OJS in an Hour

An Introduction to Open Journal Systems
Version 2.1.1

Last Updated: July 30, 2006

Open Journal Systems is a research and development initiative of the Public Knowledge Project at the University of British Columbia. Its continuing development is currently overseen by a partnership among UBC's Public Knowledge Project, the Canadian Center for Studies in Publishing, and the Simon Fraser University Library.

For more information, see the Public Knowledge Project web site: http://pkp.sfu.ca

Overview

OJS is an open source solution to managing and publishing scholarly journals online. OJS is a highly flexible editor-operated journal management and publishing system that can be downloaded for free and installed on a local Web server.

It has been designed to reduce the time and energy devoted to the clerical and managerial tasks associated with editing a journal, while improving the record-keeping and efficiency of editorial processes. It seeks to improve the scholarly and public quality of journal publishing through a number of innovations, from making journal policies more transparent to improving indexing.

OJS Features

1. OJS is installed locally and locally controlled.
2. Editors configure requirements, sections, review process, etc.
3. Online submission and management of all content.
4. Subscription module with delayed open access options.
5. Comprehensive indexing of content part of global system.
6. Reading Tools for content, based on field and editors' choice.
7. Email notification and commenting ability for readers.
8. Complete context-sensitive online Help support.

The OJS Journal

The following image is a screenshot of an OJS Demonstration Journal Table of Contents:

Figure 1: OJS Table of Contents

The next image shows the HTML version of an article from the table of contents, including the Reading Tools in the right column. PDF documents can also be made available:

Figure 2: OJS HTML Article

Editorial Process

OJS moves submissions to the journal through five steps in the editorial process, which will be managed by one or more of the editors.

1. Submissions Queue: Items begin here and are assigned to an editor.
2. Submission Review: Items undergo peer review and editorial decision.
3. Submission Editing: Items undergo copyediting, layout, and proofreading.
4. Scheduling Queue: Items assigned to an issue and/or volume.
5. Table of Contents: Items ordered for publication and issue published.

Editorial Roles

- Journal Manager: Sets up journal and staffs editorial roles (can also serve as an Editor and other roles as well).

- Editor: Oversees editorial process; can assign submissions to Section Editors to see through Submission Review and Submission Editing; undertakes scheduling of content and publishing of journal.

- Section Editor: Oversees Submission Review and possibly Submission Editing for assigned submissions.

- Copyeditor: Works with submissions to improve grammar and clarity, pose questions to author on possible errors, and ensure strict adherence to journal's bibliographic and textual style.

- Layout Editor: Transforms copyedited submission into galleys in HTML, PDF, and/or PS files in the proper format for electronic publishing.

- Proofreader: Reads galleys for typographic and formatting errors.

OJS Workflow Chart

Author

Editor and Section Editor

Journal Manager, Reviewer, Copyeditor, Layout Editor, and Proofreader

Submission
Author uploads file to journal Web site, and enters metadata for OAI indexing

1. Submission Queue
Editor assigns submission to Section Editor to see through the editorial process

Journal Management
Setup and configure journal; enroll editors, reviewers, copyeditors, proofreaders.

Submission Review
Author can track process, see files, reviews, revise and resubmit, at editor's request

2. Submission Review
a) Check submission
b) Conduct peer review
c) Reach editorial decision

Select Reviewers
Editor invites reviewers from database with interests, load

Review Conducted
Reviewer submits review and recommendation (which may be rated by editor)

Submission Editing
Authors reviews copyedits and proofreads galleys

3. Submission Editing
a) Copyedit submission
b) Layout of formatted galleys
c) Proofread galleys

Copyediting

Layout
Layout Editor prepares galleys in HTML,PDF, PS, etc.

4. Issue Management
a) Create issues
b) Schedule submissions
c) Organize Table of Contents

Proofreading

5. Publication
Offering immediate open access or delayed open access, with subscriptions

Submission Archive
Complete records kept of submission process for published and declined items

Current Issue
Items appear with Reading Tools linking to related internal and external resources

Journal Archive
Browsing issues, with indexing by OAI search engines, as well as Google, etc.

Key

Journal Manager
Editor
Section Editor
Reviewer
Copyeditor
Layout Editor
Proofreader
Author
Reader

Open Journal Systems is an open source development of the Public Knowledge Project:
http://pkp.sfu.ca

System Requirements

A server environment meeting the following requirements is recommended:

- PHP support (4.2.x or later)
- MySQL (3.23.23 or later) or PostgreSQL (7.1 or later)
- Apache (1.3.2x or later) or Apache 2 (2.0.4x or later) or Microsoft IIS 6 (PHP 5.x required)
- Linux, BSD, Solaris, Mac OS X, Windows operating systems

Other versions or platforms may work but are not supported and may not have been tested. We welcome feedback from users who have successfully run OJS on platforms not listed above.

Help Documentation

Open Journal Systems 2.1.1 has a 12,000 word Help document that is contextually embedded within OJS, with the relevant pages coming up depending on where the user is when requesting Journal Help.

The Help document can be viewed at:
http://pkp.sfu.ca/ojs/demo/present/index.php/index/help/

Community Contributions

The OJS team encourages contributions from the developer community. If you are interested in getting involved in making OJS even better, we welcome your participation.

CJC contributes to the OJS software

The Canadian Journal of Communication was an early adopter of online publishing. We had back issues of our journal on the web as early at 1994. At first we did our own web development, but the software grew more and more complex, and our ability to support it couldn't keep up. As well, we had no or limited "back end" to our system. Our software was mainly about presenting finished articles to the reader, and not helpful to the submission, review, revision, and release process. We decided to move to OJS very early on, and were attracted to the fact that it was open source, so we could extend and enhance it in ways that suited us.

At first we made those enhancements on our own, but based on my own research into the benefits of open source community software development, I encouraged our developers to get in touch with the team at OJS and we quickly found that we had much in common. Not only that, but some of our priorities were not priorities for the OJS at the time (subscriptions, for example). So, we developed code that provided enhancements that we needed, but we did so in a way that would allow them to be included in the *main* code for the project. Over the years we have submitted many small (bug fix) and large (the subscriptions module) pieces to the code, all the while keeping our overall software and development costs WAY below what they were before we went with the OJS software. In fact, we have a system with three times the functionality and our software cost is less than one

third what it used to be. And with our code submissions, OJS still feels like "our" system.

Recently OJS has moved to a modular format and created a plug-in architecture. We believe that this will greatly increase both the number of code submissions but also the quality and diversity of those submissions. Our group has recently completed to plug-ins, one for a notice board and one for accepting thesis abstracts as a publication type. We're working on revising our existing RSS feed code (which we have working on version 1.x of OJS) and making that available for OJS 2.1.

I strongly encourage anyone who has an inclination toward software development, or has access to software programming expertise, and who wants to get involved, to contact the team at PKP, learn about the process for developing plug-ins, and get started building a better OJS for the entire community. If you need a feature it is likely someone else does, too, so why not share the load? That's what open source is all about! Even if you aren't a coder, you can contribute to the project by translating menu items and help screens: we've got many more languages to go.

Test-Drive OJS 2.1.1

A demonstration journal utilizing OJS 2.1.1 has been set up online at
http://pkp.sfu.ca/ojs/demo/present/

In addition, potential users of OJS may take OJS out for a test-drive –
as a Journal Manager, Editor, or a Reviewer – at a second
demonstration journal site that has been set up for this purpose at
http://pkp.sfu.ca/ojs/demo/testdrive/

Log in using **admin** as the username and **testdrive** as the password,
and select one of the available roles in the editorial process, and
explore how it operates.

Also feel free to submit a test manuscript to see what authors
experience, or assign submissions to reviewers, and come in as a
reviewer.

Please note that any changes made to the Test-Drive Journal will be
cleared every Monday (8:00 GMT).

Site Administration

Once OJS is installed, the Site Administrator can generate as many journal sites as required, and oversee the administration of each journal site that is created.

Getting Started

- Log in to your OJS account.
- Select your role as 'Site Administrator':

Figure 3: Selecting your role as Site Administrator

In the above example, the Site Administrator also has the ability to carry out different roles in the journal. You make take some of these roles yourself, or delegate those responsibilities to others.

Site Settings

From the Site Administration menu, under "Site Management", choose "Site Settings":
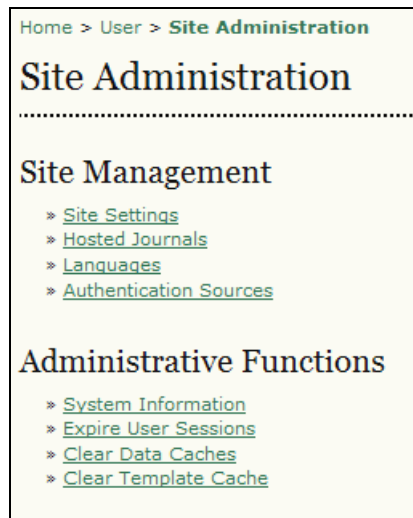
Figure 4: Site Administration Menu

This will allow you to add information regarding your overall OJS installation, not individual journals. This includes the name of your site, an introductory statement about your site, a redirect option (leave this blank if you do not need to redirect users), a description of your site, contact information, a minimum password length for registered users, and indexing registration. You will have the opportunity to provide details about your individual journal(s) at a later stage.

Figure 5: Site Settings

Creating a New Journal

When you return to the Site Administration menu (see Figure 4 above), choose 'Hosted Journals". You will be taken to a list of the journals hosted by your site. If you have not yet created a journal, this section will be empty:
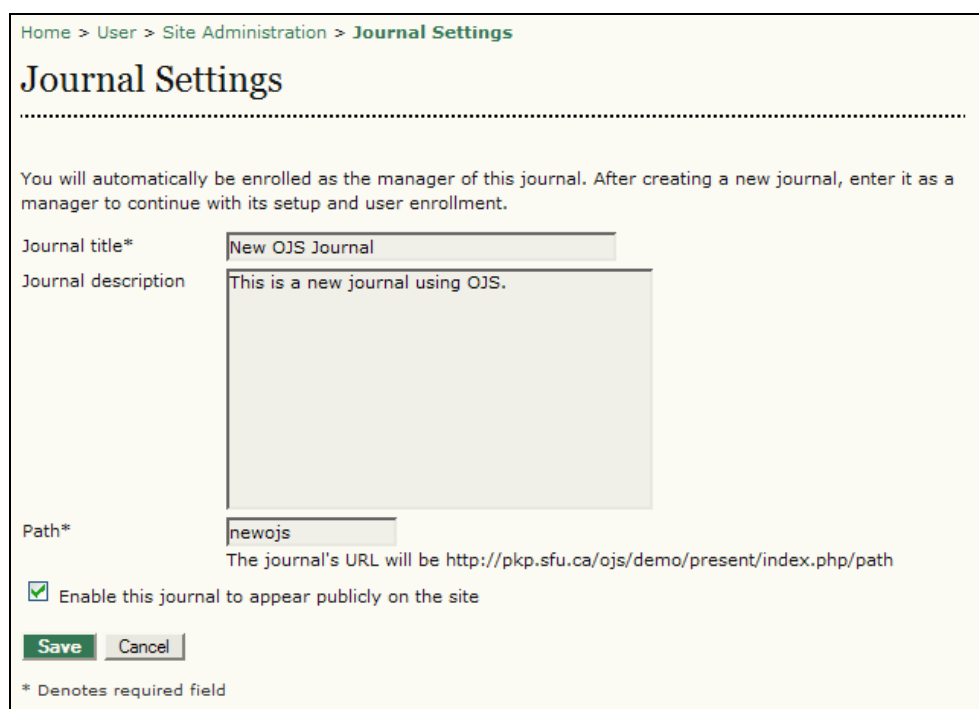
Figure 6: Creating a new journal

Select 'Create Journal' and fill in the resulting form:

Figure 7: Journal settings

The 'path' should be a single word or abbreviation that will be unique for this journal. It will also be part of your journal's URL, so choose carefully.

Select the 'Enable' checkbox to allow this journal to appear publicly on your site. If you wish to limit access to the journal, do not check this box.

Select 'Save' to return to your list of journals. Your new journal is now available.

You can reorder your journals using the up and down 'order' arrows. You can also edit or delete a journal using the links on the right of this page.

Your Journal Manager is now able to work with the new journal (see **Setting up a New Journal** in the Journal Management section of this document).

If you are not acting as the Journal Manager, you will need to create a new user with those responsibilities (see **Create New Users** in the Journal Management section of this document).

Migrating from OJS 1.x

OJS 2.x represents a complete re-design and re-implementation of the Open Journal Systems project, and as such, it is not possible to directly upgrade a 1.x system to 2.x.

Instead, a migration utility has been provided to allow content from OJS 1.x to be imported into an installed 2.x system -- including most journal settings and all user, issue, and article data.

Migration is only supported for OJS 1.1.5 and later. Older releases of OJS 1.x must first be upgraded to a newer release of 1.x. See the Upgrade document included in the download of OJS 2.x.

To migrate data from OJS 1.x to a 2.x system, you will first need to install the latest release of OJS 2 onto the same server as the current OJS 1 installation.

Next, go to the Site Administration menu and choose 'Hosted Journals". Select **Import from OJS 1** (see Figure below):
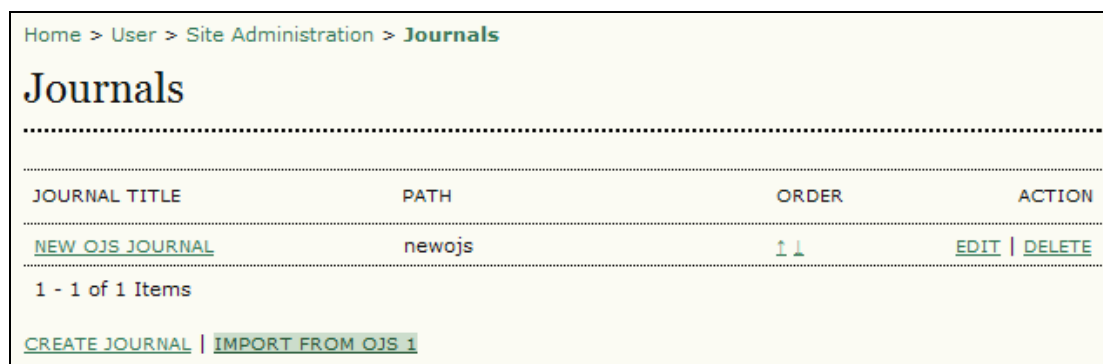
Figure 8: Import from OJS 1.x

This will take you to the Import from OJS 1 form:
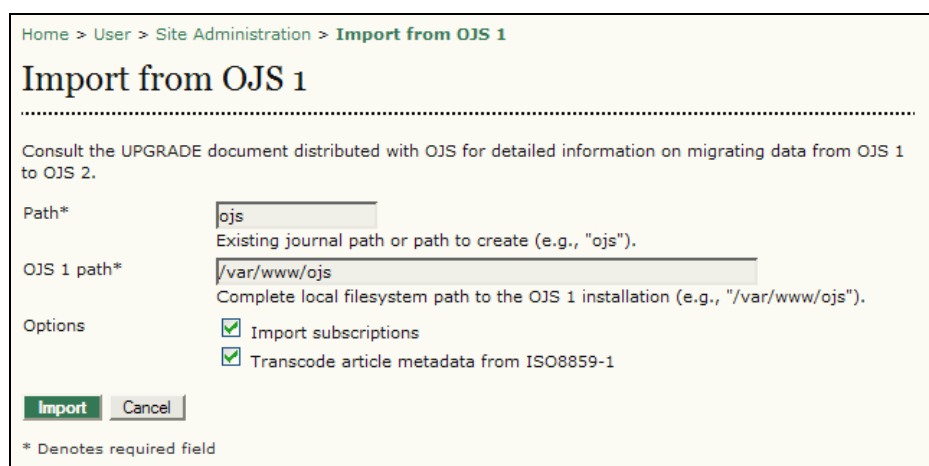
Figure 9: Import from OJS 1

On the Form, fill in the Path (e.g., "ojs"). If a path already exists, all content except journal settings will be imported into the existing journal

Next is the OJS 1 path (e.g., /var/www/ojs). This should be the complete local file system path to the OJS 1 installation.

Finally, you can choose to import subscriptions from the OJS 1 installation, and transcode the article metadata from ISO8859-1, by selecting the checkboxes.

Select **Import** to begin the migration.

Note that, depending on the amount of content in the journal to be imported, it may take a long time for the migration utility to complete -- especially if your system is configured to index full-text files.

The migration can also be completed from a command line. The Upgrade document included in the new version of OJS contains details on using the command line (see /docs/UPGRADE).

Some additional notes regarding migration:

- After using the migration tool, edit and save the hosted journal settings under Site Administration, and proceed through and complete all Journal Setup steps under Journal Management -- there are a number of new and modified settings in OJS 2.x compared to OJS 1

- Any number of OJS 1.x journals can be imported into a single OJS 2.x instance (OJS 2.x is designed as a multiple journal system)

- OJS 2.x requires both user usernames and email addresses to be unique (OJS 1 did not enforce the latter restriction):
  - If a user already exists with the same username as an imported user, all imported data will be associated with the existing user
  - If a user already exists with the same email address as an imported user, the email address of the imported user will be prefixed with "ojs-<username>+" to ensure uniqueness -- such users can then be updated manually post-migration
- Modified email templates and RST versions are not migrated due to the numerous revisions and enhancements to these components in OJS 2.x

- Migrated subscription types are given a 12-month duration and public visibility by default -- these settings can be modified post-migration

OJS 1.x features that are currently not supported in 2.x:

- OJS 2 currently only includes English, French, Spanish, Italian, Russian, Turkish, and Portuguese localizations (see the README for information on producing a translation for other languages)

- Distinct "Book/Media Review" listings are not currently and are not likely to ever be supported

Languages

OJS is designed to be a multilingual system, allowing journals supporting a wide variety of languages to be hosted under a single site. The Site Administrator can specify the default language of the

site and install additional locales as they become available to make other languages available for use by journals.

The next step in administering your OJS site is to select the languages to be used. English is enabled by default.

From the Site Administration menu, under "Site Management", choose "Languages":
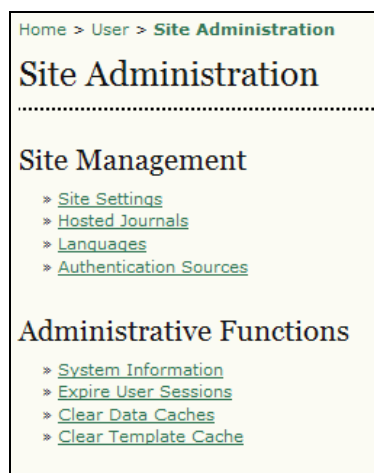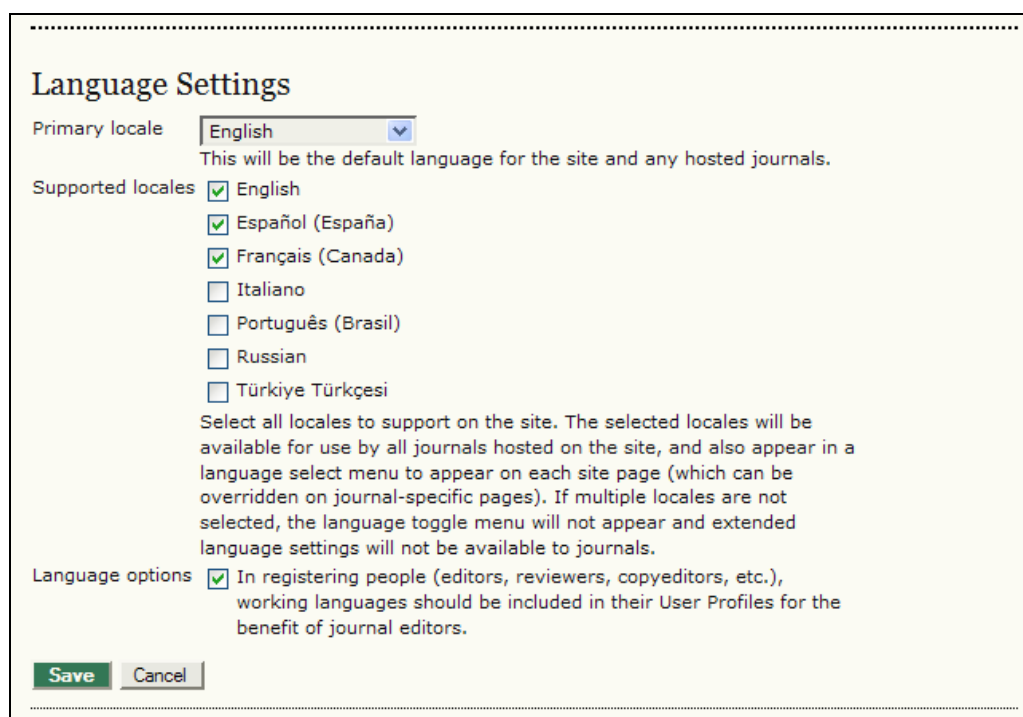
Figure 10: Site Administration Menu

Select the default language for your journal from the dropdown box. You can also check other languages, to provide a multilingual interface for your journal.

Figure 11: Languages

If additional languages are not showing under 'Supported Locales', scroll down the page to the Install Languages section. From here, you can check each additional language you would like for your journal, and then click **Install**:

Figure 12: Installing additional languages

You can now scroll back up the page and check the languages for your journal.

Authentication Sources

By default, the OJS user database is used for authentication. In some cases, however, alternative methods, such as LDAP, may be required.

Figure 13: Authentication Sources

To enable LDAP authentication, use the dropdown menu under Create Authentication Source. This will open a page of LDAP options and settings for your journal:

Figure 14: LDAP options and settings

Version Checking

You can check which OJS version you are currently using from the Site Administrator menu. Select "System Information".
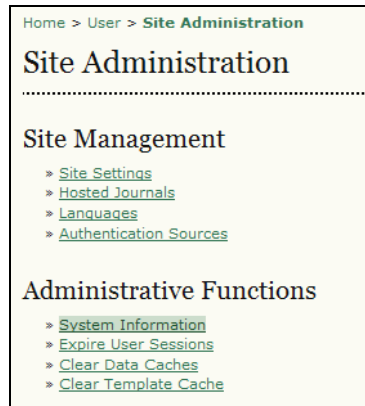
Figure 15: System Information

From the System Information screen, you can see the current version information. This screen also allows you to check for OJS software updates.

Figure 16: Checking for updates

You can also use this screen to edit your config.inc.php file, via the web interface.

Expire User Sessions

This clears all active user sessions in the system, requiring any user that is currently logged in to sign in to the system again.

Clear Data Caches

Clears all cached data. This function may be useful to force data to be reloaded after customizations have been made.

Clear Template Cache

Clears all cached versions of HTML templates. This function may be useful to force templates to be reloaded after customizations have been made.

Journal Managers

The Journal Manager manages the overall publishing system. This does not involve any advanced technical skills, but entails filling out templates and uploading files. The Journal Manager does the setup for the journal, and enrols the Editors, Section Editors, Copyeditors, Layout Editors, Proofreaders, and Reviewers.

The Journal Manager also has access to the journal's other management systems, and can create new Sections for the journal, edit the default set of Emails the system uses, manage the Reading Tools that are available with this journal, and see to the Journal Statistics the system can generate.

Getting Started

- Log in to your OJS account.
- Select your role as 'Journal Manager':

Figure 17: Selecting your role

- You will see a menu of options to choose from:
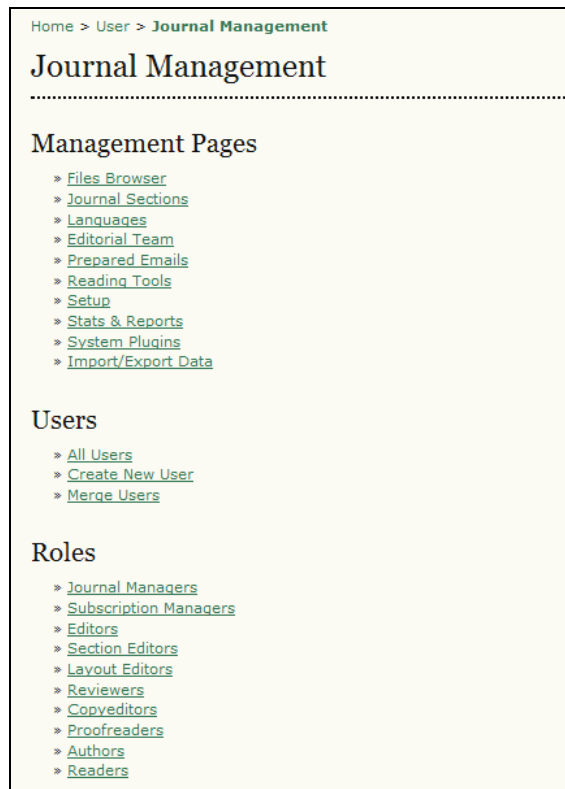
Figure 18: Journal Management options

From here, you will be able to fulfill all of your tasks as the Journal Manager.

Setting up a New Journal

- Go to the 'Management Pages' section.
- Select 'Setup' and follow the 5 steps to create your new journal:

Figure 19: Five steps to setting up a journal web site

Complete as many of the sections as possible, but remember that you can always go back and fill in additional details as they become available. Default options are often pre-selected for common functions.

You can get started quickly by filling in the most important information first (journal name, principal contact, etc.) and returning to the details later.

Step 1: Details

1.1 General Information

This form provides general details about your journal, including the name, abbreviation, address, print or online ISSNs, and DOI. Use the link provided to obtain an ISSN or DOI.

Figure 20: General Information

1.2 Principal Contact

Figure 21: Principal Contact

1.3 Technical Support Contact

Figure 22: Technical Support Contact Information

1.4 Email Identification

OJS makes extensive use of internal email forms. This signature will appear on the bottom of all emails sent by the system.

You can also enter a bounce address, where any undeliverable email messages will be sent.

Figure 23: Email signature

1.5 Publisher

The following three forms (1.5, 1.6, 1.7) will add information to the About the Journal section of your journal web site, under Journal Sponsorship.

Figure 24: Publisher information

1.6 Sponsoring Organizations

Figure 25: Sponsoring organization information

Additional organizations can be added by clicking the "Add Sponsoring Organization" button.

1.7 Sources of Support

Figure 26: Sources of support information

Additional sources can be added by clicking the "Add Contributor" button.

1.8 Search Engine Indexing

Figure 27: Search engine indexing information

Step 2: Policies

2.1 Focus and Scope of Journal

The following forms will add information to the About the Journal section of your journal web site.

Figure 28: Focus and scope of the journal

2.2 Peer Review

2.2 Peer Review

Outline the journal's peer review policy and processes for readers and authors, including the number of reviewers typically used in reviewing a submission, the criteria by which reviewers are asked to judge submissions, typical time taken to conduct the reviews, and the principles for recruiting reviewers. This will appear in About the Journal.

Figure 29: Peer review

Review Policy

This will be visible on the About the Journal section.

Review Policy

Peer review in Filaria Journal is designed to ensure that the research published is 'good science'.

Filaria Journal accepts articles spanning a wide range of scientific interests, as long as the results and conclusions are scientifically justified and not misleading.

We recognize the importance of highlighting articles that contain the most interesting, important or significant research. Peer reviewers are asked to indicate which articles they consider to be especially interesting or significant. These articles will be given greater prominence within Filaria Journal and greater external publicity.

Figure 30: Review policy

Review Guidelines

Review Guidelines

The Review Guidelines provide reviewers with criteria for judging a submission's suitability for publication in the journal, as well as any special instructions for preparing an effective and helpful review.

Drawn from the Journal of Public Policy & Marketing...

As a reviewer, you are to assess the potential contribution to knowledge of manuscripts in your areas of expertise and, when it seems productive to do so, to offer guidance likely to further such contributions. The reviewer report form provides an overview of your judgment of the paper; however, your written comments to the editor primarily impact the disposition of the paper. Your written comments to the author should provide guidance regarding a possible revision or resubmission. In preparing reviews, adhere to the following guidelines:

Figure 31: Review guidelines

Review Process

This section allows you to choose the best method of peer-review for your journal. By default, the standard review process is selected, but you may prefer to bypass this internal OJS process, and rely on email attachments.

Review Process

OJS supports two models for managing the review process. The Standard Review Process is recommended because it steps reviewers through the process, ensures a complete review history for each submission, and takes advantage of automatic reminder notification, and standard recommendations for submissions (Accept; Accept with revisions; Submit for review; Submit elsewhere; Decline; See comments).

Select one of the following:

○ **Standard Review Process**
Editors will email selected Reviewers the title and abstract of the submission, as well as an invitation to log into the journal web site to complete the review. Reviewers enter the journal web site to agree to do the review, to download submissions, submit their comments, and select a recommendation.

○ **Email-Attachment Review Process**
When the Section Editor sends Reviewers a request to review, it will include the submission as an attachment. If Reviewers are willing, they will first email their assent, and later email their review and recommendation to the Editor. The Editors will the copy the review under the Reviewer's name on the Review page and enter the Reviewer's recommendation for the submission, ensuring that the system has a record for review process.

Figure 32: Review process

Review Options

OJS allows for the configuration of a number of review options, including how long reviewers have to complete their review, when to send reminders to reviewers (see the technical documentation to enable this option), use a rating system for reviewers (visible only to the editors), and setting up one-click access for reviewers.

One-click access allows editors to send reviewers an email message with a secured URL, taking them directly into the appropriate section of OJS, without the need to create an account or login. This option was created to reduce any technical barriers to reviewer participation.

Figure 33: Review options

2.3 Privacy Statement

The privacy statement will appear on the About the Journal section of your web site.
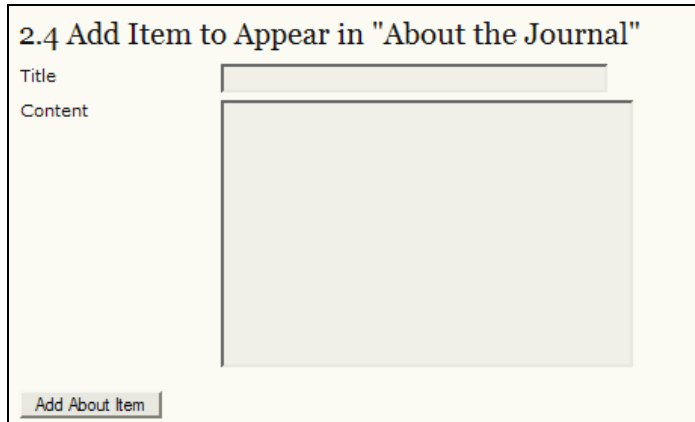
Figure 34: Privacy statement

2.4 Add Item to Appear in "About the Journal"

If you wish to add more information to the "About the Journal" section, this section allows you to enter content.

Figure 35: Add Item to Appear in "About the Journal"

2.5 Journal Archiving

LOCKSS is an open source solution to archiving online journals. To ensure the preservation of your journal, follow the steps outlined in this section. OJS will even generate the email message to send to the participating libraries.

2.5 Journal Archiving

Open Journal Systems supports the LOCKSS (Lots of Copies Keep Stuff Safe) system to ensure a secure and permanent archive for the journal. LOCKSS is open source software developed at Stanford University Library that enables libraries to preserve selected web journals by regularly polling registered journal websites for newly published content and archiving it. Each archive is continually validated against other library caches, and if content is found to be corrupted or lost, the other caches or the journal is used to restore it.

Setting up LOCKSS support for Open Journal Systems does not need to take place until after publishing is fully underway, at which point follow these two steps:

Identify 6-10 libraries that will register and cache the journal. For example, turn to institutions where editors or Board members work and/or institutions already participating in LOCKSS. See participating libraries. Use the prepared invitations for (i) libraries participating in LOCKSS or (ii) libraries not yet participating in LOCKSS.

☑ Enable LOCKSS to store and distribute journal content at participating libraries via a LOCKSS Publisher Manifest page. A LOCKSS license will appear in About the Journal under Archiving:

This journal utilizes the LOCKSS system to create a distributed archiving system among participating libraries and permits those libraries to create permanent archives of the journal for purposes of preservation and restoration. More...

See other versions of a LOCKSS license.

Figure 36: Journal Archiving

2.6 Security/Access Settings

Figure 37: Security and access settings

You will need to make your selections based on the level of access you wish to provide to your journal. You may wish to restrict access to registered users, or allow free access to your content.

You can also decide whether to allow for reader comments and for logging and auditing of your journals submissions.

Logging and auditing are also available, to help you track actions taken on a submission and emails send out via OJS.

Step 3: Submissions

3.1 Author Guidelines

These guidelines will appear on the About the Journal page.

Figure 38: Author guidelines

Submission Preparation Checklist

When submitting to your journal, authors will be asked to ensure certain conditions are met using the submission preparation checklist. Author submissions will not be accepted until they agree that all conditions have been met.

Default items are provided, but you may add new ones or delete any that do not apply to your journal, using the "Add Checklist Item" or "Delete" buttons.

Figure 39: Submission preparation checklist

3.2 Copyright Notice

This copyright notice will appear on the About the Journal page.

Figure 40: Copyright notice

3.3 For Authors to Index Their Work

3.3 For Authors to Index Their Work

OJS adheres to the Open Archives Initiative Protocol for Metadata Harvesting, which is the emerging standard for providing well-indexed access to electronic research resources on a global scale. The authors will use a similar template to provide metadata for their submission. The Journal Manager should select the categories for indexing and present authors with relevant examples to assist them in indexing their work, separating terms with a semi-colon (e.g., term1; term2). The entries should be introduced as examples by using "E.g.," or "For example,".

☑ **Academic Discipline and Sub-Disciplines**
Useful when journal crosses disciplinary boundaries and/or authors submit multidisciplinary items.
Provide examples of relevant academic disciplines for this journal:
For example, Education; Sociology; Psychology
(E.g., History; Education; Sociology; Psychology; Cultural Studies; Law)

☑ **Subject Classification**
Title   ERIC Thesaurus
URL   http://eric.ed.gov:80/ERICWebPortal/Home.
(E.g., Mathematics Subject Classification; Library of Congress Classification)

☑ **Keywords**
Provide examples of keywords or topics as a guide for authors:
For example, Reading comprehension; Curriculum design; Schoo
(E.g., Photosynthesis; Black Holes; Four-Color Map Problem; Bayesian Theory)

☑ **Coverage**
Refers to geo-spatial location, chronological or historical coverage, and/or characteristics of research sample.
Provide examples of relevant geo-spatial or geographical terms for this field:
For example, Vancouver School Board; Canada; English-speakin
(E.g., Iberian Peninsula; Stratosphere; Boreal Forest; etc.)
Provide examples of relevant chronological or historical terms for this field:
For example, Contemporary; 1960-1985; Twentieth century
(E.g., European Renaissance; Jurassic Period; Third Trimester; etc.)
Provide examples of research sample characteristics for this field:
For example, Grade 8 students; Lower SES; English as a second
(E.g., Age; Gender; Ethnicity; etc.)

☑ **Type (Method/Approach)**
Provide examples of relevant research types, methods, and approaches for this field:
For example, Survey/interview; Ethnographic; Quasi-Experiment
(E.g., Historical Inquiry; Quasi-Experimental; Literary Analysis; Survey/Interview)

Figure 41: For authors to index their work

Carefully selecting the most appropriate disciplines, classification system, and keywords will enhance the ability of others to find your articles.

In OJS, authors index their own submissions, but this information can be changed by the editors prior to publication.

3.4   Register Journal for Indexing

3.4 Register Journal for Indexing (Metadata Harvesting)

To have the contents of this journal indexed within a globally distributed system of research databases, register your journal's URL with the Public Knowledge Project metadata harvester. This tool collects the metadata from each indexed item in this journal, enabling accurate and collective searching among the research sites that adhere to the Open Archives Initiative Protocol for Metadata Harvesting.

Note that if your site administrator has already registered this site with the PKP Harvester, your journal will be indexed automatically and you do not need to register your journal.

Click here and enter http://pkp.sfu.ca/ojs/demo/present/index.php/demojournal under **Site URL**, and http://pkp.sfu.ca/ojs/demo/present/index.php/demojournal/oai under **Base URL for OAI Archive**.

Figure 42: Register journal for indexing

Registering your journal for OAI harvesting will substantially increase the ability of readers to find your articles.

3.5   Notification of Author Submission

3.5 Notification of Author Submission

On completing the submission process, authors are automatically sent an acknowledgement email (which can be viewed and edited in Prepared Emails). In addition, a copy of the acknowledgement email can be sent as follows:

☐   Send a copy to the journal's primary contact, identified in Setup Step 1.

☐   Send a copy to this email address: [   ]

Figure 43: Notification of Author Submission

Step 4: Management

4.1 Publication Scheduling

OJS allows you to set the publication schedule that is best for your journal.

4.1 Publication Scheduling

Publication Schedule

Journal items can be published collectively, as part of an issue with its own Table of Contents. Alternatively, individual items can be published as soon as they are ready, by adding them to the "current" volume's Table of Contents. Provide readers, in About the Journal, with a statement about the system this journal will use and its expected frequency of publication.

> The journal is published quarterly.

Format

Select the default format for identifying journal issues and/or volumes. The format can be overridden for individual issues.

- ⦿ Volume, issue, and year
- ○ Volume and year
- ○ Year
- ○ Custom issue title
  Note: While a title can be added to any issue, with this final option, the issue is identified by its title alone (if OJS is used, for example, for a set of edited volumes).

Starting Point and Frequency

Set the initial issue/volume numbers and year for the first publication of the journal, as well as intended frequency for issue/volumes.

Number	1
Volume	1
Year	2005
Issues per volume	4
Volumes per year	1

Note: Leave items blank if not used with this journal, and editors can re-set numbers in the publishing process.

Figure 44: Publication scheduling

4.2 Identification of Journal Content

Figure 45: Identification of journal content

Visit http://doi.org/ to learn more about registering for a Digital Object Identifier for your journal.

A page number option is also available for journals.

4.3   Online Access Management

Fill in this section to indicate whether your journal will be open access or charge subscription fees to access the content. If you will be charging subscriptions, the role of a subscription manager will be created.

Figure 46: Online Access Management

4.4   Announcements

This allows you to create an Announcements page, and post messages to your readers.

Figure 47: Announcements

4.5   Copyeditors

The Copyeditor edits submissions to improve grammar and clarity, works with authors to ensure everything is in place, ensures strict adherence to the journal's bibliographic and textual style, and produces a clean, edited copy for the Layout Editor to turn into the galleys that will be in the published format of the journal.

If you have individuals to act as copyeditors, select the first option. If your editors will be acting as copyeditors, select the second option.

Figure 48: Copyeditors

The instructions will be made available to copyeditors, authors, and section editors in the Submission Editing stage.

4.6   Layout Editors

The Layout Editor transforms the copyedited versions of the submission into galleys in HTML, PDF, PS, etc., files which the journal has elected to use for electronic publication.

If you have individuals to act as layout editors, select the first option. If your editors will be acting as layout editors, select the second option.

Figure 49: Layout Editors

The instructions will be made available to layout editors and section editors on the Editing page of each submission.

4.7 Proofreaders

The Proofreader carefully reads over the galleys in the various formats in which the journal publishes (as does the author). The Proofreader (and the Author) records any typographic and formatting errors for the Layout Editor to fix.

If you have individuals to act as proofreaders, select the first option. If your editors will be acting as proofreaders, select the second option.

Figure 50: Proofreaders

The instructions will be made available to proofreaders, authors, layout editors, and section editors in the Submission Editing stage.

Step 5: The Look

5.1 Journal Homepage Header

Titles and images can be added to give your journal a unique appearance and identity.

Figure 51: Journal Homepage Header

5.2 Journal Homepage Content

Use this section to customize the appearance of your journal's homepage, including a description, an image, the table of contents for the latest issue, and any additional content.

5.2 Journal Homepage Content

By default, the homepage consists of navigation links. Additional homepage content can be appended by using one or all of the following options, which will appear in the order shown. Note that the current issue is always accessible through the Current link in the navigation bar.

Journal Description

Add a brief 20-25 word description in text/HTML which will appear just below the navigation links.

This is a demonstration site for the open access journal management and publishing system developed by the Public Knowledge Project.

Homepage image

Add an image or graphic file to the middle of the page.

Homepage image   [   ] [Browse...] [Upload]

Current issue

☑   Add the table of contents for the current issue (if available).

Additional Content

Add the following content, using text/HTML, which will appear below the homepage image, if one is uploaded.

Figure 52: Journal Homepage Content

5.3 Journal Page Header

This option allows you to place a different title, image, or logo on pages other than the homepage. In many cases, this may simply be a smaller version of the homepage logo.

Figure 53: Journal Page Header

5.4 Journal Page Footer

Footers can also be added to each page of your journal.

5.4 Journal Page Footer

This is the footer of your journal. To change or update the footer, paste the HTML code in the textbox below. Examples could be another navigation bar, a counter, etc. This footer will appear on every page.
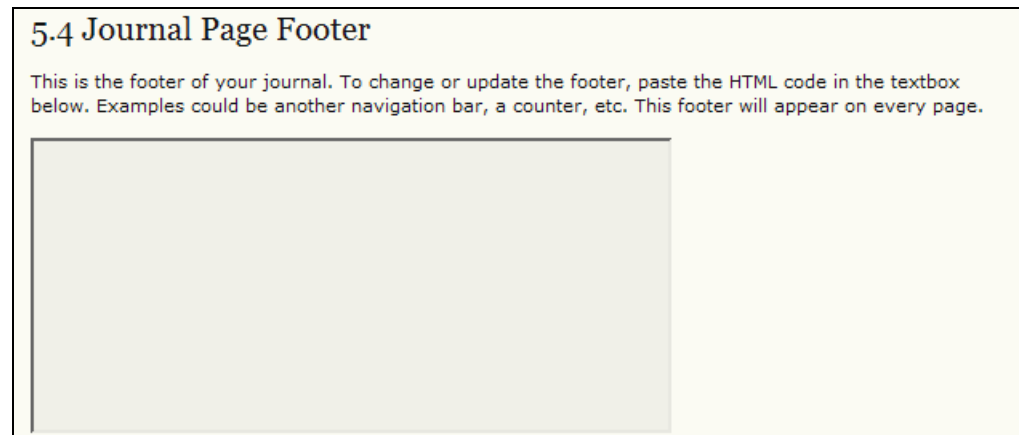
Figure 54: Journal page footer

5.5 Navigation Bar

5.5 Navigation Bar

Navigation bar items can be added to the current set (Home, About, User Home, etc.) that appear at the top of the page.

Label name   Simon Fraser University
                    ☑ The label value is a literal string (e.g., "Journal Setup") rather than a localization message key (e.g., "manager.setup")

URL   http://www.lib.sfu.ca
                    ☑ URL is an absolute URL (e.g., "http://www.example.com") rather than a path relative to the site (e.g., "/manager/setup")

Add Item

Figure 55: Navigation bar

By default, the most important navigation links will be included in your journal. However, if there are additional items to include, you may do so here (e.g., a link to the publishing institution's home page). Additional links may be added using the "Add Item" button.

5.6 Journal Style Sheet

If you would like to add your own style sheet for your journal, you may add one here.

Figure 56: Journal Style Sheet

A copy of the general OJS v.2.x style sheet is available at: http://pkp.sfu.ca/ojs/download/common.css

To change the background colour to white, for example, edit the common.css file, changing from this:

```
body {                                          body {
  margin: 0;                                      margin: 0;
  padding: 0;                                     padding: 0;
  background-color: #FBFBF3;                      background-color: #FFFFFF;
  color: #111;              to this               color: #111;
  font-family:                                    font-family: Verdana,Arial,
Verdana,Arial,                                  Helvetica,sans-serif;
Helvetica,sans-serif;                           }
  }
```

Once you've made and saved the changes to your copy of the common.css file, upload it using the Journal Style Sheet upload tool.

For more complex style sheet modifications, or to change an OJS template, consult the OJS Technical Reference (http://pkp.sfu.ca/ojs/OJSTechnicalReference.pdf).

5.7 Information

Each of these descriptions will appear on your journal's web site.

Figure 57: Information

5.8 Lists

Figure 58: Lists

File Browsing

The **Files Browser** is an advanced feature that allows the files and directories associated with a journal to be viewed and manipulated directly.

Figure 59: File Browsing

Editorial Team

This option provides two methods of displaying the members of your journal's Editorial Team – either automatically or manually (using the Create Editorial Team Title option).

Figure 60: Editorial Team

Creating Sections

OJS journals may contain several sections (e.g., Articles, Reviews, Research, etc.). You will need to create at least one section for your journal. If you do not wish for the section title to be visible to your readers, you can choose to omit it from the Table of Contents.

To create a new section:

- Go to 'Management Pages' and select 'Journal Sections':

Figure 61: Sections

- Select 'Create Section':
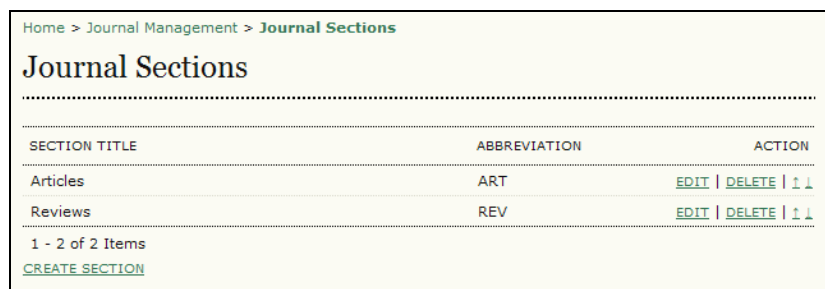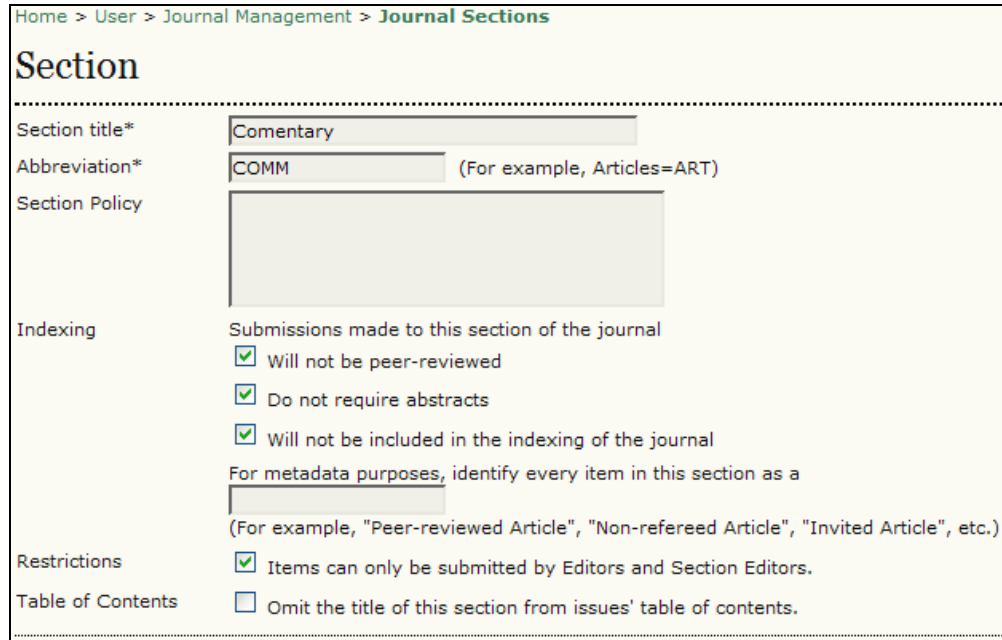
Figure 62: Create Section

- Complete the form with the new section's information, and check the appropriate options:
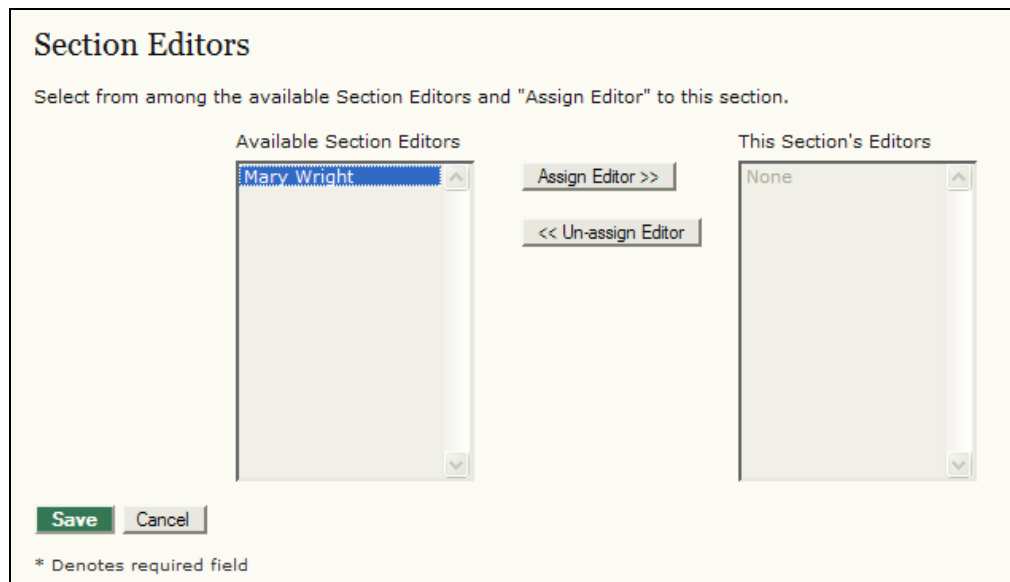
Figure 63: Section information

- Next, choose a user as the Section Editor. If you haven't set up your journal's users yet, go to Create Users.

Figure 64: Assigning Section Editors

Setting up Email Notices

OJS facilitates work flow communication through the use of internal email messages. The templates for the various messages that are automatically generated can be edited in this section.

- Go to 'Management Pages' section and select 'Prepared Emails':

Figure 65: Emails

- From the Prepared Emails page, select the template you wish to edit:

Figure 66: Email templates

- Make your changes to the selected template (avoid changing any of the embedded programming however, as these will dynamically generate the appropriate information):

Figure 67: Editing email templates

Languages

OJS can be made available to users in any of several supported languages. As well, OJS can operate as a partially multilingual system, providing users with an ability to toggle between languages on each page.

If you do not see any additional languages to choose, have your Site Administrator add them for you.

Figure 68: Languages

In this example, English, French, and Spanish have been chosen. By checking off the Language Options, we have allowed for multilingual title images, page headers, etc. See how this has changed the interface for section 5.1 of the Journal Setup:

Figure 69: Language Options

This adds a dropdown menu on the right-side of the journal's web site, allowing users to toggle between English and Spanish.

Figure 70: Language Toggle

For information on adapting your OJS to another language, see the OJS technical documentation.

Reading Tools

The Reading Tools are designed to assist experienced and novice readers by providing a rich context of related materials from a wide variety of largely open access sources. The tools use an author's keywords to automatically search a relevant open access database for related materials which are presented to the reader in another window. Readers have a choice of tools, and within each tool a choice of databases, along with access to information about the database.

By default, the Reading Tools are disabled. To activate and configure them:

- Go to 'Management Pages' section and select 'Reading Tools'.
- Choose Reading Tool Options:
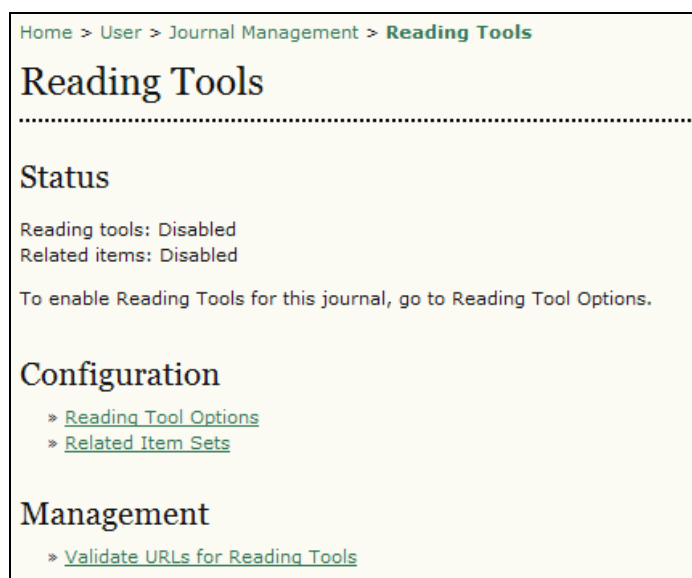
Figure 71: Activating Reading Tools

Checking "Enable Reading Tools…" will activate them for your journal:

Figure 72: Reading Tool Options

At this point, you can also configure which tools will be available to your readers. You may wish to experiment with these yourself to see if some or all of them will be useful to your audience.

Under "Related Item Tools", you will find a dropdown menu of subject areas. You can select the subject that best matches your journal to provide additional reading tools that are specific to that discipline.

Returning to the Reading Tools menu, you can now choose "Related Item Sets" to customize the Reading Tools for your journal:

Figure 73: Related Item Sets

From here, you will see a list of subject areas, and the configuration options for each of them:

Figure 74: Related Item Sets

For each subject, you will see a series of option: Validate, Metadata, Contexts, Export, and Delete.

Validate will check that all of the URLs for the resources associated with that subject are valid. Depending on the amount of associated resources, this may take a few minutes.

Metadata describes the subject item.

Contexts show the various options that are available for that subject area:

Figure 75: Contexts

The Up and Down arrows allow you to reposition the contexts. The Metadata link allows you to configure the context. The Searches link lets you view, edit, add, or delete the various resources associated with the context:

Figure 76: Searches

Export creates an XML file of the items.
Delete removes the item.

Scrolling down the page of subject items, you will also see the option to create your own set for a discipline not listed here:

Figure 77: Creating Item Sets

Statistics and Reports

OJS 2.x provides a number of statistical and reporting features for your journal.
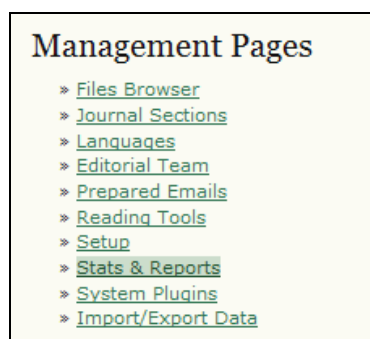
Figure 78: Journal Management menu

Statistics

OJS provides a summary of your journal's usage.
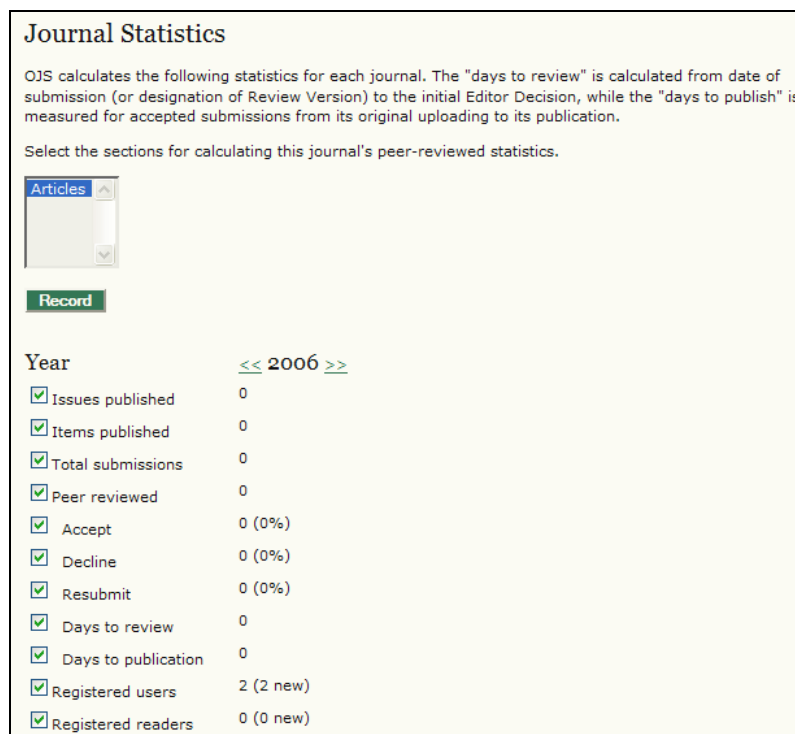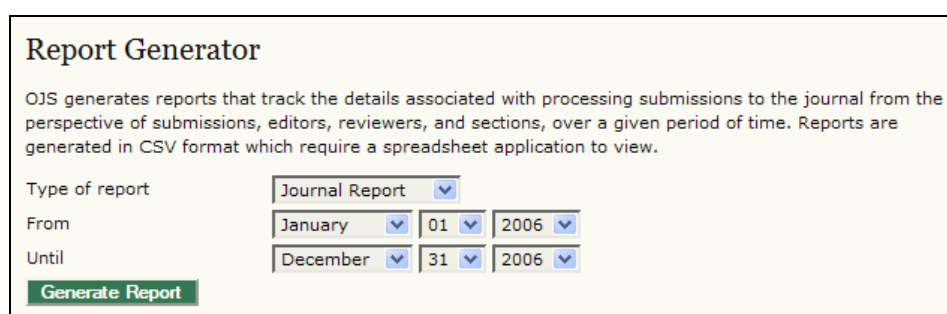
Figure 79: Statistics

You can use the checkboxes to make these statistics available to readers in About the Journal.

Reports

In addition, OJS allows you to generate a spreadsheet report on your journal's usage.
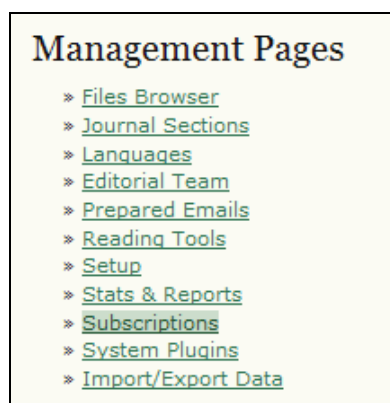
Figure 80: Reports

Subscriptions

If you have chosen the subscription option for your journal (see Setup section 4.3), a link to manage your subscriptions will appear on your menu:

Figure 81: Managing subscriptions

Select 'Subscriptions'. From the Subscriptions page, you can choose to 'Create New Subscription' or 'Subscription Types' or 'Subscription Policies':

Figure 82: Subscription choices

Create Subscription Types

The first step in setting up the subscription management is to designate the types of subscriptions the journal offers. Journals typically offer individual subscription and institutional subscription rates. Some journals may have special offers for members of an organization or students. OJS will support the management of print and/or online subscriptions. More than one type of subscription can be created to cover longer periods of time (12 months, 36 months).

To begin, select 'Subscription Type' and from the resulting page, click 'Create New Subscription Type':

Figure 83: Creating a new subscription type

Next, fill in the details:

Figure 84: Subscription type information

For "institutional" subscriptions, use the "validated via domain or IP authentication" option, as all members of the institution, coming in from its associated domain or IP address, will be permitted access without a password. Similarly, the "members of an association or organization" option should be used for membership subscriptions, whether free to members or at a discount. Use the "publicly visible" option to make the subscription type and its fee appear under Subscriptions on the About the Journal. While most subscription types are typically displayed in About, a type created for internal accounting, staff subscriptions, and/or management purposes, for example, would not appear on the About page.

Subscription Policies

You will next need to determine your journal's subscription policies. Included in this are:

Subscription Manager Information

This information will be publicly available under About the Journal:

Figure 85: Subscription Manager Information

Subscription Information

Next, provide any additional details for your web site about your subscriptions. The Subscription Types and fee structure will be automatically placed under Subscriptions on the About the Journal page, along with the name and contact information for the Subscription Manager. Additional information about subscriptions, such as methods of payment or support for subscribers in developing countries, can be added here.

Subscription Expiry Reminders

Useful reminders can be sent out to your subscribers, informing them of expiry dates.

Figure 86: Expiry Reminders

Open Access Options for Subscription Journals

Delayed Open Access

Although a journal may wish to limit their content to subscribers, it is also possible to allow for back issues to become openly accessible. You can set the number of months to pass before content is opened:

Figure 87: Delayed Open Access

OJS in an Hour

It is also possible to send readers a notice when content becomes open, and to add a statement about delayed open access to your About the Journal page.

Author Self-Archiving Policy

This section allows you to also post a statement about your journal's author self-archiving policy. A default statement is provided, but can be changed to best suit your needs:

Figure 88: Author self-archiving policy

Create New Subscriptions
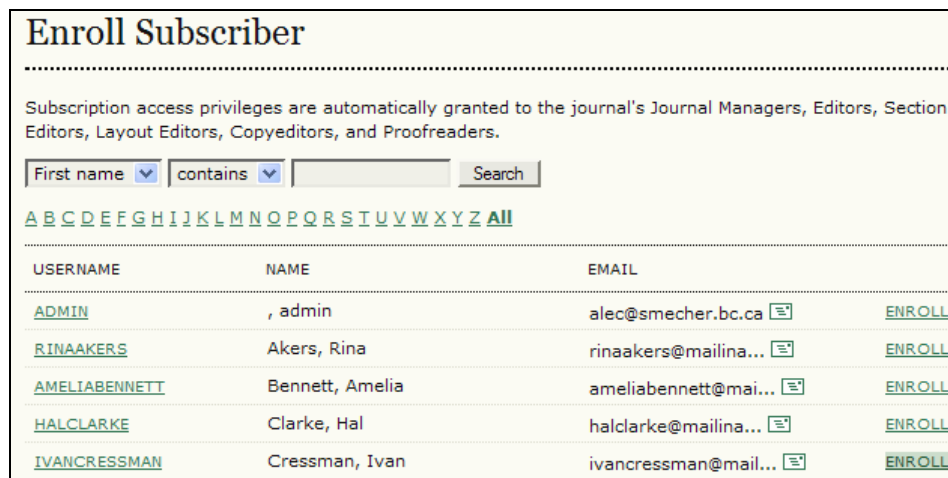
To create a new subscription, for an individual or for an institution, choose 'Create New Subscription':

Figure 89: New subscriptions

On the resulting form, select the user, and click on 'Enroll':

Figure 90: Enroll Subscribers

If the person is not already listed, an account will have to first be created for them. See the section on Creating Users.

After selecting 'Enroll', fill in the details for their new subscription:

Figure 91: New subscription details

Remember the set the End date the appropriate number of months ahead (12, 24, 36, etc.).

On saving this information, the subscriber will be emailed a username, which will work with all content the journal publishes until the user is deleted from the Subscriptions list by the Journal Manager.

For institutional and organizational subscriptions, the contact person at the institution needs to be enrolled as a reader, and then selected by the Journal Manager on the Create Subscriptions page. The contact person will need to provide the institution's domain and/or IP addresses, which are used to validate the account, sparing individual users at the institution the need to have user accounts in order to access subscription content. Organizations with membership lists can have those lists imported into the system, through the Import User function in Journal Management.

Existing subscriptions can be deleted or edited from the Subscriptions page, once they have been created:

Figure 92: Deleting subscriptions

System Plugins

System plugins allow OJS to expand its functionality, and accept contributions from participating developers, without altering the core of the program. If you are interested in writing a plugin for OJS, please contact us using the OJS Development Forum at http://pkp.sfu.ca/support/forum.

As a Journal Manager, you can decide which plugins to add to your journal, and which to leave out.
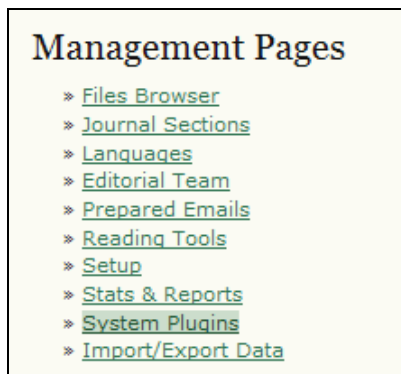
Figure 93: Journal Management menu

As new plugins are developed, you will be able to activate or deactivate them in this section. Current plugins include an alternative user authentication system (LDAP), imports and exports, an indexing tool for Google Scholar, and more:
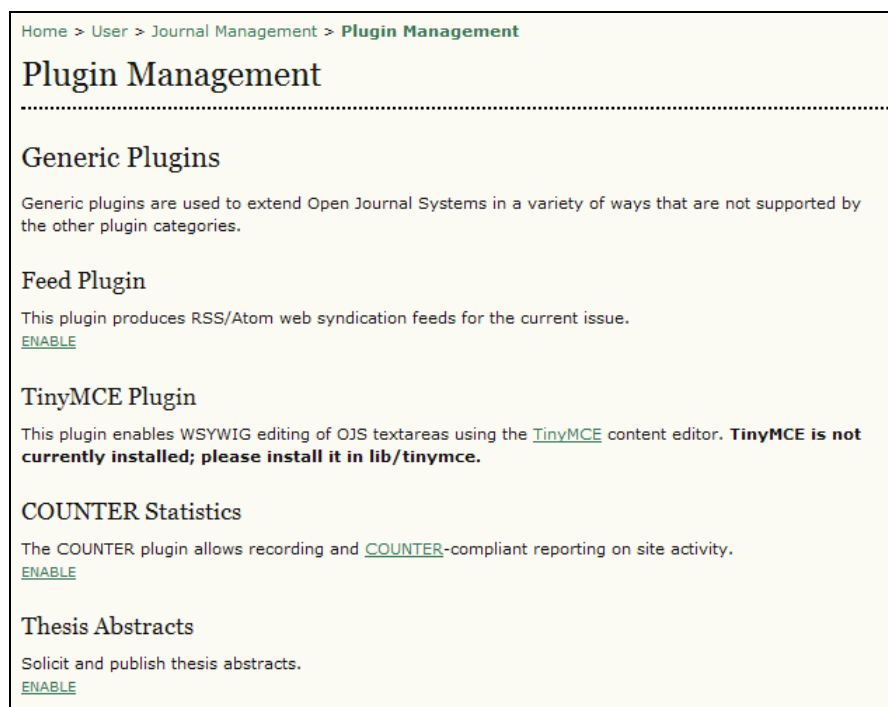
Figure 94: Plugin Management

Import/Export Data

OJS allows Journal Managers to import or export data. To do this, go to the Journal Management menu and select **Import/Export Data**:

Figure 95: Journal Management menu

From the Import/Export Data page, you can choose whether to deal with article/issue data or with user data:
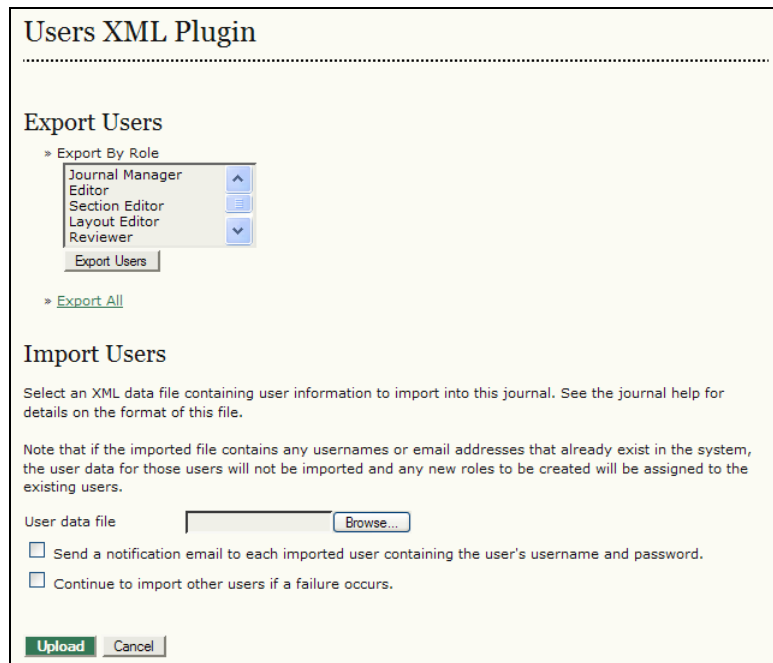
Figure 96 Import/Export Data page

Users XML Plugin

The Users XML Plugin supports the import and export of users and their roles based on the DTD supplied in plugins/importexport/users/users.dtd, with "users" as the root element.

This plugin treats emails as unique user identifiers in order to ensure that duplicate users are not created. If an existing user is found in the database with the same email as an imported user, no additional user is created; the roles described in the XML file are attributed instead to the existing user. Usernames are treated likewise.

Figure 97: User data page

You can choose a specific role to export all of those users (for example, **Reviewer**, to export all of the reviewers). You can also use the **Export All** link to retrieve data for all of the journal's users.

To import a list of users, you can use the User Data File upload tool. You should consult the technical documentation included with OJS for more information about the XML format and XML DTD for user data (see `/docs/IMPORTEXPORT`).

Note the two options which allow you to automatically notify the imported users of their new accounts, and to continue with the import process even if errors occur with one record.

Erudit Article Export Plugin

This plugin allow you to export articles using the English Erudit DTD. This would allow your journal to interoperate with the Erudit publishing system from the Université de Montréal.

Article and Issue Data

The Articles & Issues XML Plugin supports import and export of articles and issues based on the DTD supplied in plugins/importexport/native/native.dtd. It supports the following root elements: <article>, <articles>, <issue>, and <issues>.

Click the Export Issues link or Export Articles link to download this information from your journal:

Figure 98: Importing or exporting articles and issues

To import data, use the Import Data upload tool to browse for and import this data from an external file.

PubMed XML Export Plugin

Exports article metadata in PubMed XML format for indexing in MEDLINE.

CrossRef XML Export Plugin

Exports article metadata in CrossRef XML format.

All Users

To see a list of all of your journals registered users, go to the 'Users' section and select 'All Users':
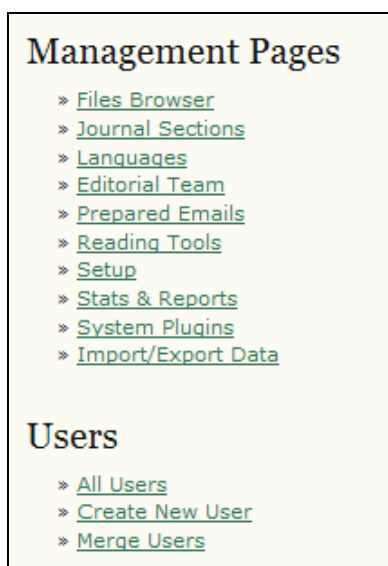
Figure 99: Users Menu

From here you can edit anyone's account, log in as them to temporarily perform any of their tasks, remove them from the list, or disable their account:

Figure 100: All users

Enroll Existing Users

Scrolling down the list of users reveals the Enroll Existing User link:

Figure 101: Enroll Existing User

This feature allows you to enrol an existing user into an additional role. For example, if Mary is currently registered as an author, but volunteers to become a reviewer, this feature will allow you to add that role to her profile.

Email Users

The ability to send an email message to several (or all) of your users at once is another useful feature available at the bottom of this page. To use this function, check each of the desired recipients (or use the Select All button), and click Email Users. This will bring up an email message that you can write in and send to everyone. A good example of this would be for a notification of a new issue.

Creating Users

To create a new user for your journal, go to the 'Users' section and select 'Create New User'. Fill in the form and press 'Save':

Figure 102: Creating a new user

If you have activated additional languages, you can choose a language preference for your new user as well.

Merge Users

To merge two user accounts into one, go to the 'Users' section and select 'Merge Users'. One the resulting page, select a user you wish to merge with another user:

Figure 103: Merge Users

This can be a useful feature if a user has mistakenly created more than one account.

Editors

The Editor oversees entire editorial and publishing process. The Editor, working with the Journal Manager, typically establishes the policies and procedures for the journal, which are used in setting up the journal in Setup.

In the Editorial Process, the Editor assigns submissions to the Section Editors to see through Submission Review and Submission Editing, while, keeping an eye on the submission's progress and assisting with any difficulties in the process.

The Editor can also play the role of Section Editor in the Editing process, seeing accepted submissions through copyediting, layout, and proofreading.

The Editor also schedules submissions for publication, arranges the Table of Contents and publishes the issue, as part of the Publishing Process.

Getting Started

- Log in to your OJS account.
- Select your role as 'Editor'.
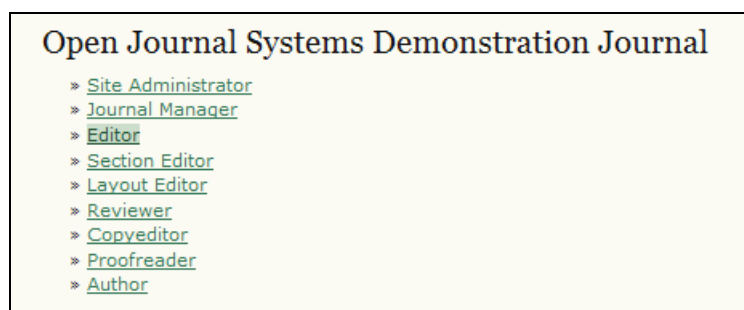
Figure 104: Signing in as an editor

Submissions

Under "Submissions", you will see articles which are "unassigned", "in review", "in editing", or in the "archives". Clicking any of these links will provide additional details on each article in these categories:
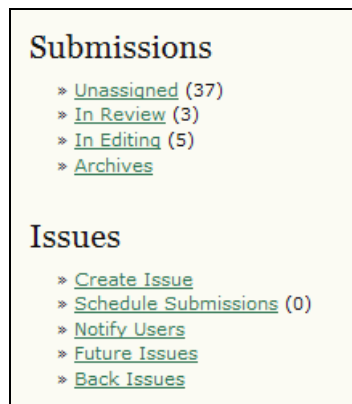
Figure 105: Editor's Menu

Assigning Articles

Select "unassigned" and then click the article title link.
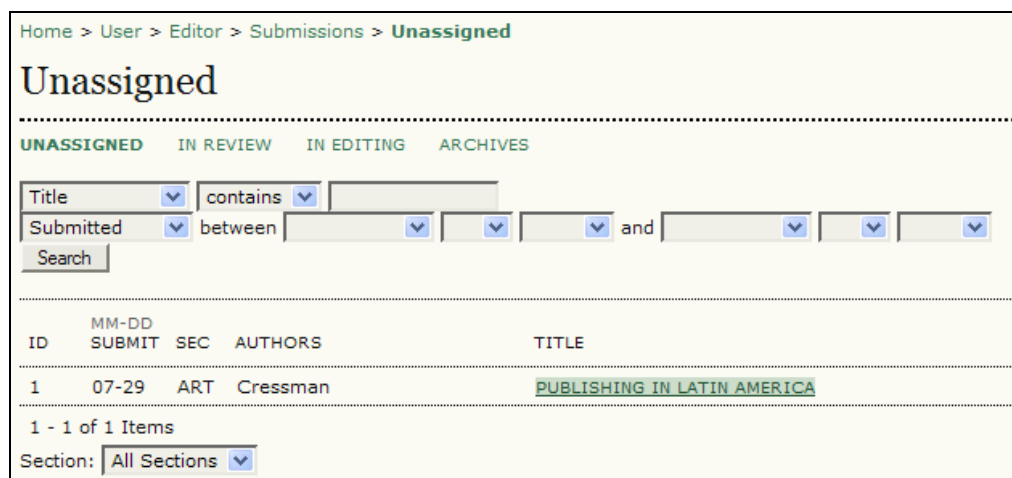
Figure 106: Selecting an unassigned article

On the "Summary" page, go to the "Submission" section:

Figure 107: Unassigned article summary page

From here, you have the option to:

- Send an email message to the author (click on the envelope icon next to the author's name)

- Read the original file by clicking on the submission file name (e.g., 1-1-1-SM.txt).

- Add any supplementary files by clicking on the "Add Supplementary File" link.

- Change the section you want the article to appear in, using the drop down menu.

- Assign an editor or section editor. This will take you to a list of your editors or section editors. Select the "Assign" link to give the submission to that person:

Figure 108: Assigning a section editor

- This will automatically generate an email message informing the section editor of your decision:

Figure 109: E-mail to the section editor

In the "Submission Metadata" section of the article Summary page, you may use the "Edit Metadata" link to make any changes to the submission's metadata fields:

Figure 110: Editing the article metadata

For example, you may wish to review the abstract provided by the author.

You can also use the "Review", "Editing", and "History" links at the top of the Summary page to follow the progress of the submission:

Figure 111: Summary Links

Issues

Return to the Editor Home page:
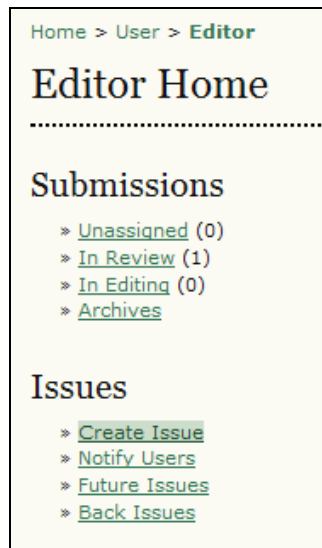
Figure 112: Editor's Menu

Under "Issues", you have the option to:

Create a New Issue

Select "Create Issue". From the Create Issue screen, choose whether it will be a "Back Issue", a "Current Issue", or a "Future Issue":

Figure 113: Create issue

Enter the Volume, Issue, and Year information. You may also wish to select an issue identification format (Year only, Volume/Year, Issue/Volume/Year, etc.). This will depend upon the frequency of publication as previously determined by the Journal Manager.

If your OJS journal is subscription-based, you can use the Access section to allow for limited open access for the issue. Select a date for when the issue should become freely available.

You also have the opportunity to add a special title and description for the new issue. A custom cover and caption is also available. Use the "Save" button when you have made your choices.

The new issue will now be available when you schedule submissions.

Schedule Submissions

When a submission has completed the reviewing and editing process and is ready for publication, the section editor will send it to the appropriate issue. From the Editors' Home page, select either Future Issue or Back Issues to see articles awaiting publication:
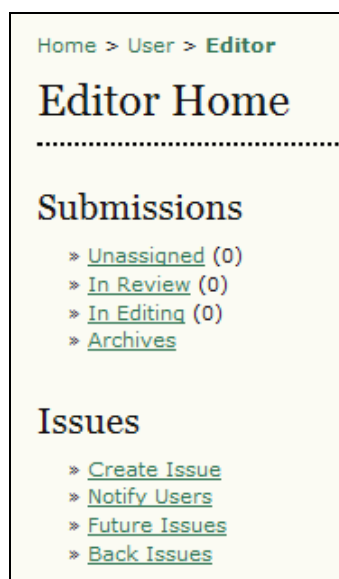
Figure 114: Editor Home Menu

Selecting Future Issues results in a list of all future issue:
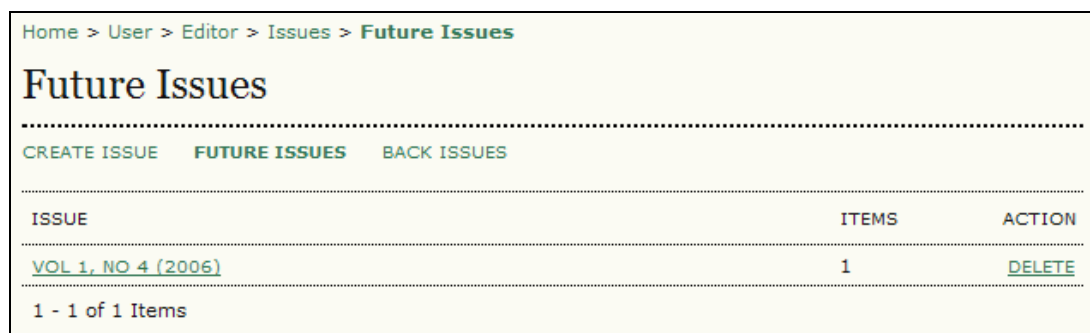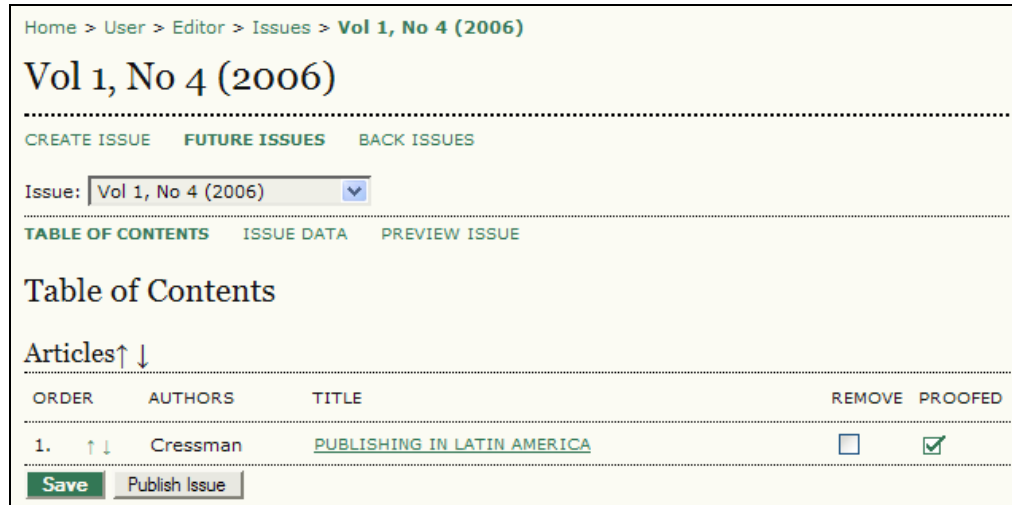
Figure 115: Future Issues

Select the issue you wish to publish:

Figure 116: Table of Contents

You can review each article by clicking its linked title:

Figure 117: Article History

Use the Summary, Review, Editing, and History links to reveal every aspect of the submissions lifecycle, who was involved with it, etc.

When there are multiple articles for an issue, you can use the up and down arrows to reorder how they will appear in the table of contents. You can also use the Remove check box to take an article out of that issue and allow it to be reassigned.

When you are satisfied with the content for an issue, use the Publish Issue button to build the new issue and make it available to your readers.

Notify Users

Allows you to send an email to users associated with your journal:

Figure 118: Notifying users

View Future Issues

Allows you to see any issues which have not yet been published:

Figure 119: Viewing a future issue

Select the issue link to see its Table of Contents.

View Back Issues

Lets you see all issues which have been published. Issues can also be deleted from the journal:

Figure 120: Viewing back issues

Select the issue link to see the Table of Contents for that issue:

Figure 121: Issue Table of Contents

It is possible to reorder the articles using the "Order" arrows, to delete articles using the "Remove" checkboxes, or to edit the articles by clicking on the linked titles.

Section Editors

The Section Editor manages the Review and Editing of submissions in those Sections (e.g., Articles, Book Reviews, etc.) for which they have responsibilities. In some cases, a Section Editor assigned to see a submission through the Review Process will also see that submission if accepted for publication, through the Editing process, that is, through copyediting, layout, and proofreading, but often not, with the Editor taking on the role of Section Editor for the Editing process. The journal will have a policy on how the tasks are divided.

Getting Started

- Log in to your OJS account.
- Select your role as 'Section Editor':
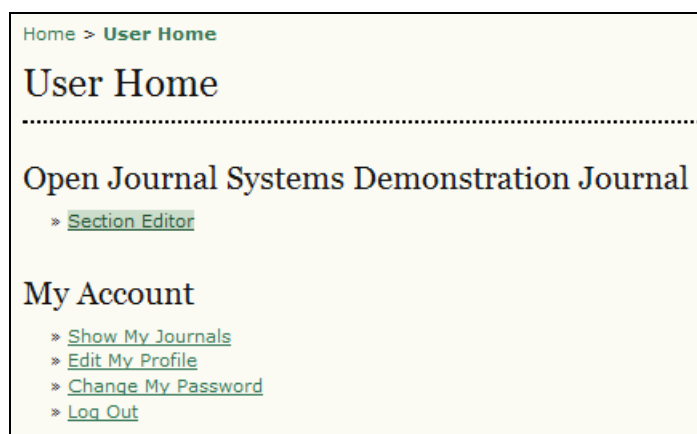
Figure 122: Signing in as a section editor

Submissions

Under "Submissions in Review", you will see any articles which are "in review", "in editing", or in the "archives":

Figure 123: Submissions in review

Clicking any of these links will provide additional details on individual articles in these categories.

Assigning Reviewers

Click on the article title:

Figure 124: Review details

You have the option to:

- Send an email message to the author (click on the envelope icon next to the author's name) or the editor.

- View the original submission file by clicking the link (1-2-1-RV.TXT) or upload a new version of the document for review.

- Select a reviewer for the first round of review. Click the "Select Reviewer" link. From the list of names, assign a reviewer:

SIMON FRASER
UNIVERSITY **library**

Figure 125: Selecting reviewers

If you wish to assign further reviewers, repeat this process.

- When you have finished assigning reviews, you should be returned to the "Review" Section. Click the "Request" icon to generate an email message to each reviewer:

Figure 126: Requesting a review

This email message includes a one-click access URL that will allow the reviewer immediate access into the OJS system.

Note that after sending the message, the "Request" icon now includes a message sent date:

Figure 127: Review Request Date

Working with Reviewers

Once a review request has been accepted, you can send an email using the "Underway" icon:

Figure 128: Review is underway

You can also use this section to cancel a review request (click Cancel Request), change the due date (click the due date link), send a reminder to the reviewer (use the Send Reminder link), and to read the reviewers comments (click the "Review" icon). Any uploaded files from the reviewer will also be available here.

The reviewer's recommendation will also appear in this section once their decision has been made.

Some journals are also configured to allow you to rate the reviewer on a scale of 1 – 5, based on the quality of their review, their timeliness, etc.

You will receive a message once the reviewer has completed their review. At this point, you can use the "Acknowledge" icon to thank them for their efforts:


Figure 129: Acknowledging the reviewer

Making a Decision on an Article

You must now decide the next step for the submission. In the "Editor Decision" section, you must select whether to accept, ask for revisions, resubmit for another reviewer, or decline the submission. Select your choice from the dropdown menu and click "Record Decision":

Figure 130: Making your decision

Next, you will need to notify the author of your decision, using the Notify Author email icon. You must upload an edited version to the copyeditor:

Figure 131: Uploading the Editor Version

Finally, you can use the Send button to select the copy of the article for the copyeditor:

Figure 132: Selecting file for the Copyeditor

Copyediting

You will then be taken directly to the editing section for the article. If your journal employs people as copyeditors, you will be asked to select one now. You will request and acknowledge their participation as with the reviewers:

Figure 133: Assigning a copyeditor

The following screen will allow you to pick from your list of copyeditors:

Figure 134: Selecting a copyeditor

Once the copyeditor has been assigned, you can use the Request icon to send an email asking him or her to undertake the assignment:

Figure 135: Requesting copyediting

The copyeditor will then review the document and correspond with the author. You will be notified when they are both satisfied with the article.


Figure 136: Completing the copyediting process

Be sure to use the Acknowledge email messages to thank everyone involved for their participation.
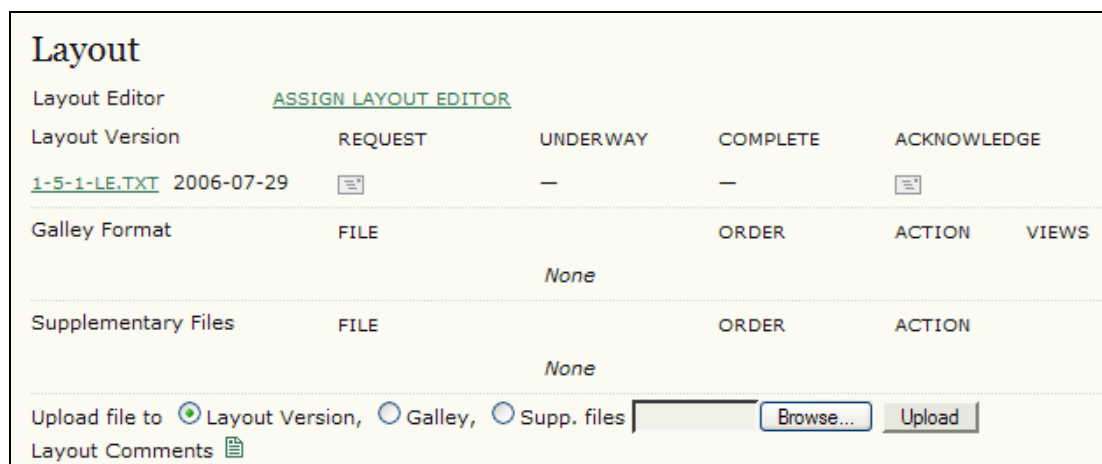
For journals where the section editor acts as the copyeditor, you can begin the copyediting process by selecting the "Initiate" link. The section editor reviews the copyedit version of the article by selecting the file link (e.g., 1-4-1-CE.TXT). He or she then makes any changes and uploads the edited version using the file upload tool. When the copyediting is completed, select the "Complete" link. This will activate the "Request" icon allowing you to send a message to the author asking for them to now review your copyedits and make any changes.

When the author responds, send an acknowledgement message. Review any changes they have made. You may now use the file upload tool to add any final changes you wish to make.

Layout Editing

Once the copyediting has been completed, you may now begin the layout editing process by using the file upload tool to enter the latest version of the article and selecting a layout editor. If the section editor is also acting as the layout editor, you will initiate the process and upload the galley formats yourself.

If you have people to act as Layout Editors, you may select one using the "Assign Layout Editor" link:

Figure 137: Assigning the layout editor

Choose a layout editor from the list:

Figure 138: Assigning the Layout Editor

Use the Assign link to assign them to the article. Request their participation using the "Request" icon:

Figure 139: Request Layout Editing

You can review any layout comments from the Layout Editor using the Layout Comments icon.

When the HTML and PDF documents are delivered by the Layout Editor, you can view, edit, or delete them. You also have the option of uploading additional files. Send the Layout Editor an acknowledgment message when you are satisfied with the galley files:

Figure 140: Final layout editing

Proofreading

You may now begin the proofreading process by sending a request to the author for a final review of the article before publication. Use the "Request" icon to send the message:

Figure 141: Proofreading request to the author

If your journal employs people as proofreaders, you will be asked to select one now. You will request and acknowledge their participation as with the reviewers. Use the Assign Proofreader link for a list of possible proofreaders:

Figure 142: Selecting a proofreader

If the section editor acts as the proofreader, you can begin the process by selecting the "Initiate" link.

Throughout the proofreading process, you will be able to examine the revisions and communicate with the author and/or proofreaders. Acknowledgement messages can also be sent as each task is completed.

Once the author and proofreader/section editor are satisfied with the galleys and have recorded any necessary changes in the "proofreading corrections" section, send acknowledgement messages thanking all involved for their efforts:

Figure 143: Completing the proofreading process

Finally, scroll down to the Scheduling section, and using the dropdown menu, select the issue in which this article will appear. Notice that the

article can be placed in a current issue, a future issue, or even a back issue:

Figure 144: Scheduling the submission

Reviewers

The Reviewer is selected by the Section Editor to review a submission. Reviewers are asked to submit reviews to the journal's web site (although some journals opt for an email review policy – see Journal Setup section 2.2) and are able to upload attachments for the use of the Editor and Author. Reviewers may be rated by Section Editors, again depending on the policies for this journal.

Getting Started

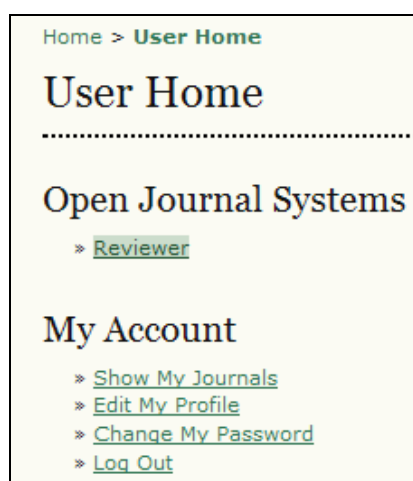- Log in to your OJS account.
- Select your role as 'Reviewer'.

Figure 145: Selecting role as Reviewer

Reviewing Articles

In the "Active Submissions" section, select the article title (note the due date of the review):

Figure 146: Active submissions for review

From the "Review" page, you can see some brief information about the submission and the review schedule (including the due date of the review):

Figure 147: Review page

Further down the Review page, you will see the 5 review steps which need to be followed:

Figure 148: Review Steps

Step 1: To accept the request, click the "Will do the review" icon and send the email message that is generated:

Figure 149: Accepting Review Request

To decline the request, click the "Unable to do the review" icon and send the email message that is generated.

Step 2: Click the file name to read the submitted article (as well as any supplementary files). Depending on the settings of your journal, the reviewer may not be able to see the file until they have accepted the review request. Once the acceptance email is sent, the link to the file will appear.

Step 3: Click the "Review" icon to record your review. You may enter text for both the author and the editor, or just to the editor:

Figure 150: Review comments

Save your comments. You may return to this form and add additional information at anytime until your review is complete. When you have finished your review, select "Done".

Step 4: If you wish to upload files for the author and/or the editor to consult, use the "Upload files" tool.

Important: Please read the linked information on ensuring a blind review.

Step 5: Select a recommendation and submit the review to complete the process. You must enter a review or upload a file before selecting a recommendation:
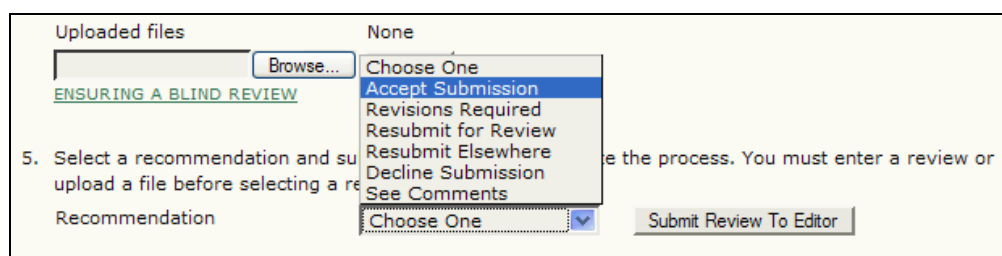

Figure 151: Making a recommendation

Once you have submitted a review to the editor, you will no longer be able to make changes to your review. Be sure you have completed your review before clicking the submit button:
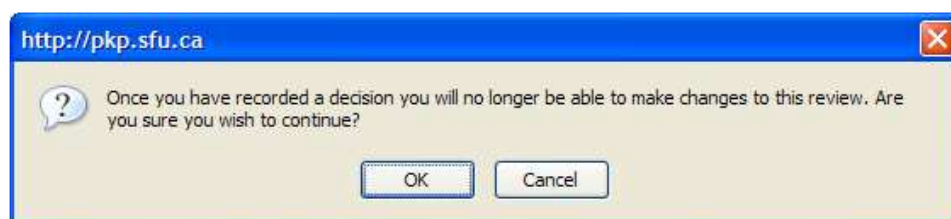

Figure 152: Warning message

At this point, an email message will also be provided, informing the Section Editor of the completion of your review:

Send Email

To	Lucy Kaleb <lucykaleb@mailinator.com>
CC	
BCC	

Add Recipient   Add CC   Add BCC

☐ Send a copy of this message to my address (karenzarega@mailinator.com)

Attachments   [   ] Browse...   Upload

From   Karenza Rega <karenzarega@mailinator.com>

Subject   [OJSDJ] Article Review Completed

Body

Lucy Kaleb:

I have now completed my review of "Publishing in latin america" for Open Journal Systems Demonstration Journal, and submitted my recommendation, "Accept Submission."

Karenza Rega

Send   Cancel   Skip Email

Figure 153: Completed Review Message

Copyeditors

The Copyeditor edits submissions to improve grammar and clarity, works with authors to ensure everything is in place, and ensures strict adherence to journal's bibliographic and textual style, and produces a clean, edited copy for the Layout Editor to turn into the galleys that will be in the published format of the journal. Some journals have an Editor or Section Editor play this role.

Getting Started

- Log in to your OJS account.
- Select your role as 'Copyeditor'.

Figure 154: Signing in as a copyeditor

Copyediting

Choose the title link for the article to begin the copyediting process:
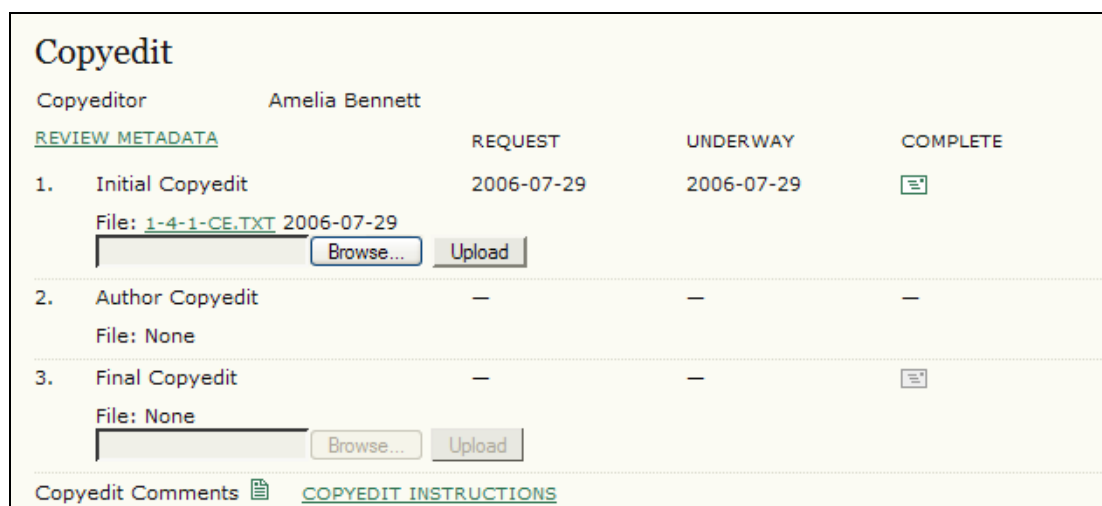
Figure 155: Selecting an article for copyediting

From the Copyedit section, you can view a copy of the submission:

Figure 156: Downloading an article for copyediting

Make any necessary changes and upload the revised document using the upload tool. Select the "Complete" icon to send a message to the author, as well as a revised copy of the submission.

When the author has finished with their copyediting, they will notify you and submit a revised document. You may then review this document for final copyediting.

When finished, you may or may not upload a revised version, and select the "Complete" icon informing the Section Editor that you have finished with the submission:

Figure 157: Completing the copyediting

The article is now ready for layout editing. Remember to read the copyedit instructions and review any copyedit comments.

Layout Editors

The Layout Editor transforms the copyedited versions of the submission into galley files in HTML, PDF, PS, etc., depending on which formats the journal has elected to use for electronic publication.

This system does not provide software for converting word processing documents to galley formats, so the Layout Editor should have access to and be able to use third-party software packages for creating galleys (Adobe Acrobat, PDF Creator [open source] or Open Office [open source] for PDFs; or Dreamweaver or Nvu [open source] for HTML), which present the articles on the screen with a well-formatted and readable layout, in the manner of scholarly journals, and with an eye to this new publishing medium (by consulting the layout used by other online publishers, such as Highwire Press, for example, in the life sciences or Project Muse in the humanities).

Getting Started

- Log in to your OJS account.
- Select your role as 'Layout Editor':

Figure 158: Signing in as a Layout Editor

Layout Editing

From the "Active Submission" page, select the title of the article:
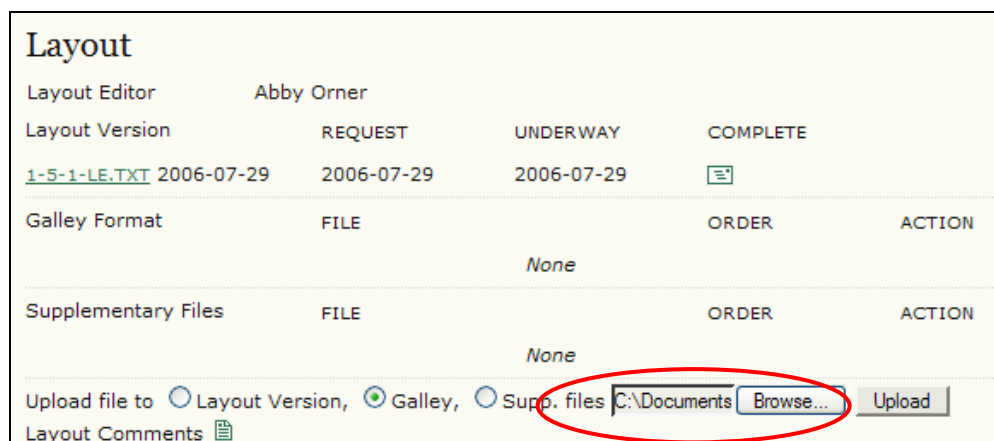
Figure 159: Selecting an article for editing

In the "Layout" section, you must download a copy of the submission and create HTML and PDF versions of the article (galley formats). It is important to review the standards for these documents before uploading them by reading the Layout Instructions. Any comments can be recorded using the "Layout Comments' icon.

Use the upload galley format tool to submit these documents:
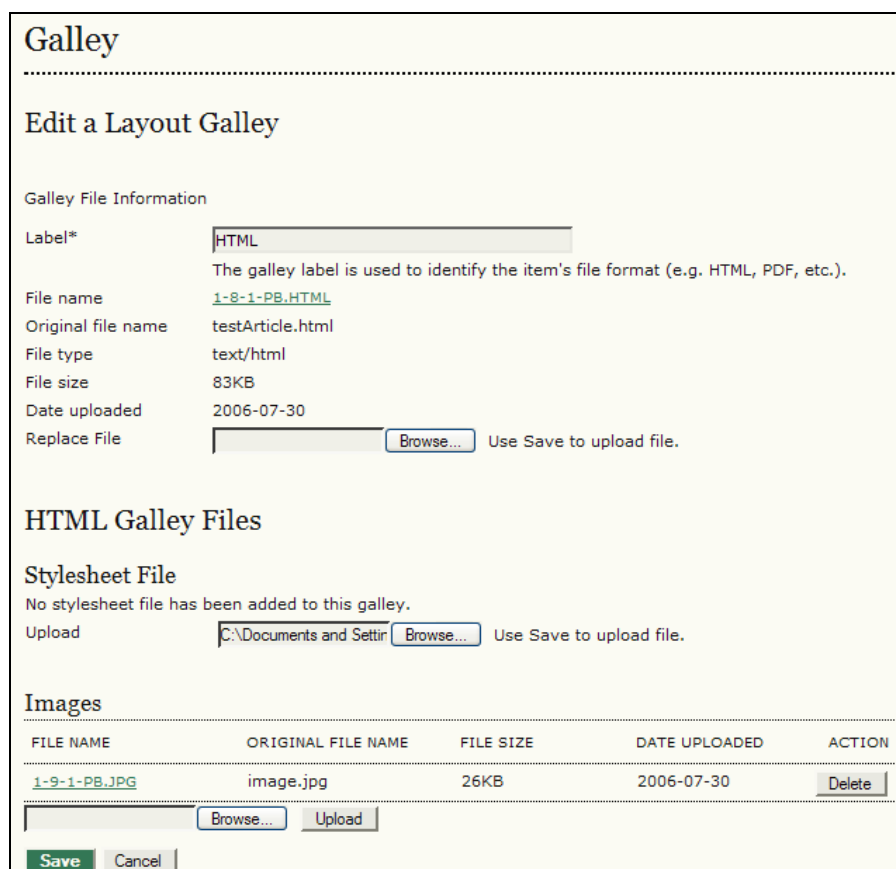
Figure 160: Uploading galley files

For HTML documents, you will add a label (e.g., HTML):

Figure 161: Adding the HTML galley

Any image or style sheet files associated with the HTML document should also be uploaded at this point.

For PDF documents, you will add a label (e.g., PDF):

Figure 162: Adding the HTML galley

When the HTML and PDF documents have been uploaded, you may then change the order in which they will appear, using the up and down "Order" arrow links.

You may also view the proofs, edit them, or delete them:

Figure 163: Editing the galley files

When you have finished, select the "Complete" icon, notifying the section editor that the documents are ready for proofreading.

Once the author and proofreader have finished with the HTML and PDF versions, you may review any proofreading corrections using the "Proofreading Corrections" link near the bottom of the section. When you are finished making all changes to the documents, use the "Complete" icon to notify the Section Editor:

Figure 164: Completing the layout editing

The article is now ready to be published.

Proofreaders

The Proofreader carefully reads over the galleys in the various formats in which the journal publishes (as does the author), checking for typographic and formatting errors, which the Layout Editor will fix. In the case of some journals, the Editor and Section Editors play this role.

Getting Started

- Log in to your OJS account.
- Select your role as 'Proofreader':

Figure 165: Signing in as a proofreader

Proofreading

Select the article title from your list of submissions to proofread.

The HTML and PDF versions are available in the "Layout" section. Proofreading instructions are linked at the bottom of the section. You may also submit corrections using the "Proofreading Corrections" icon. When you are finished, use the "Complete" icon to notify the Layout Editor:

Figure 166: Proofreading

Authors

Authors are able to register and submit items to the journal directly through the journal's web site. The Author is asked to upload the item, as well as provide metadata or indexing information associated with the item, to improve the search capacity for research online and for this journal.

The Author is also able to accompany an item with Supplementary Files in the form of data sets, research instruments, or source texts that will enrich the item, as well as contribute to more open and robust forms of research and scholarship.

The Author is able to track the submission through the editorial process – as well as participate in the copyediting and proofreading of submissions accepted for publication – by logging in, and using the username and password provided.

Getting Started

- Log in to your OJS account.
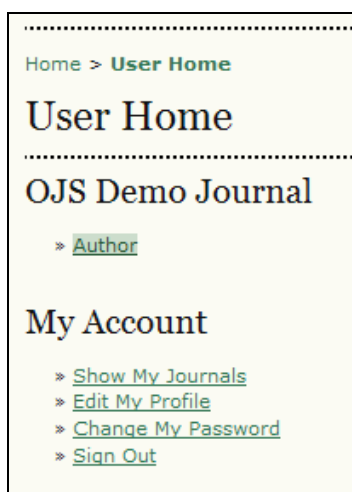- Select your role as 'Author':

Figure 167: Selecting your role as an author

Submitting Articles

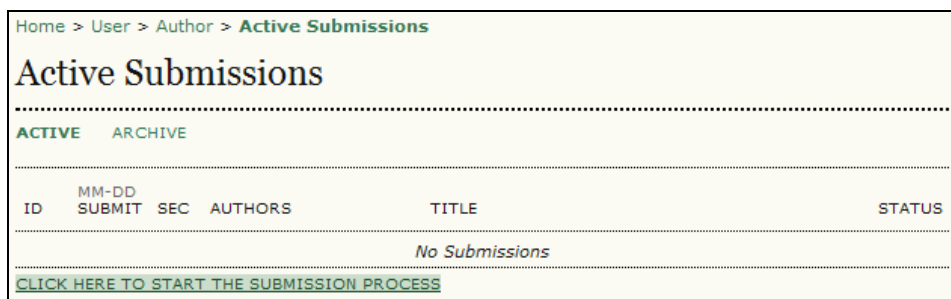**Step 1**: Start the submission process by selecting the "Click here to start the submission process" link:

Figure 168: Starting a new submission

1. Confirm each item in the Submission Checklist is correct and check each box:

Figure 169: Submission Checklist

2. Select which section you feel is most appropriate for your article:
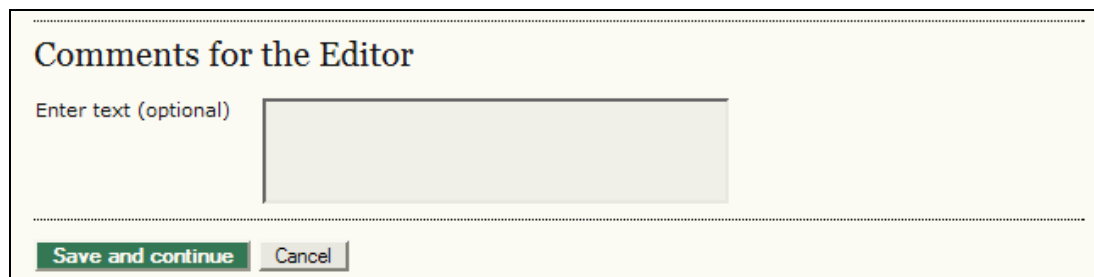
Figure 170: Selecting the Journal Section

3. Optionally, you may add any comments you wish to send to the editor:

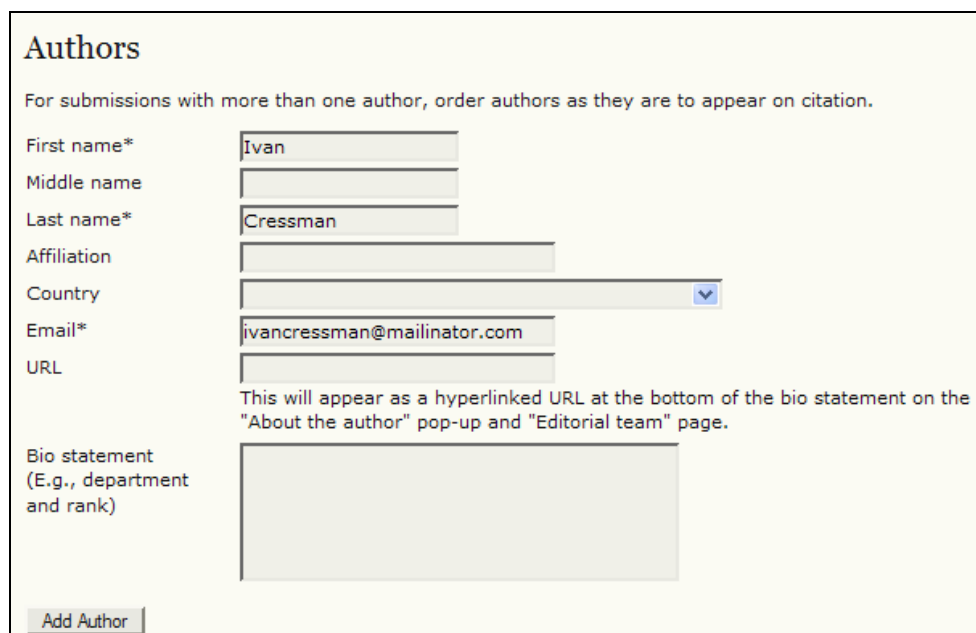**Figure 171**: Comments and saving

4. Select "Save and continue".

Step 2: Enter the submission's metadata.

1. Complete the author details. All fields marked with an asterisk are required. If there are multiple authors, use the "Add Author" button to bring up additional fields:

Figure 172: Adding author information

2. Add the title and abstract, in multiple languages if appropriate:

Title and Abstract

Title*	Publishing in latin america
Title (Español (España))	El publicar en América latina
Title (Français (Canada))	
Abstract	This is an article about the current state of publishing in Latin America.
Abstract (Español (España))	Esto es un artículo acerca del estado actual de publicar en América latina.

Figure 173: Adding title and abstract information

3. Complete the indexing:

Indexing

Choose terms that best describe the submission's content following the categories used by this journal, and examples provided by the editor. Separate terms with a semi-colon (term1; term2; term3).

Language	en;es
	English=en; French=fr; Spanish=es. Additional codes.

Figure 174: Indexing

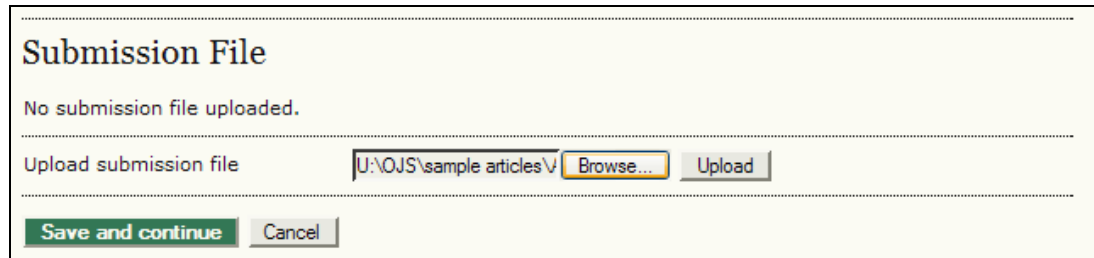4. Enter the names of any supporting agencies:

Supporting Agencies

Identify agencies that provided funding or support for the work presented in this submission.

Agencies	

Save and continue   Cancel

Figure 175: Adding supporting agency information and saving

5. Select "Save and continue".

Step 3: Upload the submission.

Figure 176: Uploading an article

1. Click Browse to open a Choose File window for locating the file on the hard drive of your computer.
2. Locate the file you wish to submit and highlight it.
3. Click Open on the Choose File window, which places the name of the file on this page.
4. Click Upload on this page, which uploads the file from the computer to the journal's web site and renames it following the journal's conventions.
5. Once the submission is uploaded, click "Save and continue".

Step 4: Upload supplementary files.

1. This step is optional. If you have any supplementary files, such as research instruments, data sets, etc., you may add them here. These files are also indexed by the author, identifying their relation to the submission, as well as their ownership. Supplementary Files can be uploaded in any file format and will be made available to readers in their original format.
2. Locate the file you wish to submit and highlight it.
3. Click Open on the Choose File window, which places the name of the file on this page.

4. Click Upload on this page, which uploads the file from the computer to the journal's web site and renames it following the journal's conventions.
5. Once the submission is uploaded, click "Save and continue".

Step 5: Confirming the submission.

With the previous four steps of the submission process completed, click "Finish Submission" to submit your manuscript. You will receive an acknowledgement by email and will be able to view your submission's progress through the editorial process by logging in to the journal web site.

Figure 177: Completing the submission process

Each time you log in, you will be presented with a list of all of your outstanding submissions, including their status.

Figure 178: Active submissions

Articles may be listed as awaiting assignment to an editor, queued for editing, etc. Clicking on the article title link or the status link will provide further details.

Responding to Reviews

Log in to your account and click on the linked title of your submission. From the 'Summary' page, you will be able to review the fields you entered at the time of submission.

Go to the "Review" section:

Figure 179: Selecting the "Review" link

Figure 180: Following the review process

From here you can read the reviewer's version and the editor's version. Read or submit comments using the "Editor/Author" icon.

Use the file upload tool to submit any changes for your article.

Copyediting

When your submission has been accepted, a copy will be returned to you for copyediting.

Log in to your account and select the "Queued for Editing" link:

Figure 181: Queued for editing

Read through the edited version and make any additional changes necessary. This will be your last opportunity to make any major changes to your article before publication. Copyedit comments can be added using the icon near the bottom of this section. Note the link to "Copyedit Instructions" as well.

Upload the revised version in the "Author Copyedit" section. Select the "Complete" icon when finished, notifying the Copyeditor that you are finished:

Figure 182: Author copyediting

Proofreading

Once the HTML and PDF documents have been created, you will be asked to proofread them before publication. Proofreading instructions are linked at the bottom of the section. You may also submit corrections using the "Proofreading Corrections" icon. When you are finished, use the "Complete" icon to notify the Proofreader:

Figure 183: Author proofreading

This is your last opportunity to make any changes to your article before publication.

Readers

Readers include subscribers for journals for which access is subscription-based and readers who chose to register for open access journals (whether immediately open access or open after a period of time after initial publication of journal content).

Registered Readers received a notification with the publication of each issue that includes the Table of Contents from the journal.

Reading Tools

Reading Tools are intended to assist both expert and novice readers of the journal in building a context for interpreting, evaluating and utilizing the research they are reading.

Reading Tools have been developed for a wide range of academic disciplines, and from which the Journal Manager can select, as well as update and edit, in supporting the reading environment for the journal. The Reading Tools also enable Readers to join relevant forums, as well as contact the author or share the item with another Reader.

The Tools open in a frame in the user's browser to the right of the article or item being read:

Figure 184: Reading Tools

The Tools provide Readers with access to the item's indexing information, print version, and author biographical statement. The Tools enable Readers to look up words in the item (by double clicking on any work in the HTML version of the item), to email the author or another Reader, or to comment on the article. All of these features can create a much more interact reading environment.

The Tools are also designed to take the first two keywords from the item and feed them into the search engines of open access databases and other resources grouped under Research Studies, Author's Other

Works, Press and Media, Government Websites, Instructional Resources, Discussions and Forums, and other categories, depending on the set of Tools selected. Readers are also able to access background information on each of the selected resources. In each category, whether Studies, Media, on Instruction, the Tools provide multiple choices or databases to consult, while allowing the Reader to learn more about each database by providing a link to an About page for the resource. (The Journal Manager is able to edit or delete existing resources and add new ones as well – see the Journal Manager section of this document for details.)