Institutional portal guide

Learn how to access and use the RightsLink® institutional portal to manage your open access business.

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

Support
If you need any support accessing BMJ resources please visit support.bmj.com
For any other queries contact openaccess@bmj.com
How to access

Visit apcfunding.copyright.com

You should have received login credentials from BMJ. If not contact oasales@bmj.com, or if you encounter difficulty with the system, email publicationservices@copyright.com.

When you first log into the Institutional Portal you will find the following three tabs:

- Billing Profiles
- Funding Requests
- Reports

Billing Profiles

Threshold amount (balance)

An APC threshold represents an up-front deposit made by the institution to cover APC fees up to a certain monetary value. It can also represent an open access spending cap on certain Read & Publish agreements.

Creating a new notification

To keep a track of funds, you can view, create, edit or delete notifications via the Manage Notifications page, which can be found by clicking on the notifications icon.

If you have an open access account you will receive notifications when your institution is close to using available funds so you are prompted to request an invoice to top up funds.

Selecting the button to create a new notification from the Manage Notifications Page will load the create notification form where you can customise your notifications.

Customising your notifications

1. Select Contacts

You can add up to 5 unique email addresses to send the notification to. Your organisation contacts, as listed in the profile, can be selected and their email address will be automatically populated, or you can choose to add a new contact. You can remove any contacts you have added.

2. Select Trigger

You can choose one of four trigger types for the notification to be sent. One we recommend is for APC Threshold – Funds Remaining:

This is triggered once the total remaining threshold balance has reached or is below the number entered.

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, publisher, profile name (more on this follows), or status.

- Sorting on status enables you to bring to the top all articles that need your attention:
  - Requests that you have 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, discounts applied, and licenses chosen by the author.

- 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.
How to approve and deny funding requests via central dashboard:

Institutional portal users can approve or deny each funding request under the profiles they have set up with their account. Visit the funding requests tab to review articles accepted for publication, by participating RightsLink® publishers including BMJ. Once an author, affiliated to your institution, has an article accepted for publications you will be alerted by email (you must be opted in to receive emails alerts, you can update your email preferences in dashboard settings).

If you approve the request, the order will be deducted from your threshold amount (the APC value removed from your balance) 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.

Note: If TouchFree transactions are not enabled for the profile authors will complete the funding requests themselves. Authors will be able to view the Order Confirmation from within their Manage Account portal, by clicking their original payment due link or, in many cases, by clicking an APC link from within their author dashboard.

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:
- 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. Once paid, the article will be sent to the BMJ production team and published open access in the journal of their choice. If required, you will be able to amend your decision within the dashboard.

Funding statuses, including deny reasons, appear in your reports so that you can easily filter and analyse patterns.
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 (selected dates, approved articles only), simply click ‘Run Report.’ This will give you a list of results on screen.

Then click ‘Request Full Report’ to receive a full Excel report via email confirmation that the system is generating your report.

Once your institution transaction summary report has generated you will receive confirmation via email. This email confirmation will contain a link so that you can download the report to your computer.

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

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