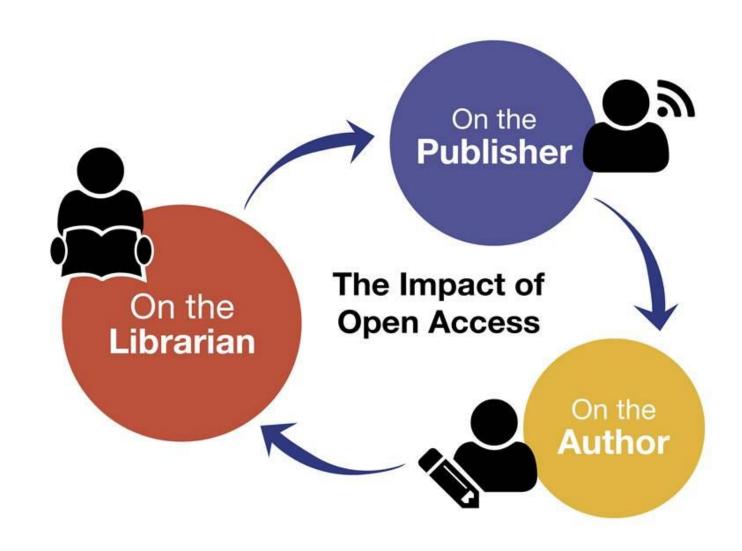


Taylor & Francis Author Workflow & Research Dashboard Demo





# Visibility, Workflow and Communication





# Key Features of the Workflow

# For the Library

- Individual Research Dashboard accounts to approve article eligibility under the agreement
- Libraries have full control over which articles to approve
- Real time self service reporting
- Reduces administration around OA
- Dedicated workflow contacts at T&F

### For the Researcher

- Affiliation based workflow: matching engine identifies eligibility
- Clear messaging at each stage of the process to alert them to the agreement in place
- Communication to confirm funding approval
- Choice of Creative Commons licence



# Workflow for an Open Select Article at Taylor & Francis

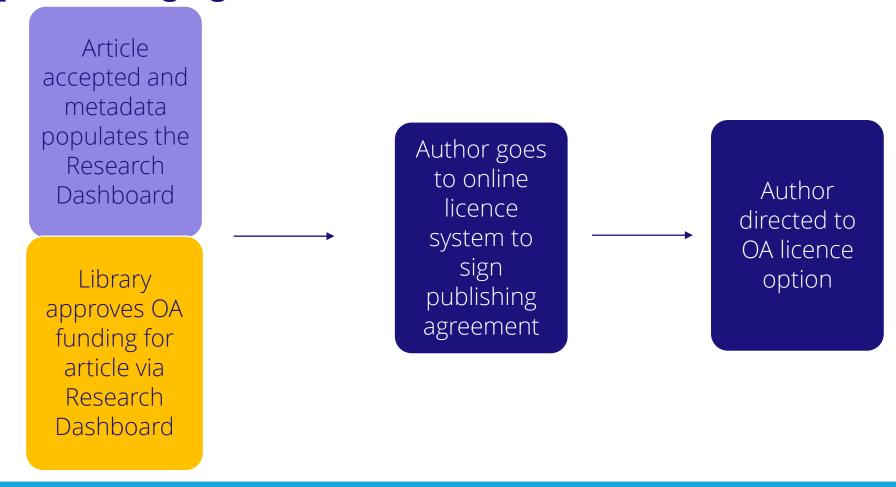




From Article Acceptance: 2
different workflows, depending on how
quickly the library and author take
action



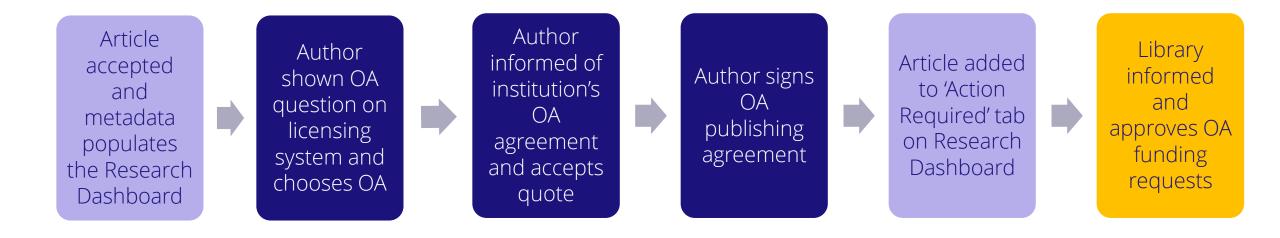
1. Library approval for OA funding via Dashboard \*before\* author has signed publishing agreement



The default workflow



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





# 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 <u>open access</u>. 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.

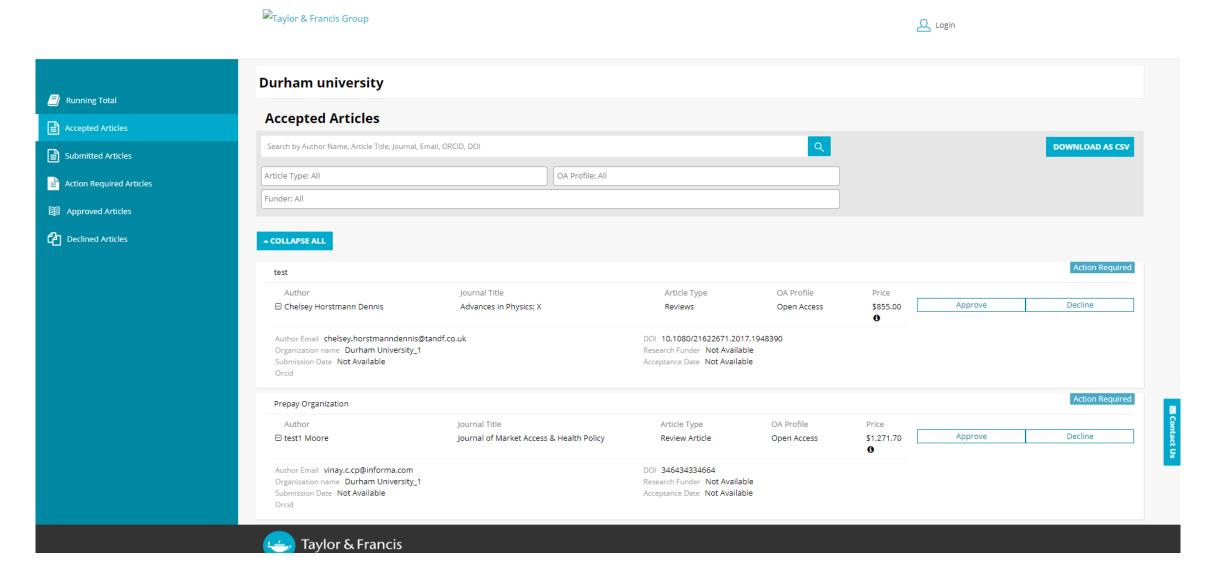
If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

Kind regards,

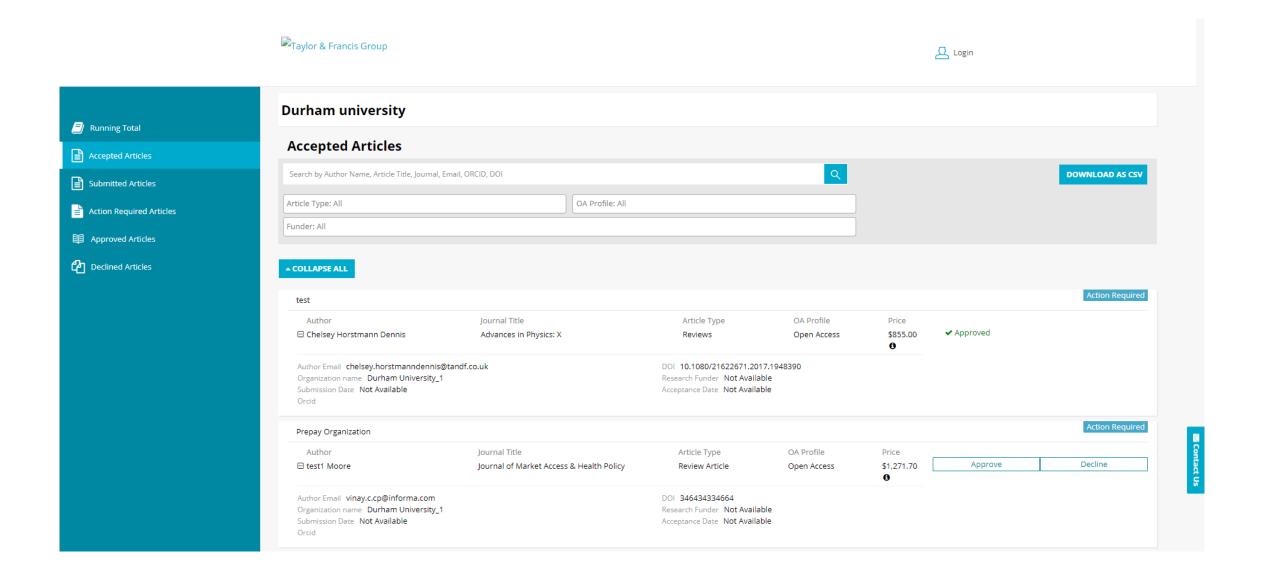
Mark Robinson Taylor & Francis open access team Email to author, alerting them to OA agreement



If the organizational user approves the article before the author gets to the licence email:









# 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 <a href="mailto:sue.starr@valtech.com">sue.starr@valtech.com</a>.

Thank you.



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

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Author Publishing Agreement

### Online Author Publishing Agreement Home Page

Welcome to the Taylor & Francis journal article publishing agreement. This online tool allows you to generate and electronically sign your journal article publishing agreement. You will be presented with a series of screens that prompt you to answer questions relating to your article. You will be given the opportunity to review the full information on the agreement and its terms before signing.

Please note that this system supports the following browsers – IE7 and newer, Safari 6 and newer, Chrome 36 and newer, Firefox 29 and newer.

We generate PDF files with digital signatures. To view these correctly you will require either Adobe Acrobat or Adobe Reader version X or higher. For details on the latest versions and how to upgrade please visit the Adobe website.

There is help available on all screens, marked with this symbol:

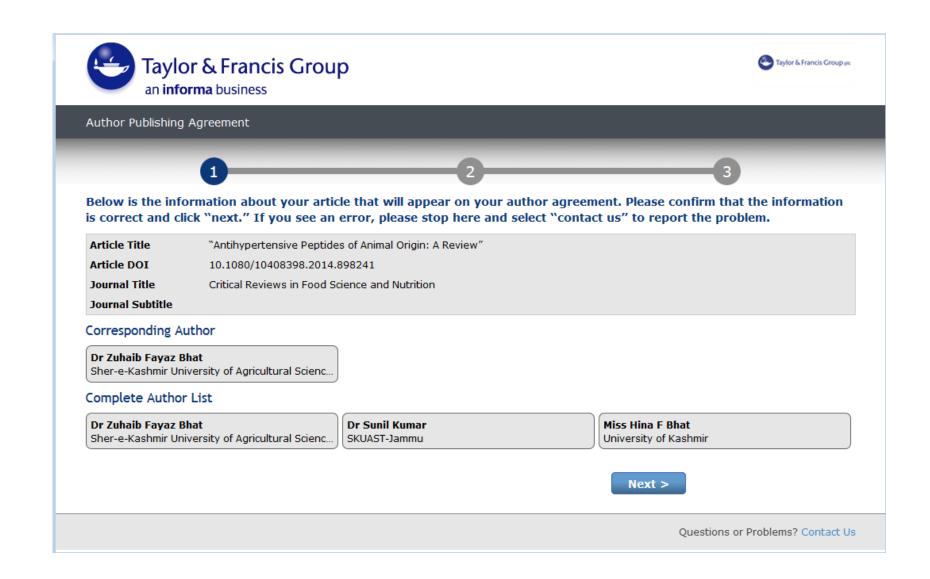


After answering each question, please press the "next" button to take the next step.

Please click the "next" button to continue.

Next > Contact Us Please let us know your query by entering it into the box below (max. 4000 characters). Once you have completed your message, please click the 'Send' button to send your message to Taylor & I have some questions about which option I should choose. Could you call me at 555-555-5555?









### **Specify Article Funders**

This page is used to supply us information on funders. Some funders require specific author agreement forms.

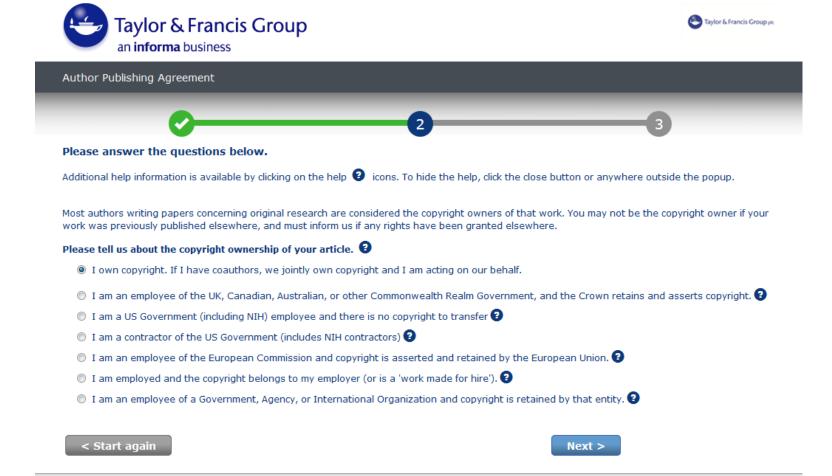
Note that entering funding information is not mandatory, as we understand many articles will not have funders. If we have already received funding information about your article, it will appear here, but you may edit it if necessary.

Start typing the name of your funder(s) and we will suggest options for you to select. If your funder is not found, you can still add them manually.

Add	
Grant Number	
A43w644	×
3768-0986	×
	A43w644

Questions or Problems? Contact Us





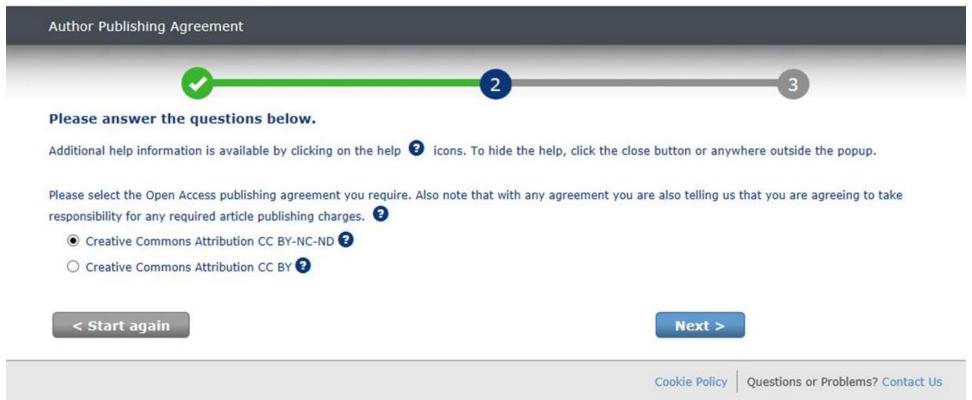
Questions or Problems? Contact Us



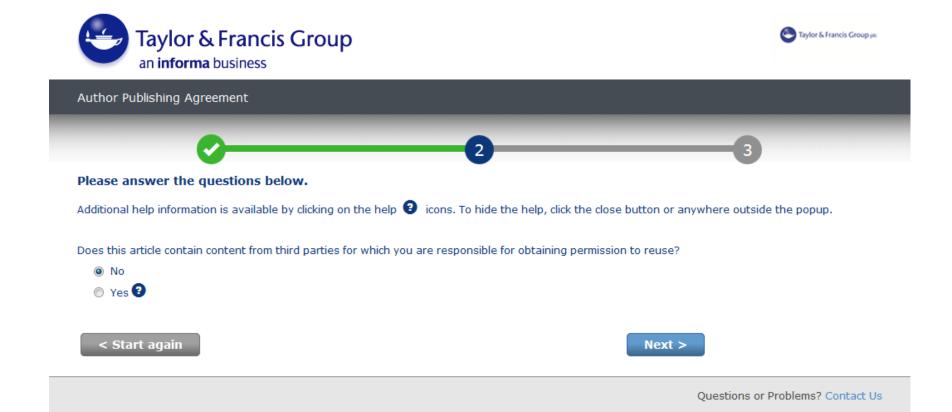
# Taken directly to OA licence options



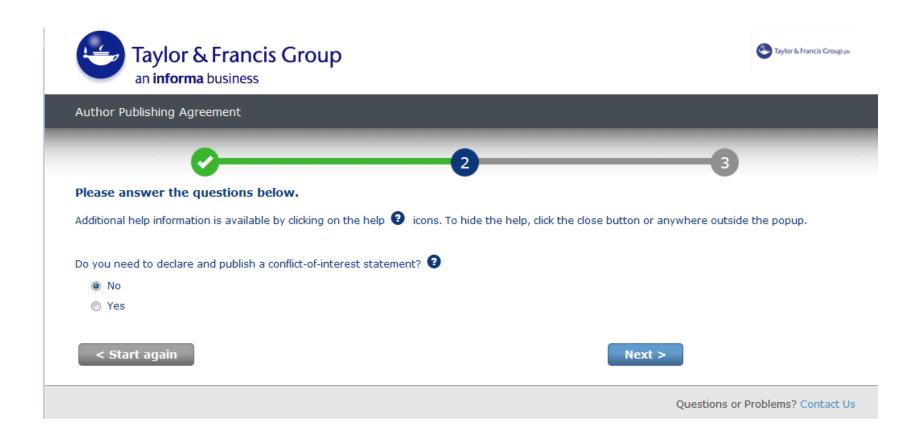




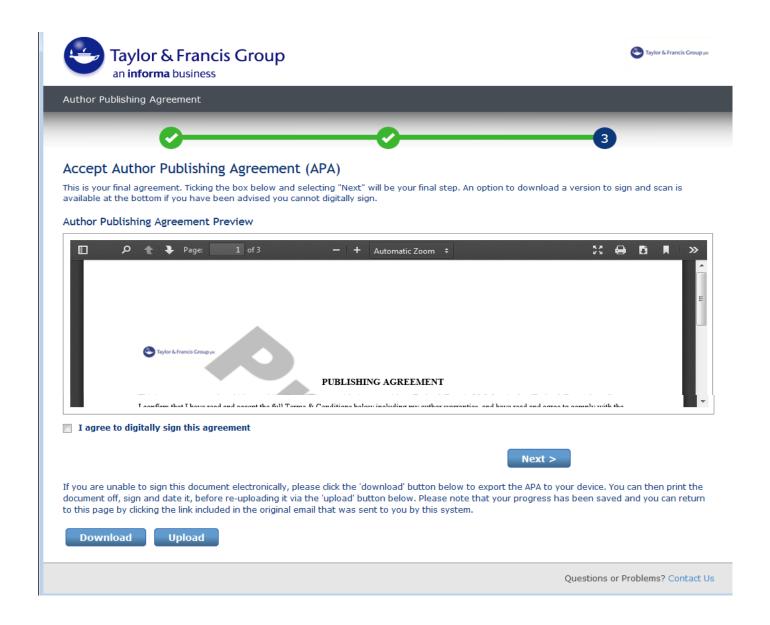














# Workflow 2:

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 <u>open access</u>. 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 <a href="mailto:sue.starr@valtech.com">sue.starr@valtech.com</a>.

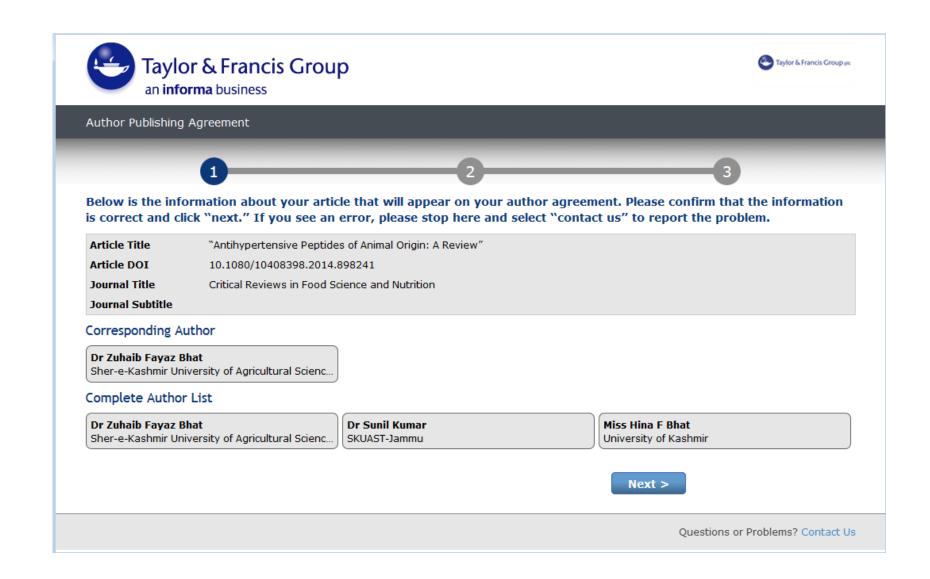
Thank you.



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

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### **Specify Article Funders**

This page is used to supply us information on funders. Some funders require specific author agreement forms.

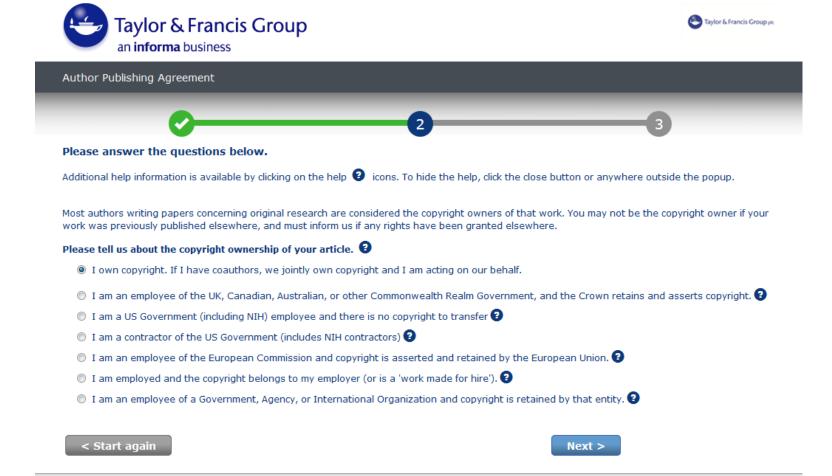
Note that entering funding information is not mandatory, as we understand many articles will not have funders. If we have already received funding information about your article, it will appear here, but you may edit it if necessary.

Start typing the name of your funder(s) and we will suggest options for you to select. If your funder is not found, you can still add them manually.

Add	
Grant Number	
A43w644	×
3768-0986	×
	A43w644

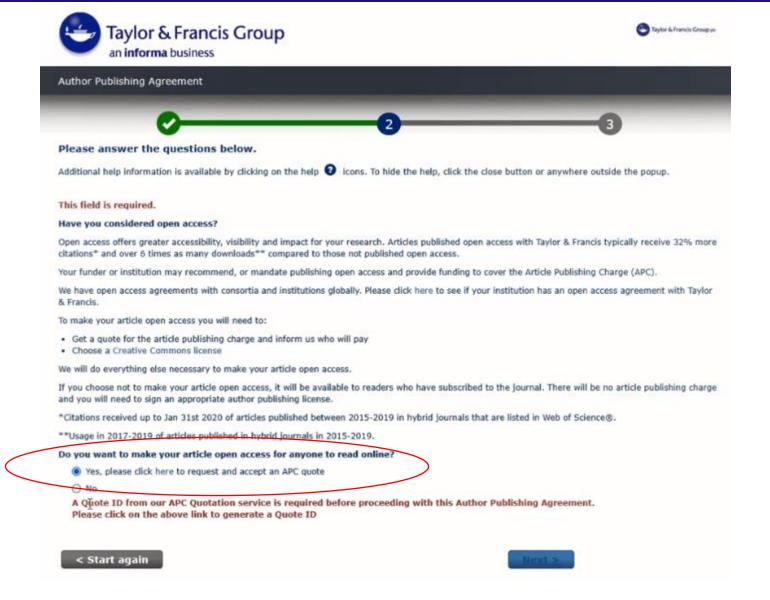
Questions or Problems? Contact Us





Questions or Problems? Contact Us

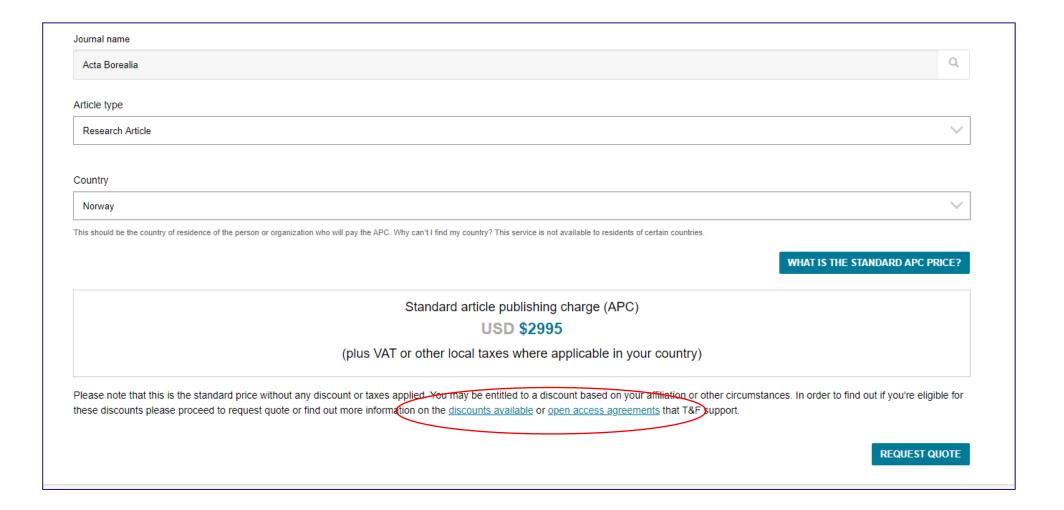




NB: if the author selects no to Open Access here, the library can still approve the article for OA funding via the Dashboard and the author will receive a new OA licence to sign

Author given the option to publish Open Access

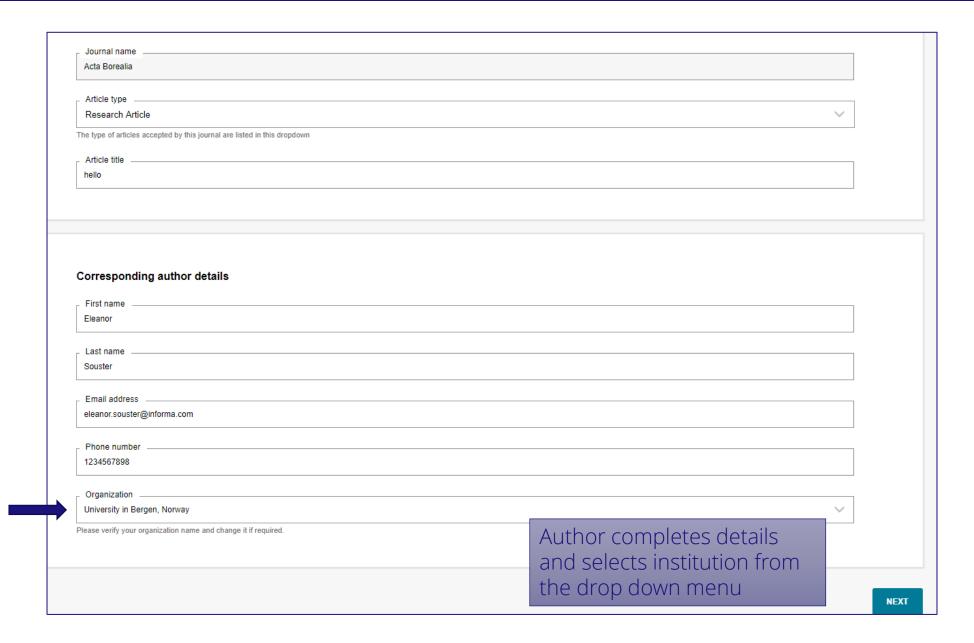




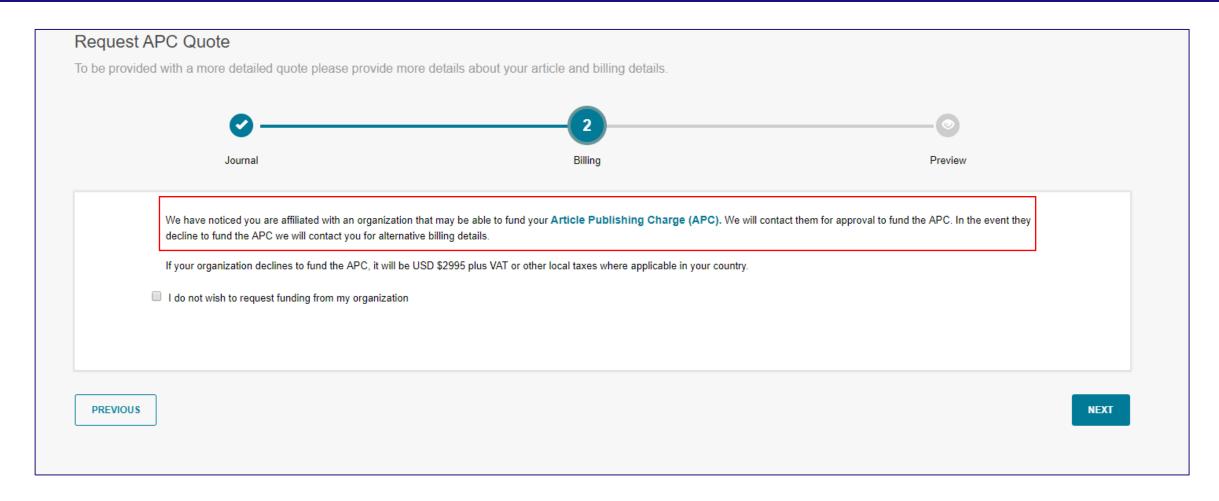
Author taken through to the Quotation Service

Link to <u>T&F OA Agreements</u> <u>page</u>, for more information on the agreement









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



This is for example purposes, the discount will be 100% for the author

### Preview your quote Journal: Acta Borealia Article type: Research Article Article details Title hello Article ID (DOI) 4561123737876676 Corresponding author details Eleanor Souster Name Organization Durham University\_1 Quote details Quote number Q-14791 Order ref. Open Access Fee List price USD \$2,995.00 Discount 75% The author needs to Amount payable (does not include applicable taxes) USD \$748.75 This is the information that will be included in your invoice. Please make sure that all of the information is correct. If you need to make amendments navigate back to previous page. accept the quote

Once you accept this quote you are confirming you wish to continue with gold open access, and you agree with our terms and conditions. Please note an invoice containing a link to our

payment system will be sent to the invoice email address you have provided above.

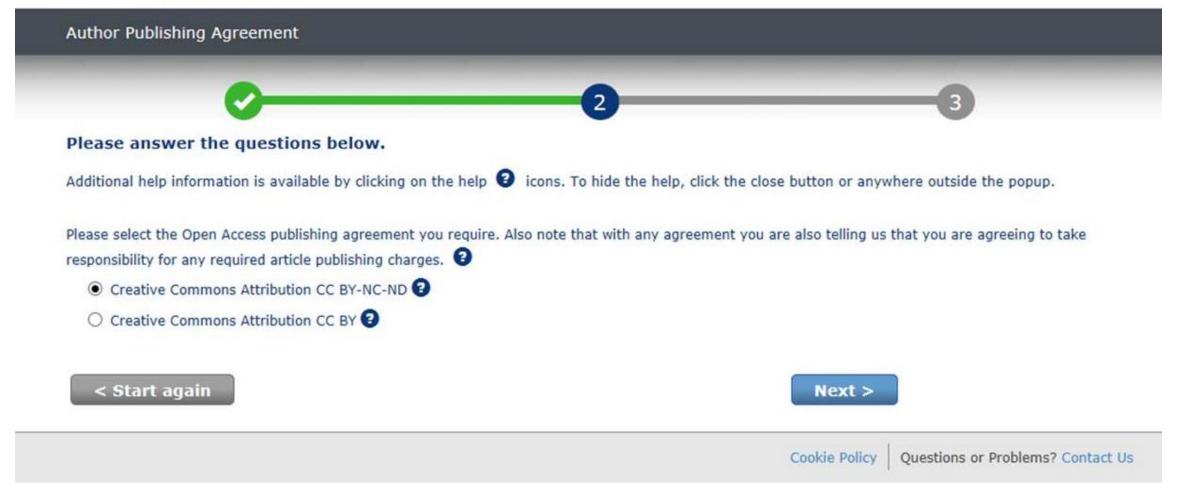
**PREVIOUS** 

**I ACCEPT** 

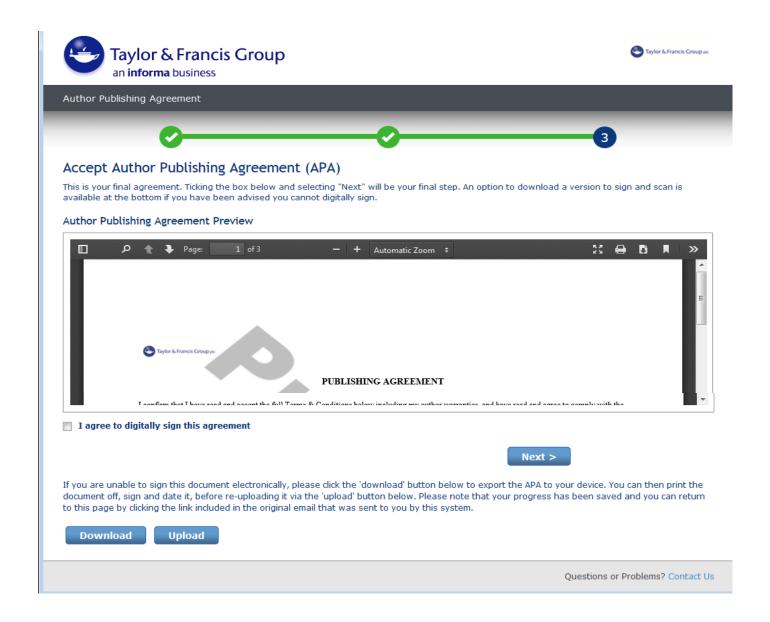




Relevant OA licence options displayed









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 O Horstmann Dennis, Chelsey

Dear Sir/Madam,

Article Title: test

DOI/MS ID: 191412402

Journal: Advances in Physics: X

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

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



# Library

# Notification to library

From: apc@tandf.co.uk <apc@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 uni	versity								
unning Total										
ccepted Articles	Action Requ	uired OA								
ubmitted Articles	Search by Author Nar	Search by Author Name, Article Title, Journal, Email, ORCID, DOI							DOWNLOAD AS CS	
action Required Articles	Article Type: All	Article Type: All  OA Profile: All								
Approved Articles	Funder: All									
Declined Articles	◆ COLLAPSE ALL									
	- COLLAPSE ALE									
	Prepay Organizati	on							Action Require	
	Author		Journal Title	es 9 Haalth Dolies	Article Type	OA Profile	Price	Approve	Decline	
	⊟ test1 Moore		Journal of Market Acces	s & Health Policy	Review Article	Open Access	\$1,271.70 <b>①</b>	Арргоче	Decime	
	Author Email <b>vina</b> Organization name Submission Date <b>I</b> Orcid	y.c.cp@informa.com Durham University_1 Not Available			DOI 346434334664 Research Funder Not Available Acceptance Date Not Available					
	Taylor	& Francis								
	Privacy Policy	Cookie Policy	Terms & Conditions							
	Registered in England & 5 Howick Place   Londo							UK Limited		



# 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 O Horstmann Dennis, Chelsey

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



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

If the funding is declined by the institution the author will receive this email. They can still choose OA if they wish (they will need to create a new quote with a new payer) or go down the green OA route.



For further questions, please contact:

Sabyasachi.Bhuyan@tandf.co.uk