

Taylor & Francis
Author Workflow





# Workflow for an Open Select Article at Taylor & Francis

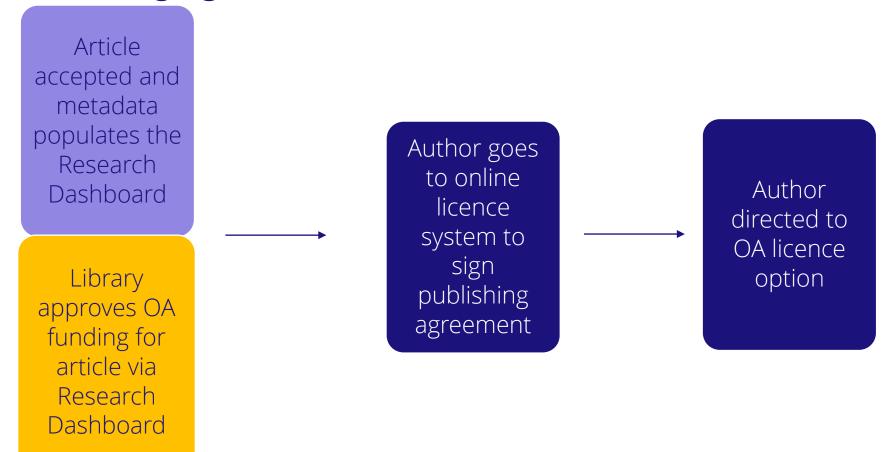




From Article Acceptance: 2
different workflows, depending on how
quickly the library and author take
action



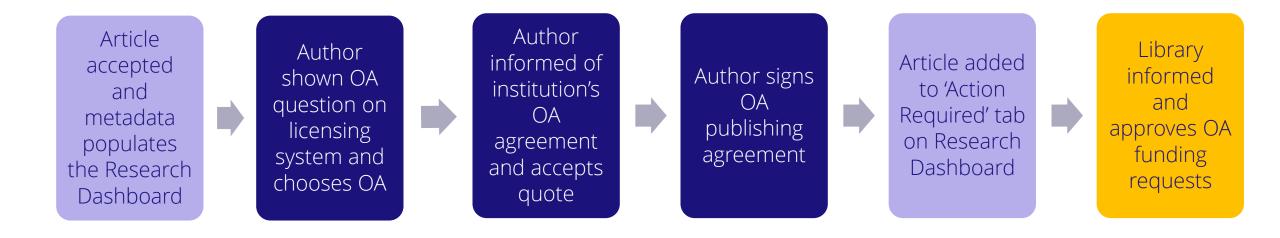
1. Library approval for OA funding via Dashboard \*before\* author has signed publishing agreement



This is the smoothest 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





### New Article Email to Author

Send To: Author Email

Subject: Informing your institution of your accepted article

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.

In the meantime, I would like to let you know that your institution has an open access agreement with Taylor & Francis. As a part of this agreement your library has access to a Research Dashboard, which shows them that your article has been accepted and displays information about the article, including your email address.

#### What happens next?

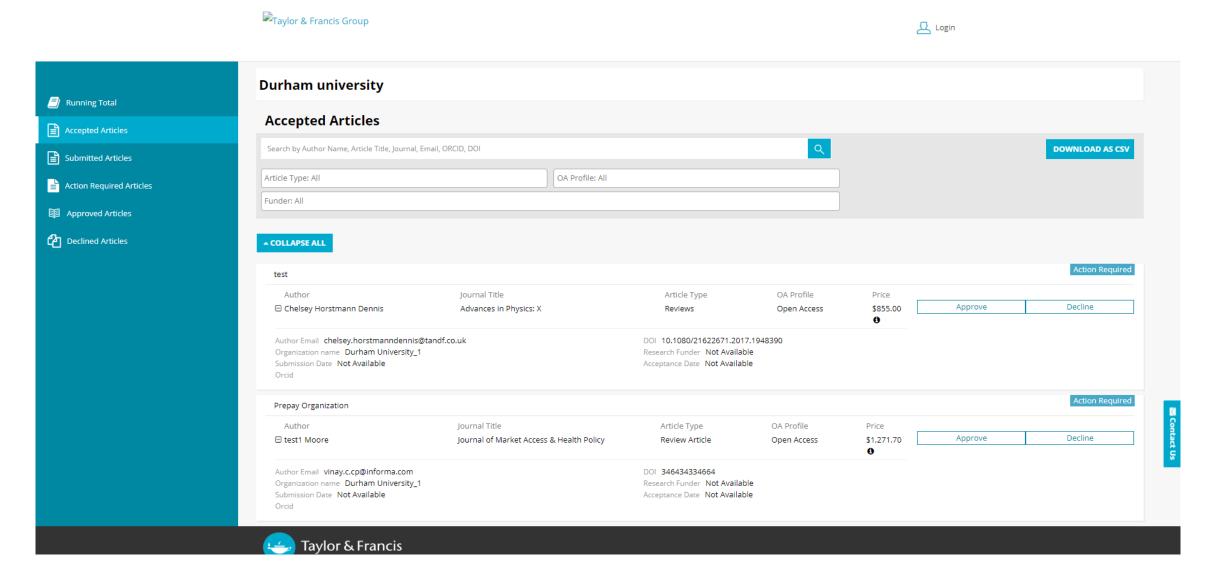
If your institution approves Gold Open Access funding for your article, we will let you know. You may also request approval by using our Quotation service – look out for an email inviting you to select and sign your article publishing agreement.

If you have any questions, please do not hesitate to contact apc@tandf.co.uk, or your librarian.

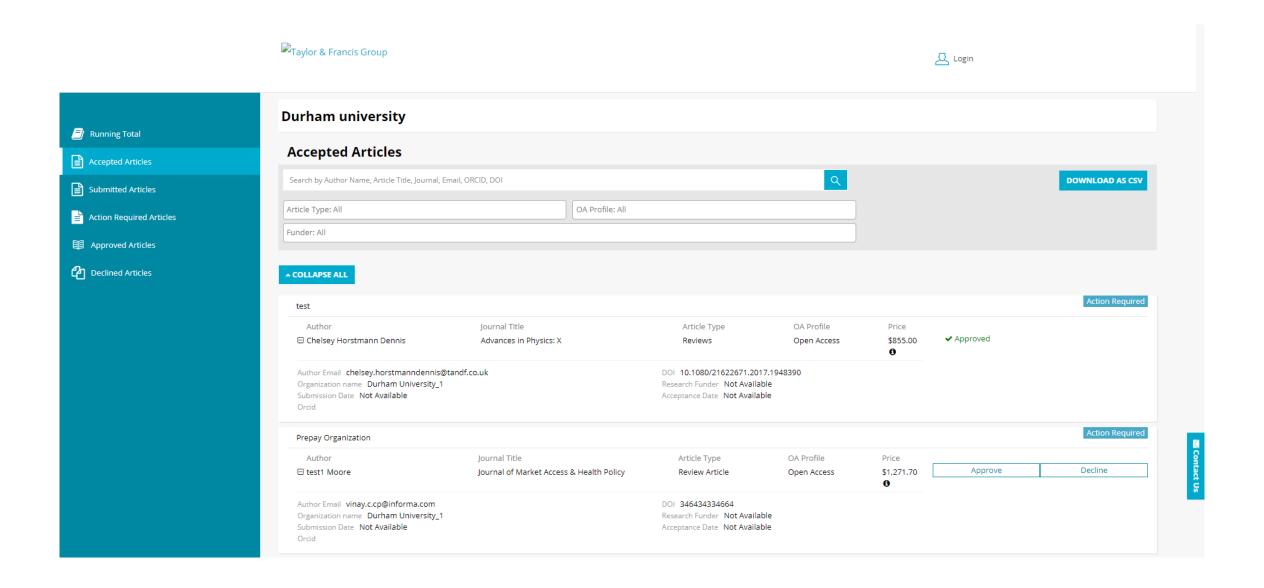
Best wishes, Taylor & Francis Group Email to author, alerting them to OA agreement



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: Hello, Your Author Publishing Agreement for your article, , is waiting for your approval. Click the link below (or copy the URL into your browser) to go to our online Author Agreement portal to complete the process. If you cannot use the system or have other questions, please contact taylorandfrancis.com. Thank you. Start »

https://authoragreement.taylorandfrancisgroup.com/Start/5d§







Author Publishing Agreement

#### 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 36 and newer, Firefox 29 and newer.

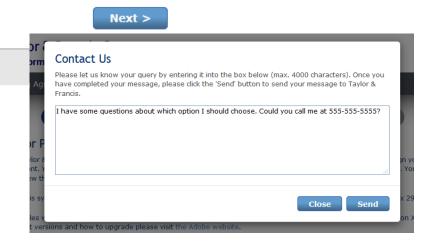
We generate PDF files with digital signatures. To view these correctly you will require either Adobe Acrobat or Adobe Reader version X or higher. For details on the latest versions and how to upgrade please visit the Adobe website.

There is help available on all screens, marked with this symbol:

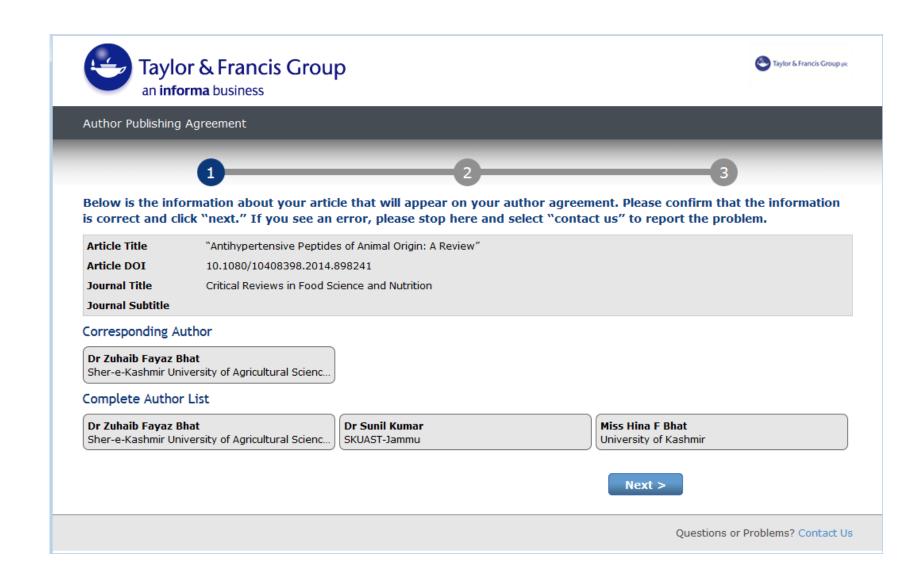


After answering each question, please press the "next" button to take the next step.

Please click the "next" button to continue.











#### **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.

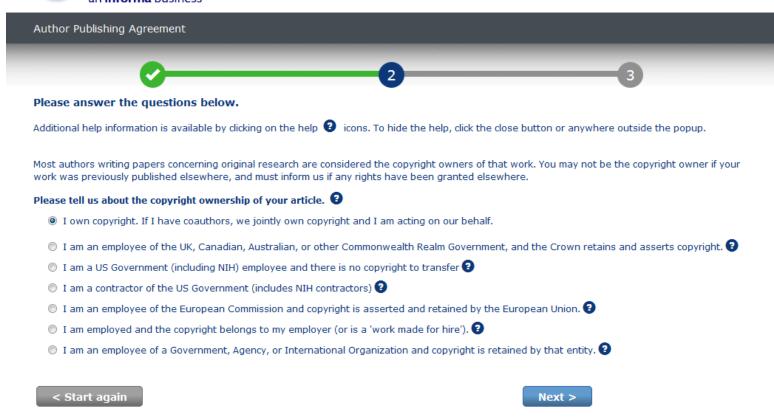
Add	
Grant Number	
A43w644	×
3768-0986	×
	A43w644

Questions or Problems? Contact Us









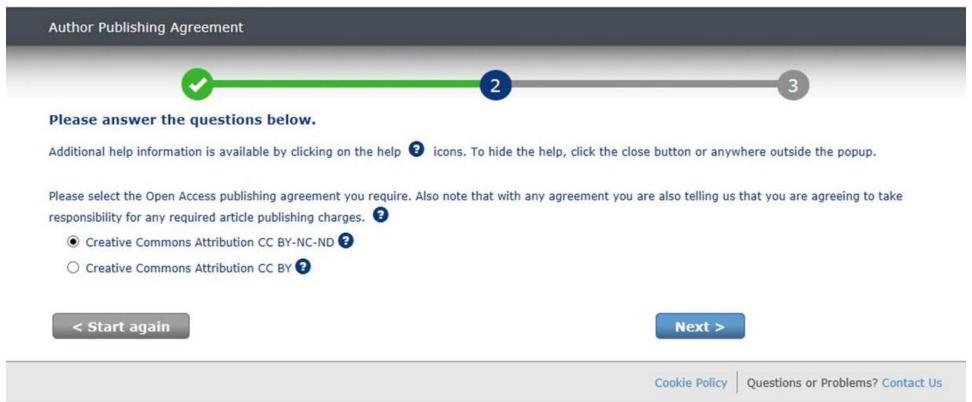
Questions or Problems? Contact Us



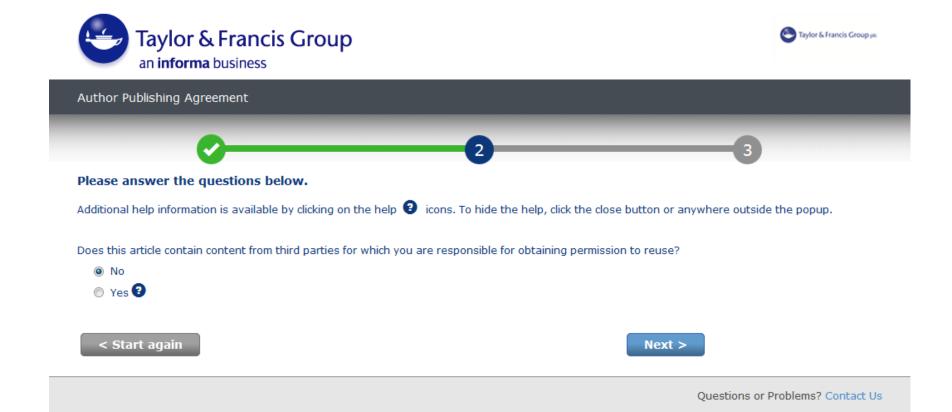
# Taken directly to OA licence options



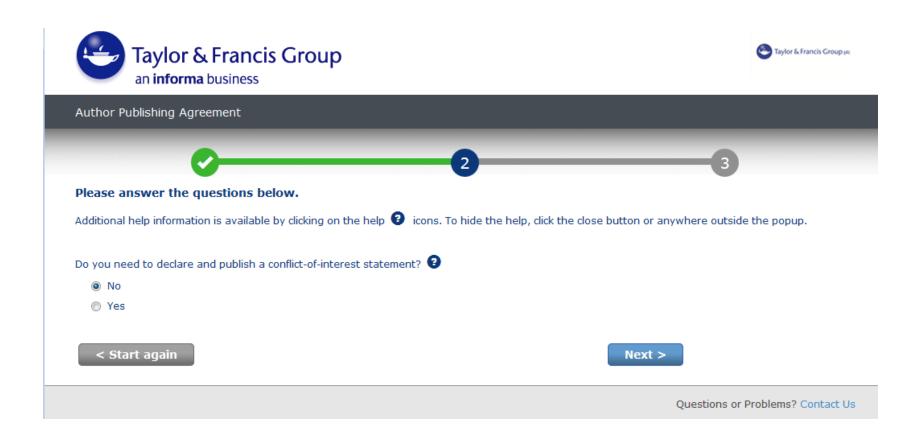




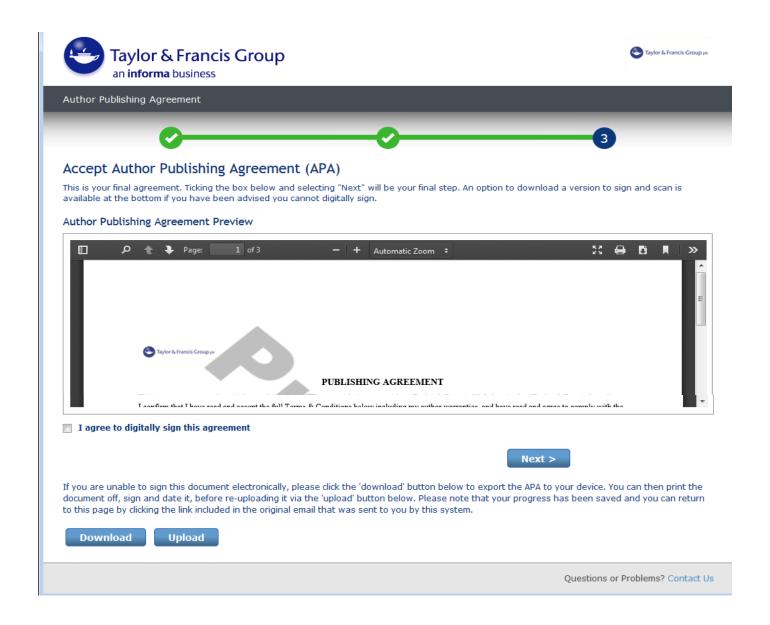














# Workflow 2:

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: Informing your institution of your accepted article

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.

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#### What happens next?

If your institution approves Gold Open Access funding for your article, we will let you know. You may also request approval by using our Quotation service – 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.

Best wishes, Taylor & Francis Group Email to author, alerting them to OA agreement

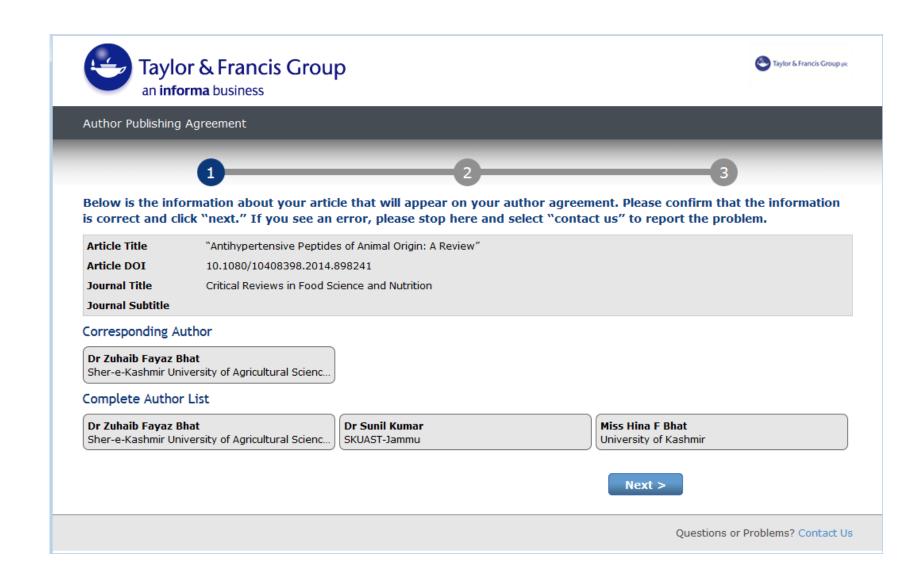


# Your Author Publishing Agreement (APA) with Taylor and Francis

Attention:
Hello,
Your Author Publishing Agreement for your article,
, is waiting for your approval. Click the link below (or copy the URL into your browser) to go to our online Author Agreement portal to complete the process.
If you cannot use the system or have other questions, please contact taylorandfrancis.com.
Thank you.
Start »

https://authoragreement.taylorandfrancisgroup.com/Start/5d{









#### **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.

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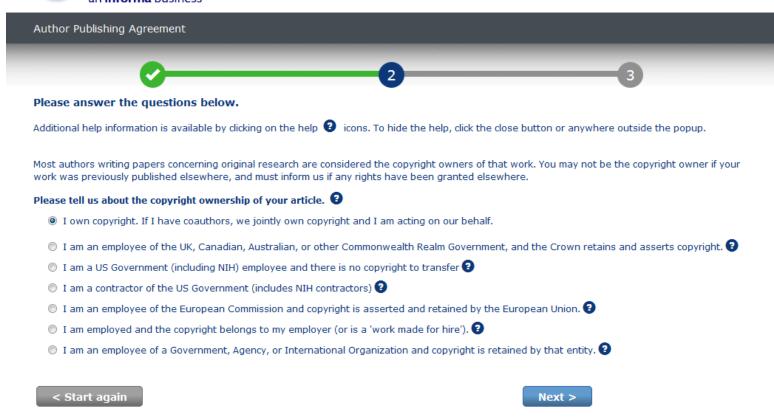
Add	
Grant Number	
A43w644	×
3768-0986	×
	A43w644

Questions or Problems? Contact Us



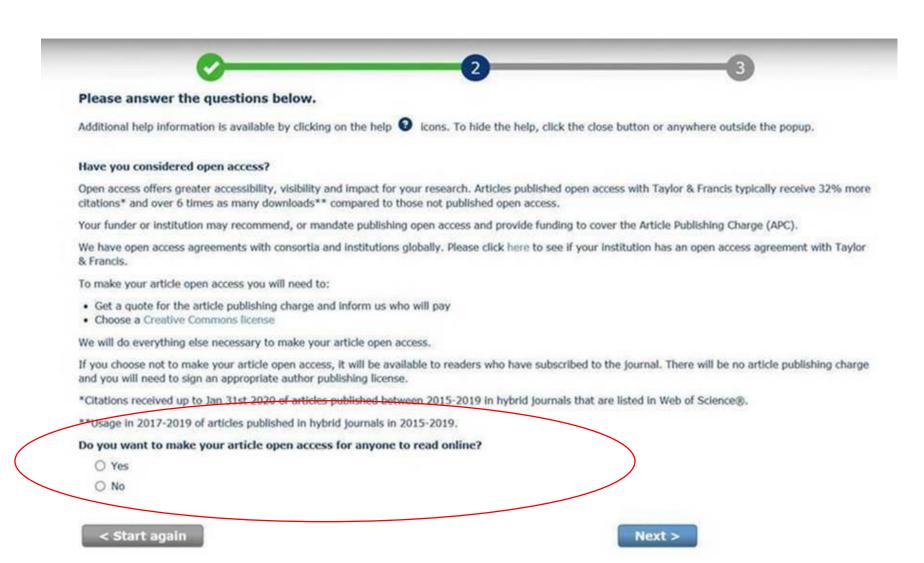






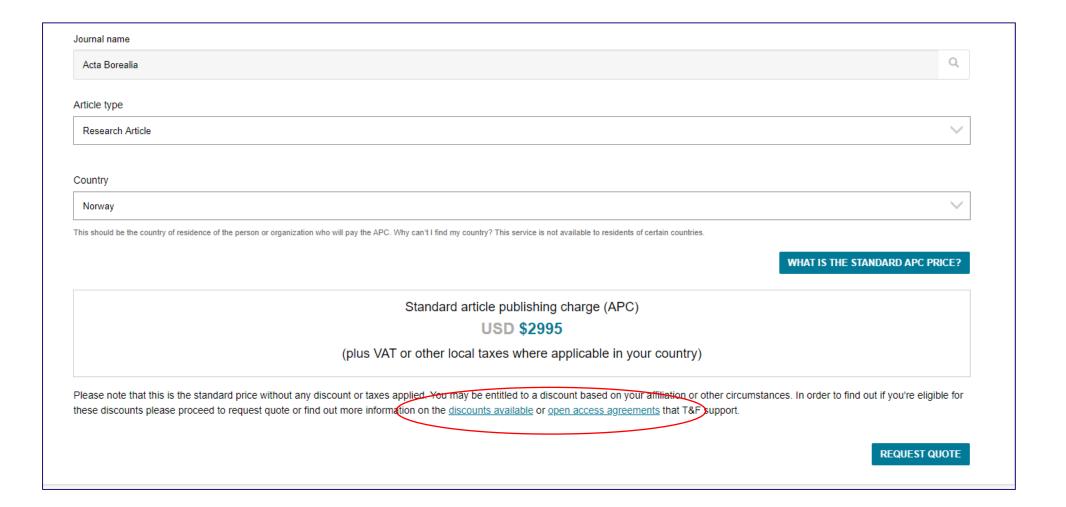
Questions or Problems? Contact Us





Author given the option to publish Open Access

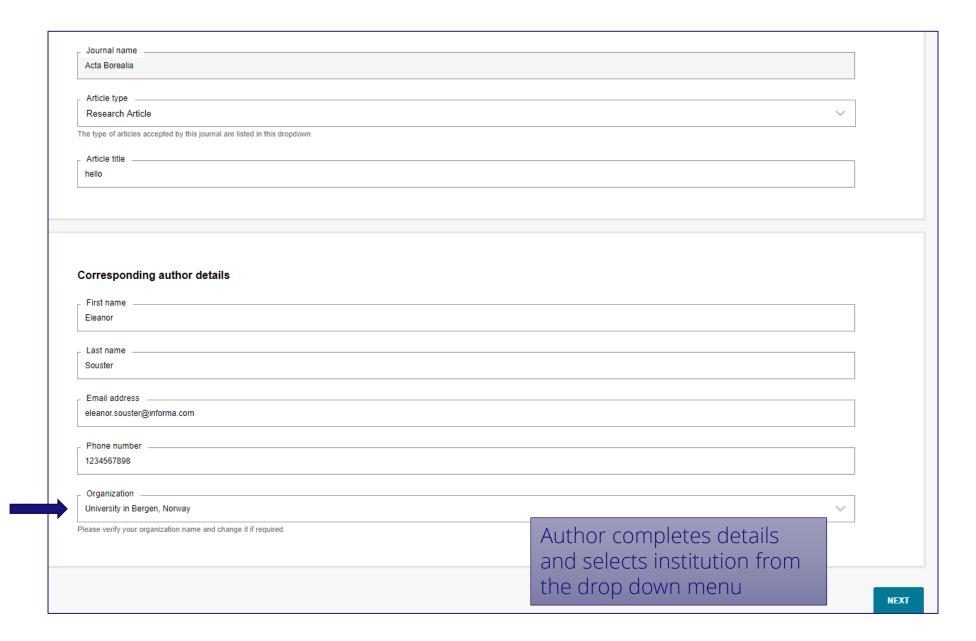




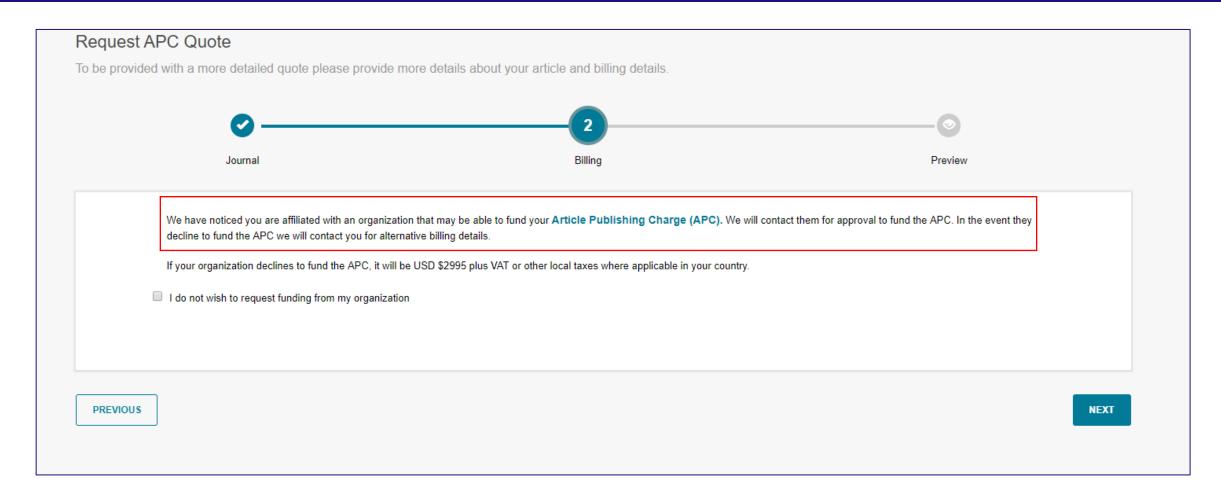
Author taken through to the Quotation Service

Link to <u>T&F OA Agreements</u> page, for more information on the agreement









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

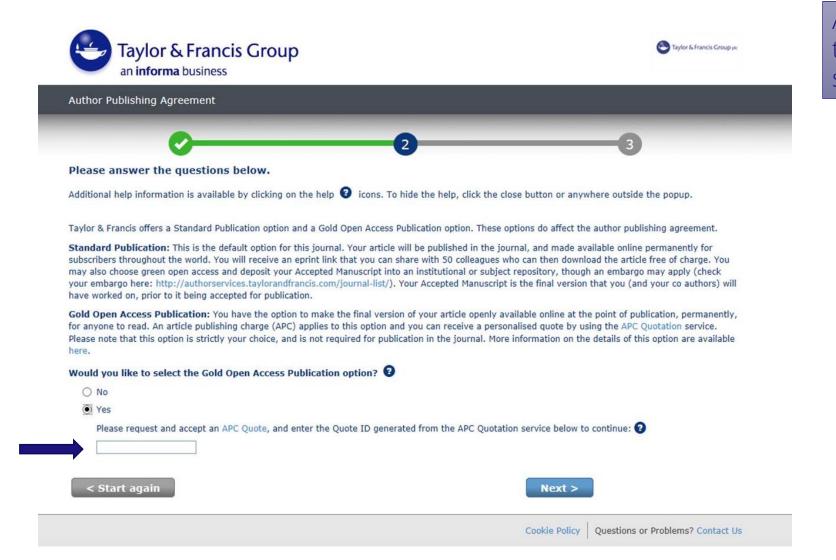
#### Preview your quote Journal: Acta Borealia Article type: Research Article Article details Title hello Article ID (DOI) 4561123737876676 Corresponding author details Eleanor Souster Name Organization Durham University\_1 Quote details Quote number Q-14791 Order ref. Open Access Fee List price USD \$2,995.00 Discount 75% Amount payable (does not include applicable taxes) USD \$748.75 The author needs to This is the information that will be included in your invoice. Please make sure that all of the information is correct. If you need to make amendments navigate back to previous page. accept the quote

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.

**PREVIOUS** 

**I ACCEPT** 



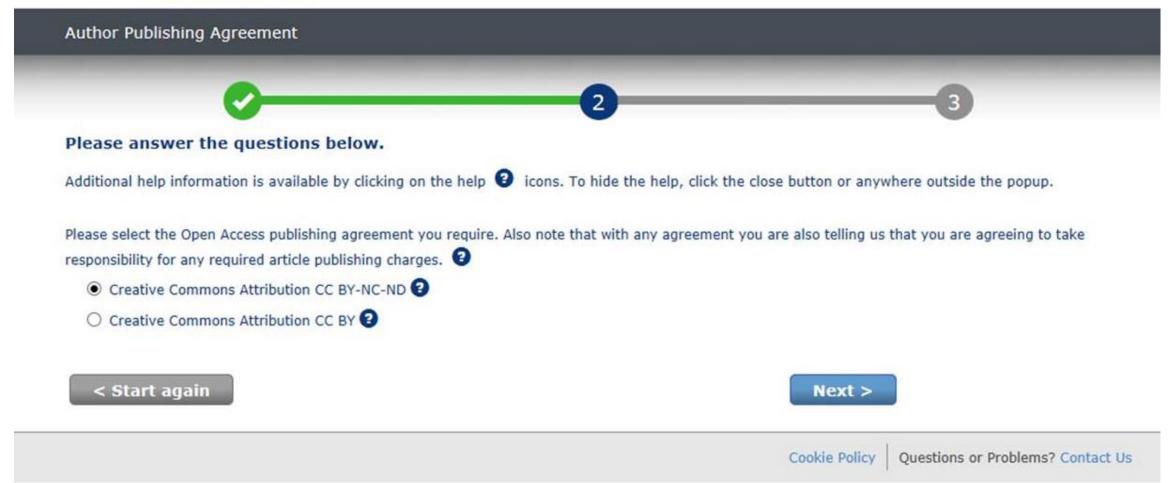


Author provides quote ID to finalise OA agreement signature

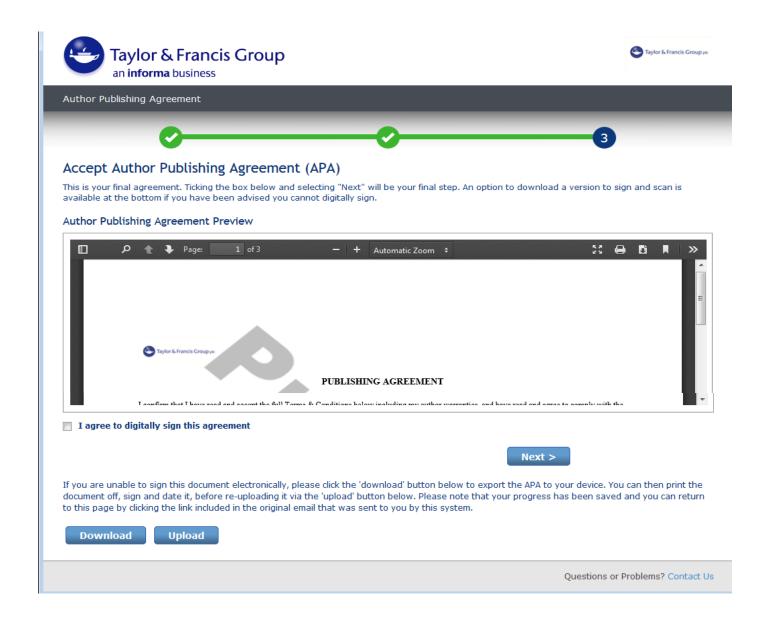




Relevant OA licence options displayed









Tue 26/11/2019 09:27

#### 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 O Horstmann Dennis, Chelsey

Dear Sir/Madam,

Article Title: test

DOI/MS ID: 191412402

Journal: Advances in Physics: X

Once they confirm that they wish to ask the institution for funding, they receive this email.

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



## Library

# Notification to library

From: apc@tandf.co.uk <apc@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.

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ccepted Articles	Action Required OA						
	Search by Author Name, Article Title, Journ	al, Email, ORCID, DOI			DOWNLOAD AS CSV		
Submitted Articles				Q			
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Approved Articles	Funder: All						
Declined Articles	▲ COLLAPSE ALL						
	- COLLAPSE ALL						
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	Author	Journal Title	Article Type	OA Profile	Price	Approve	Decline
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	Author Email vinay.c.cp@informa.con Organization name Durham Universit Submission Date Not Available Orcid		DOI 346434334664 Research Funder Not Available Acceptance Date Not Available				
	Taylor & Francis						
	Privacy Policy Cookie Policy	Terms & Conditions					
	Registered in England & Wales No. 3099067 5 Howick Place   London   SW1P 1WG				© 2017 Informa	UK Limited	



# 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 Author receives confirmation of OA funding





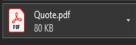
Mon 25/11/2019 14:25

#### AP-No-Reply <apc@tandf.co.uk>

Sandbox: Your request to use your organization's fund has been declined

To O Horstmann Dennis, Chelsey

f) If there are problems with how this message is displayed, click here to view it in a web browser.



Dear Sir/Madam

Article Title: test

DOI/MS ID: 45678763567634565 /

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 organization

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:

Nicolo.Pierini@tandf.co.uk Sabyasachi.Bhuyan@tandf.co.uk