



# Institutional Guide to Copyright Clearance Centre's RightsLink<sup>®</sup>

## Manual approval of funding requests

**Learn how to access and use the RightsLink<sup>®</sup> platform to manage your open access business at an institutional and 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](mailto:support@bmj.com)

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



# 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 the same address.

## 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**”

Profile Name	Profile Account Name	Agreement Name	Eligibility Timeframe	Eligibility Start	Eligibility End	Profile Status	Automatic Approvals	Actions
BMJ Publishing Co. Copyright Clearance Center	University of Reading	Open Access Fund	Manuscript Acceptance Date	01-Jan-2022	31-Dec-2022	Active	<input type="checkbox"/>	
<b>Amount Approved for Invoicing</b>		0.00 GBP						
<b>Number of APC Tokens Remaining on the agreement</b>		55						
<b>Number of APC Tokens Used by this profile</b>		2						
<b>Value of APC Tokens Used by this profile</b>		6,600.00 GBP						

## 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.

Order Date	Article Title	Primary Author	Funder	Publisher	Profile Name	Total Fee Due	Status	Actions
12-Jan-2019	ACCEPTED	John Prosser	National Science Foundation	ARTICLE11 Publisher	6602_3	13,130.00 USD	Pending	APPROVE DENY
18-Jan-2019	ACCEPTED	John Prosser	National Science Foundation	ARTICLE11 Publisher	6602_3	6,000.00 USD	Approved	APPROVE DENY
Secondary Author(s)		John Prosser						
Journal		ACCEPTED						
Acceptance Date		18-Jan-2019						
APC Name or Threshold Value		6,000.00 USD						
18-Jan-2019	ACCEPTED	John Prosser	National Science Foundation	ARTICLE11 Publisher	Please fill in Profile Name	4,000.00 USD	Approved	APPROVE DENY
18-Dec-2017	Impact of Bioactive Peptide and Testosterone on Healthy In Population	John Prosser	National Institutes of Health	Intergroup Publishing	NIH/NIH	2,000.00 USD	Denied	APPROVE DENY
Secondary Author(s)		John Prosser						
Journal		ACCEPTED						
DOI		10.1002/ajph.12624						
License		CC BY						
Acceptance Date		18-Dec-2017						

- 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.

### 3. How to approve and deny funding requests via central dashboard

Institutional portal users can approve or deny each funding request under their 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.

**Approve Request**

**Article Title:** Science of Accupuncture

**Author(s):** Smith, John

\*By selecting Approve you are authorizing this request to be included in your next invoice.

CANCEL APPROVE

#### 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.

**Deny Request**

**Article Title:** Bending Carbon Nanoforms for Supramolecular Recognition: A Topological Study on Hemifullerene-Based Aggregates

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

# Running reports

## 4. Reports

Go to the 'Reports' tab to generate a report which has information 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 the BMJ system. It features a 'Transaction Summary Report' form with various search and filter fields. Below the form is a table of results, with one result highlighted. A 'Request Full Report' button is visible next to the table.

**Transaction Summary Report**

Manuscript ID:  Primary Author First Name:

Manuscript Name:  Primary Author Last Name:

Manuscript DOI:  Primary Author ID:

Publisher Name:  Primary Author Institution:

Promotion Name:  Funding Status:

Funder Name:  Payment Status:

Invoice Number:  Order Date:

Order ID:

Results 1 - 7 of 7

Manuscript ID	Manuscript Name	Publisher Name	Primary Author Name	Primary Author Institution	Order Date	Order ID	Total Order Amount	Currency	Funding Status	Payment Status
g0jnl-2022-327168	JISC profile logic testing 1	BMJ	Rashid, Fatima	BMJ Publishing Group	14-Feb-2022	Pending	0.00	GBP	Pending	Open

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 [oasales@bmj.com](mailto:oasales@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

[www.copyright.com/rlinstitutionalportalrc/guides/](http://www.copyright.com/rlinstitutionalportalrc/guides/)

### 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](mailto:support@bmj.com)  
For any other queries contact [oasales@bmj.com](mailto:oasales@bmj.com)