Knowledge Unlatched
KU Open Funding: User Guide for Libraries

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Please click on [https://openfunding.knowledgeunlatched.org/login](https://openfunding.knowledgeunlatched.org/login) to access your account.

If you already have an account in the KU pledging portal then your login is the same.

If you are new to KU when logging on for the first time you will need to reset your password. Do this by clicking on “Forgot Password?” and by following the instructions in the email you will receive (check your spam folder if you do not immediately receive an email!).
Once you have reset your password and logged in to the portal you will see the main overview screen. Here you will be able to see submissions by your researchers once they have started using the portal, but for now it will be very white and empty in your account.

The button “submissions” lists all submissions made by researchers at your institution.
With the button “Researchers” you will be able to invite your researchers/faculty members to create a user account in order to start using the portal.

For test purposes we recommend you invite yourself or some of your library colleagues to play the role of the researchers, that way you can have a look at the Researcher Portal and understand how the process works. You could for example invite yourself using a different email address from the one you are currently logged on to the platform with.

Click on “Researchers” then “invite” to invite yourself, or a colleague:
The recipient of the email address you entered will then receive an email inviting them to the portal. If they click on the link in the email they are taken to the login page. Please note that if you have invited yourself using a different email address that you first have to log out of the library account in order to log in to the researcher account.

First you need to register as a new user:
The role of “Researcher” now needs to be selected in order to be able to use the platform as a researcher:
Once the researcher account has been set up, and let’s assume for now that you are logged on yourself as a researcher, the main screen on entry shows the search parameters available to search for the right publisher(s) for a title submission. Several criteria can be selected, including discipline, language, BPC range etc. You could also enter a search into the field at the top of the page, e.g. “comparative literature”: 

![Find Publishing Opportunities](image_url)
The results shown become more specific the more search criteria which are used.
Click on any result to see details of the publisher, their profile and offer as well as the price per publication form/word count. This screenshot only shows the initial information on the page, far more (including information on included or extra services, hosting and discoverability) is available by scrolling down in the portal.

<table>
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<th>Offer from transcript Verlag</th>
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<td>transcript is one of Europe’s leading independent academic publishers. We focus on publishing in cultural studies and the social sciences, in history, philosophy, and in cultural management. We offer more than 100 series and release about 400 new German- and English-language titles every year. Our backlist catalogue includes more than 3,500 titles in print and digital formats. We were established in Germany in the late 1990s in order to provide an editorial service for innovative and critical research, and this commitment has formed our unique and broad yet well-balanced program that contributes high-quality publications to the latest debates in various academic.</td>
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<td>Monograph</td>
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<td>PUBLISHER SOURCE DISCIPLINE</td>
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As a real researcher you could now click on “Apply” in order to submit your book proposal/manuscript to the selected publisher, we would however like to request that you only select the publisher “Demo Publisher” in order to try out the functionality and in order to avoid our publishing publishers receiving “test” submissions! We have set up the publisher “Demo Publisher” for this purpose, which you are free to select as often as you wish.

Return to the main selection page and select “Demo Publisher” from the dropdown menu of publishers:
Now you can click on the publisher in the results screen and click on “Apply” in order to make a submission. Enter the title of your manuscript and click on “Apply”:

![Offer from Demo Publisher](image)

You immediately see a confirmation that your submission has been sent.

Now in the background we at KU receive a notification of the submission and make contact with the publisher. It will of course take some time for the publisher to evaluate the submission, but as this is a demo, let us assume that the publisher has agreed to publish the title at the agreed BPC. At this point, the researcher receives a confirmation that the submission has been accepted, as do you at the institution. The researcher can see an overview of all his or her submissions, whether open or approved/declined by clicking on the button “Submissions” in the researcher account.

Let us now return to your library account so see what happens next. Please log out of your researcher account and log in again with your library account.
Click on “Submissions” in order to see an overview of all submissions from researchers linked to your institution’s account. Here you can see the submission which I just made from my researcher account. As long as demo submissions are made using “Demo Publisher” then we at KU will make sure that these test submissions are accepted so that you can continue to test out the portal.

As a library you can now decide whether or not your institution will pay the BPCs for the accepted submission. You can click on “Approve” or “Not approve” accordingly:
If you accept the submission, you will be asked to confirm your choice, then you will see in the overview that the submission has changed from “accepted” to “approved”:

And of course should you decide to decline the submission then this status will also be updated in the overview.
Once you have approved a submission this confirms that your institution will cover the BPC charge for this title. You can see this in the overview if you click on the KU Open Funding logo, and at the same time you see your institution’s balance.

In this demo case the Knowledge Unlatched Library has already made a large deposit into KU Open Funding in order to cover all accepted submissions seamlessly and without any time delay. You could of course make a payment as and when you approve a submission, but please note that it is not possible to approve a real submission without any balance in the library account.
If you have any questions at any time when you are in the portal use the chat icon to get in touch with us:
If you would like to arrange a short online demo with us, or require any further information, please let us know:

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Shortlisted: Digital Publishing Award 2019
Shortlisted: ALPSP Awards for Innovation in Publishing 2016
Winner: Curtin University Award for Best Innovation in Education 2015
Winner: IFLA/Brill Award for Open Access 2014