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.

BMJ

How to access and manage your requests

- Visit **apcfunding.copyright.com**

- You should have received login credentials from BMJ. If not contact **oasales@bmj.com**, or if you encounter any difficulties with the system, email **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.

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).
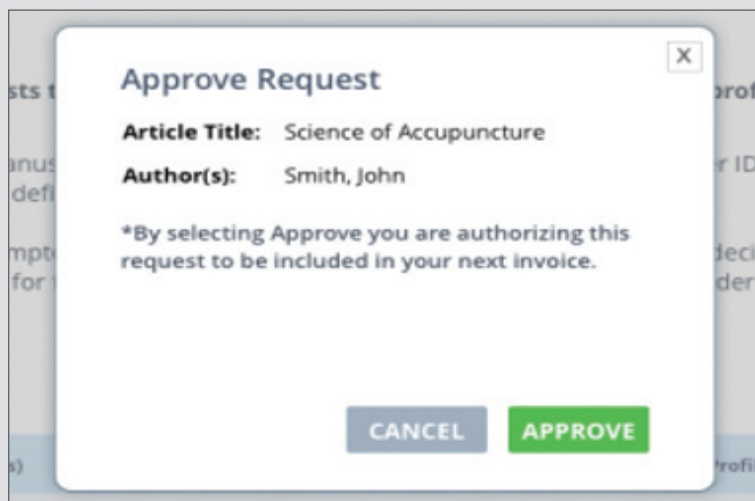
Approving funding requests

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.

Denying funding requests

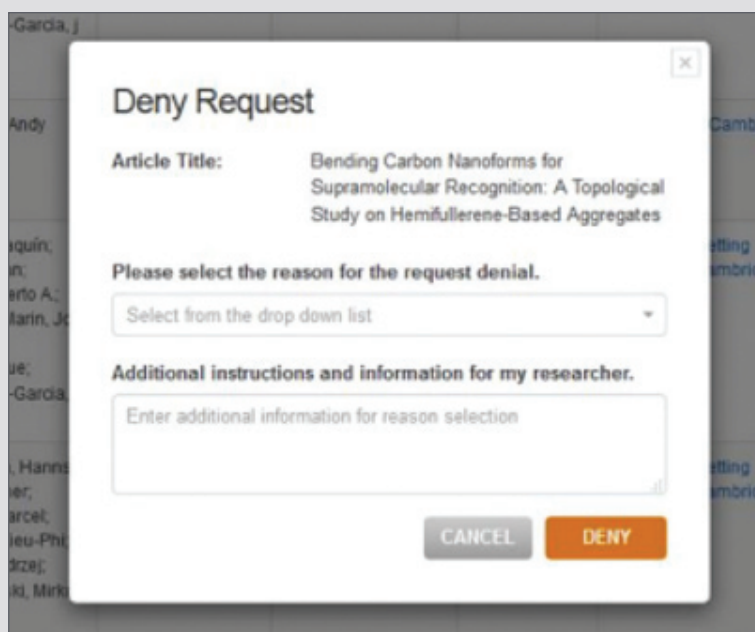When you deny a funding request, the following screen appears:

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.

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.

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** - 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