Taylor & Francis Author Workflow & Research Dashboard Demo
# Key Features of the Workflow

<table>
<thead>
<tr>
<th>For the Library</th>
<th>For the Researcher</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Individual Research Dashboard accounts to approve article eligibility under the agreement</td>
<td>• Affiliation based workflow: matching engine identifies eligibility</td>
</tr>
<tr>
<td>• Libraries have full control over which articles to approve</td>
<td>• Clear messaging at each stage of the process to alert them to the agreement in place</td>
</tr>
<tr>
<td>• Real time self service reporting</td>
<td>• Communication to confirm funding approval</td>
</tr>
<tr>
<td>• Reduces administration around OA</td>
<td>• Choice of Creative Commons licence</td>
</tr>
<tr>
<td>• Dedicated workflow contacts at T&amp;F</td>
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</tbody>
</table>
Workflow for an Open Select Article at Taylor & Francis

1. Submission
   Author submits article

2. Peer Review
   Article enters peer review

3. Acceptance
   Article is accepted for publication

4. OA
   Author chooses OA

5. License
   Author signs an OA license

6. Published
   Article is published as open online

OA
Article approved for OA funding via Research Dashboard
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

- Article accepted and metadata populates the Research Dashboard
- Library approves OA funding for article via Research Dashboard
- Author goes to online licence system to sign publishing agreement
- Author directed to OA licence option

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
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
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 sue.starr@valtech.com.

Thank you.

Start »

https://authoragreement.taylorandfrancisgroup.com/Start/2cbe1581-429e-4048-bdef-e39e9b89335f
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 26 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.
**Author Publishing Agreement**

Below is the information about your article that will appear on your author agreement. Please confirm that the information is correct and click "next." If you see an error, please stop here and select "contact us" to report the problem.

<table>
<thead>
<tr>
<th>Article Title</th>
<th>&quot;Antihypertensive Peptides of Animal Origin: A Review&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article DOI</td>
<td>10.1080/10408398.2014.898241</td>
</tr>
<tr>
<td>Journal Title</td>
<td>Critical Reviews in Food Science and Nutrition</td>
</tr>
</tbody>
</table>

**Corresponding Author**

Dr Zuhail Bhat  
Sher-e-Kashmir University of Agricultural Scienc...

**Complete Author List**

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<tr>
<td>Dr Sunil Kumar</td>
<td>SKUAST-Jammu</td>
</tr>
<tr>
<td>Miss Hina F. Bhat</td>
<td>University of Kashmir</td>
</tr>
</tbody>
</table>
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.

Enter a funder search term

Funders

<table>
<thead>
<tr>
<th>Name</th>
<th>Grant Number</th>
</tr>
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<tbody>
<tr>
<td>Research Councils UK</td>
<td>43w544</td>
</tr>
<tr>
<td>Jefferson University</td>
<td>3758-0986</td>
</tr>
</tbody>
</table>

Next >
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.

Most authors writing papers concerning original research are considered the copyright owners of that work. You may not be the copyright owner if your work was previously published elsewhere, and must inform us if any rights have been granted elsewhere.

Please tell us about the copyright ownership of your article.

- I own copyright. If I have coauthors, we jointly own copyright and I am acting on our behalf.
- I am an employee of the UK, Canadian, Australian, or other Commonwealth Realm Government, and the Crown retains and asserts copyright.
- I am a US Government (including NIH) employee and there is no copyright to transfer.
- I am a contractor of the US Government (includes NIH contractors).
- I am an employee of the European Commission and copyright is asserted and retained by the European Union.
- I am employed and the copyright belongs to my employer (or is a 'work made for hire').
- I am an employee of a Government, Agency, or International Organization and copyright is retained by that entity.

< Start again  

Next >
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 >
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.

Does this article contain content from third parties for which you are responsible for obtaining permission to reuse?

- No
- Yes
Author Publishing Agreement

Please answer the questions below.

Additional help information is available by clicking on the help 3 icons. To hide the help, click the close button or anywhere outside the popup.

Do you need to declare and publish a conflict-of-interest statement? 

- No
- Yes

< Start again  

Next >
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

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.
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?
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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
Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

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

Thank you.

https://authorsagreement.taylorandfrancisgroup.com/Start/2c8a1581-429e-4048-bda9-e39e9b69325f
Below is the information about your article that will appear on your author agreement. Please confirm that the information is correct and click "next." If you see an error, please stop here and select "contact us" to report the problem.

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<td>SKUAST-Jammu</td>
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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.

Enter a funder search term  Add

Funders

Name  Grant Number
Research Councils UK  A43w644
Jefferson University  2768-0986

Next >
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.

Most authors writing papers concerning original research are considered the copyright owners of that work. You may not be the copyright owner if your work was previously published elsewhere, and must inform us if any rights have been granted elsewhere.

Please tell us about the copyright ownership of your article.

- I own copyright. If I have coauthors, we jointly own copyright and I am acting on our behalf.
- I am an employee of the UK, Canadian, Australian, or other Commonwealth Realm Government, and the Crown retains and asserts copyright.
- I am a US Government (including NIH) employee and there is no copyright to transfer.
- I am a contractor of the US Government (includes NIH contractors).
- I am an employee of the European Commission and copyright is asserted and retained by the European Union.
- I am employed and the copyright belongs to my employer (or is a 'work made for hire').
- I am an employee of a Government, Agency, or International Organization and copyright is retained by that entity.

< 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
Acta Borealia

Article type
Research Article

Country
Norway

Standard article publishing charge (APC)
USD $2995
(plus VAT or other local taxes where applicable in your country)

Please note that this is the standard price without any discount or taxes applied. You may be entitled to a discount based on your affiliation or other circumstances. In order to find out if you’re eligible for these discounts please proceed to request quote or find out more information on the discounts available or open access agreements that T&F support.

Request Quote

Link to T&F OA Agreements page, for more information on the agreement
Author completes details and selects institution from the drop down menu.
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.

The author needs to accept the quote.

---

**Preview your quote**

Journal: *Acta Borealis*

Article type: Research Article

<table>
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<th></th>
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<tr>
<td>Title</td>
<td>hello</td>
</tr>
<tr>
<td>Article ID (DOI)</td>
<td>4561123737876676</td>
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<table>
<thead>
<tr>
<th>Corresponding author details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Eleanor Souster</td>
</tr>
<tr>
<td>Organization</td>
<td>Durham University_1</td>
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<td>OA-14791</td>
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<tr>
<td>Order ref.</td>
<td>Open Access Fee</td>
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<tr>
<td>List price</td>
<td>USD $2,995.90</td>
</tr>
<tr>
<td>Discount</td>
<td>75%</td>
</tr>
<tr>
<td>Amount payable (does not include applicable taxes)</td>
<td>USD $748.75</td>
</tr>
</tbody>
</table>

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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.
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.

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Author Publishing Agreement Preview

I agree to digitally sign this agreement

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.
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: acc@tandf.co.uk <acc@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.
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.

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You will not be asked for any payment.
If you have any queries, please contact apc@tandf.co.uk

Best wishes,
Taylor & Francis Group

Information Classification: General
Dear Sir/Madam

Article Title: test

DOI/M5 ID: 456789012345678901234

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 organisation

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