# Research Dashboard User Guide for Members



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

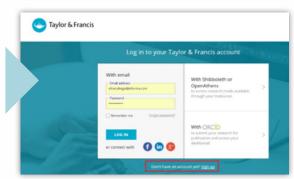
View
accepted article
metadata including
DOI and funder
information (if
available)

Approve
or decline APC
funding from
your prepayment
for each
article

Receive author requests to make particular articles open access Monitor
your current
account funds and
download historica
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.



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 <a href="mailto:support@taylorfrancis.com">support@taylorfrancis.com</a> 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, Author Requests, Approved Articles*, and *Declined Articles*.

# **Running Total**

You can monitor your current account funds and download historical transactions for reporting, including any "Top-ups" to your funds as well as "Draw-downs" where funds have been applied to articles. Please note that this page will be updated on a daily basis, and not in real time.



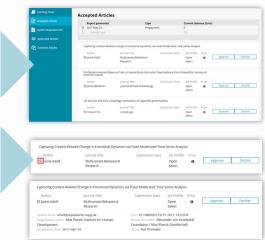
# **Accepted Articles**

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.

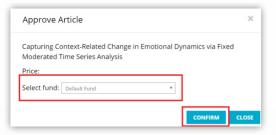
You can apply filters to your view by article type, open access profile, and funder.

Search by Author Name, Article Title, Journal, Email, ORCID, DOI	DOWNLOAD AS CSV
× Article × Open Select	CLEAR HILTERS
Please note: filters have been applied to this display	



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 membership.



## **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 membership.



# 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 drops below €/£/USD 1,000.
- 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.
- I 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 <a href="majorage-app-@tandf.co.uk">app-@tandf.co.uk</a> if you would like to check on the status of an article.
- I 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 <a href="mailto:apc@tandf.co.uk">apc@tandf.co.uk</a> 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 prepayment with us. We are continually developing this tool, and welcome any questions, comments or feedback. Simply email <a href="mailto:Chelsey.HorstmannDennis@tandf.co.uk">Chelsey.HorstmannDennis@tandf.co.uk</a>.

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

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