEEE Publication Agreement

1 2 3 4 5

Select Language ▼

### Step 4: Complete the publication agreement

You may view and download a read-only version of the agreement in a selected language. You will need to sign the English version of the form below. [Click to View](#)

#### ► Creative Commons Attribution License

**Article Title:** My groundbreaking article

**Publication Title:** IEEE ACCESS

**Authors:** Krista Thom

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With the understanding that:

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#### Information

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- [CC BY Summary](#)
- [CC BY Full License](#)
- [CC BY Machine-Readable XMP](#)

# Post acceptance – hybrid journal reminder of funding

Subject line: Eligibility for Open Access funding - JPV-2021-03-0098-R,  
10.1109/JPHOTOV.2021.3086455

Dear \${system/salutation} \${system/fname} \${system/lname}:

The following article has been accepted for publication by the IEEE, \${system/article\_title},  
\${system/doi} and may be eligible for open access funding.

We have identified you as belonging to an institution (\${system/institution}) that has an open access agreement with IEEE. As such, you may be eligible for open access funding which covers 100% of the Open Access charges. If you would like to take advantage of this agreement and make your article open access, please contact your Journals Production Manager, \${system/journal\_coordinator}, \${system/journal\_coordinator\_email} to request changing the publishing agreement from IEEE copyright to the Creative Commons (CCBY) license.

For more information about IEEE Open Access institutional partners visit:  
<https://institutions.open.ieee.org/for-institutions-funders/institutional-partners/>

Thank you for publishing with IEEE!  
\${system/journal\_coordinator}  
\${system/journal\_coordinator\_email}

Authors who choose to publish traditional (non-OA) in a hybrid title will receive an email reminding them of the OA agreement with IEEE and their institution when an active OA agreement is present based on the corresponding author affiliation.

Note: Email is only sent if institutional RLSC profile matched by the article is touch-free.



# **Author Process:** RightsLink for Scientific Communications (RLSC)

# RightsLink for Scientific Communications (RLSC)

- All article processing charges (APCs) are handled through CCC RLSC on behalf of IEEE.
- After acceptance, authors receive an email prompting them to pay all charges through RLSC.
  - In a touch-free workflow, RLSC will generate a funding request automatically when a manuscript matches an institutional profile.
- If the author is affiliated with an institution that has an OA agreement, they will be prompted to seek funding from their institution.
- Institutional profiles are matched using author-provided affiliation data including email domains and/or Ringgold IDs. Wild cards can also be used when matching on email domain.

# Article Acceptance

A funding request is automatically sent to the institution when a manuscript matches the touch free profile.

The author receives an email when the request is approved or denied by the institution.



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

Dear Mr. Ruben Garcia Alia,

Congratulations on being accepted for publication in *IEEE Geoscience and Remote Sensing Letters* for the following manuscript:

Manuscript DOI: 10.1109/JTEHM.2019.529447

Manuscript ID: TNS-003417-445

Manuscript Title: This is a touch free OA only profile test

Published by: Institute of Electrical and Electronics Engineers (IEEE)

Total Charges Covered: 2045.00 USD

**Funding for your open access publication charges has been covered by CCC University based on an agreement between CCC University and Institute of Electrical and Electronics Engineers (IEEE).**

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,  
Institute of Electrical and Electronics Engineers (IEEE)

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



RightsLink®





# Administrator Process

Responding to funding requests, reporting, and setting alerts

# Account Administrator capabilities

- The Institutional Portal in RightsLink for Scientific Communications (RLSC) allows administrators to:
  - View pending transactions
  - Approve or deny funding requests
  - Manage notifications
  - Pull transaction reports
- Administrators can also set IEEE *Xplore* alerts to monitor published articles

# Notifications



*Your author has requested APC funding.*

Dear IEEE,

Your author has requested funding:

**Request Details**

Request Date: 18-Apr-2019

Publisher: Institute of Electrical and Electronics Engineers

Publication: IEEE Access

Article Title: Test Manuscript Matching Partner (15% Disc't)

Author(s): Sheryl Holt, Jennifer Goodrich

Please [click here](#) to view details and respond.

Sincerely,

Institute of Electrical and Electronics Engineers

Administrators will receive an email when an eligible author chooses to seek funding under their account.



# RLSC Institutional Portal dashboard

Welcome to the RightsLink® Institutional Portal. Use the **Billing Profiles** tab to view the special billing profiles we have on file between your institution and RightsLink® client publishers. Use the **Funding 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.

Account Name: IEEE University  
Account #: 7001904909

**Billing Profiles** | **Funding Requests** | **Reports**

The table below includes any funding requests that have been matched to one of your special billing profiles.

**APPROVE** When you approve funding for a manuscript, the transaction will be completed, assigned an Order ID, and when a balance is due, included in your next invoice based on the schedule defined in that agreement's profile.

**DENY** If you deny funding you will be prompted to provide a deny reason to inform the author of your decision. The author will have the opportunity to self-fund the transaction, resubmit for funding based on your deny reason, or elect to publish under a subscription model, as available.

Results per page: 25 Results 1 - 25 of 240 Previous 1 2 3 4 5 Next


Order Date	Article Title	Primary Author	Primary Author Email & Affiliation	Publisher	Profile Name	Total Fees Due	Status	Actions
13-Dec-2021	The unexpected narrowness of eccentric debris rings: a sign of eccentricity during the protoplanetary disc phase	Kennedy, Grant M	robinson@copyright.com University of Warwick 417804	Replica Publishing	AR Profile_1	0.00 USD	Pending	<b>APPROVE</b> <b>DENY</b>

When administrators log in, they will be able to view and respond to outstanding requests.





# Manuscript details page



**Test Manuscript Matching Deposit IEEE Univ (15% Disc)**

Publication:	IEEE Electron Device Letters	Publisher:	Institute of Electrical and Electronics E...
Publication ID:	0045900	Author:	Krista Thom
Manuscript DOI:	10.1000/IEEE_Test04222019AM	ORCID® ID:	14326821581
Manuscript ID:		Institution:	IEEE University
Publication Date:	01-Aug-2019	Institution ID:	RINGGOLD-5824
OA License(s):	CC BY	Co-Authors:	Jennifer Goodrich

[View all transactions associated with this manuscript](#)

**ORDER CONFIRMATION** [Print Friendly Format](#)


Order number: *Not available until funding is approved.* **TOTAL DUE: 0.00 USD**  
Order date: 23-Apr-2019

**Thank you for your order! We have requested funding approval from your institution.**  
If approved, you will receive a request confirmation email with your order number.  
If not, we will notify you of the reason your institution has not funded your request and you will be invited to pay your order on your own.

Charge	Original Fee	Discounts	Tax/VAT *	Total Due
Open Access	2,345.00 USD	(2,345.00 USD)	0.00 USD	0.00 USD
<b>TOTAL</b>	<b>2,345.00 USD</b>	<b>(2,345.00 USD)</b>	<b>0.00 USD</b>	<b>0.00 USD</b>

\* Tax/VAT may be based on the customer location and is the customer's responsibility.

<b>Billing address:</b>	Peter Tuohy IEEE University 445 Hoes Ln Piscataway, NJ 08854 United States	<b>TOTAL DUE:</b>	<b>0.00 USD</b>
<b>Customer location:</b>	Krista Thom Route de Meyrin 385 Geneve 23, CH-1211 Switzerland	<b>APC organizational contact:</b>	Krista Thom k.thom@ieee.org 732-562-3977

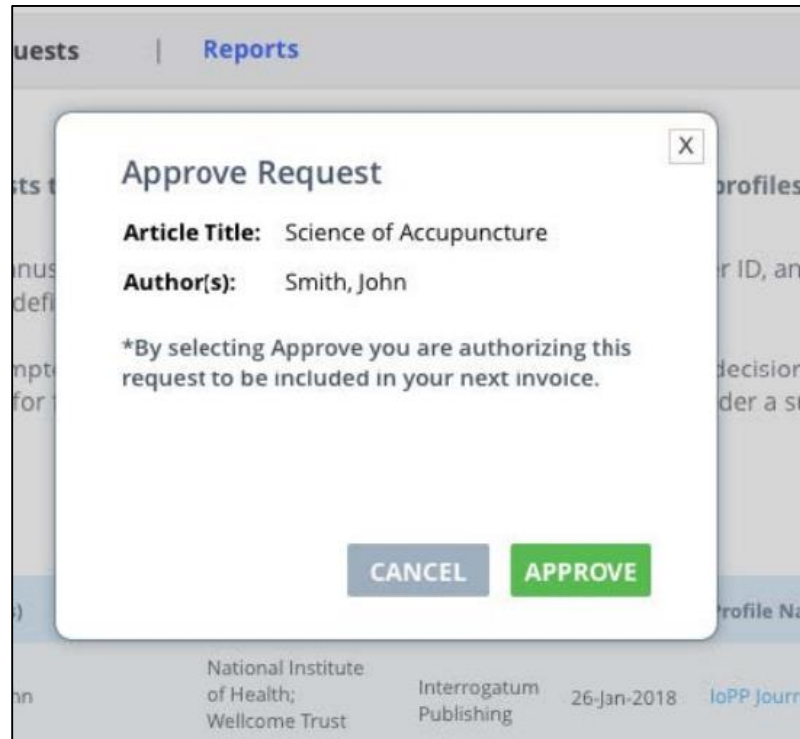
[Terms and conditions](#)   
[Invoice payment instructions](#)

The detailed order confirmation page is available to both authors and administrators.

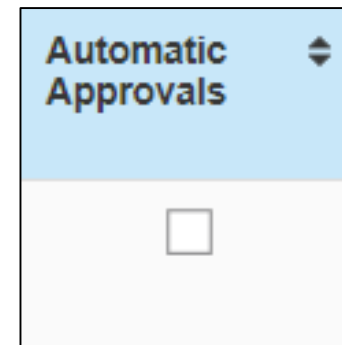
It includes information on article license type, discounts, and pricing.



# Approving requests

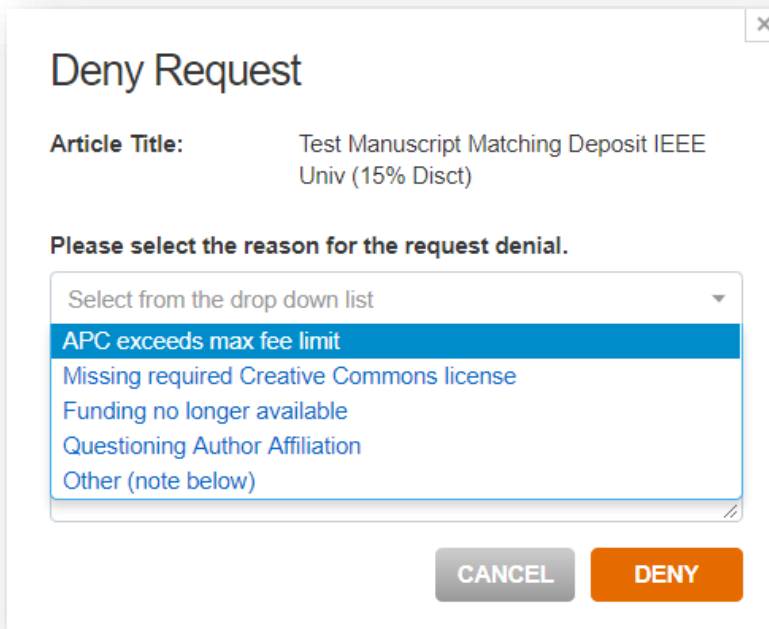


Administrators can also choose to approve requests automatically under the “Billing Profiles” tab.



Clicking “Approve” will launch a pop-up box that prompts the administrator to confirm approval. As further confirmation, the author also receives a Funding Approved email.

# Denying requests



**Deny Request**

**Article Title:** Test Manuscript Matching Deposit IEEE Univ (15% Disc)

Please select the reason for the request denial.

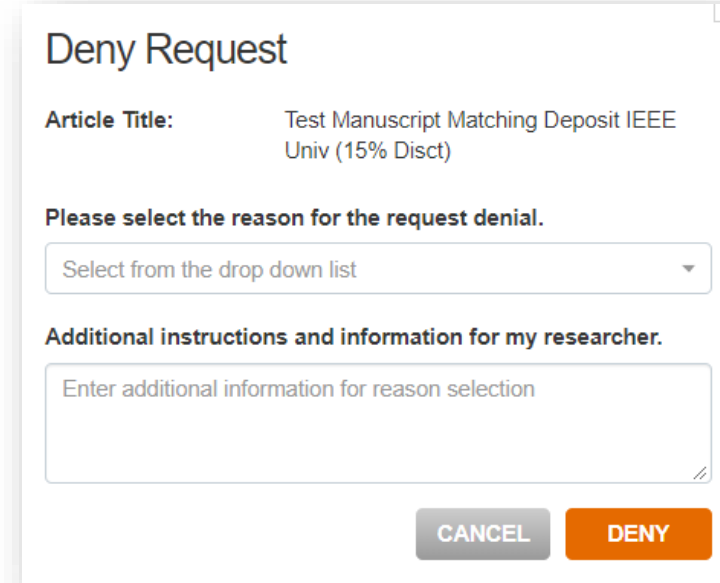
Select from the drop down list

- APC exceeds max fee limit
- Missing required Creative Commons license
- Funding no longer available
- Questioning Author Affiliation
- Other (note below)

**CANCEL** **DENY**

If a funding request is denied, administrators can select the reason from the pre-populated dropdown list. The reason will be included in the notification email sent to the author.

Administrators can also add an explanation or further instructions. (If “Other” is selected from the dropdown menu, this field is mandatory.)



**Deny Request**

**Article Title:** Test Manuscript Matching Deposit IEEE Univ (15% Disc)

Please select the reason for the request denial.

Select from the drop down list

**Additional instructions and information for my researcher.**

Enter additional information for reason selection

**CANCEL** **DENY**

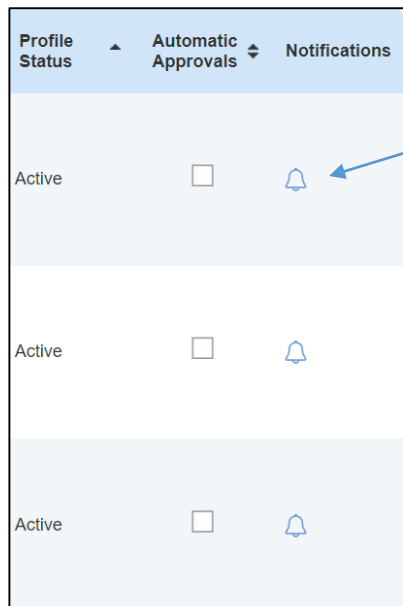


# Adding Custom Notifications

Custom Notifications can be created so that a contact or contacts can be notified when a profile has met a set value.

This is often used as an alert when the profile has only a few APCs remaining.

A notification will alert a contact or contacts by email that a value has been reached.



Step 1: Click Bell under "Notifications"

Step 2: Add notification contact

Step 3: Set threshold for alert

The screenshot shows a form titled '1. SELECT CONTACTS'. It has a dropdown menu labeled 'Select Contact'. Below this are two input fields: 'Contact Name' with the value 'Jon Smith' and 'Email Address' with the value 'test@ieee.org'. There is a checkbox that is checked, with the text: 'I consent to the use of my contact information for the purposes of sending this custom notification. If I am entering contact information on behalf of another party, I have obtained any necessary consents from that party to provide you with such information for the purposes of sending this custom notification.' Below this is section '2. SELECT TRIGGER'. It has a label 'Trigger this email when' followed by four radio button options: 'Amount Approved for Invoicing', 'Number of APC Tokens Used', 'Number of APC Tokens Remaining' (which is selected), and 'APC Threshold - Funds Remaining'. Below these options is the text 'has reached' followed by an input field containing the number '3'. Below the input field is the text: 'This number is the threshold that will trigger your custom email.' followed by a bulleted list of four items: 'Amount Approved for Invoicing', 'Number of APC Tokens Used', 'Number of APC Tokens Remaining', and 'APC Threshold - Funds Remaining'. At the bottom right of the form are two buttons: 'CANCEL' and 'SAVE'.

# Billing Profiles

**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 - 17 of 17

Profile Nickname	Profile Name	Agreement Name	Publisher	Invoicing Frequency	Profile Start Date	Profile End Date	Profile Status	Automatic Approvals	Notifications
> <input type="button" value="Click to add"/>	<u>APCTEST1</u>		APCHQ (Association provinciale des constructeurs d'habitation du Quebec)	Monthly	08-Aug-2019	N/A	Active	<input type="checkbox"/>	
> <input type="button" value="Click to add"/>	<u>CZ Deposit Account - 5% Discount</u>		The Institute of Electrical and Electronics Engineers, Incorporated (IEEE)	Monthly	01-Oct-2019	N/A	Active	<input checked="" type="checkbox"/>	
> <input type="button" value="Click to add"/>	<u>Special Deposit Account - 10% Discount</u>	Deposit Account - 10% Discount	The Institute of Electrical and Electronics Engineers, Incorporated (IEEE)	Monthly	19-May-2020	28-Feb-2022	Active	<input type="checkbox"/>	

If an institution has agreements with multiple publishers that use RLSC, they will be able to access all profiles from the “Billing Profiles” tab.

Administrators can also set automatic approvals, manage notifications, and view agreement details.



# Billing Profiles

## IEEE University: Deposit Account - 15% Discount

IEEE - INST OF ELECTRICAL AND ELECTRONICS ENGRS

This profile is currently active.

Last modified: 25-Jun-2021 05:24:13 by TTS-55104

CREATE NOTIFICATION

### Update Special Billing Profile

Use this form to view the special billing arrangement between your organization and a publishing house. You can also update contact information for your organization, assign a primary organization contact, and choose to suppress email notifications as needed.

- If you have more than one agreement with a publisher that varies by journal, you should expect to see separate profiles for each agreement.
- Note under the *Profile Attributes* section, you can see if the agreement applies to all journals or a subset.

CONTACTS

WORKFLOW OPTIONS

CONFIRM & SAVE

### BILLING

#### PROFILE INFORMATION

Profile Name *	IEEE University: Deposit Account - 15% Discount	Profile Type	Deposit
Agreement Name *	Scott's Test Agreement		

ORGANIZATION DETAILS

BILLING ADDRESS

Clicking on a specific profile will bring up agreement details.

Most of the data is read-only.

Administrators can add contacts, manage notifications, add a special note to authors, and choose to require an order number.



# Reports

Billing Profiles | Funding Requests | Reports

Report type: Transaction Summary Report ⓘ Time zone: ⓘ RightsLink (Eastern) Local

Transaction Summary Report

Manuscript ID:	<input type="text"/>	Primary Author first name:	<input type="text"/>
Manuscript name:	<input type="text"/>	Primary Author last name:	<input type="text"/>
Publisher name:	<input type="text"/>	Primary Author ID:	<input type="text"/>
Promotion name:	<input type="text"/>	Primary Author Institution:	<input type="text"/>
Funder name:	<input type="text"/>	Funding status: ⓘ	All ▾
Invoice number:	<input type="text"/>	Payment status: ⓘ	All ▾
Order ID:	<input type="text"/>	Order date:	In last 30 days ▾

**Run Report** Clear

- If an institution has profiles with multiple publishers, manuscripts from all publishers will be shown by default. Users can select to limit results to a single publisher.
- Transaction Summary Report data is refreshed hourly.
- RLSC reports do not include traditionally published articles.

In the “Reports” tab, administrators can run Transaction Summary Reports based on various criteria.

Full reports are sent by email in XLS format.

Funding status: ⓘ All ▾

Payment status: ⓘ All ▾

Order date: In last 30 days ▾

**Run Report** Clear

**Request Full Report**

Order Date	Order ID	Total Order Amount	Currency	Funding status	Payment Status
31-Jan-2019	10000071712	0.00	USD	Approved	Closed

# Additional OA resources

IEEE Open and IEEE Author Resources



# IEEE Open Access Partners

IEEE OPEN

About For Authors For Institutions Publishing Options What's New

Institutional Open Access Options

Institutional Partners

## The Trusted Solution for Open Access Publishing

Browse Journals and Submit a Paper →

Search Institutional Partners →

Search for Institution

All Australia Austria Canada China Colombia Finland Germany Greece Hong Kong Hungary India Ireland Italy Lebanon Netherlands Poland Qatar Spain Sweden Switzerland United Arab Emirates

United Kingdom United States

Berner Fachhochschule

CERN

OST Ostschweizer Fachhochschule

eawag aquatic research

Berner Fachhochschule

CERN Geneva, Switzerland

Eastern Switzerland University of Applied Sciences

Eawag - Swiss Federal Institute of Aquatic Science and Fisheries



### Fully Open Access Topical Journals

IEEE offers more than 20 technically focused gold fully open access journals spanning a wide range of fields.



### Hybrid Open Access Journals

IEEE offers over 160 hybrid journals that support open access, including many of the top-cited titles in the field.



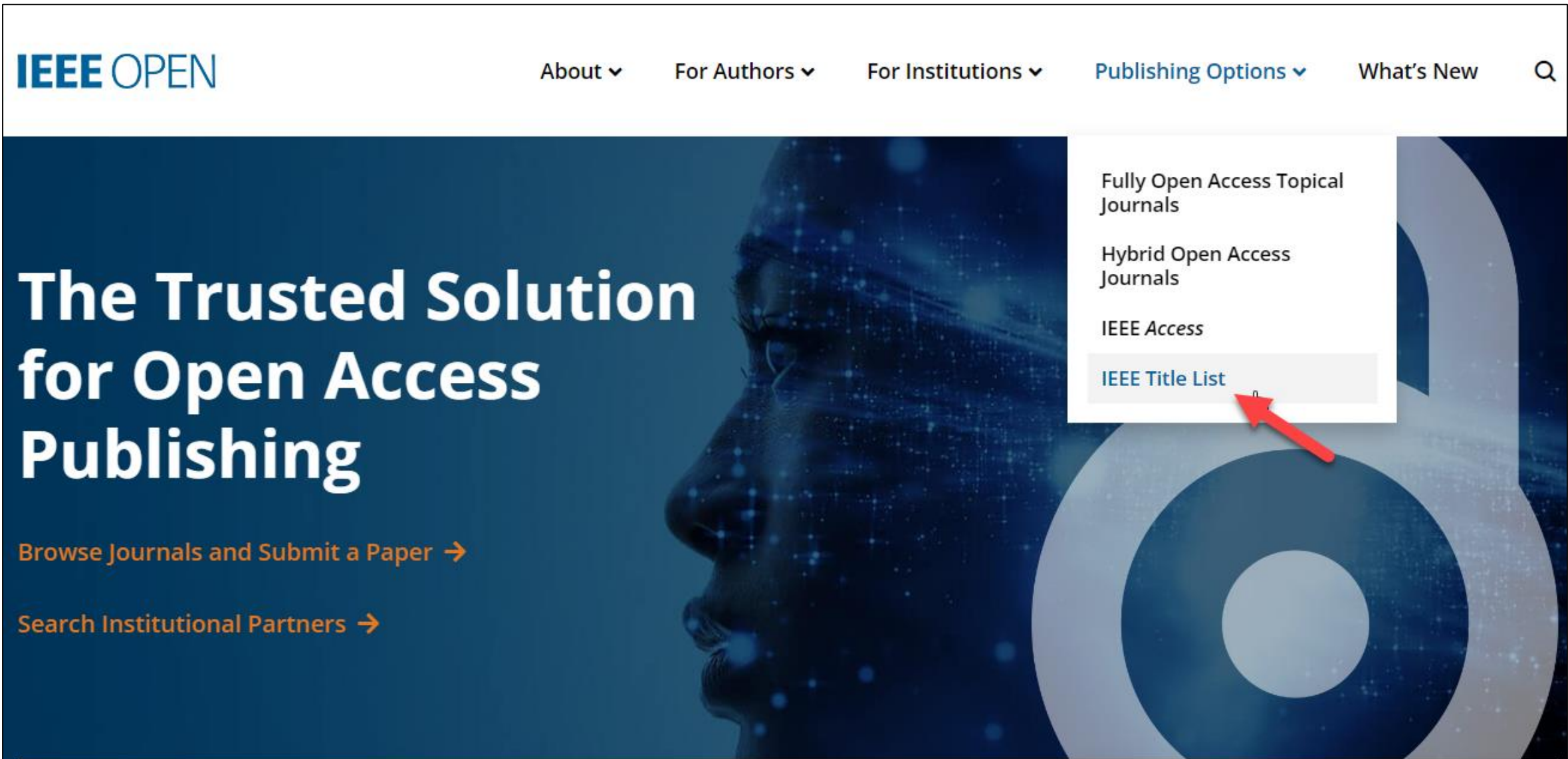
### IEEE Access

The multidisciplinary, gold fully open access journal of the IEEE, publishing high quality research across all of IEEE's fields of interest.





# IEEE Title List on IEEE Open



The screenshot displays the IEEE Open website interface. At the top left is the "IEEE OPEN" logo. The navigation bar includes links for "About", "For Authors", "For Institutions", "Publishing Options", and "What's New", each with a dropdown arrow. A search icon is located on the far right. The main content area features a large blue banner with the text "The Trusted Solution for Open Access Publishing". Below this banner are two orange links: "Browse Journals and Submit a Paper" and "Search Institutional Partners", both with right-pointing arrows. A dropdown menu is open under "Publishing Options", listing "Fully Open Access Topical Journals", "Hybrid Open Access Journals", "IEEE Access", and "IEEE Title List". A red arrow points to the "IEEE Title List" option.

**IEEE OPEN**

About ▾ For Authors ▾ For Institutions ▾ Publishing Options ▾ What's New 🔍

## The Trusted Solution for Open Access Publishing

[Browse Journals and Submit a Paper →](#)

[Search Institutional Partners →](#)

- Fully Open Access Topical Journals
- Hybrid Open Access Journals
- IEEE Access
- IEEE Title List**

# IEEE Open Access Author Guide

## Publishing Open Access with IEEE: A Guide for Corresponding Authors

Now you can benefit from the IEEE open access agreement with [Institution Name]. This agreement allows authors to publish open access articles in IEEE's industry-leading journals and provides reading access to over five million documents from the IEEE Xplore Digital Library. The agreement makes it more convenient for authors to publish open access articles with IEEE as eligible authors pay no access charges as these costs are covered by [Institution Name] under the agreement.

### Benefits of Publishing Open Access with IEEE

IEEE journals are trusted, respected, and rank among the most highly cited in their fields. We aim to provide our authors with an outstanding publishing experience and offer numerous benefits to facilitate this.

- The advantage of being published by IEEE, whose journals are trusted, respected, and rank among the most highly cited in their fields
- Maximum visibility and global reach to millions of users of the IEEE Xplore Digital Library
- Rigorous peer review following IEEE's established publishing principles and quality standards
- Rapid decisions to get your research exposed faster with many titles targeting a publication time frame of a matter of weeks for most accepted papers
- Enhanced discoverability of author works with abstracting and indexing providers such as Elsevier, EBSCO, OCLC, Clarivate, ProQuest, IET, and NLM
- A variety of multimedia integration options (video abstracts, etc.) as well as the ability to publish code (Code Ocean) and add datasets (IEEE Dataport)



IEEE OPEN

open.ieee.org • ieeeauthorcenter.ieee.org



## Publishing OA with IEEE: A Guide for Corresponding Authors

### IEEE Open Access Publishing Options



IEEE offers a growing portfolio of gold fully open access journals spanning a wide range of topical focus areas. Publish faster online and reach a larger potential audience with a rapid, yet thorough, peer-review process.



A hybrid journal is a subscription-based journal that provides authors the choice to publish their accepted article as open access. IEEE offers over 160 hybrid journals that span an array of technology fields and offer the benefits of a respected reputation of publishing the leading research in the field.



IEEE Access is a multidisciplinary, open access journal that features a rapid, yet rigorous peer review process of 4 to 6 weeks. With over 50,000 articles to date, the journal also offers discipline-specific special sections aligned with IEEE technical communities.

For more information on current IEEE institutional partners, please visit:  
<https://institutions.open.ieee.org/for-institutions-funders/institutional-partners/>

For information on choosing the right publication for your research submission, please visit:  
<https://publication-recommender.ieee.org/home>

Please note: Prior to submission, please check with your institution's administrator to learn if your institution has any specific funding policies on author publishing. Some institutions only fund articles published in fully open access journals due to funder mandates. Regardless, IEEE has many open access publishing options suitable for all authors that meet these policies and are mandate compliant.

### 5 Easy Steps to Submitting an OA Article:

- 1 Once you find a publication to submit your paper to, click "Submit Manuscript" to start the submission process from the journal home page on IEEE Xplore and follow the ScholarOne manuscript system prompts.
- 2 In the Author and Affiliations step, enter the name of your institution in the "Edit Account Information" screen and select from the results that are displayed along with the corresponding RINGGOLD IDs. The results shown will help to match your article to an open access agreement as a primary authentication method. Be sure to use your institutional email, which will be used as a secondary option to match your manuscript to an open access agreement.
- 3 If your article is accepted and you publish your article as open access, you will receive an email notification regarding APC/open access payment processes to submit a funding request. (Note: In some agreements, an open access administrator may receive this funding request automatically and you would not receive an email notification.)
- 4 Once the request is submitted, your institution's OA administrator will receive and review for approval.
- 5 To ensure accurate processing, please be sure to use your institution's name from the dropdown menu as well as your own institutional email address for all forms and submissions.

IEEE OPEN

open.ieee.org • ieeeauthorcenter.ieee.org





# Summary of what we've covered

- **Author Process**
  - Submission process
  - Post acceptance
  - RightsLink for Scientific Communications (RLSC)
- **Administrator Process**
  - Notifications
  - Responding to funding requests
  - Reports
  - Additional IEEE open access resources

# Additional Resources

## **IEEE Open**

<https://open.ieee.org/>

## **CCC RLSC: Resources for Institutions**

<https://www.copyright.com/rlinstitutionalportalrc/>

## **IEEE Author Center**

<https://ieeauthorcenter.ieee.org/>

## **IEEE Author Posting Guidelines**

<https://www.ieee.org/publications/rights/author-posting-policy.html>

