

# Research Dashboard User Guide: Open Access Memberships



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

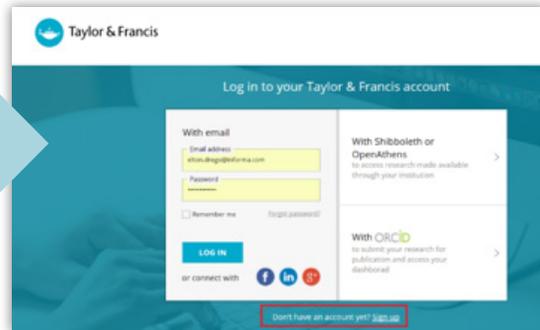
Approve or decline articles for APC funding

Receive author requests to make particular articles open access

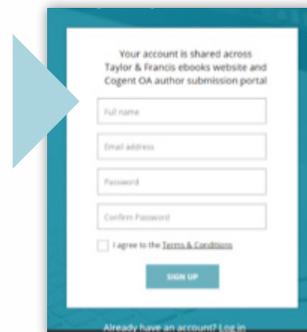
Monitor your current account funds and download historical transactions for reporting

## Getting started – register your user account

1. Visit: [www.taylorfrancis.com/oashboard](http://www.taylorfrancis.com/oashboard)  
*Don't forget to bookmark the page!*
2. Click on 'Sign up'

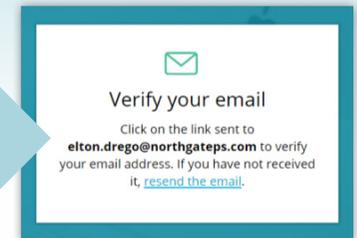


3. Enter your full name, email address (this should be the same as the one you have already logged with us), and create a password
4. Read and tick 'I agree to the Terms & Conditions' box and click on the 'Sign up' button



## Verify your user account

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



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](mailto:support@taylorfrancis.com) who will be happy to help.

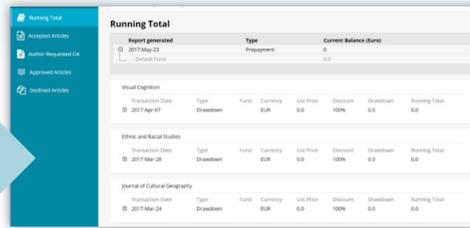
Thanks,  
Taylor & Francis Online Customer Services

## You're all set!

To find 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*.

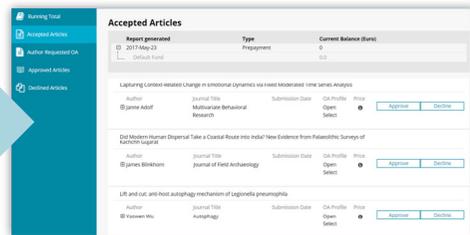
# Running Total

You can monitor your balance and download historical transactions for reporting. The metadata is updated every 12 hours.

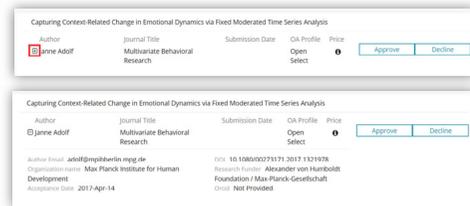


# Accepted Articles

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.

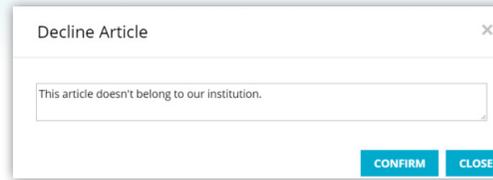
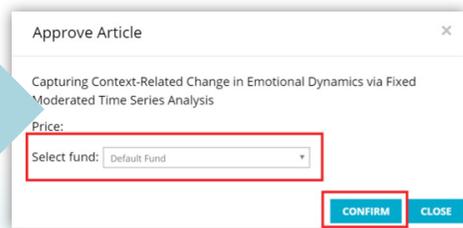


You can apply filters to your view by article type, open access profile, and funder.



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

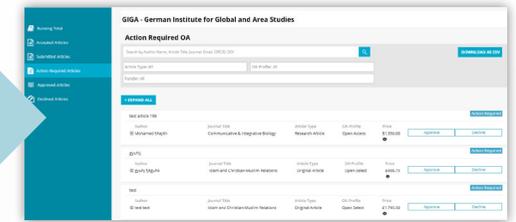
Look out for the 'Download as CSV' button throughout the dashboard to download transactional information



When declining an article, please add a short reason.

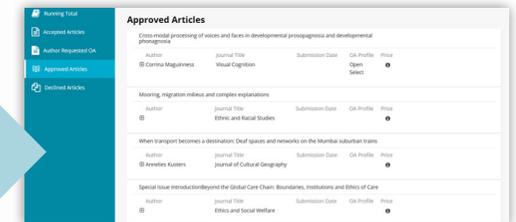
# Action Required Articles

When an author chooses to publish their article open access before you have approved the article on the Research Dashboard, it will appear on the 'Action Required Articles' tab. On this tab you can see all author requests for open access funding from your institution and approve or decline these requests.



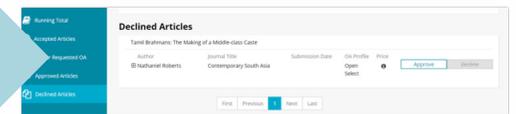
# Approved Articles

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.



# Submitted Articles

This section is currently in development throughout 2020 and will allow you to view all articles by corresponding authors on submission. Once fully functioning, you will be able to pre-approve or pre-decline articles for APC funding, if accepted for publication.

## 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.
- **What happens when my fund gets low?** You will receive an email notification when your fund gets low
- **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 be a short delay so the article is made open access after publication. Please contact [apc@tandf.co.uk](mailto: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](mailto: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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