

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/open-access-agreements/

Support

If you need any support accessing BMJ resources please visit support@bmj.com

For any other queries contact openaccess@bmj.com

BMJ

How to access and manage your requests

- Visit apcfunding.copyright.com
- If you do not have login credentials, or experience any difficulties with the system, then please contact us at 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 see the number of APC tokens (and value) spent by your institution, and the balance for your Consortia as a whole.*

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.

BMJ TEST 2	BMJ University	Daily	BMJ Test Oct Release Threshold	Manuscript Acceptance Date	09-Nov-2021	N/A	Active
Amount Approved for Invoicing	0.00 GBP						
Number of APC Tokens Remaining on the agreement	94						
Number of APC Tokens Used by this profile	1						
Value of APC Tokens Used by this profile	2,500.00 GBP						

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: 1703 U-001 College Account #: 7002049986

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.

Order Date	Article Title	Primary Author	Funder	Publisher	Profile Name	Total Fees Due	Status	Actions
12-Jan-2019	ACCEPTED	Joan, Hoare	National Science Foundation	APC TEST 1 Publisher	4000_0	13,130.00 USD	Pending	APPROVE DENY
19-Jan-2019	ACCEPTED	Joan, Hoare	National Science Foundation	APC TEST 1 Publisher	600	0.00 USD	Approved	APPROVE DENY
Secondary Author(s)		Joan, Hoare						
Journal	ACCEPTED							
Acceptance Date	19-Jan-2019							
APC Taken at Threshold Value	4,000.00 USD							
19-Jan-2019	ACCEPTED	Joan, Hoare	National Science Foundation	APC TEST 1 Publisher	Please fill in Profile Name	4,000.00 USD	Approved	APPROVE DENY
18-Dec-2017	Impact of Backdoor Program and Tactics Escalation on Holiday in Pakistan	Qin, Youqiang	National Institutes of Health	Hemisphere Publishing	West University	2,000.00 USD	Denied	APPROVE DENY
Secondary Author(s)		Qin, Youqiang						
Journal	ISSNED							
DOI	10.1002/OrigJUnderstand							
MSRN	00 0Y							
Acceptance Date	18-Dec-2017							

Please note that the APC threshold you will see for BMJ is not based on your forecasted agreement, but on 2022 prices.

* If you are from IReL you will continue to see £/ threshold amounts, and not tokens.

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:

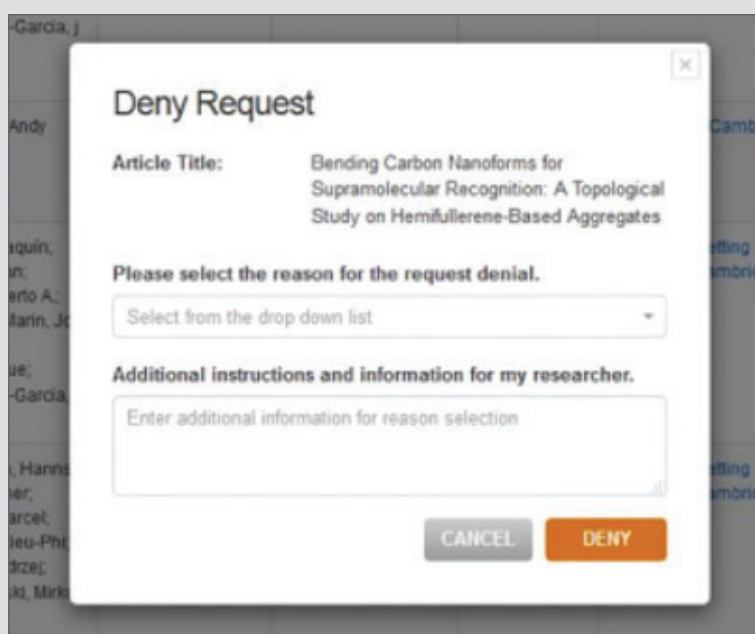
The drop-down list includes predefined reasons for denying a funding request. One of the following might be selected

- 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.



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.

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

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"/>
Manuscript DOI:	<input type="text"/>	Primary Author ID:	<input type="text"/>
Publisher name:	<input type="text"/>	Primary Author Institution:	<input type="text"/>
Promotion name:	<input type="text"/>	Funding status: ⓘ	Approved
Funder name:	<input type="text"/>	Payment status: ⓘ	All
Invoice number:	<input type="text"/>	Order date:	Year-to-date
Order ID:	<input type="text"/>	<input type="button" value="Run Report"/>	<input type="button" value="Clear"/>

Results 1 - 14 of 14

Manuscript ID	Manuscript Name	Publisher name	Primary Author Name	Primary Author Institution	Order Date	Order ID	Total Order Amount	Currency	Funding status	Payment Status
annrheumdis-2021-221961	test	BMJ	Rashid, Fatima	BMJ China	09-Dec-2021	10000006240	0.00	GBP	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 - 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/rlinstitutionalportalrc/guides/

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