



Taylor & Francis Group
an informa business

Taylor & Francis Author Workflow & Research Dashboard

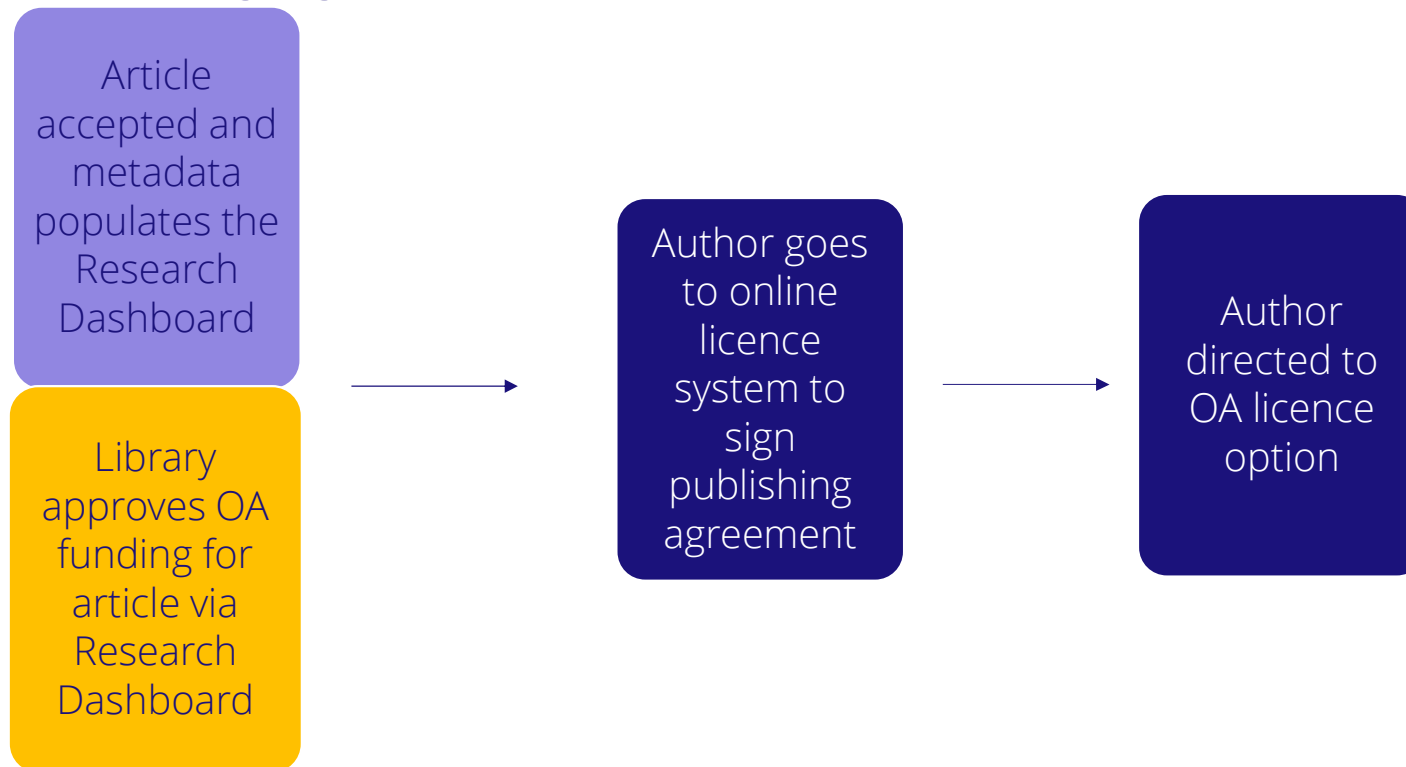


Workflow for an Open Select Article at Taylor & Francis



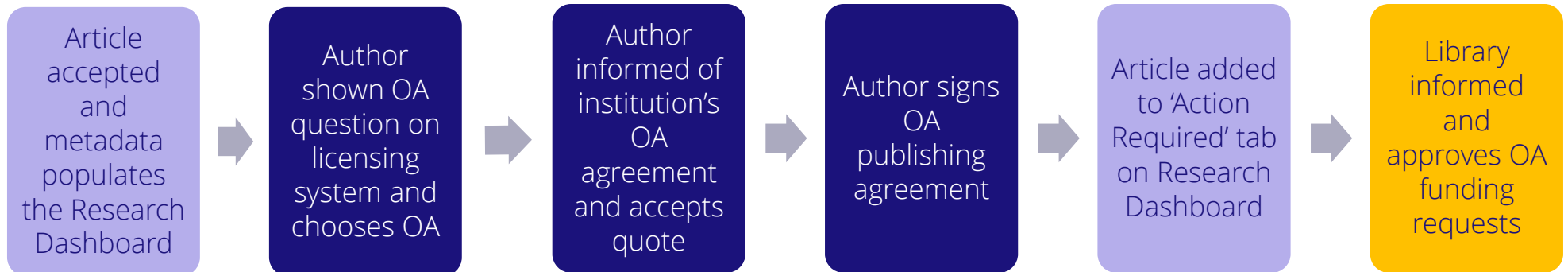
From Article Acceptance: 2
different workflows, depending on how
quickly the library and author take
action

1. Library approval for OA funding via Dashboard *before* author has signed publishing agreement



The default workflow

2. Author signs publishing agreement and chooses OA before library approves for OA funding via Dashboard





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Workflow 1:

Library approval for OA
funding via Dashboard before
author has signed publishing
agreement



New Article Email to Author

Send To: Author Email

Subject: Your article with Taylor & Francis

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

Congratulations on the recent acceptance of your manuscript submission to *Journal Title*. The Taylor & Francis production team will work with you to publish your article online as quickly as possible.

We would like to let you know that your institution has an open access agreement with Taylor & Francis, which means you may be eligible for funding to publish your article [open access](#). We have let them know that your paper has been accepted and shared your article information, including your email address.

What happens next?

It's important to know that not all articles will be eligible for funding under this agreement, so please [click here](#) to view the latest information.

If your institution approves open access funding for your article, we will let you know. You may also request approval by selecting the open access option.

Look out for an email inviting you to select and sign your article publishing agreement.

If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

Kind regards,

Mark Robinson
Taylor & Francis open access team

Email to author,
alerting them to
OA agreement

Running Total

Accepted Articles

Submitted Articles

Action Required Articles

Approved Articles

Declined Articles

Durham university

Accepted Articles

Search by Author Name, Article Title, Journal, Email, ORCID, DOI



DOWNLOAD AS CSV

Article Type: All

OA Profile: All

Funder: All

COLLAPSE ALL

test

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
<input type="checkbox"/> Chelsey Horstmann Dennis	Advances in Physics: X	Reviews	Open Access	\$855.00	<input type="button" value="Approve"/> <input type="button" value="Decline"/>

Author Email chelsey.horstmann@tandf.co.uk
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 10.1080/21622671.2017.1948390
 Research Funder Not Available
 Acceptance Date Not Available

Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
<input type="checkbox"/> test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	<input type="button" value="Approve"/> <input type="button" value="Decline"/>

Author Email vinay.c.cp@informa.com
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 346434334664
 Research Funder Not Available
 Acceptance Date Not Available

Contact Us

Running Total

Accepted Articles

Submitted Articles

Action Required Articles

Approved Articles

Declined Articles

Durham university

Accepted Articles

Search by Author Name, Article Title, Journal, Email, ORCID, DOI



DOWNLOAD AS CSV

Article Type: All

OA Profile: All

Funder: All

COLLAPSE ALL

test

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
Chelsey Horstmann Dennis	Advances in Physics: X	Reviews	Open Access	\$855.00	✓ Approved

Author Email chelsey.horstmandennis@tandf.co.uk
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 10.1080/21622671.2017.1948390
 Research Funder Not Available
 Acceptance Date Not Available

Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price		
test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	Approve	Decline

Author Email vinay.c.cp@informa.com
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 346434334664
 Research Funder Not Available
 Acceptance Date Not Available

Contact Us

Approved Article Email to Author

Send To: Author Email

Subject: Gold Open Access funding approval for your article

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

We recently emailed you to let you know that your institution has an open access agreement with Taylor & Francis. We're pleased to let you know that your library has approved Gold Open Access funding for your article through their Research Dashboard.

This means that your article will be published open access; it will be available online for anyone to read, anywhere.

What happens next?

If you have already signed an open access publishing agreement, you don't need to do anything.

If you have not yet signed a publishing agreement, or have already signed a non-open access publishing agreement, then you will receive an email asking you to sign a new publishing agreement. You will be asked to choose a Creative Commons licence, you can find more information about licence choice here. <http://authorservices.taylorandfrancis.com/publishing-agreements-your-options>. Please note that this can take 24 to 48 hours to reach you.

You will not be asked for any payment.

If you have any queries, please contact apc@tandf.co.uk

Best wishes,
Taylor & Francis Group



Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b69325f>


Taken directly to OA
licence options




Author Publishing Agreement

Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Please select the Open Access publishing agreement you require. Also note that with any agreement you are also telling us that you are agreeing to take responsibility for any required article publishing charges. 

- Creative Commons Attribution CC BY-NC-ND 
- Creative Commons Attribution CC BY 

[< Start again](#)

[Next >](#)

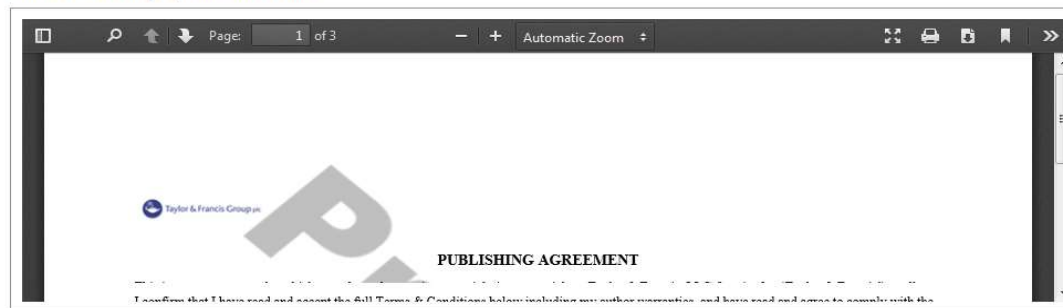
Author Publishing Agreement



Accept Author Publishing Agreement (APA)

This is your final agreement. Ticking the box below and selecting "Next" will be your final step. An option to download a version to sign and scan is available at the bottom if you have been advised you cannot digitally sign.

Author Publishing Agreement Preview



I agree to digitally sign this agreement

Next >

If you are unable to sign this document electronically, please click the 'download' button below to export the APA to your device. You can then print the document off, sign and date it, before re-uploading it via the 'upload' button below. Please note that your progress has been saved and you can return to this page by clicking the link included in the original email that was sent to you by this system.

Download

Upload

Questions or Problems? [Contact Us](#)



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Workflow 2:

Author signs publishing agreement and chooses OA before library approves for OA funding via Dashboard



New Article Email to Author

Send To: Author Email

Subject: Your article with Taylor & Francis

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

Congratulations on the recent acceptance of your manuscript submission to *Journal Title*. The Taylor & Francis production team will work with you to publish your article online as quickly as possible.

We would like to let you know that your institution has an open access agreement with Taylor & Francis, which means you may be eligible for funding to publish your article [open access](#). We have let them know that your paper has been accepted and shared your article information, including your email address.

What happens next?

It's important to know that not all articles will be eligible for funding under this agreement, so please [click here](#) to view the latest information.

If your institution approves open access funding for your article, we will let you know. You may also request approval by selecting the open access option.

Look out for an email inviting you to select and sign your article publishing agreement.

If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

Kind regards,

Mark Robinson
Taylor & Francis open access team

Email to author,
alerting them to
OA agreement



Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b69325f>

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Author Publishing Agreement



Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

This field is required.

Have you considered open access?

Open access offers greater accessibility, visibility and impact for your research. Articles published open access with Taylor & Francis typically receive 32% more citations* and over 6 times as many downloads** compared to those not published open access.

Your funder or institution may recommend, or mandate publishing open access and provide funding to cover the Article Publishing Charge (APC).

We have open access agreements with consortia and institutions globally. Please click here to see if your institution has an open access agreement with Taylor & Francis.

To make your article open access you will need to:

- Get a quote for the article publishing charge and inform us who will pay
- Choose a Creative Commons license

We will do everything else necessary to make your article open access.

If you choose not to make your article open access, it will be available to readers who have subscribed to the journal. There will be no article publishing charge and you will need to sign an appropriate author publishing license.

*Citations received up to Jan 31st 2020 of articles published between 2015-2019 in hybrid journals that are listed in Web of Science®.

**Usage in 2017-2019 of articles published in hybrid journals in 2015-2019.

Do you want to make your article open access for anyone to read online?

- Yes, please click here to request and accept an APC quote
- No

A Quote ID from our APC Quotation service is required before proceeding with this Author Publishing Agreement.
Please click on the above link to generate a Quote ID

[< Start again](#)

[Next >](#)

Author given the option to publish Open Access

NB: if the author selects no to Open Access here, the library can still approve the article for OA funding via the Dashboard and the author will receive a new OA licence to sign

Request APC Quote

To be provided with a more detailed quote please provide more details about your article and billing details.



We have noticed you are affiliated with an organization that may be able to fund your **Article Publishing Charge (APC)**. We will contact them for approval to fund the APC. In the event they decline to fund the APC we will contact you for alternative billing details.

If your organization declines to fund the APC, it will be USD \$2995 plus VAT or other local taxes where applicable in your country.

I do not wish to request funding from my organization

PREVIOUS

NEXT

The system has recognised that the institution is part of the agreement and therefore directs the author to this page, letting them know that they may be eligible for APC funding



Thank you!

Your request for gold open access has been processed.

A request will now be sent to your institution. Please return to your author publishing agreement to complete the licence signing.




Relevant OA licence options displayed

Author Publishing Agreement



Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Please select the Open Access publishing agreement you require. Also note that with any agreement you are also telling us that you are agreeing to take responsibility for any required article publishing charges. 

- Creative Commons Attribution CC BY-NC-ND 
- Creative Commons Attribution CC BY 

[< Start again](#)

[Next >](#)

Author Publishing Agreement



Accept Author Publishing Agreement (APA)

This is your final agreement. Ticking the box below and selecting "Next" will be your final step. An option to download a version to sign and scan is available at the bottom if you have been advised you cannot digitally sign.

Author Publishing Agreement Preview



I agree to digitally sign this agreement

Next >

If you are unable to sign this document electronically, please click the 'download' button below to export the APA to your device. You can then print the document off, sign and date it, before re-uploading it via the 'upload' button below. Please note that your progress has been saved and you can return to this page by clicking the link included in the original email that was sent to you by this system.

Download

Upload

Questions or Problems? [Contact Us](#)

Author Publishing Agreement



Article License Summary

Status - Awaiting T&F approval of APA

Taylor & Francis have been notified of your acceptance and will review your Author Publishing Agreement.

Journal Title	Aphasiology
Journal SubTitle	
Article DOI	10.1080/02687038.2021.1946022
Article Title	testing this article

Corresponding Author

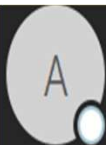
Elle Souster **APA Signed**
Eleanor.Souster@informa.com
Durham University

Complete Author List

Elle Souster **APA Signed**
Eleanor.Souster@informa.com
Durham University

Exit

Tue 26/11/2019 09:27



AP-No-Reply <apc@tandf.co.uk>

Sandbox: An approval request has been sent to your institution to cover the APC on your article

To ● Horstmann Dennis, Chelsey

Dear Sir/Madam,

Article Title: test

DOI/MS ID: 191412402

Journal: Advances in Physics: X

I can confirm that the details of your article will now be passed to the contact we have at your institution. They will then make a decision about covering the article publishing charge (APC) for your article using the information you have supplied.

Once they have reviewed your request you will be informed of their decision and of the next steps or further options available to you.

If you have any further questions, please do not hesitate to contact us.

Kind regards

APC Team

Taylor and Francis Customer Support

apc@tandf.co.uk

Once they confirm that they wish to ask the institution for funding, they receive this email.

Notification to library

From: abc@tandf.co.uk <abc@tandf.co.uk>

Sent:

To:

Subject: Action needed: author request to use your OA membership fund with T&F

Dear Sir/Madam,

We have been contacted by an author who has informed us that they are affiliated with your institution. They would like to make their article Open Access using your OA membership fund. Please log in to your dashboard to approve or decline this request (the article will show in the 'Author Requested OA' tab). You can find the article details below.

The link for your Dashboard is

domain=taylorfrancis.com, and you will need your username and password to access the site.

If you have any further questions, please do not hesitate to contact us.

Kind Regards,

APC Team

Taylor and Francis Customer Support

Article

DOI

Article Title

Main Author

Article Type

Journal

Publishing Model

Final Price

This article will then appear on your action required tab as the author has requested this funding. You then have the ability to approve or decline.

Durham university

Action Required OA

Search by Author Name, Article Title, Journal, Email, ORCID, DOI



DOWNLOAD AS CSV

Article Type: All

OA Profile: All

Funder: All

← COLLAPSE ALL

Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	<input type="button" value="Approve"/> <input type="button" value="Decline"/>

Author Email vinay.c.cp@informa.com
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 346434334664
 Research Funder Not Available
 Acceptance Date Not Available

Approved Article Email to Author

Send To: Author Email

Subject: Gold Open Access funding approval for your article

Body:

Dear Author First Name Last Name,

Re: Article Title; Journal Title

We recently emailed you to let you know that your institution has an open access agreement with Taylor & Francis. We're pleased to let you know that your library has approved Gold Open Access funding for your article through their Research Dashboard.

This means that your article will be published open access; it will be available online for anyone to read, anywhere.

What happens next?

If you have already signed an open access publishing agreement, you don't need to do anything.

If you have not yet signed a publishing agreement, or have already signed a non-open access publishing agreement, then you will receive an email asking you to sign a new publishing agreement. You will be asked to choose a Creative Commons licence, you can find more information about licence choice here. <http://authorservices.taylorandfrancis.com/publishing-agreements-your-options>. Please note that this can take 24 to 48 hours to reach you.

You will not be asked for any payment.

If you have any queries, please contact apc@tandf.co.uk

Best wishes,
Taylor & Francis Group


Author receives
confirmation of
OA funding

Mon 25/11/2019 14:25

AP-No-Reply <apc@tandf.co.uk>

Sandbox: Your request to use your organization's fund has been declined

To ● Horstmann Dennis, Chelsey

 If there are problems with how this message is displayed, click here to view it in a web browser.

 Quote.pdf
80 KB

If the funding is declined by the institution the author will receive this email. They can still choose OA if they wish, and this email explains how

Dear Sir/Madam

Article Title: test

DOI/MS ID: 45678763567634565 /

Journal: Journal of Agricultural Sciences

We sent the information about your article and funding onto your Organization's Open Access team to review.

Unfortunately, your request for this article has been declined. I am happy to say there are still options available to you to make your article Open Access if you are still interested.

You can make your final article Open Access through payment of a charge (Gold) or you can archive an earlier version of your article without any charge to you (Green). For the Gold option, you can pay the article publishing charge (APC) yourself or via another funder or source. Please find a revised APC quote attached, if you would like to choose this option please complete the quote here

[Create a new quote](#) [Re-request funding from my organization](#)

For the Green option, you don't need to complete a quote. Your work will be published without charge in the journal and you can choose to make your Accepted Manuscript (AM) freely available by posting it online. Visit our [Author Services site](#) to find out more.

If you have any further questions, please do not hesitate to contact us.

Kind Regards

APC Team

Taylor and Francis Customer Support

apc@tandf.co.uk

Information Classification: General

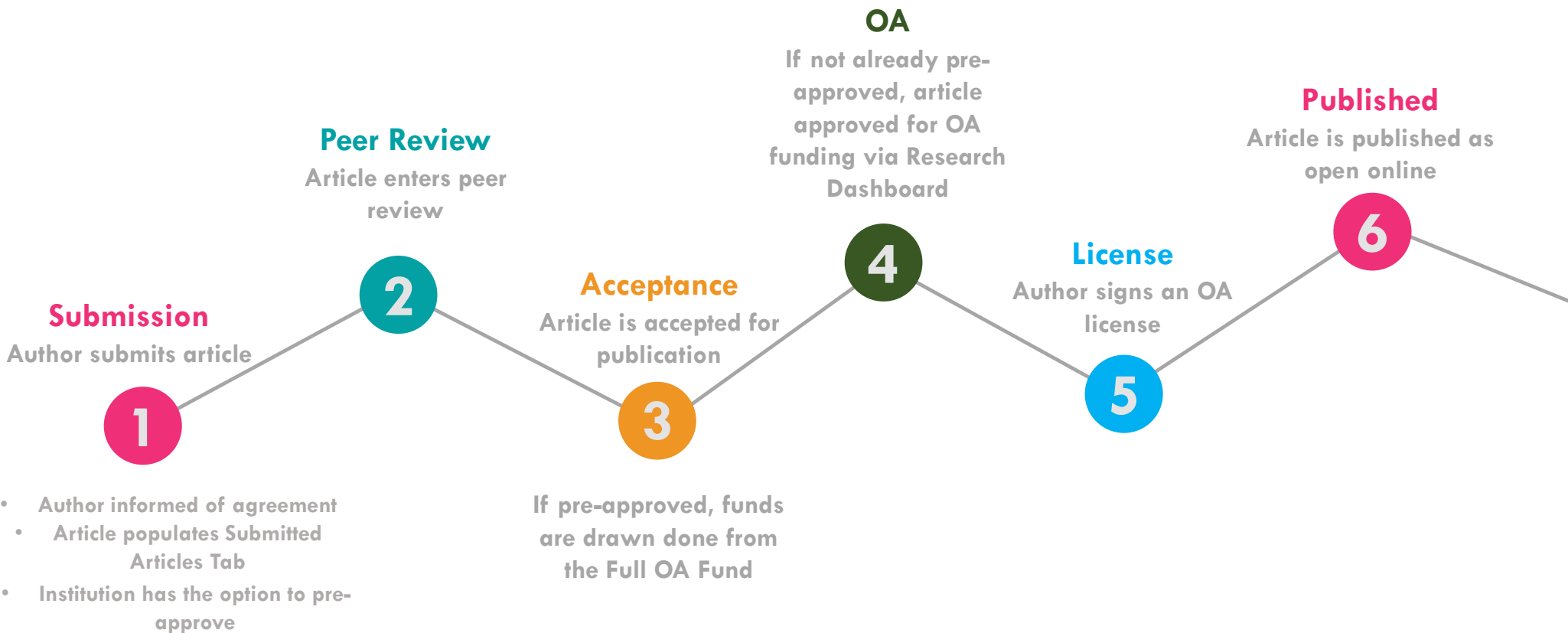


Taylor & Francis Group
an informa business

Taylor & Francis Author Workflow & Research Dashboard



Workflow for a Full Open Access Article at Taylor & Francis



Author Submission Flow – Charges step

Manuscript Subject Authors Charges Preview

We have noticed you are affiliated with an organization that may be able to fund your Article Publishing Charge (APC). We will contact them for approval to fund the APC. In the event they decline to fund the APC we will contact you for alternative billing details.

If your organization declines to fund the APC, it will be \$1,200.00 USD plus VAT or other local taxes where applicable in your country.

I do not wish to request funding from my organization

Previous Next

If your organization declines to fund the APC, it will be \$1,200.00 USD plus VAT or other local taxes where applicable in your country.

I do not wish to request funding from my organization

If you have a discount code enter it here

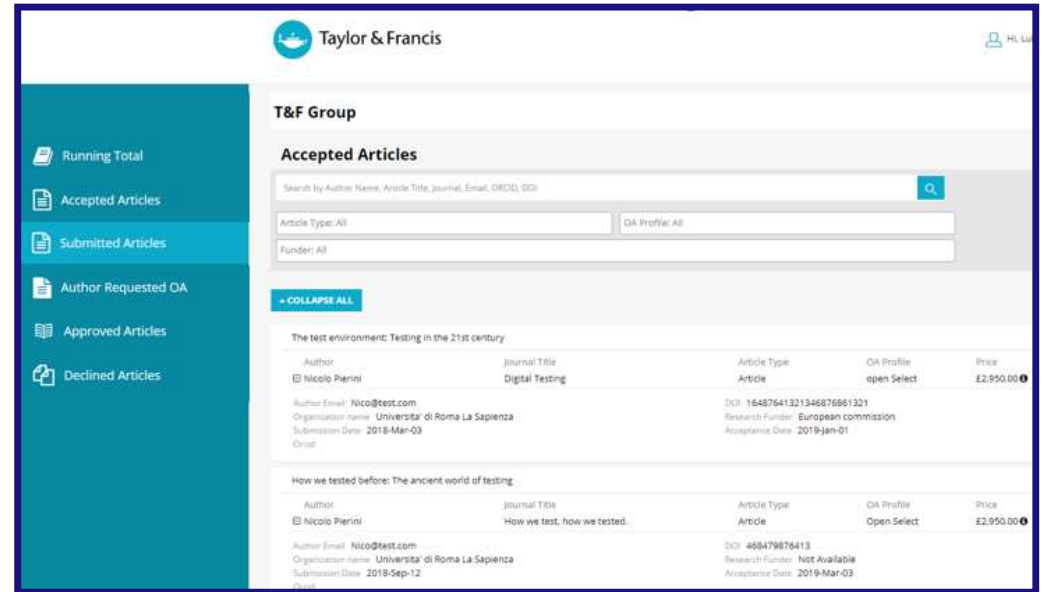
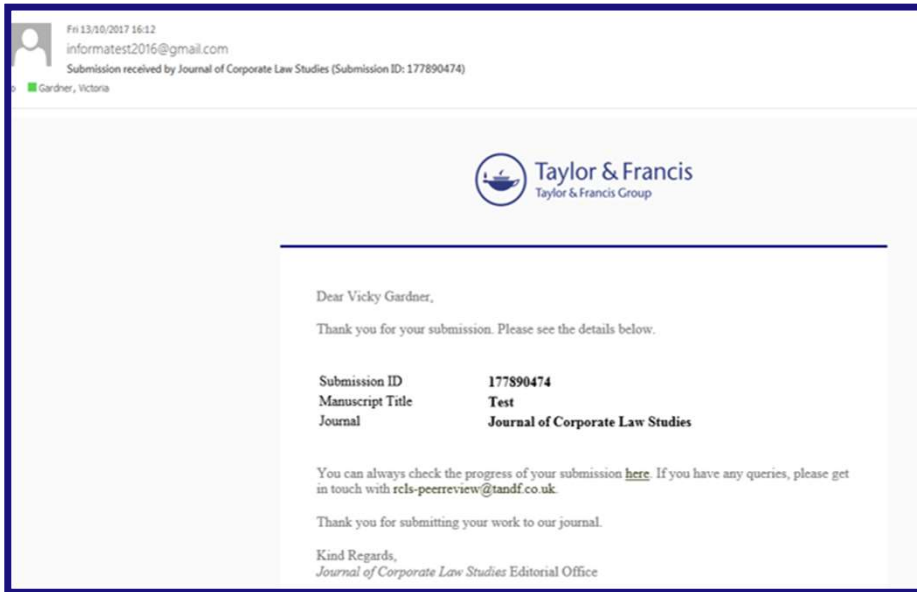
APPLY DISCOUNT

Who will be paying the article publishing charge invoice when it is issued ?

Myself
 An organization
 Other

The system has recognised that the institution is part of the agreement and therefore directs the author to this page, letting them know that they may be eligible for APC funding

Authors can choose if they do not want to request for APC funding and generate their quote or enter a discount code if they have been provided with one



Authors receive a confirmation email when they submit their manuscript. The article then appears on the Submitted Articles tab on dashboard, the library here can pre-approve the article for APC funding.

Acceptance email to author

Dear [author_first_name] [author_last_name],

Re: [article_title]

Congratulations on the recent acceptance of your manuscript submission to *[journal_title]*. The Taylor & Francis production team will work with you to publish your article online as quickly as possible.

In the meantime, I would like to let you know that your institution has an open access agreement with Taylor & Francis. As a part of this agreement your library has access to a Research Dashboard, which shows them that your article has been accepted and displays information about the article, including your email address.

What happens next?

If your institution approves Gold Open Access funding for your article, we will let you know. You may also request approval by using our Quotation service – look out for an email inviting you to select and sign your article publishing agreement.

If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

Kind regards,

APC Team

Taylor & Francis Customer Support



Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

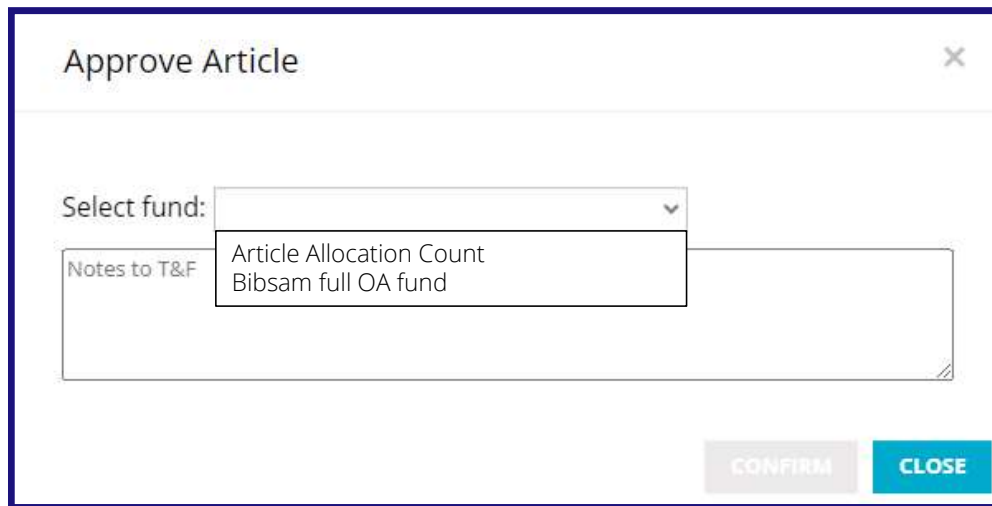
Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b69325f>

Selecting fund for OA approvals



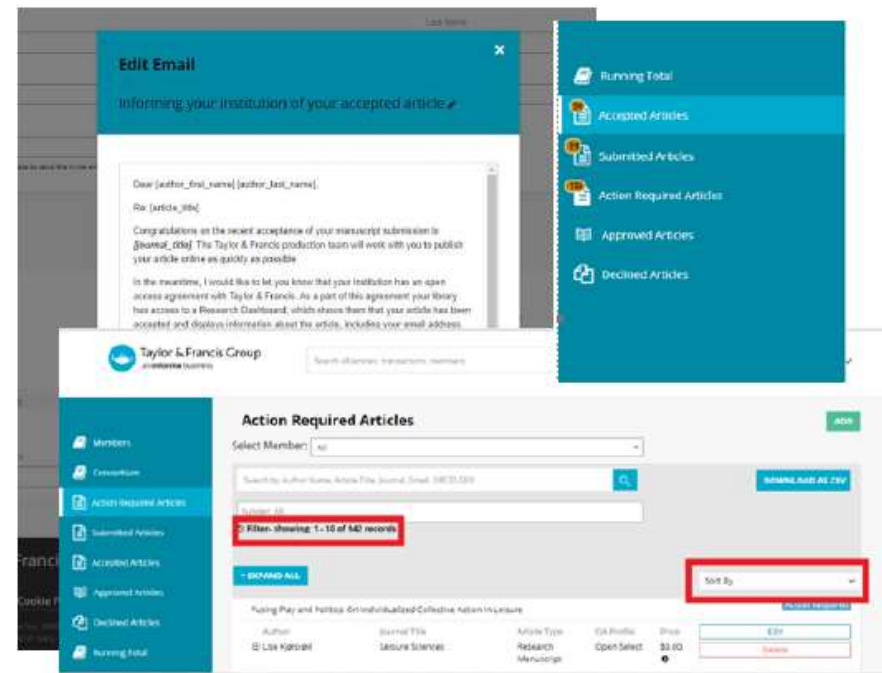
The screenshot shows a dialog box titled "Approve Article" with a close button (X) in the top right corner. Inside the dialog, there is a "Select fund:" dropdown menu. The selected option is "Article Allocation Count Bibsam full OA fund". Below the dropdown is a text area labeled "Notes to T&F" which is currently empty. At the bottom of the dialog, there are two buttons: "CONFIRM" (disabled) and "CLOSE" (active).

Members to select the Article Allocation Count fund when they approve an article from an Open Select journal

While approving an article from Full Oa journal, members to use the Full OA fund from the drop down menu.

Research Dashboard features introduced in 2021

- The ability to customise the email informing the author of the OA agreement in place
- Sort and filter features
- Call to Action badges
- Realtime updates to articles and article metadata entering the dashboard



Q&A

General enquires about the agreement:

Francisco.Vera@informa.com

Eleanor.Souster@informa.com

Access / reading queries:

Megan.Davey@tandf.co.uk

Author workflow / Research Dashboard queries:

Sabyasachi.Bhuyan@tandf.co.uk

Lisanne.Ophoff@tandf.co.uk