Research Dashboard User Guide for Consortia

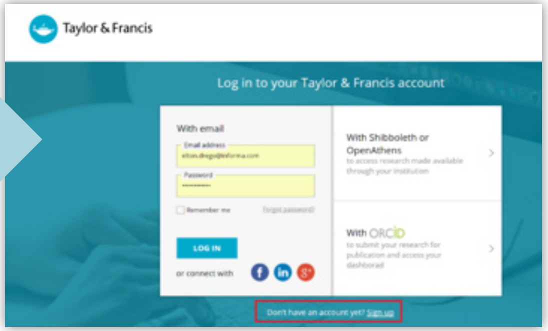
The Taylor & Francis Research Dashboard gives you visibility of all papers from corresponding authors affiliated with your members' institutions on acceptance and allows you to:

- View accepted article metadata including DOI and funder information (if available)
- View members' details including name, email alert address, Ringgold ID, and last login date
- View and download members' historical transactions for reporting
- View approved and declined articles for all members

Getting started – register your user account

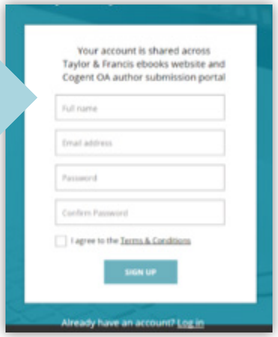
1. Visit: **www.taylorfrancis.com/oadashboard**
Don't forget to bookmark the page!

2. Click on 'Sign up'



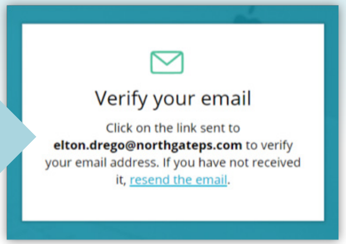
3. Enter your full name, email address (this should be the same as the one you have already logged with us), and create a password

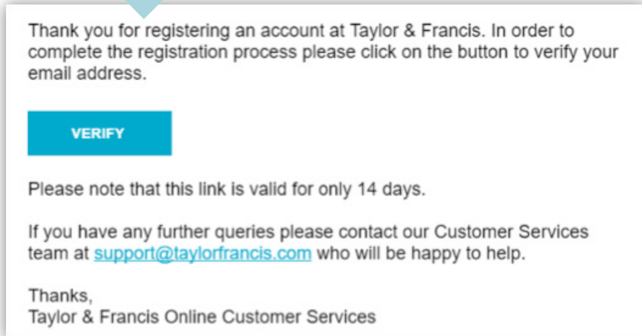
4. Read and tick the 'I agree to the Terms & Conditions' box and click on the 'Sign up' button



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 who will be happy to help.

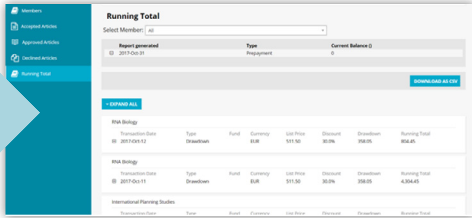
Thanks,
Taylor & Francis Online Customer Services

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

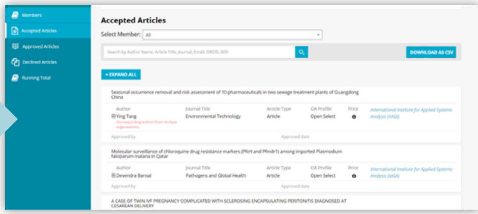
You can view prepayment transactions for 'All' or individual members, including any "Top-ups" to their funds, as well as "Drawdowns" where an article publishing charge (APC) has been applied to an article. By default, 'All' members' transactions are displayed. You can filter down to an individual member through the 'Select Member' dropdown list.



This page will be updated daily, and not in real time i.e. if your member approves an article, it will not immediately be reflected in the *Running Total*, and will only be displayed after the APC team has processed that transaction.

Accepted Articles

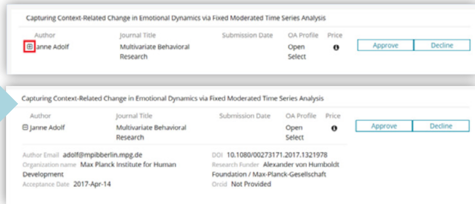
You can view accepted article metadata including DOI and funder information (if available) for the latest accepted articles by authors whose email address or affiliation match your members' institutions.



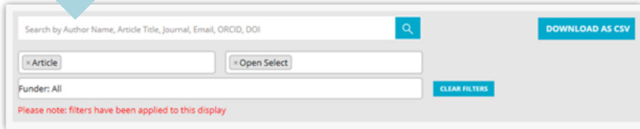
By default, 'All' members' accepted articles are displayed. You can filter down to an individual member through the 'Select Member' dropdown list.

Certain manuscript types will be excluded from display as they are not eligible for open access (e.g. Corrigenda). Only your members can approve or decline an article.

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

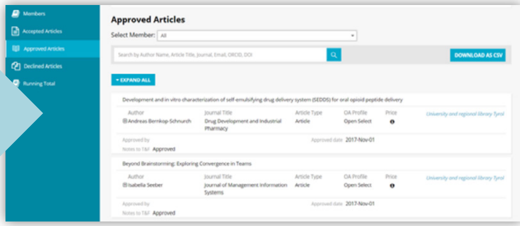


You can apply filters to your view by article type, OA profile, and funder.



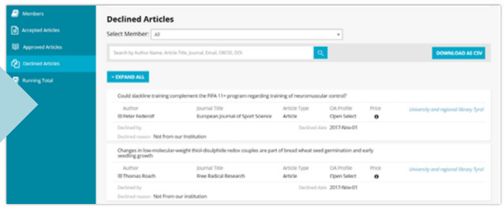
Approved Articles

When articles are approved, they will automatically be moved to the *'Approved Articles'* tab, where you can view all records for 'All' or individual members by using the dropdown list from 'Select Member'.



Declined Articles

When articles are declined, they will automatically be moved to the *'Declined Articles'* tab, where you can view all records for 'All' or individual members by using the dropdown list from 'Select Member'.



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

Frequently asked questions

- **Can the notification email to members be sent to multiple email addresses?** Yes. Members just need to let us know the contact's name and email address and we can set this up for them.
- **Members have more than one decision maker; can they have more than one user?** Yes. All users need to create their own personal log-in. Members can 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 a member's fund gets low?** They will receive an email notification when their 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.
- **A member 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 member 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 and your members to manage your prepayment with us. We are continually developing this tool, and welcome any questions, comments or feedback. Simply email Chelsey.HorstmannDennis@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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