

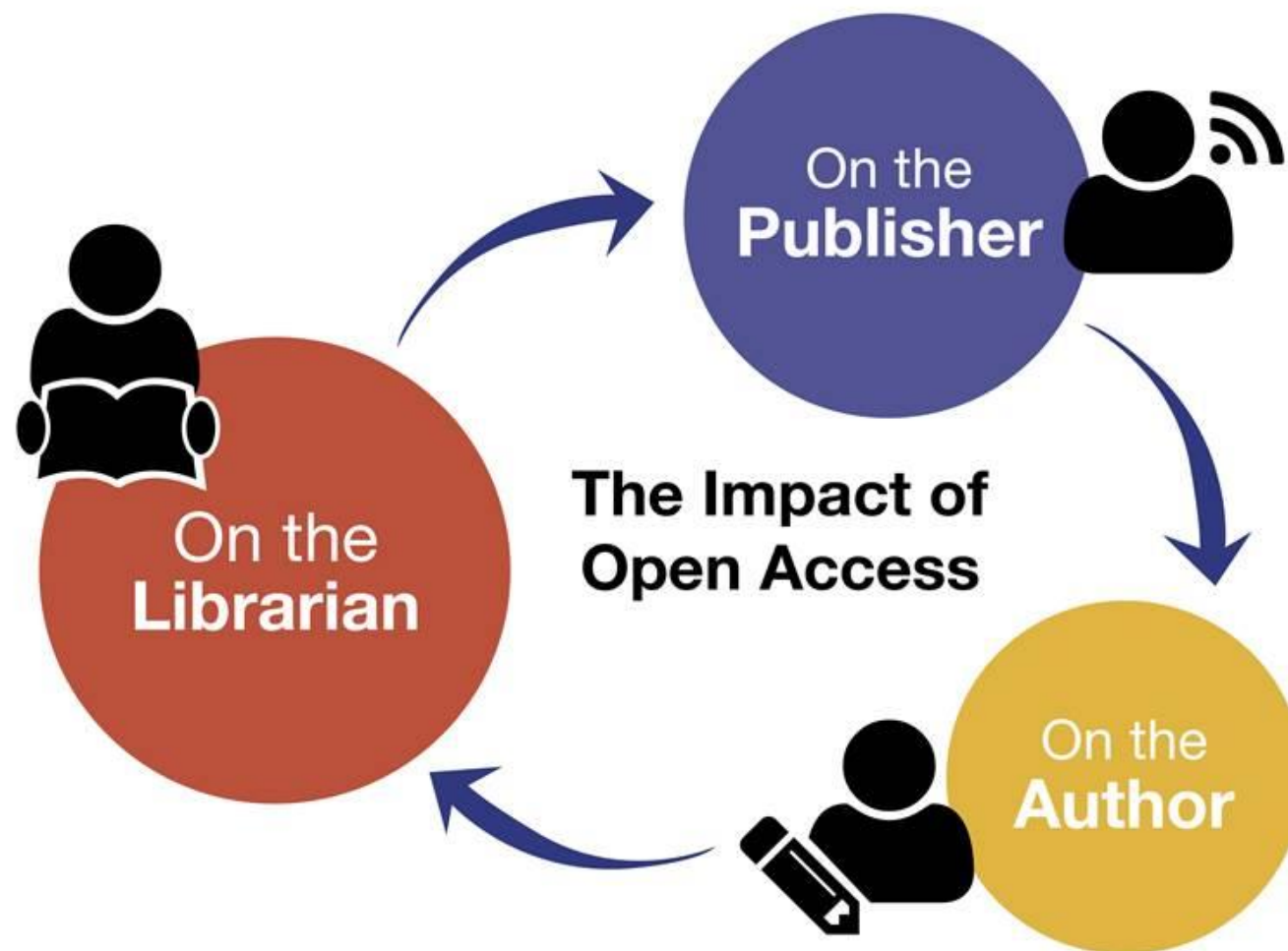


Taylor & Francis Group
an **informa** business

Taylor & Francis Author Workflow & Research Dashboard Demo



Visibility, Workflow and Communication



Key Features of the Workflow

For the Library

- Individual Research Dashboard accounts to approve article eligibility under the agreement
- Libraries have full control over which articles to approve
- Real time self service reporting
- Reduces administration around OA
- Dedicated workflow contacts at T&F

For the Researcher

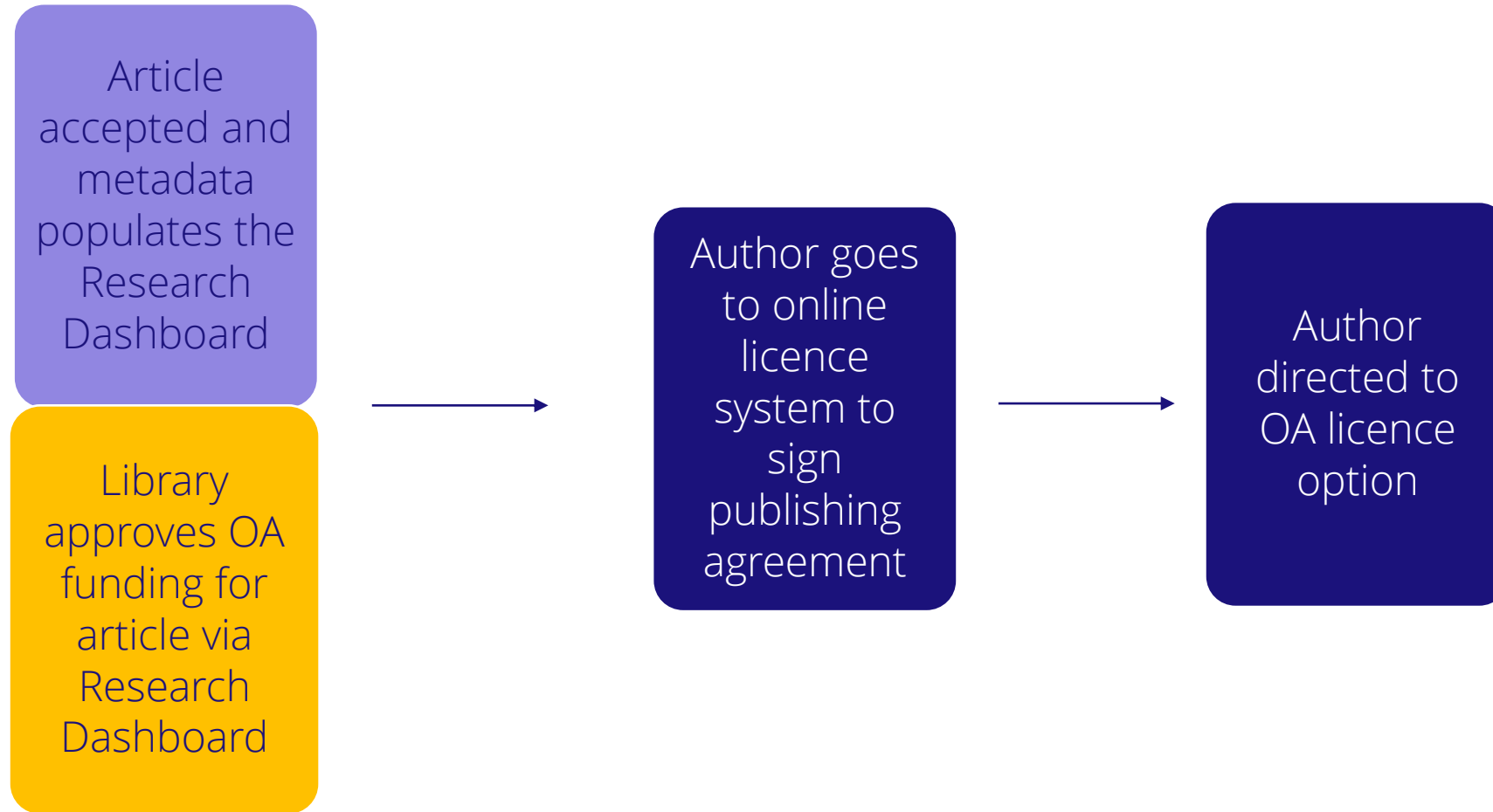
- Affiliation based workflow: matching engine identifies eligibility
- Clear messaging at each stage of the process to alert them to the agreement in place
- Communication to confirm funding approval
- Choice of Creative Commons licence

Workflow for an Open Select Article at Taylor & Francis



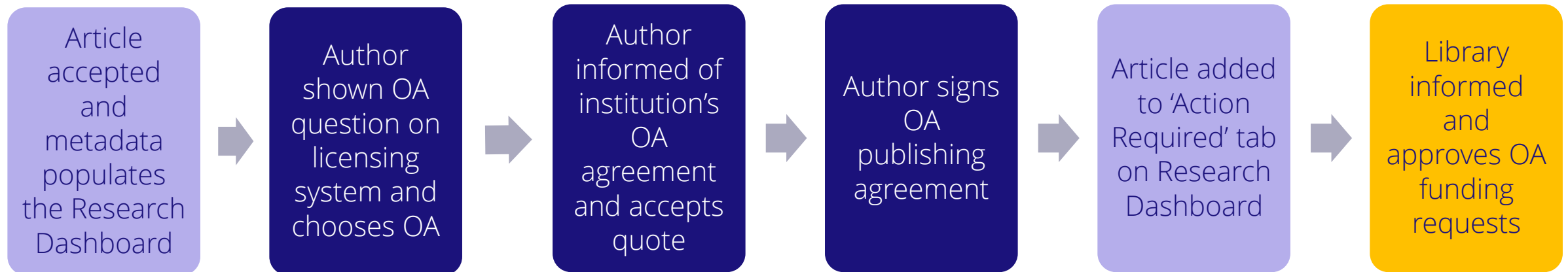
From Article Acceptance: 2
different workflows, depending on how
quickly the library and author take
action

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



The default workflow

2. Author signs publishing agreement and chooses OA before library approves for OA funding via Dashboard





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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: Your article with Taylor & Francis

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.

We would like to let you know that your institution has an open access agreement with Taylor & Francis, which means you may be eligible for funding to publish your article [open access](#). We have let them know that your paper has been accepted and shared your article information, including your email address.

What happens next?

It's important to know that not all articles will be eligible for funding under this agreement, so please [click here](#) to view the latest information.

If your institution approves open access funding for your article, we will let you know. You may also request approval by selecting the open access option.

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.

Kind regards,

Mark Robinson
Taylor & Francis open access team

Email to author,
alerting them to
OA agreement

If the organizational user approves the article before the author gets to the licence email:

Running Total
Accepted Articles
Submitted Articles
Action Required Articles
Approved Articles
Declined Articles

Durham university

Accepted Articles

🔍
DOWNLOAD AS CSV

▶ COLLAPSE ALL

					Action Required
test					
Author <input type="checkbox"/> Chelsey Horstmann Dennis	Journal Title Advances in Physics: X	Article Type Reviews	OA Profile Open Access	Price \$855.00	<input type="button" value="Approve"/> <input type="button" value="Decline"/>
Author Email chelsey.horstmandennis@tandf.co.uk Organization name Durham University_1 Submission Date Not Available Orcid			DOI 10.1080/21622671.2017.1948390 Research Funder Not Available Acceptance Date Not Available		
Prepay Organization					
Author <input type="checkbox"/> test1 Moore	Journal Title Journal of Market Access & Health Policy	Article Type Review Article	OA Profile Open Access	Price \$1,271.70	<input type="button" value="Approve"/> <input type="button" value="Decline"/>
Author Email vinay.c.cp@informa.com Organization name Durham University_1 Submission Date Not Available Orcid			DOI 346434334664 Research Funder Not Available Acceptance Date Not Available		

📧 Contact Us

Running Total

Accepted Articles

Submitted Articles

Action Required Articles

Approved Articles

Declined Articles

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Accepted Articles

Search by Author Name, Article Title, Journal, Email, ORCID, DOI



DOWNLOAD AS CSV

Article Type: All

OA Profile: All

Funder: All

COLLAPSE ALL

test

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
Chelsey Horstmann Dennis	Advances in Physics: X	Reviews	Open Access	\$855.00	✓ Approved

Author Email chelsey.horstmandennis@tandf.co.uk
Organization name Durham University_1
Submission Date Not Available
Orcid

DOI 10.1080/21622671.2017.1948390
Research Funder Not Available
Acceptance Date Not Available

Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	Approve Decline

Author Email vinay.c.cp@informa.com
Organization name Durham University_1
Submission Date Not Available
Orcid

DOI 346434334664
Research Funder Not Available
Acceptance Date Not Available

Contact Us

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: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b89325f>

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Author Publishing Agreement

1

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3

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.

Next >

Contact Us

Please let us know your query by entering it into the box below (max. 4000 characters). Once you have completed your message, please click the 'Send' button to send your message to Taylor & Francis.

I have some questions about which option I should choose. Could you call me at 555-555-5555?

Close

Send

Author Publishing Agreement

1

2

3

Below is the information about your article that will appear on your author agreement. Please confirm that the information is correct and click "next." If you see an error, please stop here and select "contact us" to report the problem.

Article Title	"Antihypertensive Peptides of Animal Origin: A Review"
Article DOI	10.1080/10408398.2014.898241
Journal Title	Critical Reviews in Food Science and Nutrition
Journal Subtitle	

Corresponding Author

Dr Zuhaib Fayaz Bhat
Sher-e-Kashmir University of Agricultural Scienc...

Complete Author List

Dr Zuhaib Fayaz Bhat
Sher-e-Kashmir University of Agricultural Scienc...

Dr Sunil Kumar
SKUAST-Jammu

Miss Hina F Bhat
University of Kashmir

[Next >](#)[Questions or Problems? Contact Us](#)

1

2

3

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.

Funders

Name	Grant Number
 Research Councils UK	<input type="text" value="A43w644"/> ✕
Jefferson University	<input type="text" value="3768-0986"/> ✕

Questions or Problems? [Contact Us](#)


Author Publishing Agreement



2

3

Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Most authors writing papers concerning original research are considered the copyright owners of that work. You may not be the copyright owner if your work was previously published elsewhere, and must inform us if any rights have been granted elsewhere.

Please tell us about the copyright ownership of your article. 

- I own copyright. If I have coauthors, we jointly own copyright and I am acting on our behalf.
- I am an employee of the UK, Canadian, Australian, or other Commonwealth Realm Government, and the Crown retains and asserts copyright. 
- I am a US Government (including NIH) employee and there is no copyright to transfer 
- I am a contractor of the US Government (includes NIH contractors) 
- I am an employee of the European Commission and copyright is asserted and retained by the European Union. 
- I am employed and the copyright belongs to my employer (or is a 'work made for hire'). 
- I am an employee of a Government, Agency, or International Organization and copyright is retained by that entity. 

< Start again

Next >

Questions or Problems? [Contact Us](#)

Taken directly to OA
licence options



Author Publishing Agreement



Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Please select the Open Access publishing agreement you require. Also note that with any agreement you are also telling us that you are agreeing to take responsibility for any required article publishing charges. 

- Creative Commons Attribution CC BY-NC-ND 
- Creative Commons Attribution CC BY 

[< Start again](#)

[Next >](#)




Author Publishing Agreement



2

3

Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Does this article contain content from third parties for which you are responsible for obtaining permission to reuse?

- No
- Yes 

< Start again

Next >

Questions or Problems? [Contact Us](#)




Author Publishing Agreement



2

3

Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Do you need to declare and publish a conflict-of-interest statement? 

- No
- Yes

< Start again

Next >

Questions or Problems? [Contact Us](#)

Author Publishing Agreement



Accept Author Publishing Agreement (APA)

This is your final agreement. Ticking the box below and selecting "Next" will be your final step. An option to download a version to sign and scan is available at the bottom if you have been advised you cannot digitally sign.

Author Publishing Agreement Preview



I agree to digitally sign this agreement

Next >

If you are unable to sign this document electronically, please click the 'download' button below to export the APA to your device. You can then print the document off, sign and date it, before re-uploading it via the 'upload' button below. Please note that your progress has been saved and you can return to this page by clicking the link included in the original email that was sent to you by this system.

Download

Upload

Questions or Problems? [Contact Us](#)



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an informa business

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: Your article with Taylor & Francis

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.

We would like to let you know that your institution has an open access agreement with Taylor & Francis, which means you may be eligible for funding to publish your article [open access](#). We have let them know that your paper has been accepted and shared your article information, including your email address.

What happens next?

It's important to know that not all articles will be eligible for funding under this agreement, so please [click here](#) to view the latest information.

If your institution approves open access funding for your article, we will let you know. You may also request approval by selecting the open access option.

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.

Kind regards,

Mark Robinson
Taylor & Francis open access team

Email to author,
alerting them to
OA agreement



Your Author Publishing Agreement (APA) with Taylor and Francis

Attention: Abigail Kaiser

Hello,

In order to publish your article, "Test article for Chelsey", we ask that you complete your Author Publishing Agreement. Please click the link below (or copy the URL into your browser) to launch our online Author Publishing Agreement portal. The process should take only a few minutes. In most cases, you will receive immediate notice that your agreement is accepted and will be able to download a copy of it for your records.

Please do not reply to this email. If you need immediate assistance concerning your article, please instead contact sue.starr@valtech.com.

Thank you.

Start »

<https://authoragreement.taylorandfrancisgroup.com/Start/2cba1581-429e-4048-bdaf-e39e9b89325f>

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Author Publishing Agreement

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Below is the information about your article that will appear on your author agreement. Please confirm that the information is correct and click "next." If you see an error, please stop here and select "contact us" to report the problem.

Article Title	"Antihypertensive Peptides of Animal Origin: A Review"
Article DOI	10.1080/10408398.2014.898241
Journal Title	Critical Reviews in Food Science and Nutrition
Journal Subtitle	

Corresponding Author

Dr Zuhaib Fayaz Bhat
Sher-e-Kashmir University of Agricultural Scienc...

Complete Author List

Dr Zuhaib Fayaz Bhat
Sher-e-Kashmir University of Agricultural Scienc...

Dr Sunil Kumar
SKUAST-Jammu

Miss Hina F Bhat
University of Kashmir

[Next >](#)

Questions or Problems? [Contact Us](#)

1

2

3

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.

Funders

Name	Grant Number
 Research Councils UK	<input type="text" value="A43w644"/> ✕
Jefferson University	<input type="text" value="3768-0986"/> ✕

Questions or Problems? [Contact Us](#)

Author Publishing Agreement



2

3

Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Most authors writing papers concerning original research are considered the copyright owners of that work. You may not be the copyright owner if your work was previously published elsewhere, and must inform us if any rights have been granted elsewhere.

Please tell us about the copyright ownership of your article. 

- I own copyright. If I have coauthors, we jointly own copyright and I am acting on our behalf.
- I am an employee of the UK, Canadian, Australian, or other Commonwealth Realm Government, and the Crown retains and asserts copyright. 
- I am a US Government (including NIH) employee and there is no copyright to transfer 
- I am a contractor of the US Government (includes NIH contractors) 
- I am an employee of the European Commission and copyright is asserted and retained by the European Union. 
- I am employed and the copyright belongs to my employer (or is a 'work made for hire'). 
- I am an employee of a Government, Agency, or International Organization and copyright is retained by that entity. 

< Start again

Next >

Questions or Problems? [Contact Us](#)

Author Publishing Agreement



Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

This field is required.

Have you considered open access?

Open access offers greater accessibility, visibility and impact for your research. Articles published open access with Taylor & Francis typically receive 32% more citations* and over 6 times as many downloads** compared to those not published open access.

Your funder or institution may recommend, or mandate publishing open access and provide funding to cover the Article Publishing Charge (APC).

We have open access agreements with consortia and institutions globally. Please click here to see if your institution has an open access agreement with Taylor & Francis.

To make your article open access you will need to:

- Get a quote for the article publishing charge and inform us who will pay
- Choose a Creative Commons license

We will do everything else necessary to make your article open access.

If you choose not to make your article open access, it will be available to readers who have subscribed to the journal. There will be no article publishing charge and you will need to sign an appropriate author publishing license.

*Citations received up to Jan 31st 2020 of articles published between 2015-2019 in hybrid journals that are listed in Web of Science®.

**Usage in 2017-2019 of articles published in hybrid journals in 2015-2019.

Do you want to make your article open access for anyone to read online?

- Yes, please click here to request and accept an APC quote
- No

A Quote ID from our APC Quotation service is required before proceeding with this Author Publishing Agreement.
Please click on the above link to generate a Quote ID

< Start again

Next >

Author given the
option to publish
Open Access

NB: if the author selects no to Open Access here, the library can still approve the article for OA funding via the Dashboard and the author will receive a new OA licence to sign

Request APC Quote

To be provided with a more detailed quote please provide more details about your article and billing details.



Journal

2

Billing



Preview

We have noticed you are affiliated with an organization that may be able to fund your **Article Publishing Charge (APC)**. We will contact them for approval to fund the APC. In the event they decline to fund the APC we will contact you for alternative billing details.

If your organization declines to fund the APC, it will be USD \$2995 plus VAT or other local taxes where applicable in your country.

I do not wish to request funding from my organization

PREVIOUS

NEXT

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



Thank you!

Your request for gold open access has been processed.

A request will now be sent to your institution. Please return to your author publishing agreement to complete the licence signing.


Relevant OA licence options displayed



Author Publishing Agreement



Please answer the questions below.

Additional help information is available by clicking on the help  icons. To hide the help, click the close button or anywhere outside the popup.

Please select the Open Access publishing agreement you require. Also note that with any agreement you are also telling us that you are agreeing to take responsibility for any required article publishing charges. 

- Creative Commons Attribution CC BY-NC-ND 
- Creative Commons Attribution CC BY 

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[Next >](#)

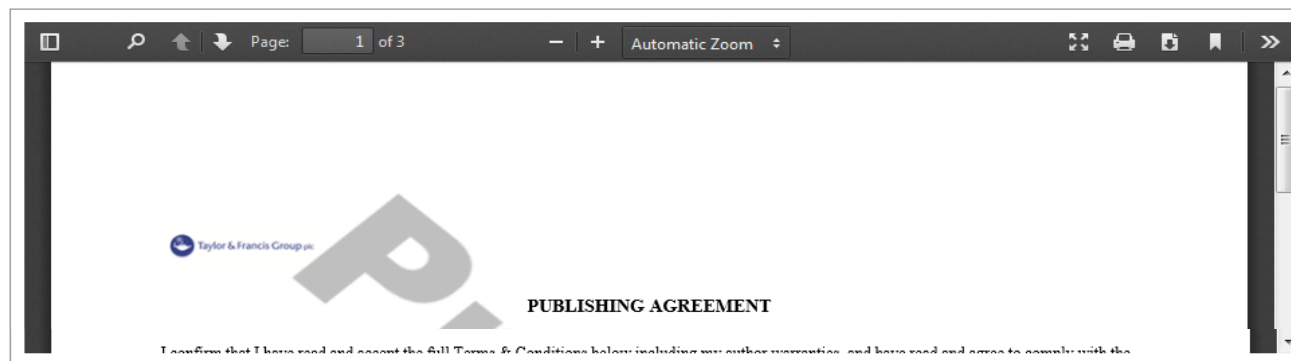
Author Publishing Agreement



Accept Author Publishing Agreement (APA)

This is your final agreement. Ticking the box below and selecting "Next" will be your final step. An option to download a version to sign and scan is available at the bottom if you have been advised you cannot digitally sign.

Author Publishing Agreement Preview



I agree to digitally sign this agreement

Next >

If you are unable to sign this document electronically, please click the 'download' button below to export the APA to your device. You can then print the document off, sign and date it, before re-uploading it via the 'upload' button below. Please note that your progress has been saved and you can return to this page by clicking the link included in the original email that was sent to you by this system.

Download

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Questions or Problems? [Contact Us](#)

Author Publishing Agreement



Article License Summary

Status - Awaiting T&F approval of APA

Taylor & Francis have been notified of your acceptance and will review your Author Publishing Agreement.

Journal Title	Aphasiology
Journal SubTitle	
Article DOI	10.1080/02687038.2021.1946022
Article Title	testing this article

Corresponding Author

Ellie Souster **APA Signed**
Eleanor.Souster@informa.com
Durham University

Complete Author List

Ellie Souster **APA Signed**
Eleanor.Souster@informa.com
Durham University

Exit

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 ● Horstmann Dennis, Chelsey

Dear Sir/Madam,

Article Title: test

DOI/MS ID: 191412402

Journal: Advances in Physics: X

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

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

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.

Durham university

Action Required OA

Search by Author Name, Article Title, Journal, Email, ORCID, DOI



DOWNLOAD AS CSV

Article Type: All

OA Profile: All

Funder: All

▲ COLLAPSE ALL

Prepay Organization

Action Required

Author	Journal Title	Article Type	OA Profile	Price	
<input type="checkbox"/> test1 Moore	Journal of Market Access & Health Policy	Review Article	Open Access	\$1,271.70	<input type="button" value="Approve"/> <input type="button" value="Decline"/>

Author Email vinay.c.cp@informa.com
 Organization name Durham University_1
 Submission Date Not Available
 Orcid

DOI 346434334664
 Research Funder Not Available
 Acceptance Date Not Available



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[Cookie Policy](#)

[Terms & Conditions](#)

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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 ● Horstmann Dennis, Chelsey

 If there are problems with how this message is displayed, click here to view it in a web browser. Quote.pdf
80 KB

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.

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

● ● For further questions, please contact:

Liz.Turner@tandf.co.uk

Sabyasachi.Bhuyan@tandf.co.uk