Research Dashboard User Guide

The Taylor & Francis Research Dashboard gives you visibility of all papers from corresponding authors affiliated with your institution on acceptance and allows you to:

- View accepted article metadata from affiliated authors
- Approve or decline articles for APC funding
- Receive author requests to make particular articles open access
- Monitor your current allocations and download historical transactions for reporting

Getting started – register your user account

1. Visit: **www.taylorfrancis.com/oadashboard**
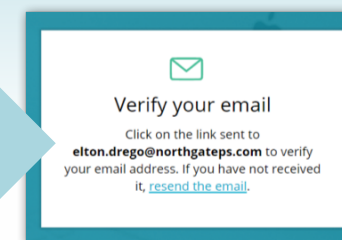   *Don't forget to bookmark the page!*

2. Click on 'Sign up'
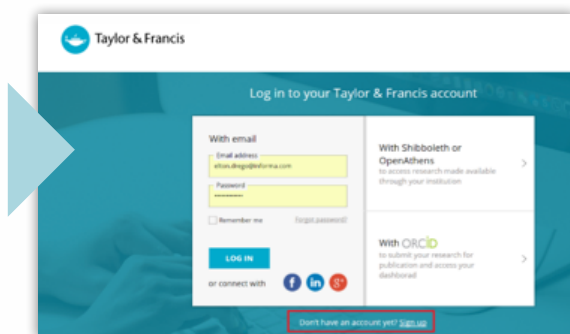
3. Enter your full name, email address (this should be the same as the one you have already logged with us), and create a password

4. Read and tick 'I agree to the Terms & Conditions' box and click on the 'Sign up' button
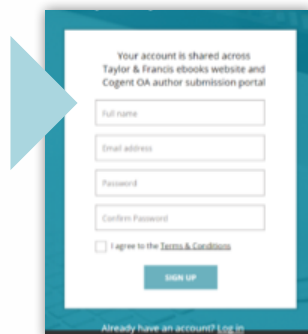
Verify your user account

An email will be sent directly to your inbox, simply click on the link provided to verify your email address.

Verify your email

Click on the link sent to
elton.drego@northgateps.com to verify
your email address. If you have not received
it, resend the email.

Thank you for registering an account at Taylor & Francis. In order to complete the registration process please click on the button to verify your email address.

VERIFY

Please note that this link is valid for only 14 days.

If you have any further queries please contact our Customer Services team at support@taylorfrancis.com who will be happy to help.

Thanks,
Taylor & Francis Online Customer Services

You're all set!

To coordinate your way around the dashboard, simply use the menu on the left hand side, where you can select; *Running Total*, *Accepted Articles*, *Action Required*, *Approved Articles*, and *Declined Articles*.

Running Total

You can monitor your current article allocation and download historical transactions for reporting. Please note that this page will be updated on a daily basis, and not in real time.

Accepted Articles

You can view accepted article metadata including DOI and funder information (if available), for the latest accepted articles by authors whose email address or affiliation matches your institution.

Click on the 'expand' icon to view the author's email address, DOI, organisation name, acceptance date, DOI, and research funder.

You can apply filters to your view by article type, open access profile, and funder.

Look out for the 'Download as CSV' button throughout the dashboard to download transactional information

From here you can 'Approve' or 'Decline' an article.
You may have more than one fund to choose from, if so you can select the relevant fund from the drop down list (please note that funds will be available only if they can be applied to the article OA profile).

When declining an article, please add a short reason.

Approved Articles

When articles are approved, they will automatically be moved to the *'Approved Articles'* tab, where you can also view all records, back to the start of your open access agreement.

Declined Articles

When articles are declined, they will automatically be moved to the *'Declined Articles'* tab, where you can view all records, back to the start of your open access agreement.

Frequently asked questions

- **Can the notification email be sent to multiple email addresses?** Yes, just let us know the contact's name and email address and we can set this up for you.

- **We have more than one decision maker; can we have more than one user?** Yes. All users need to create their own personal log-in. Let us know the contact's name and email address and we will prepare this on the dashboard and work with them to get them started.

- **Are authors informed when their article is approved for funding?** Yes. An email is sent out to notify the author of this, and what they need to do next to publish open access.

- **A user approved an article, but it has been published behind the pay-wall. Why?** We aim to publish all articles open access when approval is confirmed prior to publication. However, on occasion there may some internal delays, and unfortunately the article is therefore made open access after publication. Please contact apc@tandf.co.uk if you would like to check on the status of an article.

- **A user approved an article, but it still isn't online, why?** Sometimes the publication process is delayed; for example, if the article is submitted into a special issue. Please contact apc@tandf.co.uk if you would like to check on the status of an article.

Get in touch!

We hope that the Research Dashboard will make it easier for you to manage your agreement with us. We are continually developing this tool, and welcome any questions, comments or feedback. Simply email Sabyasachi.Bhuyan@tandf.co.uk.

Please contact your local sales representative if you would like to discuss your open access agreement or make changes to your Research Dashboard account:

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