

# Consortia portal guide

Learn how to access and use the RightsLink® institutional portal to manage your open access business at a consortia level, when manually approving funding requests.

## Resource Centre

To help raise awareness of open access within your institution, visit our resource centre where you will find relevant materials to download and share.

[bmj.com/company/bmj-resource-centre](http://bmj.com/company/bmj-resource-centre)

## Support

If you need any support accessing BMJ resources please visit [support.bmj.com](http://support.bmj.com)

For any other queries contact  
[openaccess@bmj.com](mailto:openaccess@bmj.com)

**BMJ**

# How to access and manage your requests

- Visit [apcfunding.copyright.com](https://apcfunding.copyright.com)
- You should have received login credentials from BMJ. If not contact [oasales@bmj.com](mailto:oasales@bmj.com), or if you encounter any difficulties with the system, email [openaccess@bmj.com](mailto:openaccess@bmj.com).

## 1. Balance

Make sure that, before you approve or deny any funding requests, you check the balance of your OA Agreement.

You will find the following three tabs when you first log in:

Billing Profiles

Funding Requests

Reports

Go to “Funding Requests”

## 2. Funding Requests

The funding requests table will display all funding requests from your authors for articles accepted for publication by participating RightsLink® publishers.

Click on table headings to sort by order date, article title or status.

- **Sorting on status** enables you to bring to the top all articles that need your attention:
  - Requests that have been acted upon are greyed out.
  - Requests that require action, have an approve or deny option in the far-right “Actions” column.
- **Click on a value in the total fees due column** to see the order details, including a breakdown of charges and license confirmation.
- **Primary author information** is provided. When hovering over the author's name, their email and institutional affiliation (name and ID) appear, if available. Similarly, when a manuscript reflects funding and grant information, hovering over the funder's name will show the corresponding grant information.
- Click on the arrow to the left of the funding request **to expand the view and see more information** (where available) to help you make a funding decision, including Secondary Author(s) (including the hover functionality as per Primary Author), Journal, DOI, License, Manuscript Type, Submission Date, Acceptance Date and Threshold Value.

Add Special Billing Profile

Show Advanced Search

Results per page: 25 Results 1 - 25 of 45

Profile Name	Profile Account Name	Invoicing Frequency	Agreement Name	Eligibility Timeframe	Eligibility Start	Eligibility End	Profile Status	Actions
▼ <a href="#">Bioscience Open Access</a>	National Library of Medicine National Center for Biotechnology Information (NCBI)	Daily	Bioscience Open Access	Manuscript Acceptance Date	01-Jan-2021	N/A	Active	<a href="#">Edit</a> <a href="#">Refresh</a> <a href="#">Delete</a>
Amount Approved for Invoicing				0.00 GBP				
APC Threshold - Fund Balance Remaining				165,024.00 GBP				
APC Threshold - Total Deducted from Fund Balance				3,825.00 GBP				
APC Threshold - Value of Approved Funding Requests				3,825.00 GBP				

Copyright Clearance Center Institutional Portal

Welcome, Sign Out

Account Name: 1193 Maastricht University Account #: 792048896

Help Live chat

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.

[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 1 - 4 of 4

Order Date	Article Title	Primary Author	Funder	Publisher	Profile Name	Total Fees Due	Status	Actions
12-Jan-2019	ACCEPTED	Joan Pease	National Science Foundation	APCTEST1 Publisher	4000_1	13,100.00 USD	Pending	<a href="#">APPROVE</a> <a href="#">DENY</a>
16-Jan-2019	ACCEPTED	Joan Pease	National Science Foundation	APCTEST1 Publisher	500	0.00 USD	Approved	<a href="#">APPROVE</a> <a href="#">DENY</a>
Secondary Author(s)		Joan Pease						
Journal		ACCEPTED						
Acceptance Date		16-Jan-2019						
APC Value at Threshold Value		0.00 USD						
16-Jan-2019	ACCEPTED	Joan Pease	National Science Foundation	APCTEST1 Publisher	Please ID in Profile Name	4,000.00 USD	Approved	<a href="#">APPROVE</a> <a href="#">DENY</a>
18-Dec-2017	Impact of Bioactive Peptides and Peptide Sequences on Health in Patients	Chen, Honghui	National Institutes of Health	Hemoglobin Publishing	MDPI University	2,000.00 USD	Denied	<a href="#">APPROVE</a> <a href="#">DENY</a>
Secondary Author(s)		Chen, Honghui						
Journal		Hemoglobin						
DOI		10.1002/Hemoglobin						
License		CC BY						
Acceptance Date		18-Dec-2017						

Results 1 - 4 of 4

# Managing your requests

## How to approve and deny funding requests via central dashboard:

Institutional portal users can approve or deny each funding request under the consortia profile.

Visit the funding requests tab to review research articles accepted for publication, by participating RightsLink® publishers including BMJ.

Once an author, affiliated to your institution, has an article accepted for publication you will be alerted by email, which will include the article information.

If you approve the request, the order will be deducted from the available APC fund and the author will be notified of the approval. If you deny the request, you must provide a reason for the denial which will then be shared with the author so that they can take the next best action (resubmit the request or pay themselves).

## Approving funding requests

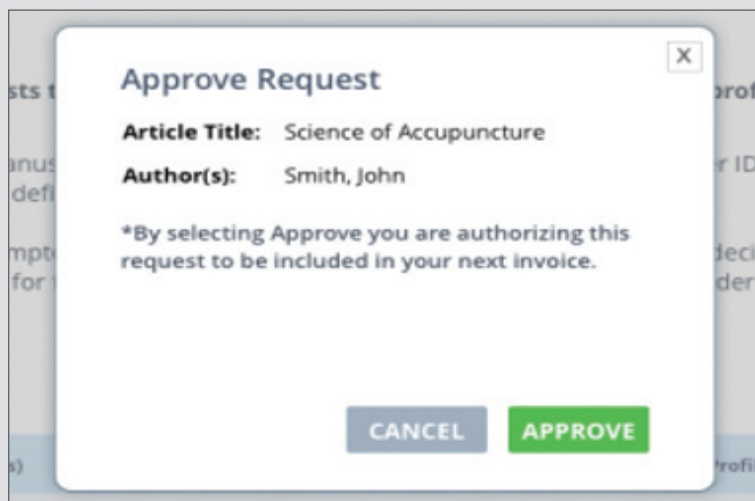
Click the green 'Approve' button and the following pop-up will appear, asking you to confirm your intent to approve funding.

### Once approved:

If you approve the request, a confirmation email will automatically be sent from Rightslink to the author. The article will proceed through production and is then published open access in the journal of your choice.

The order confirmation page is updated to reflect a Funding Approved message displayed above the charges table.

The transaction appears on the next eligible invoice per the billing profile's 'Invoice Grouping' and 'Invoice Frequency' settings.



The screenshot shows a white pop-up dialog titled "Approve Request" with a close button (X) in the top right corner. It contains the following text: "Article Title: Science of Accupuncture" and "Author(s): Smith, John". Below this is a disclaimer: "\*By selecting Approve you are authorizing this request to be included in your next invoice." At the bottom are two buttons: "CANCEL" (grey) and "APPROVE" (green).

## Denying funding requests

When you deny a funding request, the following screen appears:

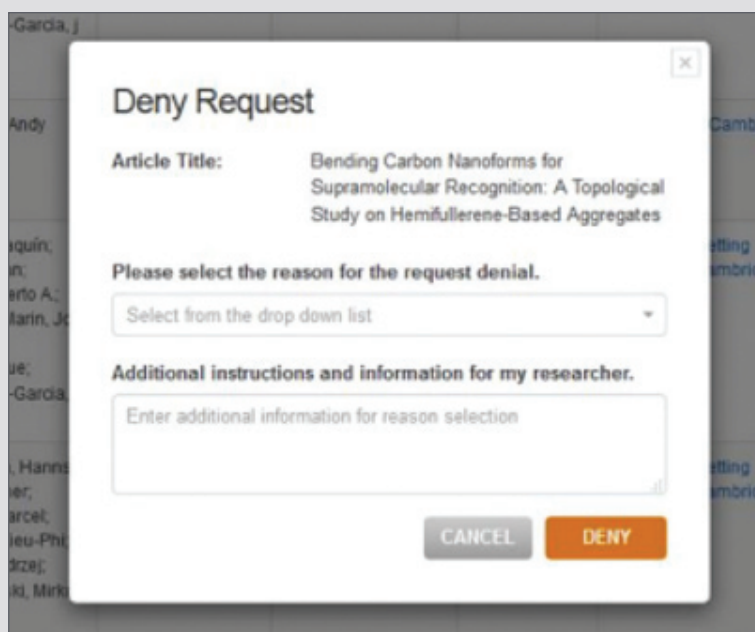
The drop-down list includes predefined reasons for denying a funding request. One of the following might be selected

- APC exceeds maximum fee limit
- Missing required Creative Commons license
- Funding no longer available
- Questioning author affiliation
- Other (note below).

If you select Other (note below) you will be prompted to supply supplementary information.

When you deny a request, an automated email will be sent to the author. This contains the reason for denial and will prompt the author to take the appropriate best steps.

Funding statuses, including deny reasons, appear in your reports so that you can easily filter and analyse patterns.



The screenshot shows a white pop-up dialog titled "Deny Request" with a close button (X) in the top right corner. It contains the following text: "Article Title: Bending Carbon Nanoforms for Supramolecular Recognition: A Topological Study on Hemifullerene-Based Aggregates". Below this is a section titled "Please select the reason for the request denial." with a drop-down menu showing "Select from the drop down list". Underneath is a section titled "Additional instructions and information for my researcher." with a text area labeled "Enter additional information for reason selection". At the bottom are two buttons: "CANCEL" (grey) and "DENY" (orange).

# Running reports

## 3. Reports

Go to the 'Reports' tab to generate a report which has hundreds of data points about your organisation's transactions. The search and filtering functionality will apply to any transactions associated with your organisation, whether they are funding requests submitted by authors or one-off transactions placed by a member of your team.

The screenshot shows the 'Reports' tab in a web application. The 'Report type' is set to 'Transaction Summary Report'. The 'Time zone' is set to 'RightsLink (Eastern)'. The form contains fields for Manuscript ID, Manuscript name, Publisher name, Promotion name, Funder name, Invoice number, Order ID, Primary Author first name, Primary Author last name, Primary Author ID, Primary Author Institution, Funding status, Payment status, and Order date. The 'Run Report' button is highlighted. Below the form, the results table shows one result for a transaction with the following details:

Manuscript ID	Manuscript Name	Publisher name	Primary Author Name	Primary Author Institution	Order Date	Order ID	Total Order Amount	Currency	Funding status	Payment Status
	Test Article Title	American Association for Cancer Research	Hall, Alex		31-Jan-2019	10000071712	0.00	USD	Approved	Closed

After filtering the report using the criteria of your choice (primary author institution, selected dates, approved articles only), simply click 'Run Report.' This will give you a list of results on screen.

To request a full excel download of the report you'll need to email [openaccess@bmj.com](mailto:openaccess@bmj.com) - including the name of your institution and the relevant date range. Your report will be emailed back to you.

For more resources to make the most of your institutional portal visit CCC's library at [copyright.com/learn/resource-library](https://copyright.com/learn/resource-library)

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