

OJS in an Hour

An Introduction to Open Journal Systems
Version 2.1.1

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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>

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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:



The screenshot shows the Open Journal Systems Demonstration Journal interface. At the top, there is a navigation bar with links: HOME, ABOUT, LOG IN, REGISTER, SEARCH, CURRENT, and ARCHIVES. Below this, the page title "Open Journal Systems Demonstration Journal" is displayed, followed by a description: "This is a demonstration site for the open access journal management and publishing system developed by the Public Knowledge Project." The main content area is titled "Vol 1, No 1 (2005)" and "Table of Contents". It lists several articles with their titles, authors, and links to the abstract, HTML, and PDF versions. The articles include "Understanding in the Absence of Meaning: Coming of Age Narratives of the Holocaust" by Theresa Rogers, "Scholarly Associations and the Economic Viability of Open Access Publishing" by John Willinsky, "Inverted Hollywood: The Pitch for e-Knowledge" by Lisa Korteweg, "Copyright Contradictions in Scholarly Publishing" by John Willinsky, "Are they talking yet? Online Discourse as Political Action" by Shula Klinger, and "Democracy and Education: The Missing Link May Be Ours" by John Willinsky. There is also a "Reviews" section with a review of Karolides by Patrick Inglis. On the right side, there is a "USER" section with login fields for Username and Password, a "Remember me" checkbox, and a "Log In" button. Below this is a "JOURNAL CONTENT" section with a search bar and a dropdown menu set to "All". There is also a "Browse" section with links for "By Issue", "By Author", and "By Title". At the bottom right, there is an "INFORMATION" section with links for "For Readers", "For Authors", and "For Librarians".

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:



Open Journal Systems Demonstration Journal, Vol 1, No 1 (2005)

HOME ABOUT LOG IN REGISTER SEARCH CURRENT ARCHIVES

Home > Vol 1, No 1 (2005) > Willinsky

Scholarly Associations and the Economic Viability of Open Access Publishing

John Willinsky, *University of British Columbia*

Abstract

The information landscapes within which scholars work is undergoing a seismic shift. The computer monitor that rises out of the photocopy stacks, piles of journals, clippings and correspondence, now offers a new, rich vein of information that seems destined to eventually overwhelm the traditional trappings of desktops, filing cabinets, and bookshelves. After little more than a decade of Internet publishing, two-thirds of academic journals provide online access, while more than 1,000 peer-reviewed journals are published solely in digital form (Tenopir and King, 2001). Faculty and students are increasingly writing with their browsers open to online research sources. [1]

Introduction

In moving online, scholarly publishing appears to have taken the next in a long line of steps to increase the circulation of this particular form of knowledge. Yet rather than imagine, in this whiggish way, that advances in knowledge naturally unfold with each new communication technology, it is well to realize that the significant choices made by key players during the early and formative period of the technology will shape the future of each publishing medium. These choices for online publishing have now brought scholarship to a critical juncture. In a very short time, online journal publishing has developed two distinct and opposed economic models, one commercial and the other not, even as this publishing is in the unsustainable position of publishing in both print and digital forms. It may not

Right Column:

OJSDJ
Vol 1, No 1 (2005)

TABLE OF CONTENTS

Scholarly...

Willinsky

Reading Tools

FOR THIS PEER-REVIEWED ARTICLE

- Abstract
- About the author
- Bibliographic info
- Indexing info
- Go to print-version
- Define Terms
- Send link to colleague*
- Add comment to item
- Email the author*

FIND RELATED ITEMS AMONG

- Author's Other Works
- e-Journals
- Related Theory
- Related Studies
- Pay-Per-View
- Online Forums
- Instructional Materials
- Government Policy
- Media Reports
- Google Search

FIND ITEMS IN THIS JOURNAL

All

Search

CLOSE

* Requires registration

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.

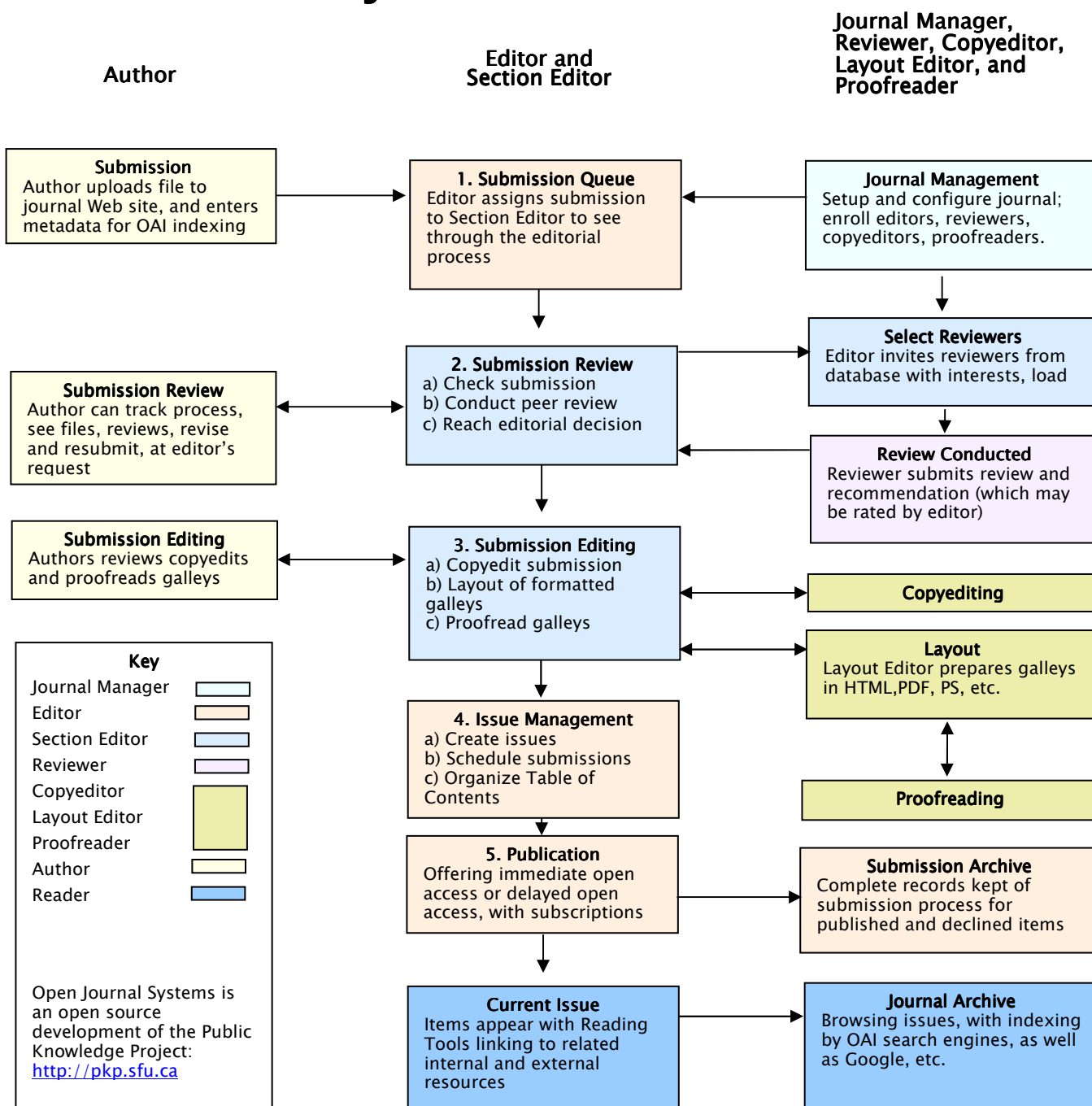
1. Submissions Queue: Items begin here and are assigned to an editor.
2. Submission Review: Items undergo peer review and editorial decision.
3. Submission Editing: Items undergo copyediting, layout, and proofreading.
4. Scheduling Queue: Items assigned to an issue and/or volume.
5. Table of Contents: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



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 as 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 two 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 may 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”:

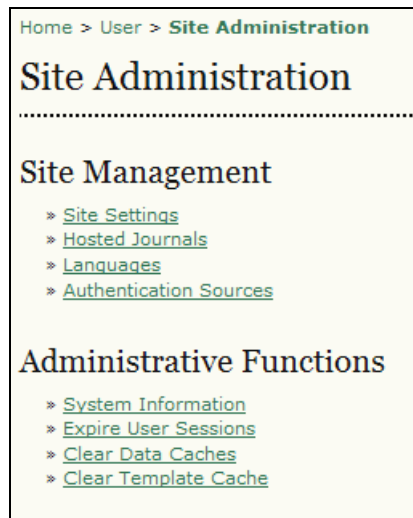


Figure 4: Site Administration Menu

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.

Home > User > Site Administration > Site Settings

Site Settings

Site title*

Introduction

Journal redirect

Requests to the main site will be redirected to this journal. This may be useful if the site is hosting only a single journal, for example.

About the Site description

Name of principal contact*

Email of principal contact*

Minimum password length* characters

Register Site for Indexing (Metadata Harvesting)

To have the contents of all journals hosted on this site indexed within a globally distributed system of research databases, [register](#) your site'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](#).

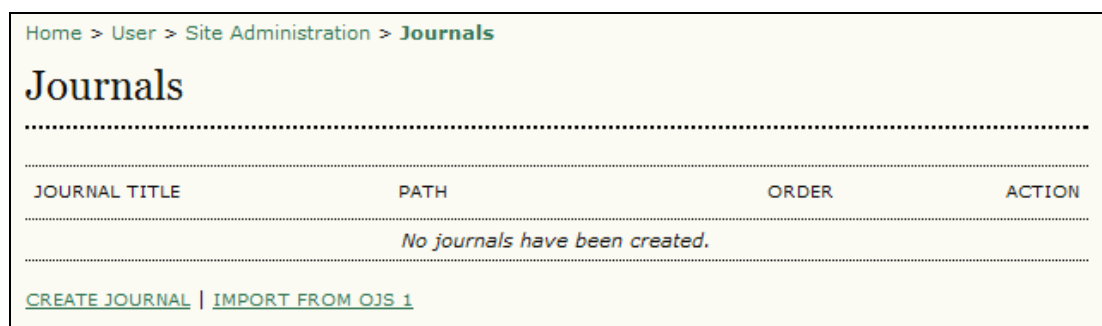
[Click here](#) and enter <http://pkp.sfu.ca/ojs/demo/present/index.php/index/index> under **Site URL**, and <http://pkp.sfu.ca/ojs/demo/present/index.php/index/oai> under **Base URL for OAI Archive**.

Note that the OAI interface can be disabled for this site by editing the OJS system configuration. Future versions of OJS will allow the OAI interface to be enabled or disabled for individual journals within the site.

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:



Home > User > Site Administration > Journals

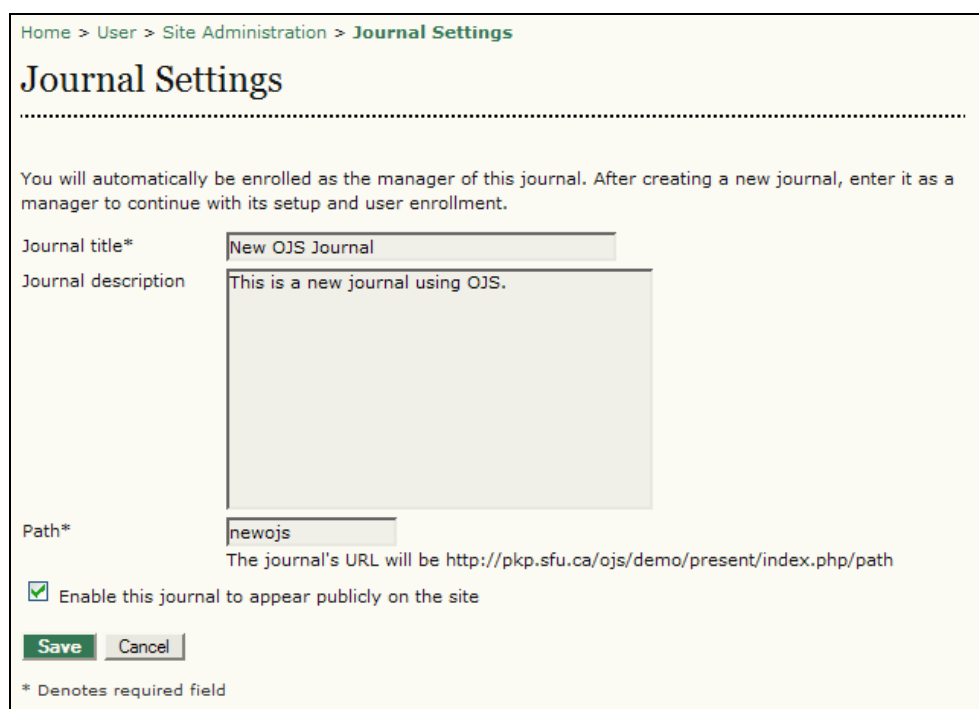
Journals

JOURNAL TITLE	PATH	ORDER	ACTION
No journals have been created.			

[CREATE JOURNAL](#) | [IMPORT FROM OJS 1](#)

Figure 6: Creating a new journal

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



Home > User > Site Administration > Journal Settings

Journal Settings

You will automatically be enrolled as the manager of this journal. After creating a new journal, enter it as a manager to continue with its setup and user enrollment.

Journal title*

Journal description

Path*
The journal's URL will be <http://pkp.sfu.ca/ojs/demo/present/index.php/path>

☒ Enable this journal to appear publicly on the site

* Denotes required field

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):

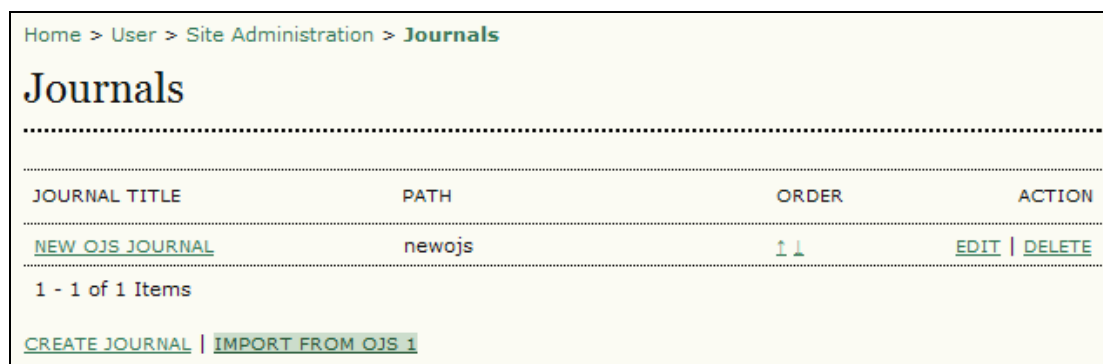


Figure 8: Import from OJS 1.x

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

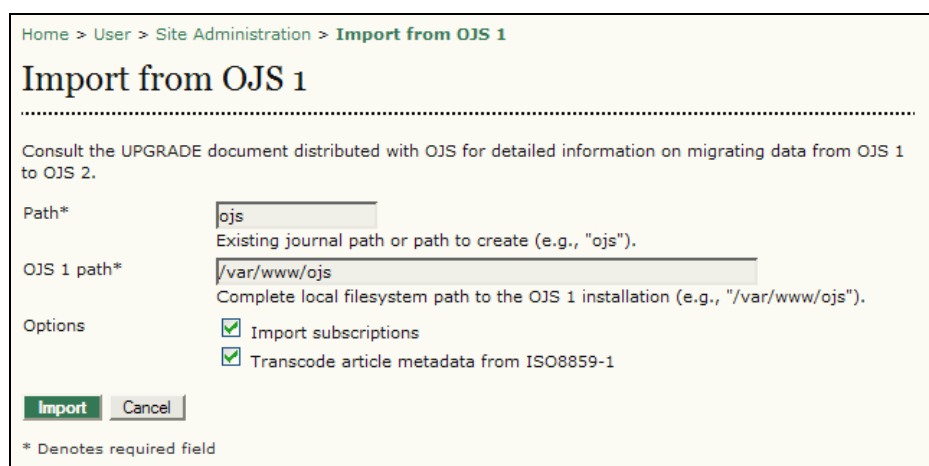


Figure 9: Import from OJS 1

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”:

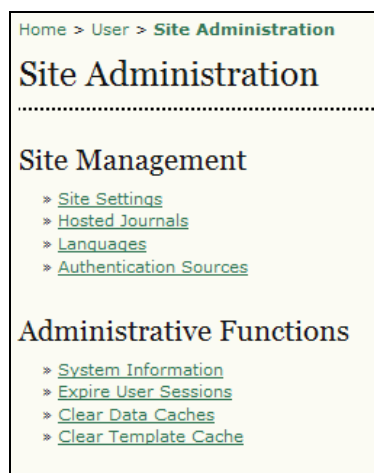
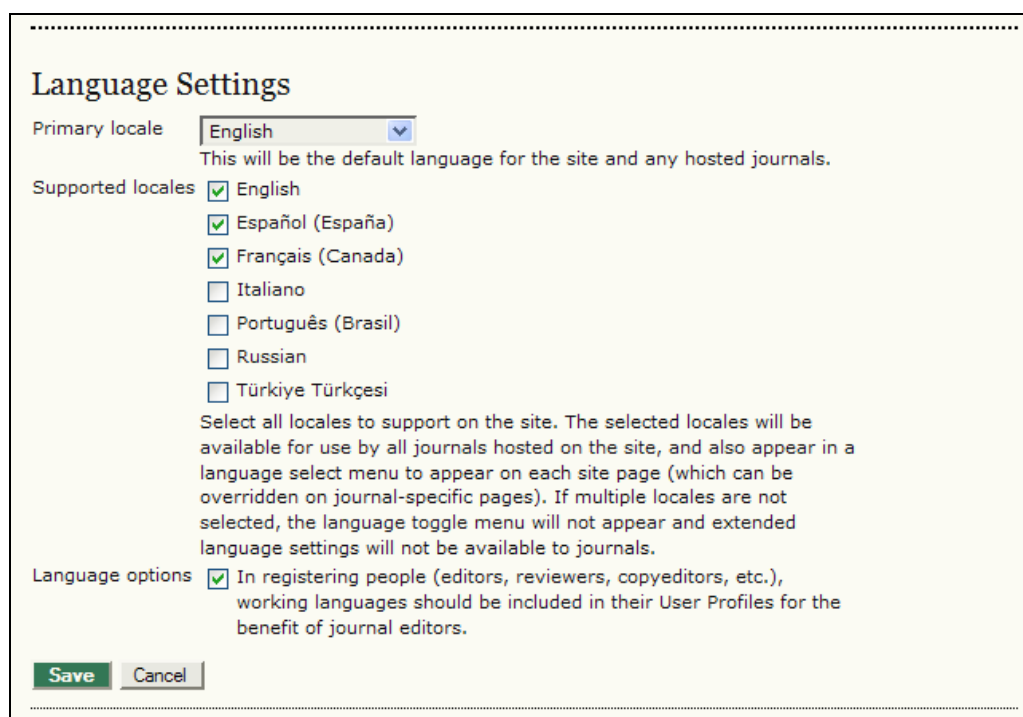



Figure 10: Site Administration Menu

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.



Language Settings

Primary locale 

This will be the default language for the site and any hosted journals.

Supported locales ☒ English

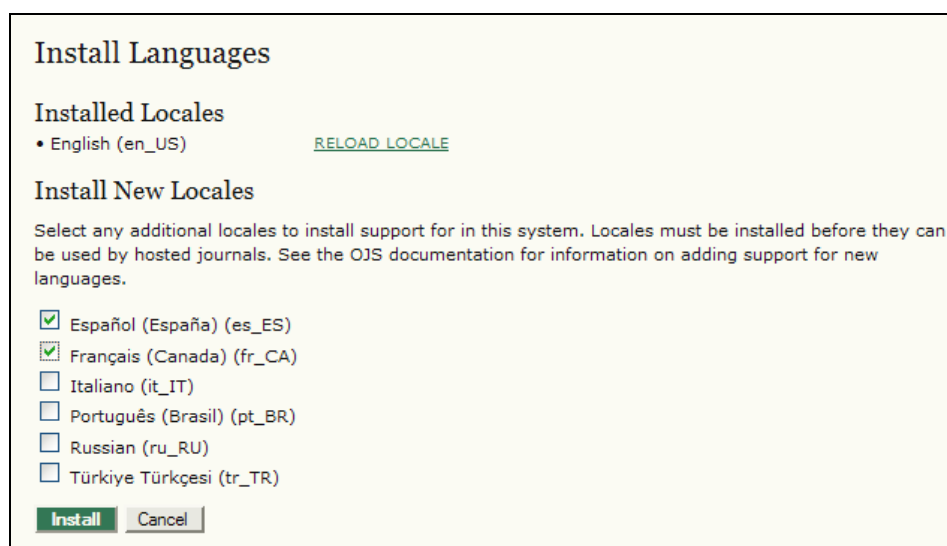
- ☒ Español (España)
- ☒ Français (Canada)
- ☐ Italiano
- ☐ Português (Brasil)
- ☐ Russian
- ☐ Türkiye Türkçesi

Select all locales to support on the site. The selected locales will be available for use by all journals hosted on the site, and also appear in a language select menu to appear on each site page (which can be overridden on journal-specific pages). If multiple locales are not selected, the language toggle menu will not appear and extended language settings will not be available to journals.

Language options ☒ In registering people (editors, reviewers, copyeditors, etc.), working languages should be included in their User Profiles for the benefit of journal editors.

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**:



Install Languages

Installed Locales

- English (en_US) [RELOAD LOCALE](#)

Install New Locales

Select any additional locales to install support for in this system. Locales must be installed before they can be used by hosted journals. See the OJS documentation for information on adding support for new languages.

- ☒ Español (España) (es_ES)
- ☒ Français (Canada) (fr_CA)
- ☐ Italiano (it_IT)
- ☐ Português (Brasil) (pt_BR)
- ☐ Russian (ru_RU)
- ☐ Türkiye Türkçesi (tr_TR)

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.

Home > User > Site Administration > Authentication Sources

Authentication Sources

DEFAULT	TITLE	PLUGIN	ACTION
	No authentication sources have been defined.		
<input checked="" type="radio"/>	OJS User Database		Save

Specifying a default authentication source other than OJS has the following effects:

- If a user attempts to register a new account with this site with a username that exists on the authentication source (but not in the OJS database), the registration attempt is only allowed if the supplied password is valid for that user account.

Create authentication source

Plugin: [Create](#)

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:

Authentication Sources

Title:

Options

- ☐ Enable user profile synchronization (if supported by this authentication plug-in). User profile information will be automatically updated from the remote source when a user logs in, and profile changes (including password changes) made within OJS will be automatically updated on the remote source. If this option is not enabled OJS profile information will be kept separate from remote source profile information.
- ☐ Enable user password modification (if supported by this authentication plug-in). Enabling this option allows users to modify their password from within OJS and to use the OJS "lost password" feature to reset a forgotten password. These functions will be unavailable to users with this authentication source if this option is not enabled.
- ☐ Enable user creation (if supported by this authentication plug-in). Users created within OJS with this authentication source will be automatically added to the remote authentication source if they do not already exist. Additionally, if this source is the default authentication source, OJS accounts created through user registration will also be added to the remote authentication source.

LDAP Settings

Server hostname:

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”.

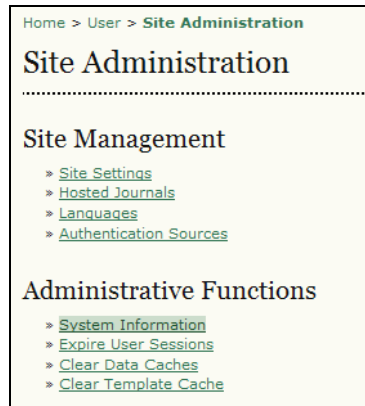


Figure 15: System Information

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 enrolls 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:

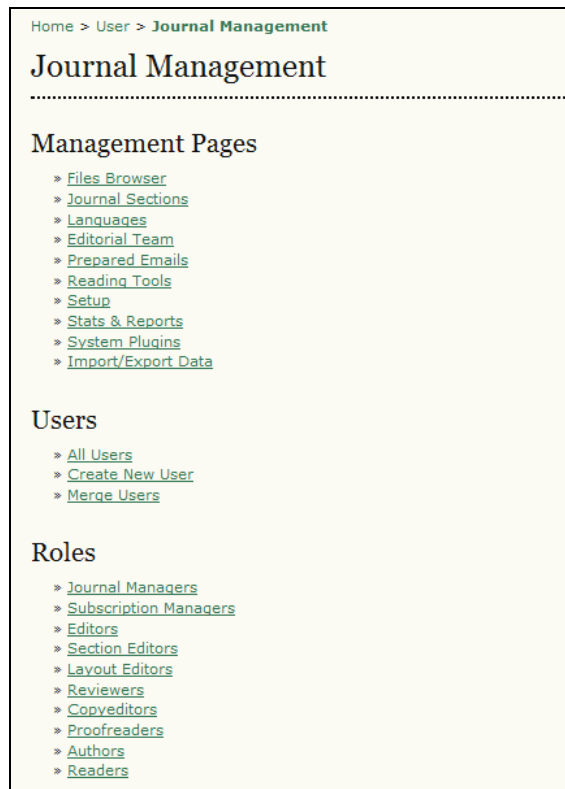


Figure 18: Journal Management options

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:

Home > User > Journal Management > **Journal Setup**

Journal Setup

Five Steps to a Journal Web Site

1. [Details](#)
Name of journal, ISSN, contacts, sponsors, and search engines.
2. [Policies](#)
Focus, peer review, sections, privacy, access, security, and additional about items.
3. [Submissions](#)
Author guidelines, copyright, and indexing (including registration).
4. [Management](#)
Scheduling, subscriptions, and use of copyeditors, layout editors and proofreaders.
5. [The Look](#)
Homepage header, content, journal header, footer, navigation bar, and style sheet.

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.

Home > User > Journal Management > **Journal Setup**

Step 1. Getting Down the Details

1. DETAILS 2. POLICIES 3. SUBMISSIONS 4. MANAGEMENT 5. THE LOOK

1.1 General Information

Journal title*	Open Journal Systems Demonstration Journal
Journal initials*	OJSDJ
Journal Abbreviation	OJS Demo J
Print ISSN	1234-5678
Online ISSN	8765-4321
	The ISSN (International Standard Serial Number) is an eight-digit number which identifies periodical publications as such, including electronic serials. It is managed by a world wide network of National Centres coordinated by an International Centre based in Paris, backed by Unesco and the French Government. A number can be obtained from the ISSN web site . This can be done at any point in operating the journal.
DOI Prefix	10.1234
	The DOI (Digital Object Identifier) Prefix is assigned by CrossRef and is in the format 10.xxxx (e.g. 10.1234).
Mailing Address	8888 University Drive Burnaby, BC V5A 1S6
	The journal's physical location and mailing address.

Figure 20: General Information

1.2 Principal Contact

1.2 Principal Contact

This position, which can be treated as a principal editorship, managing editorship, or administrative staff position, will be listed on the homepage of the journal under Contact, along with the Technical Support Contact.

Name*	John Smith
Title	Journal Manager
Affiliation	University of British Columbia
Email*	jsmith@ubc.ca
Phone	604.987.6543
Fax	
Mailing Address	1234 West Mall Complex University of British Columbia Vancouver, BC V6T 1Z2

Figure 21: Principal Contact

1.3 Technical Support Contact

1.3 Technical Support Contact

This person will be listed on the journal's Contact page for the use of editors, authors, and reviewers, and should have experience working through the system from the perspective of all of its roles. As this journal system requires very little technical support, this should be seen as a part-time assignment. There may be occasions, for example, when authors and reviewers have difficulties with the instructions or file formats, or there's a need to ensure that the journal is regularly backed up on the server.

Name*	Jane Jones
Email*	jjones@sfu.ca
Phone	604.291.1234

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.

1.4 Email Identification

The prepared emails that are sent by the system on behalf of the journal will have the following signature added to the end. The body of the prepared emails are available for editing under Journal Management.

Signature	Open Journal Systems Demonstration Journal http://pkp.sfu.ca/ojs/conferencedemo/index.php/demojournal
-----------	---

Any undeliverable emails will result in an error message to this address.

Bounce Address	
----------------	--

Note: To activate this option, the site administrator must enable the `allow_envelope_sender` option in the OJS configuration file. Additional server configuration may be required to support this functionality (which may not be possible on all servers), as indicated in the OJS documentation.

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.

1.5 Publisher

The name of the organization publishing the journal will appear in About the Journal.

Note

Institution

Simon Fraser University Library

URL

http://www.lib.sfu.ca

Figure 24: Publisher information

1.6 Sponsoring Organizations

1.6 Sponsoring Organizations

The name of the organizations (e.g., scholarly associations, university departments, cooperatives, etc.) sponsoring the journal will appear in About the Journal and may be accompanied by a note of acknowledgement.

Note

Institution

URL

Add Sponsoring Organization

Figure 25: Sponsoring organization information

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

1.7 Sources of Support

1.7 Sources of Support

Additional agencies or organizations that provide financial or in-kind support for the journal will appear in About the Journal and may be accompanied by a note of acknowledgement.

Note

Contributor

URL

Add Contributor

Figure 26: Sources of support information

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

1.8 Search Engine Indexing

1.8 Search Engine Indexing

To assist the users of search engines in discovering this journal, provide a brief description of the journal and relevant keywords (separated by semicolons).

Description

Keywords

Custom tags

Custom HTML header tags to be inserted in the header of every page (e.g., META tags).

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.

2.1 Focus and Scope of Journal

Enter a statement below, which will appear in About the Journal, that speaks to authors, readers, and librarians about the range of articles and other items which the journal will publish.

Example drawn from...
The Law, Social Justice, and Global Development Online Journal

This new academic ejournal will focus on the integration of developing and newly industrialising countries as well as the so-called transitional countries of Central and Eastern Europe into global economic, social and political processes. It will examine the implications of globalisation (in itself a contentious concept; this will be explored in the ejournal) for the countries concerned.

In particular, the ejournal will cover the impact of globalisation on legal developments in relation to human rights; social justice; democratisation; constitutionalism; national, ethnic and

If using HTML in Setup text boxes (for font size, bold, color, etc.), note that "returns" in the text are automatically treated as
.

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 then 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.

Review Options

Review Time

The typical period of time allowed for reviews: weeks

Note: Can be modified during the editorial process.

Reviewer Reminders

Automated email reminders (available in OJS's default Emails) can be sent to reviewers at two points (while the editor can always email the reviewer directly as well):

☐ If reviewer has not responded to a review request within days.

☐ If reviewer has not submitted a recommendation within days after review's due date.

Note: To activate these options, the site administrator must enable the `scheduled_tasks` option in the OJS configuration file. Additional server configuration may be required to support this functionality (which may not be possible on all servers), as indicated in the OJS documentation.

Reviewer Ratings

☒ Editors will rate reviewers on a five-point quality scale after each review.

Reviewer Access

☐ Enable one-click reviewer access.

Note: The email invitation to reviewers will contain a special URL that takes invited reviewers directly to the Review page for the submission (with access to any other pages requiring them to log in). For security reasons with this option, editors are not able to modify email addresses or add CCs or BCCs prior to sending invitations to reviewers.

☒ Reviewers will have access to the submission file only after agreeing to review it.

Figure 33: Review options

2.3 Privacy Statement

The privacy statement will appear on the About the Journal section of your web site.

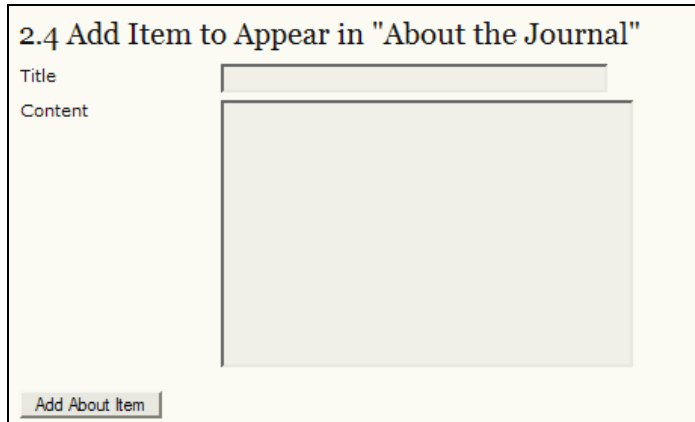
2.3 Privacy Statement

The names and email addresses entered in this journal site will be used exclusively for the stated purposes of this journal and will not be made available for any other purpose or to any other party.

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.



2.4 Add Item to Appear in "About the Journal"

Title

Content

[Add About Item](#)

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...](http://lockss.stanford.edu/)

See [other versions of a LOCKSS license](#).

Figure 36: Journal Archiving

2.6 Security/Access Settings

2.6 Security/Access Settings

OJS provides a number of security-related options that can be used to restrict to the journal's contents, and maintain additional information about submissions for auditing purposes.

User Registration

☒ Allow users to register with the journal site as:

- ☒ Readers
- ☒ Authors
- ☒ Reviewers

☐ Disable user registration. Users will have to be manually created by a journal manager.

Site Access

☒ Unregistered users can view the journal site.

☐ Users must log in to view the journal site.

Article Access

☒ Unregistered users can view the full text of published articles.

☐ Users must log in to view the full text of published articles.

Reader Comments

☒ Reader comments are disabled.

☐ Registered users can post; anonymous posting is disabled.

☐ Users can post anonymously, but must be registered.

☐ Allow anyone to post anonymously.

Logging and Auditing

☐ Enable submission event logging, which maintains a log of all actions on a submission (accessible via each submission's "History" page).

☐ Enable submission email logging, which maintains a log of all emails sent out related to a submission (accessible via each submission's "History" page).

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.

3.1 Author Guidelines

Set out for authors the bibliographic and formatting standards used for items submitted to the journal (e.g., *Publication Manual of the American Psychological Association*, 5th edition, 2001). It is often helpful to provide examples of the common citation formats for journals and books to be used in submissions. Also identify the types of appropriate Supplementary Files (e.g., data-sets, research instruments, etc.) which authors should be encouraged to upload, in addition to their submission, to enhance readers' engagement with their work.

This journal adheres to the bibliographic and research paper formatting requirements laid out in the *Publication Manual of the American Psychological Association*, 5th Edition (2001).

For example...

Alvarez, A. (1970). *The savage god: A study of suicide*. New York: Random House.

Natarajan, R., & Chaturvedi, R. (1983). *Geology of the Indian Ocean*. Hartford, CT: University of Hartford Press.

Maddux, K. (1997, March). True stories of the internet patrol. *NetGuide Magazine*, 12(2), 88-92.

If using HTML in Setup text boxes (for font size, bold, color, etc.), note that "returns" in the text are automatically treated as `
`.

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.

Submission Preparation Checklist

On making a submission to the journal, authors are first asked to check each item on the Submission Preparation Checklist as completed, before proceeding. The checklist also appears in the Author Guidelines, under About the Journal. The list can be edited below, but all items on the list will require a checkmark before authors can proceed with their submission.

Order

<input type="checkbox"/>	The submission file is in Microsoft Word, RTF, or WordPerfect document file format.	Delete
<input type="checkbox"/>	The submission has not been previously published, nor is it before another journal for consideration (or an explanation has been provided in Comments to the Editor).	Delete
<input type="checkbox"/>	All URL addresses in the text (e.g., <code>http://pkp.ubc.ca</code> are activated and ready to click.	Delete
<input type="checkbox"/>	The text is single-spaced; uses a 12-point font; employs italics, rather than underlining (except with URL addresses); and all illustrations, figures, and tables are placed within the text at the appropriate	Delete
<input type="checkbox"/>	The text, if submitted to a peer-reviewed section (e.g., Articles), has had the authors' names removed. If an author is cited, "Author" and year are used in the bibliography and footnotes, instead of	Delete
<input type="checkbox"/>	The text adheres to the stylistic and bibliographic requirements outlined in the <code><a href="http://pkp.sfu.ca/ojs/conferencedemo/ind</code>	Delete

Add Checklist Item

Figure 39: Submission preparation checklist

3.2 Copyright Notice

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

3.2 Copyright Notice

This Copyright Notice will appear in About the Journal and in each published item's metadata. Authors can retain copyright, while granting the journal right of first publication. Alternatively, authors can transfer copyright to the journal, which then permits authors non-commercial use of the work, including the right to place it in an open access archive. In addition, [Creative Commons](#) can be consulted for flexible copyright licenses.

The copyright for articles in this journal are retained by the author(s), with first publication rights granted to the journal. By virtue of their appearance in this open access journal, articles are free to use with proper attribution in educational and other non-commercial settings.

☐ Require authors to agree to Copyright Notice as part of the submission process.

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

URL

(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; School

(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-speaking

(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	<input type="text" value="1"/>
Volume	<input type="text" value="1"/>
Year	<input type="text" value="2005"/>
Issues per volume	<input type="text" value="4"/>
Volumes per year	<input type="text" value="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

4.2 Identification of Journal Content

Unique Identifier

Articles and issues can be tagged with an identification number or string, employing a registration system such as the Digital Object Identifier System (DOI).

- ☐ Custom identifiers will be used to identify issues.
- ☐ Custom identifiers will be used to identify published items.
- ☐ Custom identifiers will be used to identify supplemental article files.

Page Number Option

- ☐ Page numbers for items will be calculated and entered manually in the Table of Contents (e.g., pp. 13-26).

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.

4.3 Online Access Management

☒ The journal will provide open access to its contents.

Open Access Policy

Enter a statement on the journal's open access policy that will appear in About the Journal.

This journal provides immediate open access to its content on the principle that making research freely available to the public supports a greater global exchange of knowledge.

☐ The journal will require subscriptions to access some or all of its contents.

The Subscription Management module requires that a Subscription Manager be assigned who has access to the module, which includes additional open access, self-archiving, and email notification options.

Figure 46: Online Access Management

4.4 Announcements

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

4.4 Announcements

Announcements may be published to inform readers of journal news and events. Published announcements will appear on the Announcements page.

☐ Enable Journal Managers to add journal announcements.

☐ Display of the most recent announcements on the journal homepage.

Additional Information

Enter any additional information that should be displayed to readers on the Announcements page.

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.

4.5 Copyeditors

Select one:

☒ The journal will designate Copyeditors for working with each submission.

☐ Copyediting will be undertaken by the editor.

Copyedit Instructions

The Copyedit Instructions will be made available to Copyeditors, Authors, and Section Editors in the Submission Editing stage. Below is a default set of instructions in HTML, which can be modified or replaced by the Journal Manager at any point (in HTML or plain text).

The copyediting stage is intended to improve the flow, clarity, grammar, wording, and formatting of the article. It represents the last chance for the author to make any substantial changes to the text, as the next stage is restricted to typos and formatting corrections.

The file to be copyedited is in Word or .rtf format and therefore can be easily edited as a word processing document. This set of instructions displayed here proposes two approaches to copyediting. The one is based on Microsoft Word's Track Changes feature and requires that the copyeditor, editor and author have access to this program. A second system, that is software independent, has been borrowed, with permission,

HTML can be used in textarea (for font size, color, etc.), with "returns" treated as `
`; HTML editor works with Firefox browsers.

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.

4.6 Layout Editors

Select one:

- ☐ The journal will designate Layout Editors to prepare the galleys in HTML, PDF, PS, etc., file formats for electronic publication.
- ☒ The editors will prepare the galleys in the appropriate format for electronic publication.

Layout Instructions

Layout Instructions can be prepared for the formatting of publishing items in the journal and be entered below in HTML or plain text. They will be made available to the Layout Editor and Section Editor on the Editing page of each submission. (As each journal may employ its own file formats, bibliographic standards, style sheets, etc., a default set of instructions is not provided.)

HTML can be used in textarea (for font size, color, etc.), with "returns" treated as `
`; HTML editor works with Firefox browsers.

Layout Templates

Templates can be uploaded to appear in Layout for each of the standard formats published in the journal (e.g., article, book review, etc.) using any file format (e.g., pdf, doc, etc.) with annotations added specifying font, size, margins, etc. to serve as a guide for Layout Editors and Proofreaders.

Title

Template File

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.

4.7 Proofreaders

Select one:

- ☐ The journal will designate Proofreaders who will (along with the authors) check galleys.
- ☒ The editors and authors will proofread the galleys.

Proofing Instructions

The Proofreading Instructions will be made available to Proofreaders, Authors, Layout Editors, and Section Editors in the Submission Editing stage. Below is a default set of instructions in HTML, which can be edited or replaced by the Journal Manager at any point (in HTML or plain text).

The proofreading stage is intended to catch any errors in the galley's spelling, grammar, and formatting. More substantial changes cannot be made at this stage, unless discussed with the Section Editor. In Layout, click on VIEW PROOF to see the HTML, PDF and other available file formats used in publishing this item.

For Spelling and Grammar Errors

Copy the problem word or groups of words and paste them into the Proofreading Corrections box with "CHANGE-TO" instructions to the editor as follows...

1. CHANGE...

HTML can be used in textarea (for font size, color, etc.), with "returns" treated as `
`; HTML editor works with Firefox browsers.

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.

5.1 Journal Homepage Header

A graphic version of the journal's title and logo (as a .gif, .jpg, or .png file) can be uploaded for the homepage, which will replace the text version that otherwise appears.

Journal title

☒ Title text

Open Journal Systems Demonstration Journ

☐ Title image

Browse...

Upload

Journal Logo

Logo image

Browse...

Upload

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

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.

5.3 Journal Page Header

A graphic version of the journal's title and logo (.gif, .jpg, or .png file), possibly a smaller version of the one used on the homepage, can be uploaded to appear as a header on journal pages, which will replace the text version that otherwise appears.

Journal title

☒ Title text

☐ Title image

Journal Logo

Logo image

Alternate Header

Alternately, instead of title and logo, an HTML version of the header can be inserted into the text box below. Leave textbox blank if not required.

Figure 53: Journal Page Header

5.4 Journal Page Footer

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

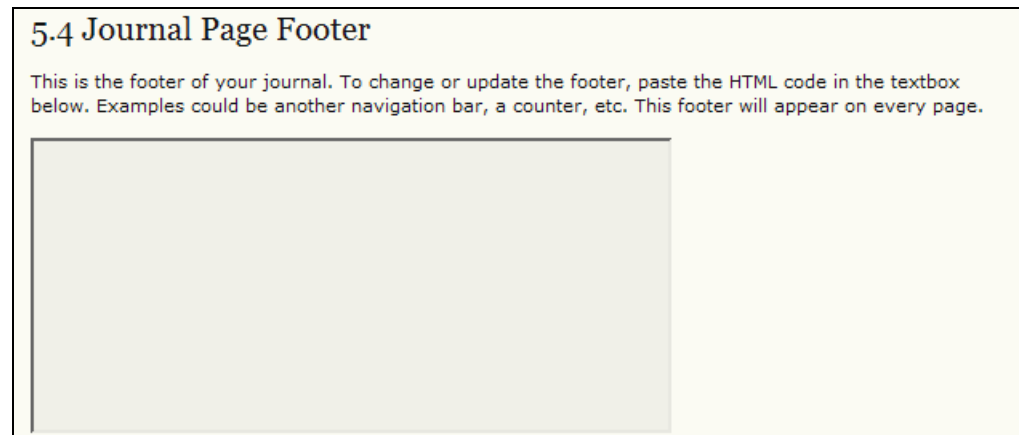


Figure 54: Journal page footer

5.5 Navigation Bar

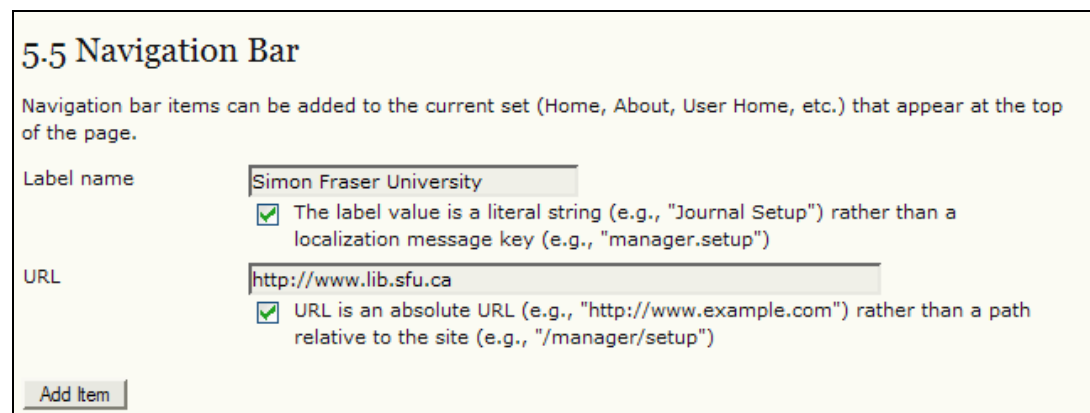
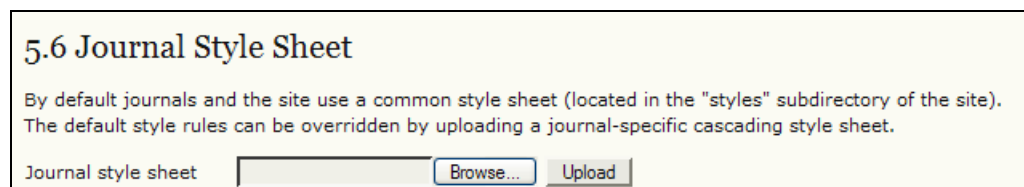


Figure 55: Navigation bar

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.

The screenshot shows a web interface for uploading a journal style sheet. It has a title '5.6 Journal Style Sheet' and a paragraph explaining that journals use a common style sheet by default, which can be overridden by uploading a journal-specific cascading style sheet. Below this, there is a label 'Journal style sheet' followed by a text input field, a 'Browse...' button, and an 'Upload' button.

5.6 Journal Style Sheet

By default journals and the site use a common style sheet (located in the "styles" subdirectory of the site). The default style rules can be overridden by uploading a journal-specific cascading style sheet.

Journal style sheet

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:

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

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.

5.7 Information

Brief descriptions of the journal for librarians and prospective authors and readers are available in the "Information" section of the sidebar.

For Readers

We encourage readers to sign up for the publishing notification service for this journal. Use the [link](http://pkp.sfu.ca/ojs/conferencedemo/index.php/demojournal/) at the top of the homepage for the journal. This registration will result in the reader receiving the Table of Contents by email for each new issue of the journal. This list also allows the journal to claim a certain level of support or readership. See the journal's [Statement](http://pkp.sfu.ca/ojs/conferencedemo/index.php/demojournal/Statement) which assures readers that their name and email address will not be used for other purposes.

< ||| >

For Authors

Interested in submitting to this journal? We recommend that you review the [the Journal](http://pkp.sfu.ca/ojs/conferencedemo/index.php/demojournal/theJournal/) page for the journal's section policies, as well as the [Guidelines](http://pkp.sfu.ca/ojs/conferencedemo/index.php/demojournal/Guidelines). Authors need to [with the journal](http://pkp.sfu.ca/ojs/conferencedemo/index.php/demojournal/) prior to submitting, or if already registered can simply [in](http://pkp.sfu.ca/ojs/conferencedemo/index.php/index/login) and begin the 5 step process.

< ||| >

For Librarians

We encourage libraries to list this open access journal among its electronic journal holdings. This publishing system is also designed to be hosted and operated by research libraries in support of the journal publishing work of its associated faculty. For more information on using Open Journal Systems to manage and publish peer-reviewed journals, see [Public Knowledge Project](http://pkp.ubc.ca).

Figure 57: Information

5.8 Lists

5.8 Lists

Enter the maximum number of items (for example, submissions, users, or editing assignments) that appear on each page of a list, and the number of pages links to display on each page.

Items per page

Page links

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.

Home > Journal Management > **Files Browser**

Files Browser

Index of /

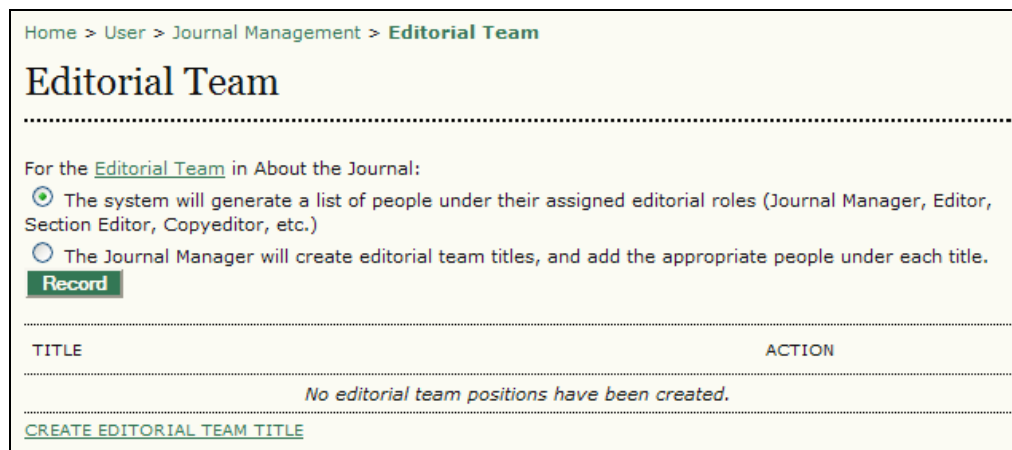
FILE NAME	TYPE	DATE MODIFIED	SIZE	ACTION
 articles	—	2006-07-28 07:13 PM	—	DELETE
 issues	—	2006-07-28 07:13 PM	—	DELETE

Note: 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).



Home > User > Journal Management > Editorial Team

Editorial Team

For the [Editorial Team](#) in About the Journal:

- ☒ The system will generate a list of people under their assigned editorial roles (Journal Manager, Editor, Section Editor, Copyeditor, etc.)
- ☐ The Journal Manager will create editorial team titles, and add the appropriate people under each title.

[Record](#)

TITLE	ACTION
<i>No editorial team positions have been created.</i>	

[CREATE EDITORIAL TEAM TITLE](#)

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':

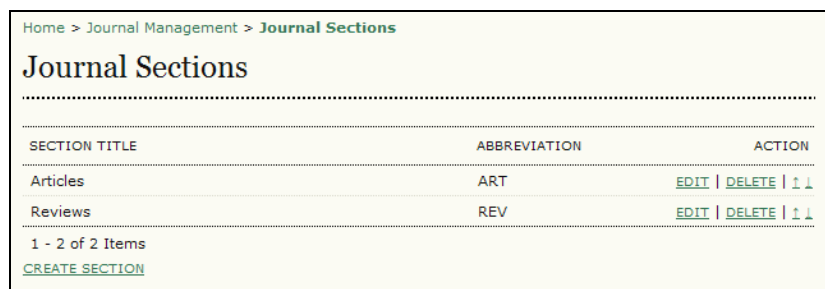
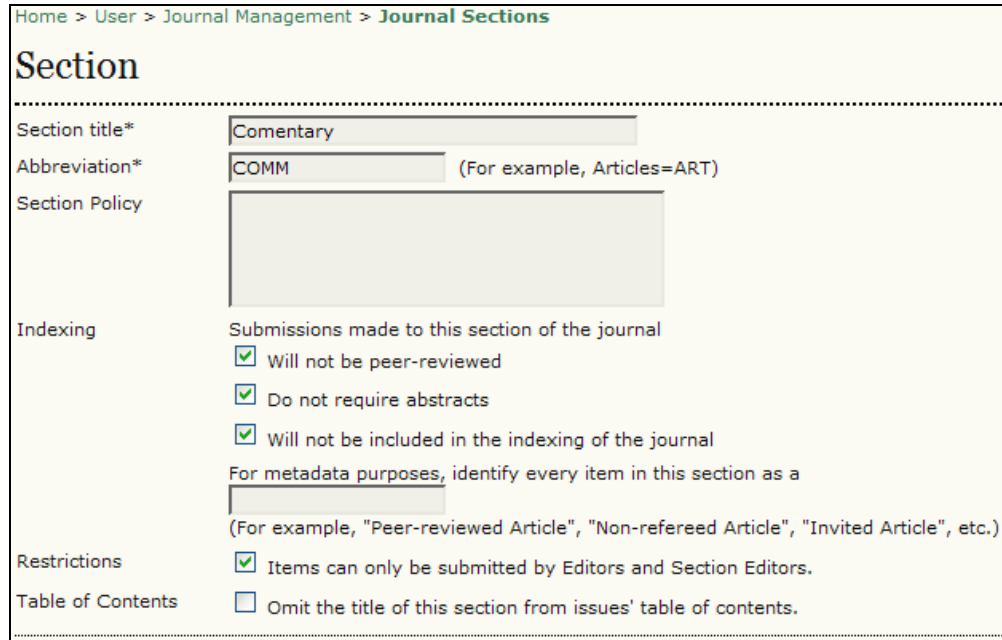


Figure 62: Create Section

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



Home > User > Journal Management > **Journal Sections**

Section

Section title*

Abbreviation* (For example, Articles=ART)

Section Policy

Indexing

Submissions made to this section of the journal

☒ Will not be peer-reviewed

☒ Do not require abstracts

☒ Will not be included in the indexing of the journal

For metadata purposes, identify every item in this section as a

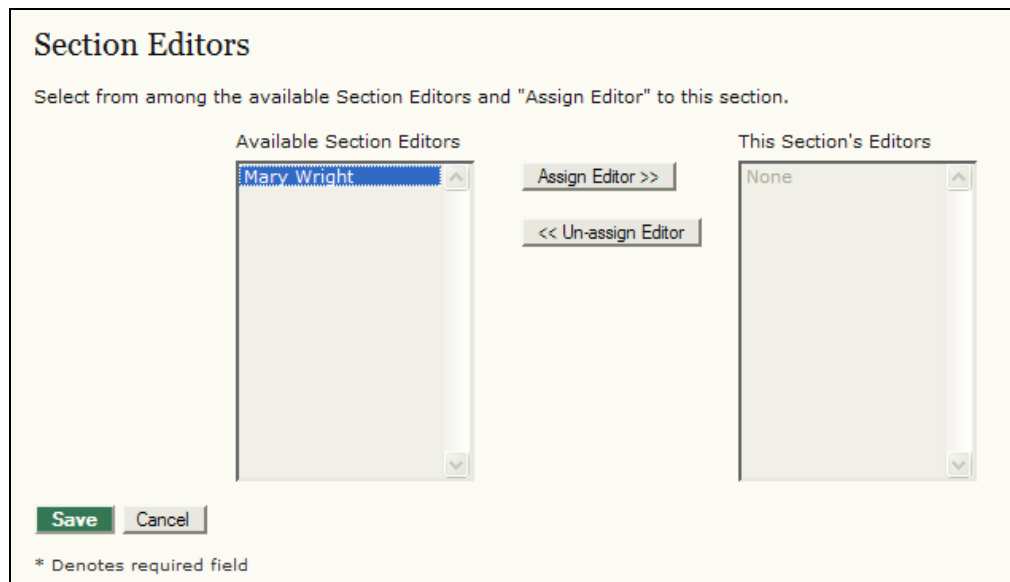
(For example, "Peer-reviewed Article", "Non-refereed Article", "Invited Article", etc.)

Restrictions ☒ Items can only be submitted by Editors and Section Editors.

Table of Contents ☐ Omit the title of this section from issues' table of contents.

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.



Section Editors

Select from among the available Section Editors and "Assign Editor" to this section.

Available Section Editors

This Section's Editors

* Denotes required field

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:

A screenshot of the 'Prepared Emails' page. The page has a breadcrumb trail: Home > Journal Management > Prepared Emails. Below the title is a table with columns: EMAIL TEMPLATES, SENDER, RECIPIENT, SUBJECT, and ACTION. The table lists six email templates with their respective senders, recipients, subjects, and actions (EDIT, DISABLE, RESET).

EMAIL TEMPLATES	SENDER	RECIPIENT	SUBJECT	ACTION
COPYEDIT_ACK	Section Editor	Copyeditor	Copyediting Acknowledgement	EDIT DISABLE RESET
COPYEDIT_AUTHOR_ACK	Section Editor	Author	Copyediting Review Acknowledgement	EDIT DISABLE RESET
COPYEDIT_AUTHOR_C...	Author	Section Editor	Copyediting Review Completed	EDIT DISABLE RESET
COPYEDIT_AUTHOR_R...	Section Editor	Author	Copyediting Review Request	EDIT DISABLE RESET
COPYEDIT_COMPLETE	Copyeditor	Section Editor	Copyediting Completed	EDIT DISABLE RESET
COPYEDIT_FINAL_ACK	Section Editor	Copyeditor	Copyediting Final Review Acknowledgement	EDIT DISABLE RESET

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):

Edit Email

This email is sent by the Section Editor to a submission's Copyeditor to acknowledge that the Copyeditor has successfully completed the copyediting process and thank them for their contribution.

Email Template

Subject: Copyediting Acknowledgement

Body: `{ $copyeditorName }`:
Thank you for copyediting the manuscript, "`{ $articleTitle }`," for `{ $journalName }`. It will make an important contribution to the quality of this journal.
`{ $editorialContactSignature }`

☒ Enable this email template

Save **Cancel** **Reset**

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.

Home > User > Journal Management > Languages

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, and allowing certain data to be entered in up to two additional languages.

If a language supported by OJS is not listed below, ask your site administrator to install the language from the site administration interface. For instructions on adding support for new languages, please consult the OJS documentation.

Primary locale*

This will be the default language for the journal site.

Supported locales

- ☒ English
- ☒ Español (España)
- ☒ Français (Canada)

Select all locales to support on the site via a language select menu to appear on each page. The menu will only appear if more than one locale is selected.

Alternate Locale #1

Alternate Locale #2

This system optionally allows certain critical information to be entered in up to two additional languages. To use this feature, select one or two alternate locales and choose from the options listed below.

Language options

- ☒ Title image, page header, etc. will be uploaded in each of the journal's languages.
- ☒ Authors should be asked to provide titles and abstracts in the other language(s), with the option of having this done by journal staff.

* Denotes required field

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:

5.1 Journal Homepage Header

A graphic version of the journal's title and logo (as a .gif, .jpg, or .png file) can be uploaded for the homepage, which will replace the text version that otherwise appears.

Journal title

☒ Title text

☐ Title image

Journal Logo

Logo image

Journal title (Español (España))

☒ Title text

☐ Title image

Journal Logo (Español (España))

Logo image

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.

[OPEN JOURNAL SYSTEMS](#)

[Journal Help](#)

USER

You are logged in as...

admin

- [My Profile](#)
- [Log Out](#)

LANGUAGE

English

English

Español (España)

JOURNAL CONTENT

Search

All

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:

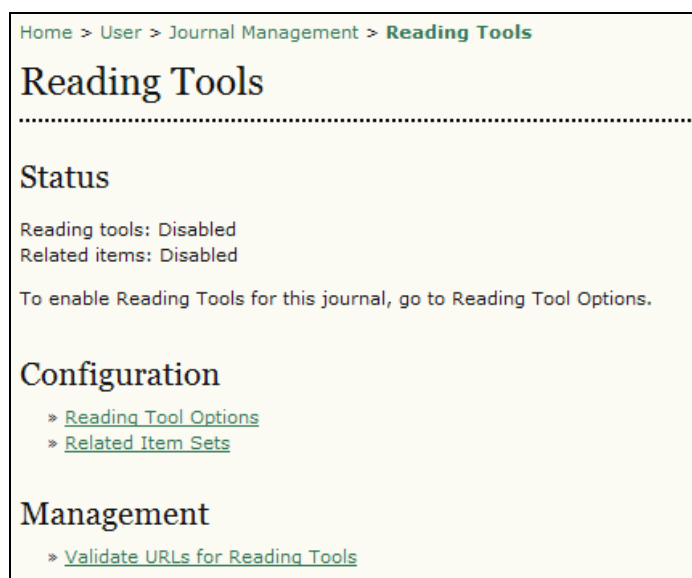


Figure 71: Activating Reading Tools

Checking “Enable Reading Tools...” will activate them for your journal:

Home > User > Journal Management > Reading Tools > **Reading Tool Options**

Reading Tool Options

The reading tools appear in a frame beside published items in the sections of the journal that have been designated for indexing. The reading tools consist of a set of optional tools related to the published item, listed below, and a set of tools that provide access to related items, organized by field and discipline.

☒ Enable Reading Tools for designated sections of journal.

Journal Item Tools

- ☒ Abstract (presents the item's abstract).
- ☒ About the author (displays the bio statements entered by the author).
- ☒ How to cite item (provides bibliographic detail for item).
Bibliographic format American Psychological Association (APA) ▼
- ☒ Indexing metadata (displays item's indexing metadata provided by author and system).
- ☒ Supplementary files (displays list of files author included with submission).
- ☒ Print version (Leads to a printer-friendly version of an item).
- ☒ Look up terms (enables readers to double-click on any word in an item and send the word to a dictionary).
- ☒ Notify a colleague (leads to an email template with link to item).
- ☒ Email the author (leads to an email template with author's email).
- ☒ Add comment (enables readers to post comments, which Journal Managers can delete. Reader Comments must be enabled in Setup, step 2).

Related Item Tools

Field Disable Related Items ▼

See [RELATED ITEMS SETS](#) to view, add, correct, or delete related items for each field.

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:

Home > User > Journal Management > **Reading Tools**

Reading Tools

Status

Reading tools: Enabled
Related items: Computer Science

To enable Reading Tools for this journal, go to Reading Tool Options.

Configuration

- > [Reading Tool Options](#)
- > [Related Item Sets](#)

Management

- > [Validate URLs for Reading Tools](#)

Figure 73: Related Item Sets

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

Home > User > Journal Management > Reading Tools > **Related Item Sets**

Related Item Sets

TITLE	LOCALE	
Agriculture	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Art & Architecture	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Astrophysics	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Biology	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Business	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Chemistry	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Cognitive Science	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Computer Science	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Economics	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Education	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Environment	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
General Science	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Generic	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Humanities	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Life Sciences	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Mathematics	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Music	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Physics	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE
Social Sciences	en_US	VALIDATE METADATA CONTEXTS EXPORT DELETE

1 - 19 of 19 Items

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:

Home > User > Journal Management > Reading Tools > Related Item Sets > Agriculture > **Contexts**

Contexts

METADATA **CONTEXTS**

TITLE	ABBREV	
Author's work	Other Works	↑ ↓ METADATA SEARCHES DELETE
Look up terms	Look up terms	↑ ↓ METADATA SEARCHES DELETE
Related studies	Related studies	↑ ↓ METADATA SEARCHES DELETE
Government policy	Gov Policy	↑ ↓ METADATA SEARCHES DELETE
Book searches	Book searches	↑ ↓ METADATA SEARCHES DELETE
Relevant portals	Relevant portals	↑ ↓ METADATA SEARCHES DELETE
Databases	Databases	↑ ↓ METADATA SEARCHES DELETE
Online forums	Online forums	↑ ↓ METADATA SEARCHES DELETE
Data sets	Data sets	↑ ↓ METADATA SEARCHES DELETE
Pay-per-view	Pay-per-view	↑ ↓ METADATA SEARCHES DELETE
Media reports	Media reports	↑ ↓ METADATA SEARCHES DELETE
Web search	Web search	↑ ↓ METADATA SEARCHES DELETE

1 - 12 of 12 Items

[CREATE CONTEXT](#)

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:

Searches		
METADATA SEARCHES		
TITLE	URL	
Google Scholar	http://scholar.google.com	↑ ↓ EDIT DELETE
OAister (Open Archives Initiative research databases)	http://oaister.umd.umich.edu/	↑ ↓ EDIT DELETE
Rice bibliography	http://ricelib.irri.cgiar.o...	↑ ↓ EDIT DELETE
Public Knowledge Project Open Archives Harvester	http://pkp.sfu.ca/harvester/	↑ ↓ EDIT DELETE
AgEcon Search: Research in agricultural Economics	http://agecon.lib.umn.edu/	↑ ↓ EDIT DELETE
The Digital Library of the Commons (DLC)	http://dlc.dlib.indiana.edu/	↑ ↓ EDIT DELETE
PESTIS document database	http://www.panna.org/resour...	↑ ↓ EDIT DELETE
Common Names for Plant Diseases	http://www.apsnet.org/onlin...	↑ ↓ EDIT DELETE
Vegetable MD online	http://vegetablemdonline.pp...	↑ ↓ EDIT DELETE
VITIS-VEA	http://vitis-vea.zadi.de/st...	↑ ↓ EDIT DELETE
World Agricultural Information Centre (WAICENT)	http://www.fao.org/waicent/...	↑ ↓ EDIT DELETE
FAO document repository	http://www.fao.org/documents/	↑ ↓ EDIT DELETE
1 - 12 of 12 Items		
CREATE SEARCH		

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:

[CREATE VERSION](#)
[RESTORE VERSIONS TO DEFAULTS](#)

Figure 77: Creating Item Sets

Statistics and Reports

OJS 2.x provides a number of statistical and reporting features for your journal.

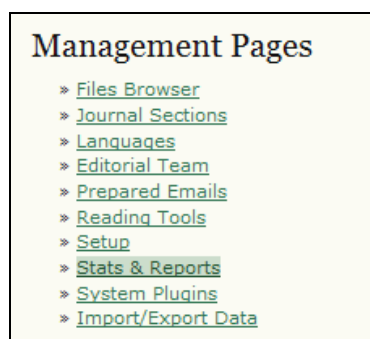


Figure 78: Journal Management menu

Statistics

OJS provides a summary of your journal's usage.

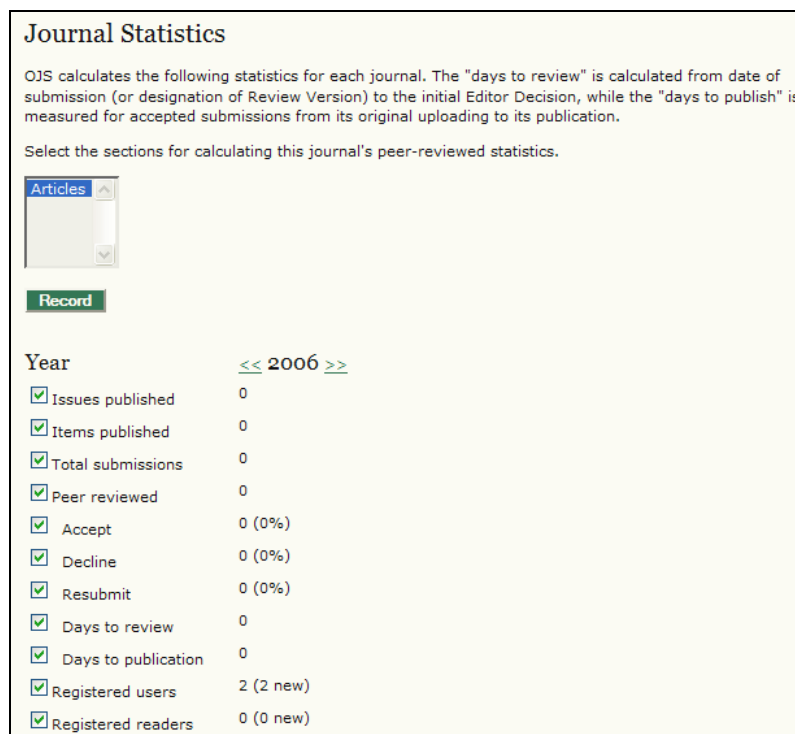
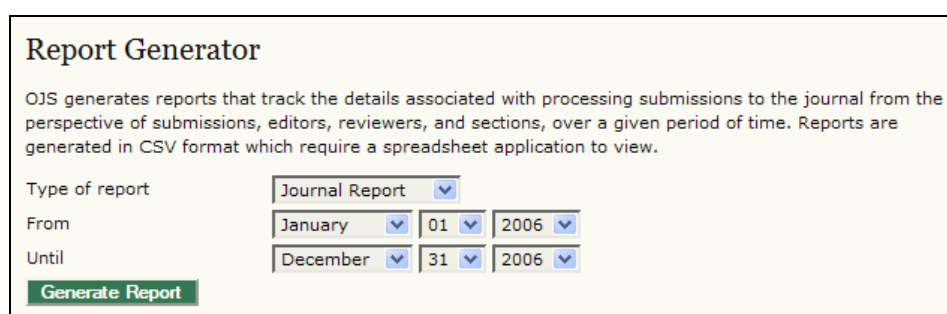


Figure 79: Statistics

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.



Report Generator

OJS generates reports that track the details associated with processing submissions to the journal from the perspective of submissions, editors, reviewers, and sections, over a given period of time. Reports are generated in CSV format which require a spreadsheet application to view.

Type of report: Journal Report

From: January 01 2006

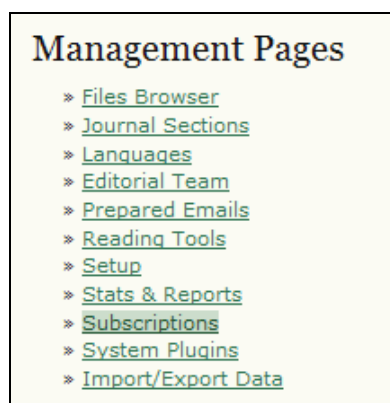
Until: December 31 2006

[Generate Report](#)

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:



Management Pages

- » [Files Browser](#)
- » [Journal Sections](#)
- » [Languages](#)
- » [Editorial Team](#)
- » [Prepared Emails](#)
- » [Reading Tools](#)
- » [Setup](#)
- » [Stats & Reports](#)
- » [Subscriptions](#)
- » [System Plugins](#)
- » [Import/Export Data](#)

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:

Home > User > Journal Management > Subscriptions > Subscription Types > Edit

Edit Subscription Type

Name* Individual

Description Personal subscriptions

Cost* 50
Enter a numeric value (e.g. 40 or 40.00). Do not include any other text such as "\$".

Currency* Canadian Dollar (CAD)

Duration* 12
The length of the subscription, in number of months (e.g. 12).

Format* Online

☐ Subscribers should be validated via domain or IP authentication.

☐ Subscribers must be members of an association or organization.

☐ This subscription type will not appear under Subscriptions in About the Journal.

Save Cancel

* Denotes required field

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:



The screenshot shows a web form titled "Subscription Manager". Below the title is a subtitle: "The contact listed under Subscriptions in About the Journal." The form contains several input fields with labels to their left: "Name" (filled with "Bill Ritter"), "Email" (filled with "billritter@mailinator.com"), "Phone" (empty), "Fax" (empty), and "Mailing Address" (a large empty text area). The form is enclosed in a thin black border.

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.

Subscription Expiry Reminders

Automated email reminders (available for editing by Journal Managers in OJS's Prepared Emails) can be sent to subscribers both before and after a subscription has expired.

☐ Notify subscribers by email month(s) before subscription expiry.

☐ Notify subscribers by email week(s) before subscription expiry.

☐ Notify subscribers by email week(s) after subscription expiry.

☐ Notify subscribers by email month(s) after subscription expiry.

Note: To activate these options, the site administrator must enable the `scheduled_tasks` option in the OJS configuration file. Additional server configuration may be required to support this functionality (which may not be possible on all servers), as indicated in the OJS documentation.

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:

Open Access Options For Subscription Journals

Subscription journals can provide "delayed open access" and/or "author self-archiving" (which increase readership and citation of content). The selected policies will appear in About the Journal.

Delayed Open Access

With delayed open access, editors are still able to designate specific articles within an issue for immediate open access.

☒ The back issues of this journal will be available in an open access format month(s) after an issue is published.

☐ Registered readers will have the option of receiving the table of contents by email when an issue becomes open access.

Note: To activate this option, the site administrator must enable the `scheduled_tasks` option in the OJS configuration file. Additional server configuration may be required to support this functionality (which may not be possible on all servers), as indicated in the OJS documentation.

The following statement will be posted in About the Journal under Delayed Open Access.

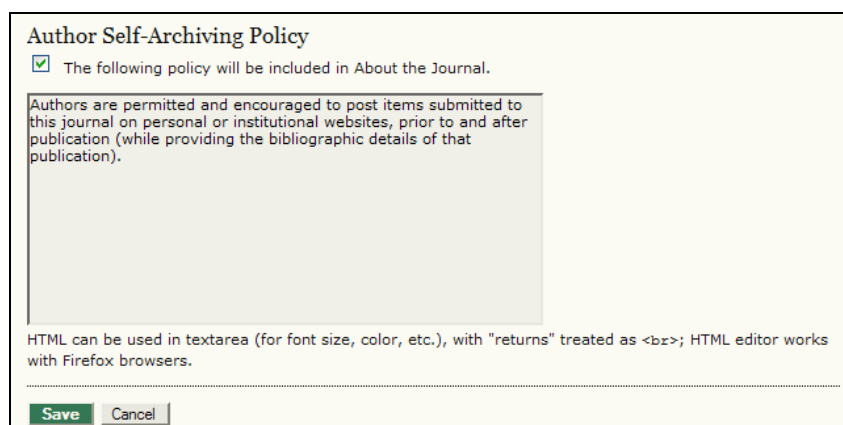
HTML can be used in textarea (for font size, color, etc.), with "returns" treated as `
`; HTML editor works with Firefox browsers.

Figure 87: Delayed Open Access

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:



The screenshot shows a web form titled "Author Self-Archiving Policy". At the top, there is a checked checkbox with the text "The following policy will be included in About the Journal." Below this is a large text area containing a default policy statement: "Authors are permitted and encouraged to post items submitted to this journal on personal or institutional websites, prior to and after publication (while providing the bibliographic details of that publication)." Below the text area, there is a note: "HTML can be used in textarea (for font size, color, etc.), with 'returns' treated as
; HTML editor works with Firefox browsers." At the bottom of the form are two buttons: "Save" and "Cancel".

Figure 88: Author self-archiving policy

Create New Subscriptions

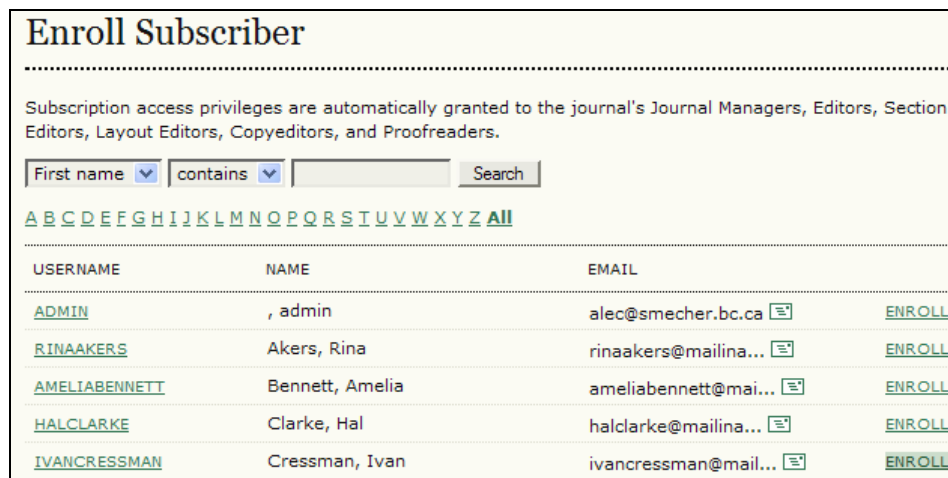
To create a new subscription, for an individual or for an institution, choose 'Create New Subscription':



The screenshot shows a web page titled "Subscriptions". At the top, there is a breadcrumb trail: "Home > User > Journal Management > Subscriptions". Below the title, there are three tabs: "SUBSCRIPTIONS", "SUBSCRIPTION TYPES", and "SUBSCRIPTION POLICIES". The "SUBSCRIPTIONS" tab is selected. Below the tabs is a table with the following headers: "USER", "SUBSCRIPTION TYPE", "START", "END", and "ACTION". Below the table, there is a message: "No subscriptions have been created." At the bottom of the page, there is a link: "CREATE NEW SUBSCRIPTION".

Figure 89: New subscriptions

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



Enroll Subscriber

Subscription access privileges are automatically granted to the journal's Journal Managers, Editors, Section Editors, Layout Editors, Copyeditors, and Proofreaders.

First name contains

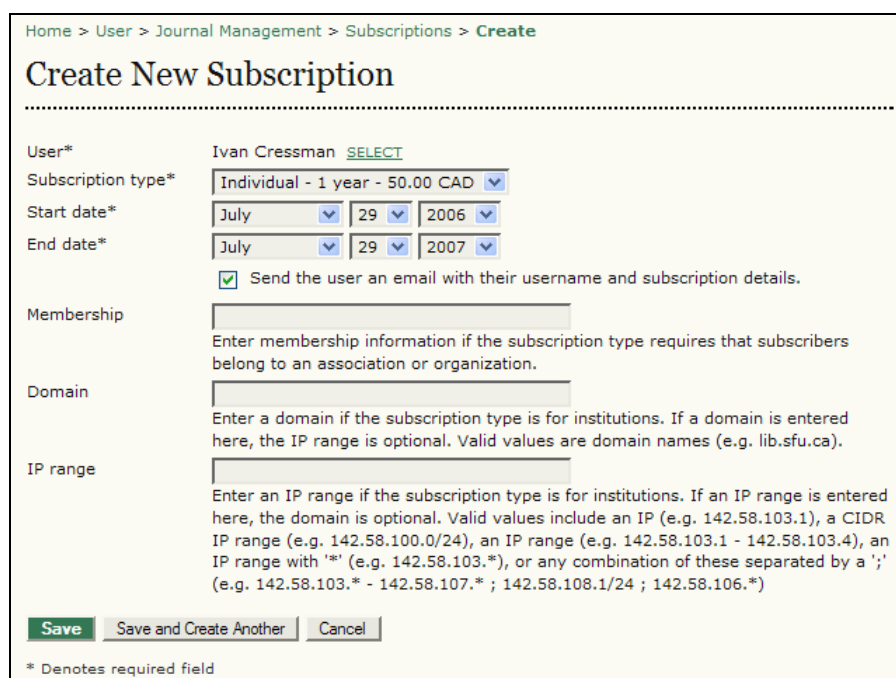
[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

USERNAME	NAME	EMAIL	
ADMIN	, admin	alec@smecher.bc.ca	ENROLL
RINA AKERS	Akers, Rina	rinaakers@mailina...	ENROLL
AMELIA BENNETT	Bennett, Amelia	ameliabennett@mai...	ENROLL
HAL CLARKE	Clarke, Hal	halclarke@mailina...	ENROLL
IVAN CRESSMAN	Cressman, Ivan	ivancressman@mail...	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:



Home > User > Journal Management > Subscriptions > Create

Create New Subscription

User* Ivan Cressman [SELECT](#)

Subscription type* Individual - 1 year - 50.00 CAD

Start date* July 29 2006

End date* July 29 2007

☒ Send the user an email with their username and subscription details.

Membership
Enter membership information if the subscription type requires that subscribers belong to an association or organization.

Domain
Enter a domain if the subscription type is for institutions. If a domain is entered here, the IP range is optional. Valid values are domain names (e.g. lib.sfu.ca).

IP range
Enter an IP range if the subscription type is for institutions. If an IP range is entered here, the domain is optional. Valid values include an IP (e.g. 142.58.103.1), a CIDR IP range (e.g. 142.58.100.0/24), an IP range (e.g. 142.58.103.1 - 142.58.103.4), an IP range with '*' (e.g. 142.58.103.*), or any combination of these separated by a ';' (e.g. 142.58.103.* - 142.58.107.* ; 142.58.108.1/24 ; 142.58.106.*)

* Denotes required field

Figure 91: New subscription details

Remember to 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:



Home > User > Journal Management > Subscriptions				
Subscriptions				
SUBSCRIPTIONS SUBSCRIPTION TYPES SUBSCRIPTION POLICIES				
USER	SUBSCRIPTION TYPE	START	END	ACTION
Ivan Cressman	Individual	2006-07-29	2007-07-29	EDIT DELETE
1 - 1 of 1 Items				
CREATE NEW SUBSCRIPTION				

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.

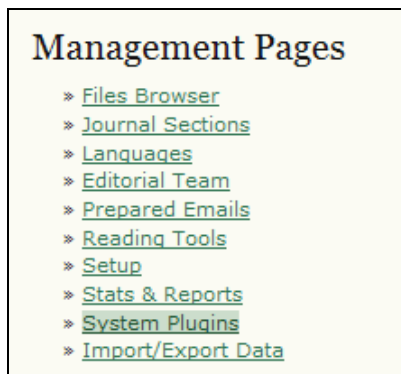


Figure 93: Journal Management menu

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:

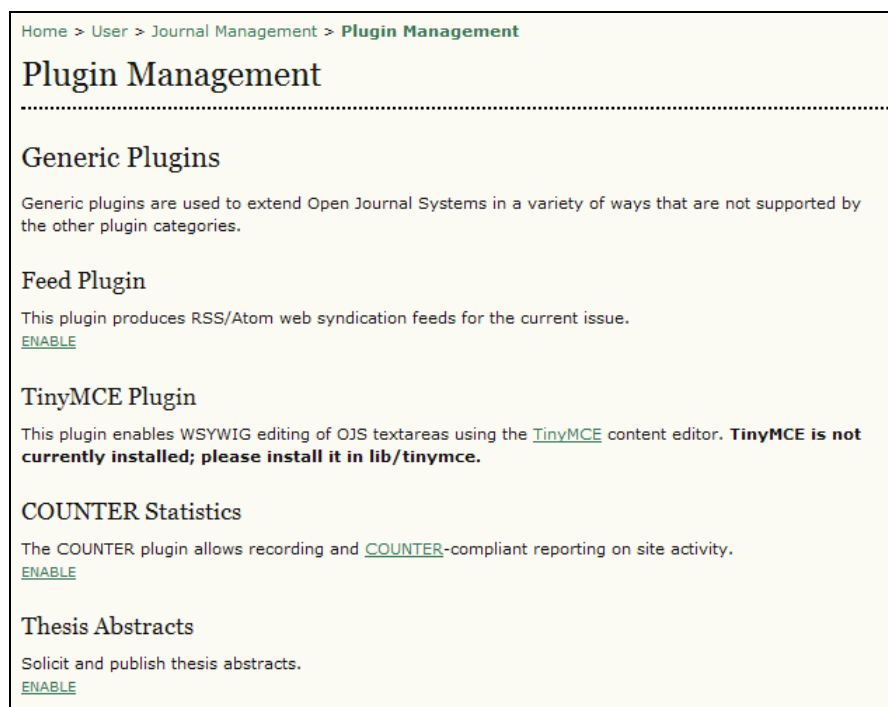


Figure 94: Plugin Management

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:

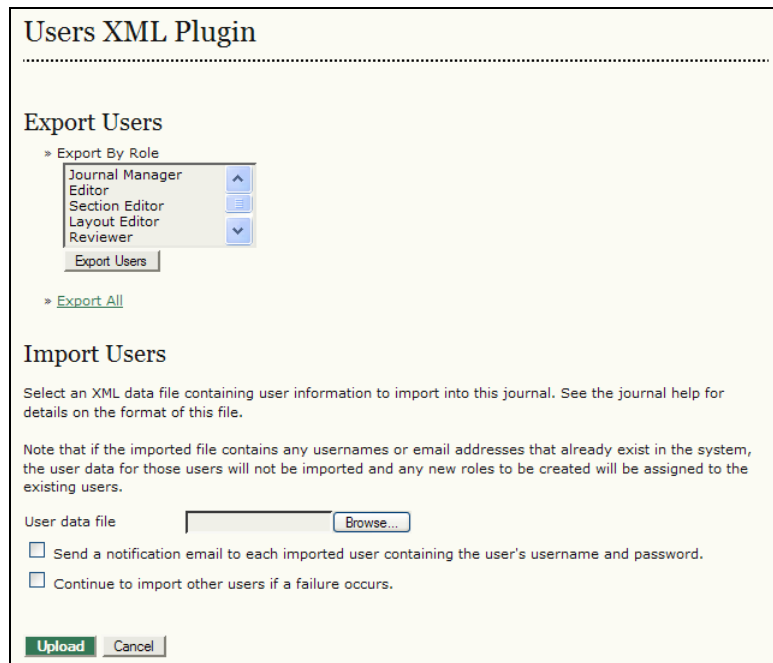


Figure 96 Import/Export Data page

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.



The screenshot shows a web interface titled "Users XML Plugin". It is divided into two main sections: "Export Users" and "Import Users".

Export Users

- Under "Export By Role", there is a dropdown menu with the following options: Journal Manager, Editor, Section Editor, Layout Editor, and Reviewer. The "Reviewers" option is currently selected.
- Below the dropdown is an "Export Users" button.
- There is also a link for "Export All".

Import Users

Select an XML data file containing user information to import into this journal. See the journal help for details on the format of this file.

Note that if the imported file contains any usernames or email addresses that already exist in the system, the user data for those users will not be imported and any new roles to be created will be assigned to the existing users.

User data file: [text input field] [Browse...]

☐ Send a notification email to each imported user containing the user's username and password.

☐ Continue to import other users if a failure occurs.

At the bottom, there are "Upload" and "Cancel" buttons.

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:

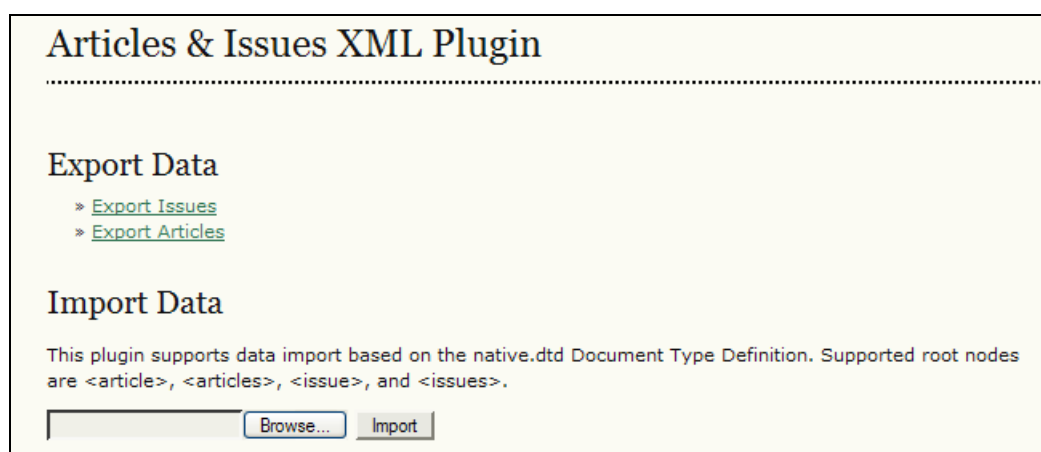
The screenshot shows a web interface titled "Articles & Issues XML Plugin". Below the title is a horizontal dotted line. Underneath, there are two sections: "Export Data" and "Import Data". The "Export Data" section contains two links: "» Export Issues" and "» Export Articles". The "Import Data" section contains a paragraph of text: "This plugin supports data import based on the native.dtd Document Type Definition. Supported root nodes are <article>, <articles>, <issue>, and <issues>." Below this text is a text input field, followed by a "Browse..." button and an "Import" button.

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':

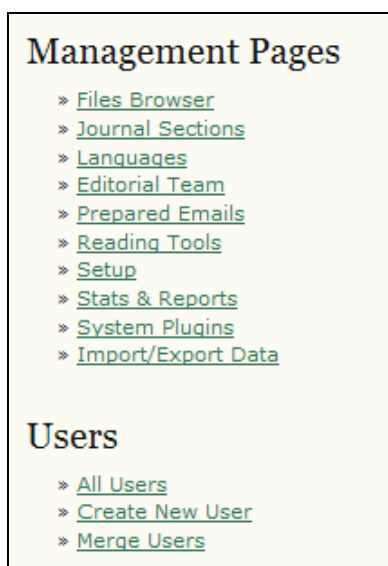


Figure 99: Users Menu

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:

Home > User > Journal Management > **Enrollment**

Enrollment

All Users

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

- [Journal Managers](#)
- [Editors](#)
- [Section Editors](#)
- [Layout Editors](#)
- [Copyeditors](#)
- [Proofreaders](#)
- [Reviewers](#)
- [Authors](#)
- [Readers](#)
- [Subscription Managers](#)

	USERNAME	NAME	EMAIL	ACTION
<input type="checkbox"/>	ADMIN	admin	alec@smecher...	EDIT
<input type="checkbox"/>	RINAAKERS	Rina Akers	rinaakers@ma...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	AMELIABENNETT	Amelia Bennett	ameliabennet...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	HALCLARKE	Hal Clarke	halclarke@ma...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	IVANCRESSMAN	Ivan Cressman	ivancressman...	EDIT LOG IN AS REMOVE DISABLE

Figure 100: All users

Enroll Existing Users

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

<input type="checkbox"/>	ARLETTESCHMIDT	Arlette Schmidt	arletteschmi...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	RAYSLATER	Ray Slater	rayslater@ma...	EDIT LOG IN AS REMOVE DISABLE
<input type="checkbox"/>	MARYW	Mary Wright	maryw@mailin...	EDIT LOG IN AS REMOVE DISABLE

1 - 12 of 12 Items

[ENROLL EXISTING USER](#) | [CREATE NEW USER](#) | [SYNC ENROLLMENT](#)

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':

People

Create New User

Enroll user as

- With no role
- Journal Manager
- Editor
- Section Editor
- Layout Editor
- Reviewer
- Copieditor
- Proofreader**
- Author
- Reader
- Subscription Manager

If no roles are selected, the user will be created in the system but not be enrolled in any role within this journal. Roles can be assigned or unassigned at any point after the user is created.

Username*

The username must contain only lowercase letters, numbers, and hyphens/underscores.

Password*

The password must be at least 6 characters.

Repeat password*

☒ Generate a random password.

☒ Send the user a welcome email containing their username and password.

☒ Require the user to change their password the next time they log in.

First name*

Middle name

Last name*

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'. On the resulting page, select a user you wish to merge with another user:

Home > User > Journal Management > **Merge Users**

Merge Users

Select a user to merge into another user account (e.g., when someone has two user accounts). The account selected first will be deleted and its submissions, assignments, etc. will be attributed to the second account.

All Users

All Users First name contains

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

- [Journal Managers](#)
- [Editors](#)
- [Section Editors](#)
- [Layout Editors](#)
- [Copyeditors](#)
- [Proofreaders](#)
- [Reviewers](#)
- [Authors](#)
- [Readers](#)
- [Subscription Managers](#)

USERNAME	NAME	EMAIL	ACTION
ADMIN	admin	alec@smecher... <input type="button" value="v"/>	
RINA AKERS	Rina Akers	rinaakers@ma... <input type="button" value="v"/>	MERGE USER
AMELIA BENNETT	Amelia Bennett	ameliabennet... <input type="button" value="v"/>	MERGE USER
HAL CLARKE	Hal Clarke	halclarke@ma... <input type="button" value="v"/>	MERGE USER
IVAN CRESSMAN	Ivan Cressman	ivanressman... <input type="button" value="v"/>	MERGE 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'.

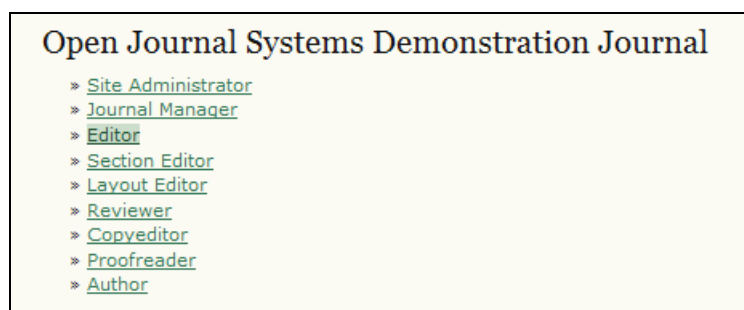


Figure 104: Signing in as an editor

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:

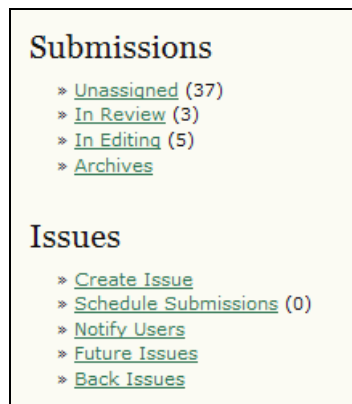


Figure 105: Editor's Menu

Assigning Articles

Select “unassigned” and then click the article title link.

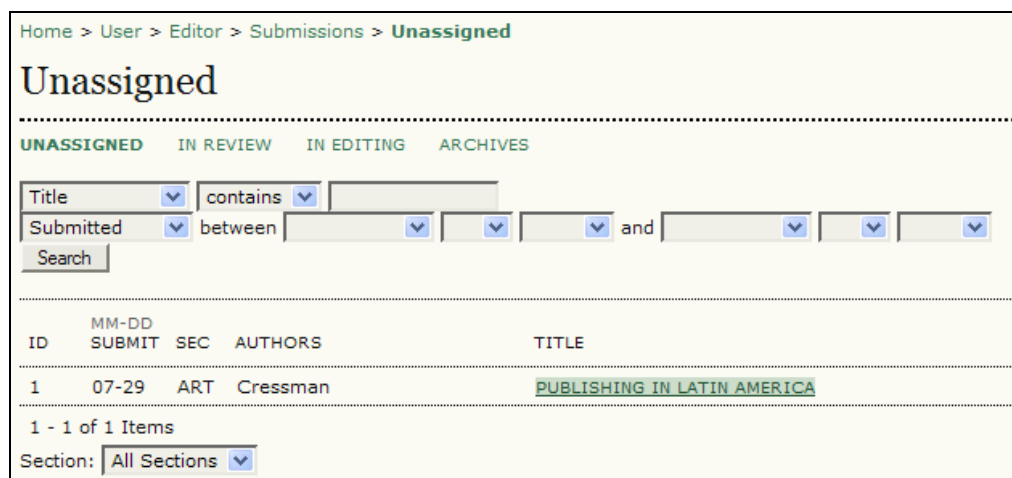


Figure 106: Selecting an unassigned article



On the “Summary” page, go to the “Submission” section:

Home > User > Editor > Submissions > #1 > **Summary**

#1 Summary

SUMMARY REVIEW EDITING HISTORY

Submission

Authors	Ivan Cressman 
Title	Publishing in latin america
Original file	1-1-1-SM.TXT 2006-07-29
Supp. files	None ADD A SUPPLEMENTARY FILE
Submitter	Ivan Cressman 
Date submitted	2006-07-29
Section	Articles Change to Articles <input type="button" value="Record"/>

Editors

	REVIEW	EDITING	REQUEST	ACTION
<i>None assigned</i>				
<input type="button" value="Record"/>	ADD SECTION EDITOR	ADD EDITOR	ADD SELF	

Status

Status	Awaiting assignment	ARCHIVE SUBMISSION
Initiated	2006-07-29	
Last modified	2006-07-29	

Submission Metadata

[EDIT METADATA](#)

[Authors](#)

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:

Select Section Editor

First name
contains

[A](#)
[B](#)
[C](#)
[D](#)
[E](#)
[F](#)
[G](#)
[H](#)
[I](#)
[J](#)
[K](#)
[L](#)
[M](#)
[N](#)
[O](#)
[P](#)
[Q](#)
[R](#)
[S](#)
[T](#)
[U](#)
[V](#)
[W](#)
[X](#)
[Y](#)
[Z](#)
[All](#)

NAME	JOURNAL SECTIONS	COMPLETED	ACTIVE	ACTION
LUCY KALEB	—	0	0	ASSIGN
MARY WRIGHT	—	0	0	ASSIGN

1 - 2 of 2 Items

Figure 108: Assigning a section editor

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

Home > User > Editor > Submissions > #1 > Summary > **Email**

Send Email

To

CC

BCC

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

Attachments

From Arlette Schmidt <arletteschmidt@mailinator.com>

Subject [OJSD] Editorial Assignment

Body

Lucy Kaleb:

The submission, "Publishing in latin america," to Open Journal Systems Demonstration Journal has been assigned to you to see through the editorial process in your role as Section Editor.

Submission URL:
<http://pkp.sfu.ca/ojs/checkout/index.php/newojs/sectionEditor/subn>
Username: lucykaleb

Thank you,
Arlette Schmidt
arletteschmidt@mailinator.com

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:

Home > User > Editor > Submissions > #1 > Summary > **Edit Metadata**

Edit Metadata

Authors

First name*	<input type="text" value="Ivan"/>
Middle name	<input type="text"/>
Last name*	<input type="text" value="Cressman"/>
Affiliation	<input type="text"/>
Email*	<input type="text" value="ivanecressman@mailinator.com"/>
URL	<input type="text"/>
Bio statement (E.g., department and rank)	<input type="text"/>

Title and Abstract

Title*	<input type="text" value="Publishing in latin america"/>
Title (Español (España))	<input type="text" value="El publicar en América latina"/>
Title (Français (Canada))	<input type="text"/>
Abstract	<input type="text" value="This is an article about the current state of publishing in Latin America."/>

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:

Home > User > Editor > Submissions > #1 > **Summary**

#1 Summary

SUMMARY REVIEW **EDITING** HISTORY

Figure 111: Summary Links

Issues

Return to the Editor Home page:

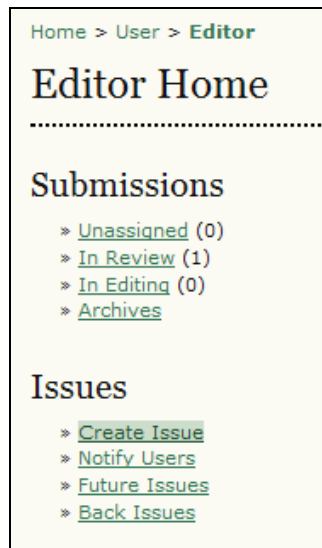


Figure 112: Editor's Menu

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”:

Home > User > Editor > Issues > **Create Issue**

Create Issue

CREATE ISSUE FUTURE ISSUES BACK ISSUES

Issue: ----- Future Issues ----- ▼

Identification

Volume

Number

Year

Issue identification ▼

Title

Description

Cover

☒ Create custom cover page for this issue.

Cover image Use Save to upload file.
(Allowed formats: .gif, .jpg, or .png)

Cover caption

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:

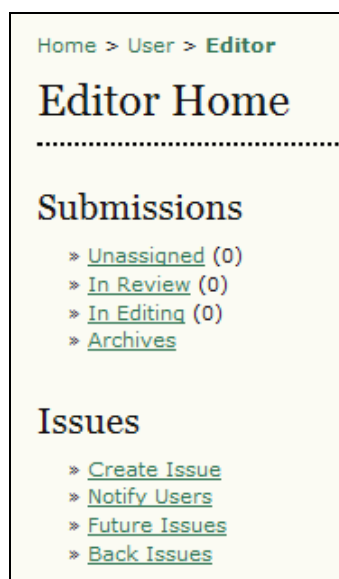


Figure 114: Editor Home Menu

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

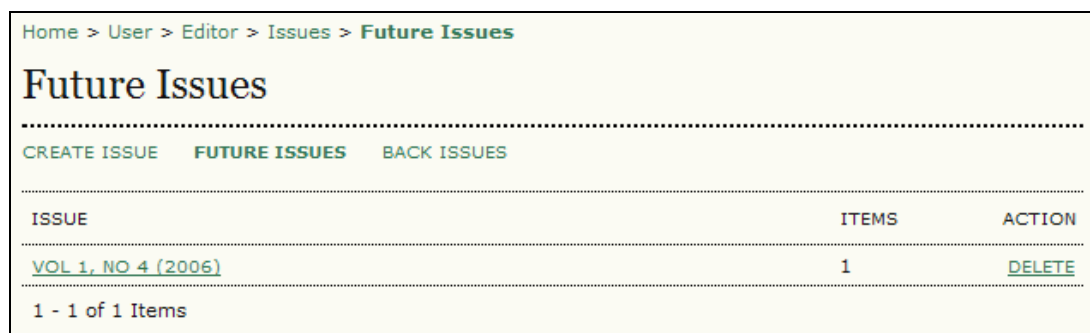
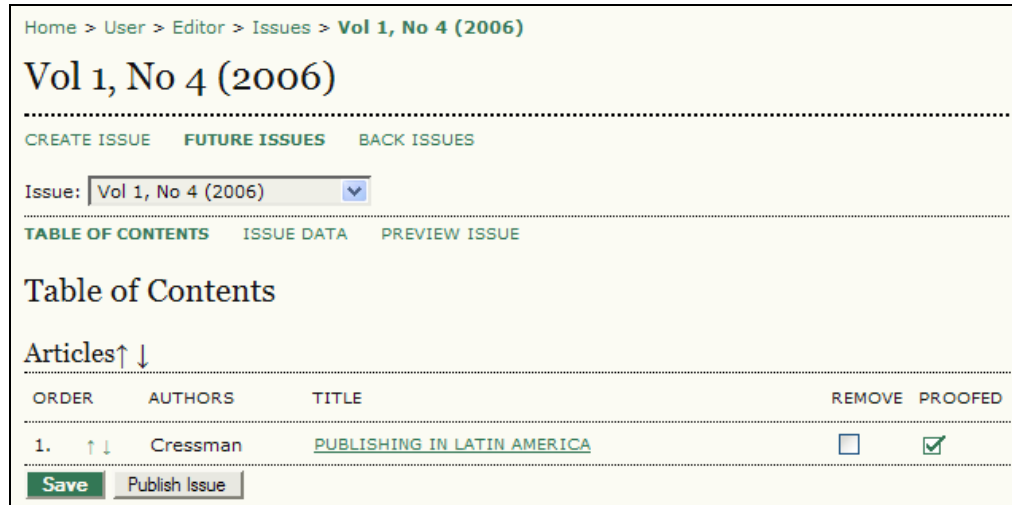


Figure 115: Future Issues

Select the issue you wish to publish:



Home > User > Editor > Issues > Vol 1, No 4 (2006)

Vol 1, No 4 (2006)

CREATE ISSUE FUTURE ISSUES BACK ISSUES

Issue: Vol 1, No 4 (2006)

TABLE OF CONTENTS ISSUE DATA PREVIEW ISSUE

Table of Contents

Articles ↑ ↓

ORDER	AUTHORS	TITLE	REMOVE	PROOFED
1.	Cressman	PUBLISHING IN LATIN AMERICA	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Publish Issue

Figure 116: Table of Contents

You can review each article by clicking its linked title:



Home > User > Editor > Submissions > #1 > Summary

#1 Summary

SUMMARY REVIEW EDITING HISTORY

Submission

Authors: Ivan Cressman

Title: Publishing in latin america

Original file: [1-1-1-SM.TXT](#) 2006-07-29

Supp. files: None [ADD A SUPPLEMENTARY FILE](#)

Submitter: Ivan Cressman

Date submitted: 2006-07-29

Section: Articles Change to: Articles Record

Abstract Views: 0

Editors

	REVIEW	EDITING	REQUEST	ACTION
Section Editor: Lucy Kaleb	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2006-07-29	DELETE

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:

Home > User > Editor > Issues > Email

Send Email

Recipients

☐ Send this message to the users associated with this journal who have indicated that they wish to receive updates (0 users)

☒ Send this message to all users associated with this journal (11 users)

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

Issue

☒ Include the table of contents from this issue: Vol 1, No 4 (2006) ▼

From: Arlette Schmidt <arletteschmidt@mailinator.com>

Subject: [OJSD] New Issue Published

Body:

Readers:

Open Journal Systems Demonstration Journal has just published its latest issue at <http://pkp.sfu.ca/ojs/checkout/index.php/newojs>. We invite you to review the Table of Contents here and then visit our web site to review articles and items of interest.

Thanks for the continuing interest in our work,
Arlette Schmidt
arletteschmidt@mailinator.com

Figure 118: Notifying users

View Future Issues

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



Home > User > Editor > Issues > Future Issues			
Future Issues			
CREATE ISSUE SCHEDULING FUTURE ISSUES BACK ISSUES			
ISSUE		NO. ARTICLES	ACTION
VOL 1, NO 3 (2005)		0	DELETE

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:



Home > User > Editor > Issues > Back Issues			
Back Issues			
CREATE ISSUE SCHEDULING FUTURE ISSUES BACK ISSUES			
ISSUE	PUBLISHED	NO. ARTICLES	ACTION
VOL 1, NO 2 (2005)	2005-05-09	2	DELETE
VOL 1, NO 1 (2005)	2005-05-08	3	DELETE

Figure 120: Viewing back issues

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

Vol 1, No 1 (2005)

[CREATE ISSUE](#)
[SCHEDULING](#)
[FUTURE ISSUES](#)
[BACK ISSUES](#)

Issue: Vol 1, No 1 (2005)

[TABLE OF CONTENTS](#)
[ISSUE DATA](#)

Table of Contents

Articles ↑ ↓

ORDER		AUTHORS	TITLE	REMOVE
1.	↑ ↓	Rogers	UNDERSTANDING IN THE ABSENCE OF MEANING: COMING OF AGE...	<input type="checkbox"/>
2.	↑ ↓	Willinsky	SCHOLARLY ASSOCIATIONS AND THE ECONOMIC VIABILITY OF OPEN...	<input type="checkbox"/>
3.	↑ ↓	Korteweg	INVERTED HOLLYWOOD: THE PITCH FOR E-KNOWLEDGE	<input type="checkbox"/>
4.	↑ ↓	Willinsky	COPYRIGHT CONTRADICTIONS IN SCHOLARLY PUBLISHING	<input type="checkbox"/>
5.	↑ ↓	Klinger	"ARE THEY TALKING YET?" ONLINE DISCOURSE AS POLITICAL...	<input type="checkbox"/>
6.	↑ ↓	Willinsky	DEMOCRACY AND EDUCATION: THE MISSING LINK MAY BE OURS	<input type="checkbox"/>

Reviews ↑ ↓

ORDER		AUTHORS	TITLE	REMOVE
1.	↑ ↓	Inglis	REVIEW OF KAROLIDES: READER RESPONSE IN SECONDARY AND...	<input type="checkbox"/>

Save

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':

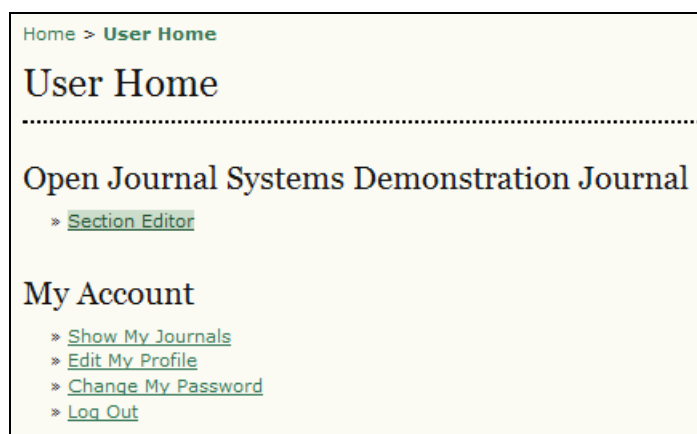


Figure 122: Signing in as a section editor

Submissions

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

Home > User > Section Editor > **Submissions in Review**

Submissions in Review

IN REVIEW IN EDITING ARCHIVES

Title contains

Submitted between and

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	PEER REVIEW ASK	REVIEW DUE	DONE	RULING
1	07-29	ART	Cressman	PUBLISHING IN LATIN AMERICA	—	—	—	—

1 - 1 of 1 Items

Section:

Notes

Due indicates number of weeks remaining until the review's due date or (-) weeks that it is overdue. It is filled in when a reviewer accepts the request to review.

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:

Home > User > Section Editor > Submissions > #1 > Review

#1 Review

SUMMARY REVIEW EDITING HISTORY

Submission

Authors	Ivan Cressman 
Title	Publishing in latin america
Section	Articles
Editor	Lucy Kaleb 
Review Version	1-2-1-RV.TXT 2006-07-29 ENSURING A BLIND REVIEW
	Upload a revised Review Version <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>
Supp. files	None

Peer Review Round 1

[SELECT REVIEWER](#) [VIEW REGRETS, CANCELS, PREVIOUS ROUNDS](#)

Editor Decision



Select decision	<input type="button" value="Choose One"/> <input type="button" value="Record Decision"/>
Decision	None
Notify Author	 Editor/Author Email Record 
Review Version	1-2-1-RV.TXT 2006-07-29
Author Version	None
Editor Version	None
	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>

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:

Home > User > Section Editor > Submissions > #1 > Review > **Reviewers**

Reviewers

Select Reviewer

Reviewing interests contains

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

[ENROLL EXISTING USER AS REVIEWER](#) | [CREATE NEW REVIEWER](#)

NAME	REVIEWING INTERESTS	RATING	DONE	WEEKS	LATEST	ACTIVE	ACTION
KARENZA REGA		N/A	0	—	—	0	ASSIGN
RAY SLATER		N/A	0	—	—	0	ASSIGN

1 - 2 of 2 Items

Notes

Name links to reviewer's profile.
 Ratings is out of 5 (Excellent).
 Weeks refers to average period of time to complete a review.
 Latest is date of most recently accepted review.
 Active is how many reviews are currently being considered or underway.

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:

Peer Review **Round 1** [SELECT REVIEWER](#) [VIEW REGRETS, CANCELS, PREVIOUS ROUNDS](#)

Reviewer A **Karenza Rega** [CLEAR REVIEWER](#)

REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
<input type="button" value="REQUEST"/>	<input type="button" value="UNDERWAY"/>	2006-08-26	<input type="button" value="ACKNOWLEDGE"/>

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:

Peer Review Round 1 [SELECT REVIEWER](#) [VIEW REGRETS, CANCELS, PREVIOUS ROUNDS](#)

Reviewer A Karenza Rega [CANCEL REQUEST](#)

	REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
	2006-07-29		2006-08-26	

Editor To Enter [AGREE TO REVIEW](#)

Upload review [Browse...](#) [Upload](#)

[RECOMMENDATION](#)

Reviewer rating [5 High](#) [Record](#)

Figure 127: Review Request Date

Working with Reviewers

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

Reviewer A Karenza Rega [CANCEL REQUEST](#)

	REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
	2006-07-29	2006-07-29	2006-08-26	

Recommendation None [SEND REMINDER](#)

Review 2006-07-29

Uploaded files None

Editor To Enter Upload review [Browse...](#) [Upload](#)

[RECOMMENDATION](#)

Reviewer rating [5 High](#) [Record](#)

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:





Reviewer A	Karenza Rega			
	REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
	2006-07-29	2006-07-29 	<u>2006-08-26</u>	
Recommendation	Accept Submission 2006-07-29			
Review	 2006-07-29			
Uploaded files	None			
Reviewer rating	5 High  <input type="button" value="Record"/>			

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:

The screenshot shows a web interface titled "Copyediting". At the top, there are two tabs: "COPYEDITOR" (which is highlighted) and "ASSIGN COPYEDITOR". Below the tabs, there are five columns representing the stages of the process: "REVIEW METADATA", "REQUEST", "UNDERWAY", "COMPLETE", and "ACKNOWLEDGE".

	REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit		—	—	—	
File: Request email cannot be sent until file is selected for copyediting in Editor Decision, Review page.					
2. Author Copyedit		—	—	—	
File:					
3. Final Copyedit		—	—	—	
File:					

Below the table, there is a section for "Upload file to" with three radio buttons: "Step 1" (selected), "Step 2, or", and "Step 3". To the right of these buttons are two buttons: "Browse..." and "Upload".

At the bottom, there is a link for "Copyedit Comments" and a link for "COPYEDIT INSTRUCTIONS".

Figure 133: Assigning a copyeditor

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

The screenshot shows a web interface titled "Assign Copyeditor". At the top, there is a search bar with a dropdown menu for "First name" and a dropdown menu for "contains". To the right of the search bar is a "Search" button.

Below the search bar, there is a row of letters: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All.

NAME	COMPLETED	ACTIVE	LATEST	ACTION
BENNETT, AMELIA	0	0	—	ASSIGN

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:



Copyediting				
Copyeditor	Amelia Bennett	ASSIGN COPYEDITOR		
REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit		—	—	
File: 1-4-1-CE.TXT 2006-07-29				

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.






Copyediting				
Copyeditor	Amelia Bennett	ASSIGN COPYEDITOR		
REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit	 2006-07-29	2006-07-29	2006-07-29	
File: 1-4-2-CE.TXT 2006-07-29				
2. Author Copyedit	 2006-07-29	2006-07-29	2006-07-29	
File: 1-4-3-CE.TXT 2006-07-29				
3. Final Copyedit	 2006-07-29	2006-07-29	2006-07-29	
File: 1-4-4-CE.TXT 2006-07-29				
Upload file to <input type="radio"/> Step 1, <input type="radio"/> Step 2, or <input checked="" type="radio"/> Step 3 <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>				
Copyedit Comments  COPYEDIT INSTRUCTIONS				

Figure 136: Completing the copyediting process

Be sure to use the Acknowledge email messages to thank everyone involved for their participation.

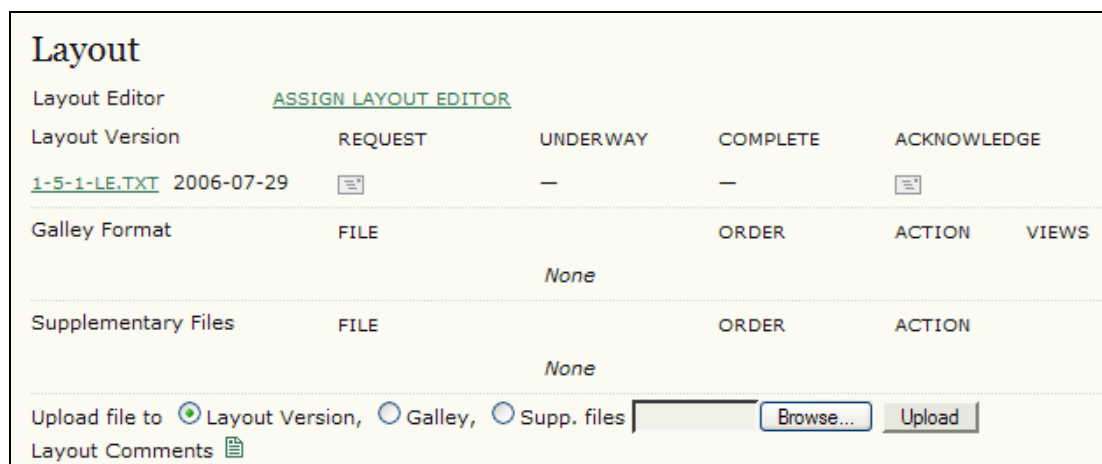
For journals where the section editor acts as the copyeditor, you can begin the copyediting process by selecting the “Initiate” link. The section editor reviews the copyedit version of the article by selecting the file link (e.g., 1–4–1–CE.TXT). He or she then makes any changes and uploads the edited 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:



Layout

Layout Editor [ASSIGN LAYOUT EDITOR](#)

Layout Version	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1-5-1-LE.TXT 2006-07-29		—	—	

Galley Format	FILE	ORDER	ACTION	VIEWS
	None			

Supplementary Files	FILE	ORDER	ACTION
	None		

Upload file to ☒ Layout Version, ☐ Galley, ☐ Supp. files

Layout Comments

Figure 137: Assigning the layout editor

Choose a layout editor from the list:

Home > User > Section Editor > Submissions > #1 > Editing > **Layout Editors**

Layout Editors

Select Layout Editor

First name contains

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [All](#)

NAME	COMPLETED	ACTIVE	LATEST	ACTION
ORNER, ABBY	0	0	—	ASSIGN

Figure 138: Assigning the Layout Editor

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

Layout

Layout Editor Abby Orner [ASSIGN LAYOUT EDITOR](#)

Layout Version	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1-5-1-LE.TXT 2006-07-29		—	—	

Galley Format	FILE	ORDER	ACTION	VIEWS
None				

Supplementary Files	FILE	ORDER	ACTION
None			

Upload file to ☒ Layout Version, ☐ Galley, ☐ Supp. files

[Layout Comments](#) 

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:

Layout

Layout Editor
Abby Orner
[ASSIGN LAYOUT EDITOR](#)

Layout Version	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1-5-1-LE.TXT 2006-07-29 <div> </div>	<div> </div> 2006-07-29	2006-07-29	2006-07-29	<div> </div>

Galley Format	FILE		ORDER	ACTION	VIEWS
1. PDF VIEW PROOF	1-6-1-PB.PDF 2006-07-29		↑ ↓	EDIT DELETE	0
2. HTML VIEW PROOF	1-7-1-PB.HTML 2006-07-29		↑ ↓	EDIT DELETE	0

Supplementary Files	FILE		ORDER	ACTION
None				

Upload file to
☒ Layout Version,
☐ Galley,
☐ Supp. files

Browse...
Upload

Layout Comments

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:

Proofreading

Proofreader
[ASSIGN PROOFREADER](#)

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	<div> </div>	—	—	<div> </div>
2. Proofreader	<div> </div>	—	—	<div> </div>
3. Layout Editor	<div> </div>	—	—	<div> </div>

Proofreading Corrections
[PROOFING INSTRUCTIONS](#)

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:

Home > User > Section Editor > Submissions > #1 > Editing > **Proofreaders**

Proofreaders

Assign Proofreader

First name contains

[All](#)

NAME	COMPLETED	ACTIVE	LATEST	ACTION
AKERS, RINA	0	0	—	ASSIGN

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 galley and have recorded any necessary changes in the “proofreading corrections” section, send acknowledgement messages thanking all involved for their efforts:

Proofreading

Proofreader: [Rina Akers](#) [ASSIGN PROOFREADER](#)

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2006-07-29	2006-07-29	2006-07-29	
2. Proofreader	2006-07-29	2006-07-29	2006-07-29	
3. Layout Editor	2006-07-29	2006-07-29	2006-07-29	

[Proofreading Corrections](#) [PROOFING INSTRUCTIONS](#)

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:

Proofreading Corrections [PROOFING INSTRUCTIONS](#)

Scheduling

Schedule for publication in To Be Assigned

Record

Dropdown Menu:

- To Be Assigned
- Future Issues -----
- Vol 1, No 4 (2006)
- Current Issue -----
- Back Issues -----

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'.

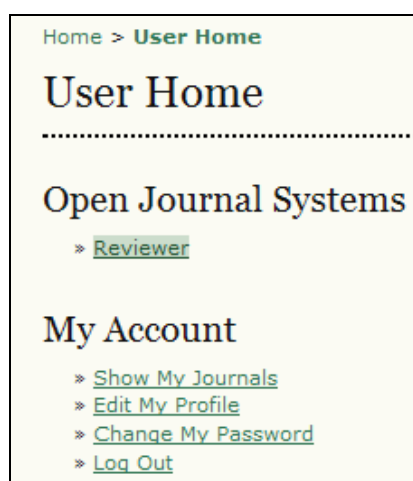


Figure 145: Selecting role as Reviewer

Reviewing Articles

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



Home > User > Reviewer > Active Submissions						
Active Submissions						
.....						
ACTIVE ARCHIVE						
.....						
ID	MM-DD ASSIGNED	SEC	TITLE		DUE	REVIEW ROUND
1	07-29	ART	PUBLISHING IN LATIN AMERICA		08-26	1
.....						
1 - 1 of 1 Items						

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):






Home > User > Reviewer > #1 > Review	
#1 Review	
.....	
Submission To Be Reviewed	
Title	Publishing in latin america
Journal Section	Articles
Abstract	This is an article about the current state of publishing in Latin America.
Submission Editor	Lucy Kaleb 
.....	
Review Schedule	
Editor's Request	2006-07-29
Your Response	—
Review Submitted	—
Review Due	2006-08-26
.....	

Figure 147: Review page

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

Review Steps

1. Notify the submission's editor as to whether you will undertake the review.
 Response Will do the review  Unable to do the review 
2. Click on file names to download and review (on screen or by printing) the files associated with this submission.
 Files can only be viewed if the review is undertaken
3. Click on icon to enter (or paste) your review of this submission.
 Review 
4. In addition, you can upload files for the editor and/or author to consult.
 Uploaded files None

[ENSURING A BLIND REVIEW](#)
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.
 Recommendation

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:

Home > User > Reviewer > Email

Send Email

To:

CC:

BCC:

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

Attachments:

From: Karenza Rega <karenzarega@mailinator.com>

Subject:

Body:

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:

Review

.....

No Reviews

Subject Publishing in latin america

For author and editor The article provides an interesting ...

For editor

* Denotes required field

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:

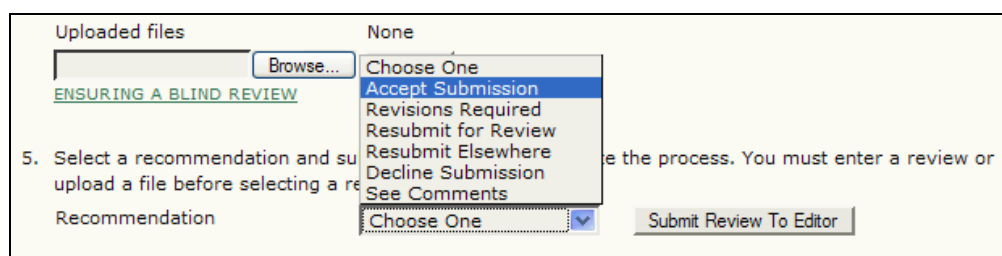


Figure 151: Making a recommendation

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:

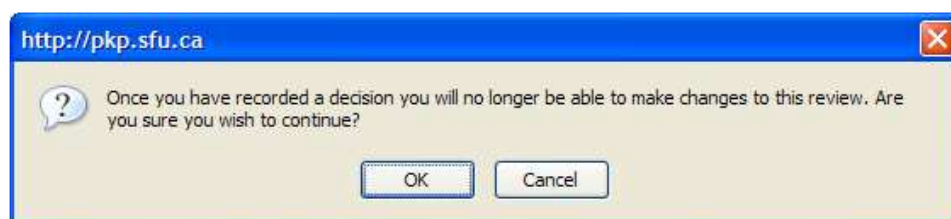


Figure 152: Warning message

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

Home > User > Reviewer > Email

Send Email

To

CC

BCC

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

Attachments

From Karenza Rega <karenzarega@mailinator.com>

Subject

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

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:



Home > User > Copyeditor > **Active Submissions**

Active Submissions

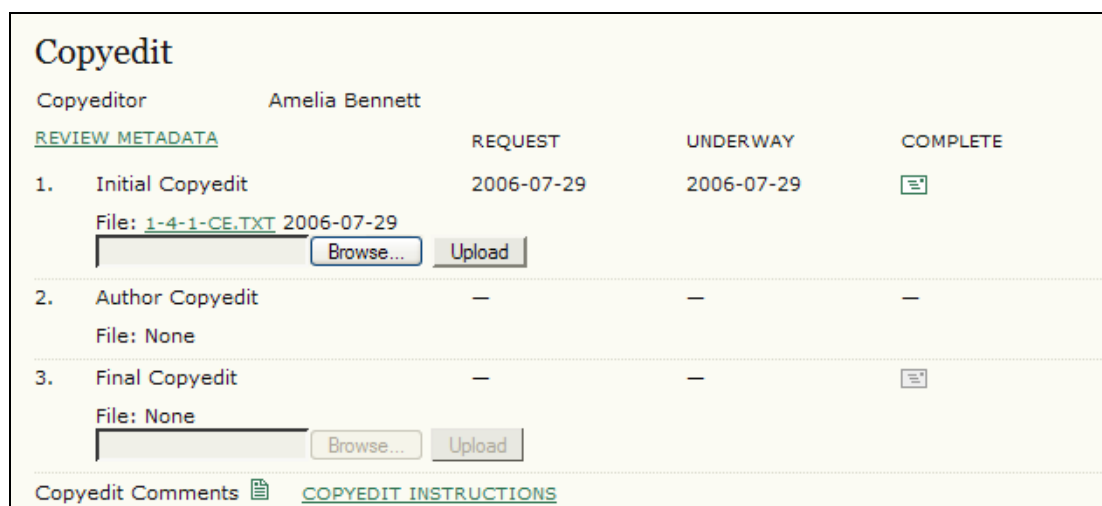
ACTIVE [ARCHIVE](#)

ID	MM-DD ASSIGN	SEC	AUTHORS	TITLE	STATUS
1	07-29	ART	Cressman	PUBLISHING IN LATIN AMERICA	Step 1

1 - 1 of 1 Items

Figure 155: Selecting an article for copyediting

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



Copyedit

Copyeditor: Amelia Bennett

	REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE
1. Initial Copyedit		2006-07-29	2006-07-29	
File: 1-4-1-CE.TXT 2006-07-29				
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>				
2. Author Copyedit		—	—	—
File: None				
3. Final Copyedit		—	—	
File: None				
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>				

[Copyedit Comments](#) [COPYEDIT INSTRUCTIONS](#)

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:

Copyedit

Copyeditor: Amelia Bennett

	REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE
1. Initial Copyedit		2006-07-29	2006-07-29	2006-07-29
File: 1-4-2-CE.TXT 2006-07-29				
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>				
2. Author Copyedit		2006-07-29	2006-07-29	2006-07-29
File: 1-4-3-CE.TXT 2006-07-29				
3. Final Copyedit		2006-07-29	2006-07-29	2006-07-29
File: 1-4-4-CE.TXT 2006-07-29				
<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>				

[Copyedit Comments](#) [COPYEDIT INSTRUCTIONS](#)

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:

Home > User > Layout Editor > **Active Submissions**

Active Submissions

ACTIVE ARCHIVE

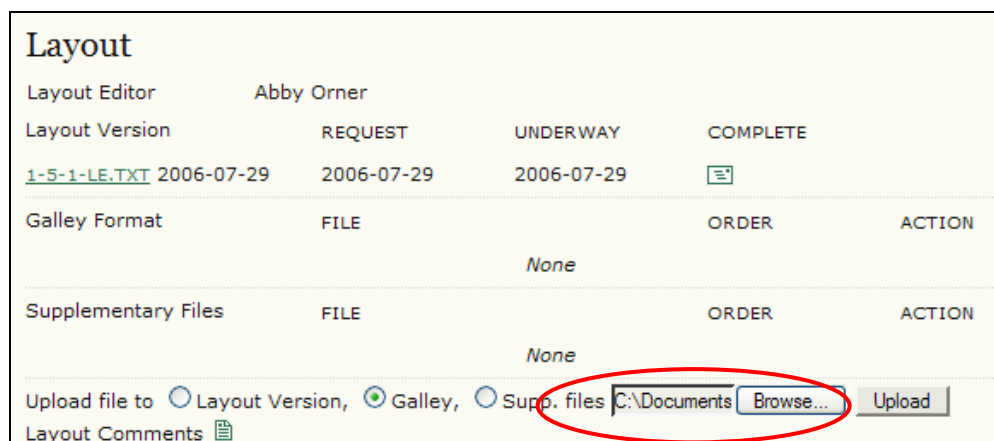
ID	MM-DD ASSIGN	SEC	AUTHORS	TITLE	STATUS
1	07-29	ART	Cressman	PUBLISHING IN LATIN AMERICA	Initial

1 - 1 of 1 Items

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:



Layout

Layout Editor: Abby Orner

Layout Version	REQUEST	UNDERWAY	COMPLETE
1-5-1-LE.TXT 2006-07-29	2006-07-29	2006-07-29	

Galley Format	FILE	ORDER	ACTION
None			

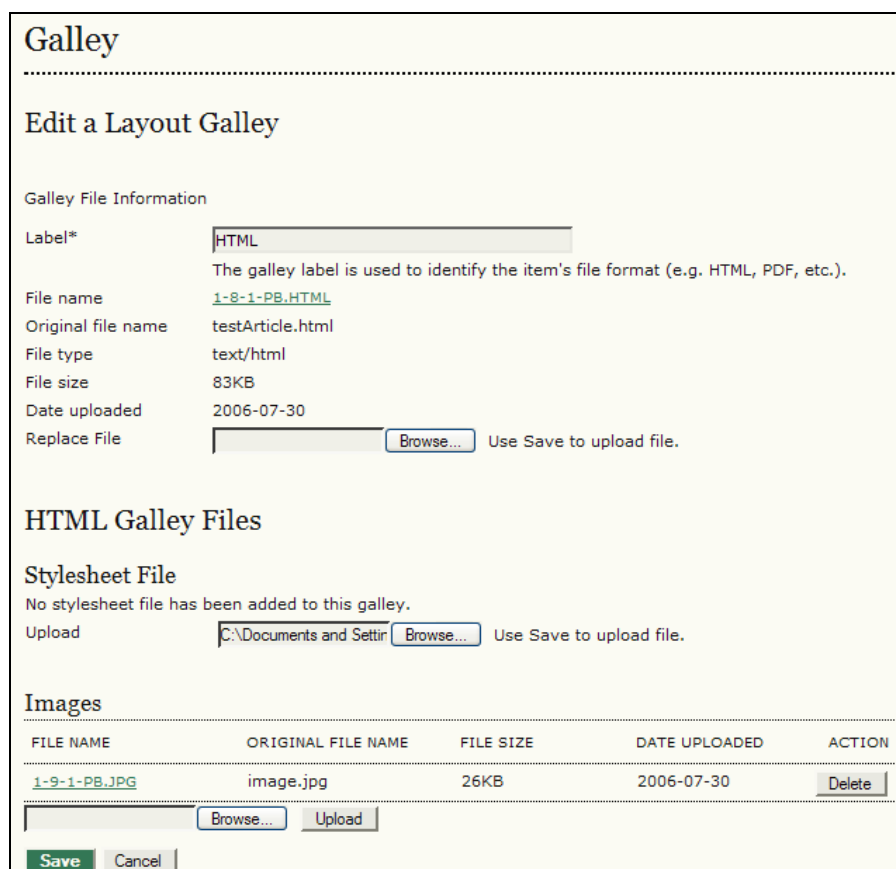
Supplementary Files	FILE	ORDER	ACTION
None			

Upload file to: ☐ Layout Version, ☒ Galley, ☐ Supp. files **Browse...**

Layout Comments

Figure 160: Uploading galley files

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



Galley

.....

Edit a Layout Galley

Galley File Information

Label*
The galley label is used to identify the item's file format (e.g. HTML, PDF, etc.).

File name [1-8-1-PB.HTML](#)

Original file name testArticle.html

File type text/html

File size 83KB

Date uploaded 2006-07-30

Replace File Use Save to upload file.

HTML Galley Files

Stylesheet File

No stylesheet file has been added to this galley.

Upload Use Save to upload file.

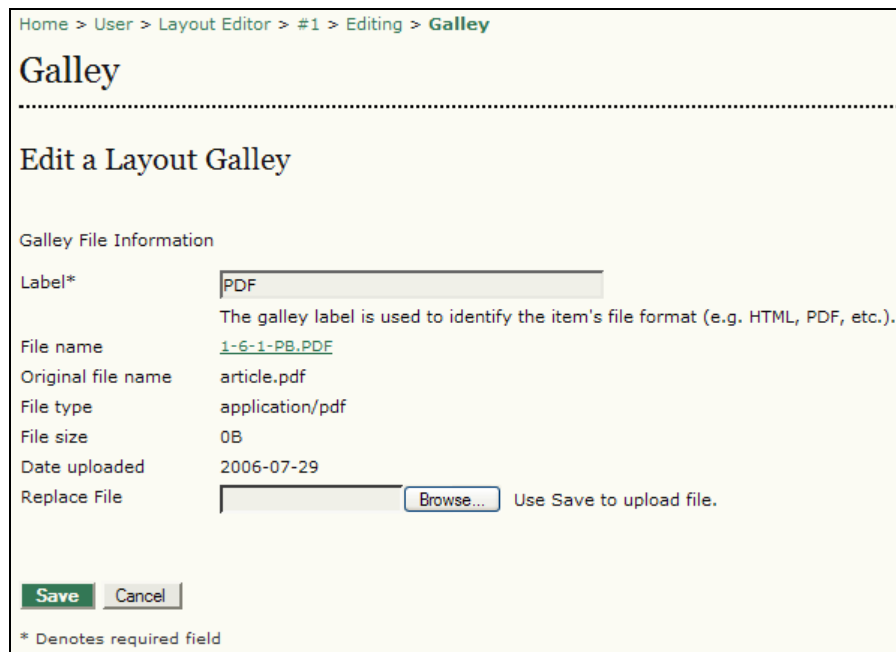
Images

FILE NAME	ORIGINAL FILE NAME	FILE SIZE	DATE UPLOADED	ACTION
1-9-1-PB.JPG	image.jpg	26KB	2006-07-30	<input type="button" value="Delete"/>

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):



Home > User > Layout Editor > #1 > Editing > Galley

Galley

Edit a Layout Galley

Galley File Information

Label* The galley label is used to identify the item's file format (e.g. HTML, PDF, etc.).

File name

Original file name

File type

File size

Date uploaded

Replace File Use Save to upload file.

* Denotes required field

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:

Layout

Layout Editor Abby Orner

Layout Version	REQUEST	UNDERWAY	COMPLETE
1-5-1-LE.TXT 2006-07-29	2006-07-29	2006-07-29	

Galley Format	FILE	ORDER	ACTION
1. PDF VIEW PROOF	1-6-1-PB.PDF 2006-07-29	↑ ↓	EDIT DELETE
2. HTML VIEW PROOF	1-7-1-PB.HTML 2006-07-29	↑ ↓	EDIT DELETE

Supplementary Files	FILE	ORDER	ACTION
None			

Upload file to ☒ Layout Version, ☐ Galley, ☐ Supp. files

[Layout Comments](#)

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:

Proofreading

Proofreader Rina Akers

	REQUEST	UNDERWAY	COMPLETE
1. Author	2006-07-29	2006-07-29	2006-07-29
2. Proofreader	2006-07-29	2006-07-29	2006-07-29
3. Layout Editor	2006-07-29	2006-07-29	

[Proofreading Corrections](#) [PROOFING INSTRUCTIONS](#)

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:

Layout

Layout Editor

Abby Orner

Galley Format

FILE

1. PDF

[VIEW PROOF](#)

[1-6-1-PB.PDF](#)

2006-07-29

2. HTML

[VIEW PROOF](#)

[1-7-1-PB.HTML](#)


2006-07-29

Supplementary Files

FILE

None

Layout Comments



Proofreading

Proofreader

Rina Akers

REQUEST

UNDERWAY

COMPLETE

1. Author Comments

2006-07-29

2006-07-29

2006-07-29

2. Proofreader Comments

2006-07-29

2006-07-29




3. Layout Editor Final

—

—

—

Proofreading Corrections



[PROOFING INSTRUCTIONS](#)

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':

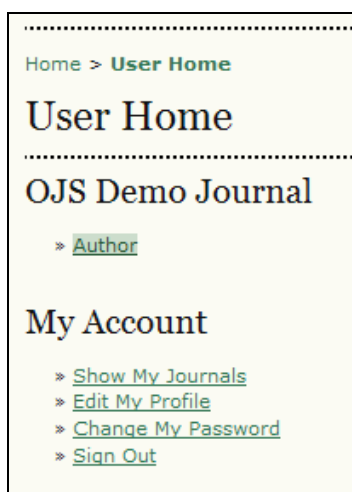


Figure 167: Selecting your role as an author

Submitting Articles

Step 1: Start the submission process by selecting the “Click here to start the submission process” link:

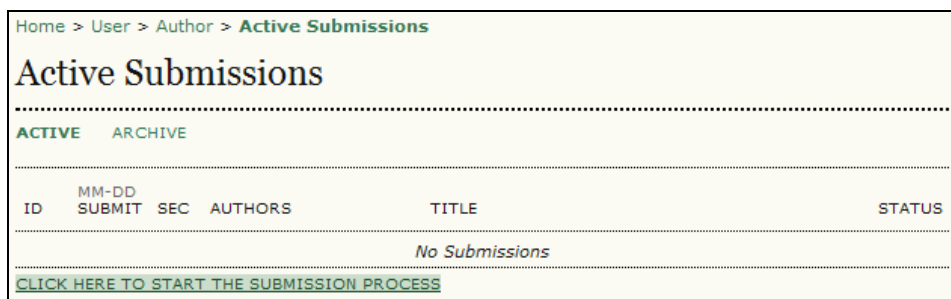


Figure 168: Starting a new submission

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

Submission Checklist

Indicate that this submission is ready to be considered by this journal by checking off the following (comments to the editor can be added below).

- ☐ The submission has not been previously published, nor is it before another journal for consideration (or an explanation has been provided in Comments to the Editor).
- ☐ The submission file is in Microsoft Word, RTF, or WordPerfect document file format.
- ☐ When available, the URLs to access references online are provided, including those for open access versions of the reference. The URLs are ready to click (e.g., <http://pkp.sfu.ca>).
- ☐ The text is single-spaced; uses a 12-point font; employs italics, rather than underlining (except with URL addresses); and all illustrations, figures, and tables are placed within the text at the appropriate points, rather than at the end.
- ☐ The text adheres to the stylistic and bibliographic requirements outlined in the [Author Guidelines](#), which is found in About the Journal.
- ☐ If submitting to a peer-reviewed section of the journal, the instructions in [Ensuring a Blind Review](#) have been followed.

Figure 169: Submission Checklist

2. Select which section you feel is most appropriate for your article:

Journal Section

Select the appropriate section for this submission (see Sections and Policies in [About the Journal](#)).

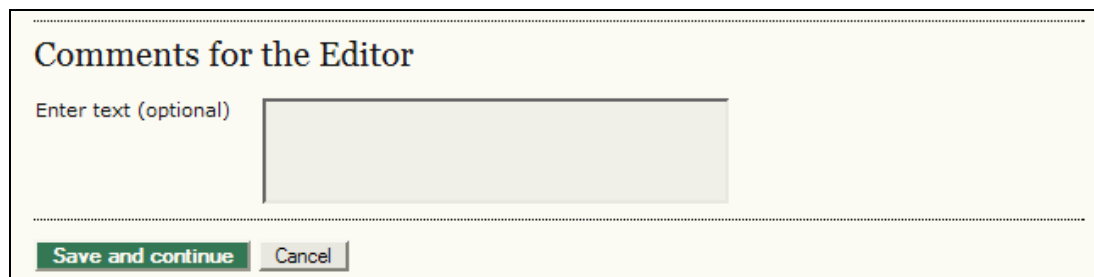
Section *
Please select a section...

Comments for
Please select a section...

Articles
Reviews

Figure 170: Selecting the Journal Section

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



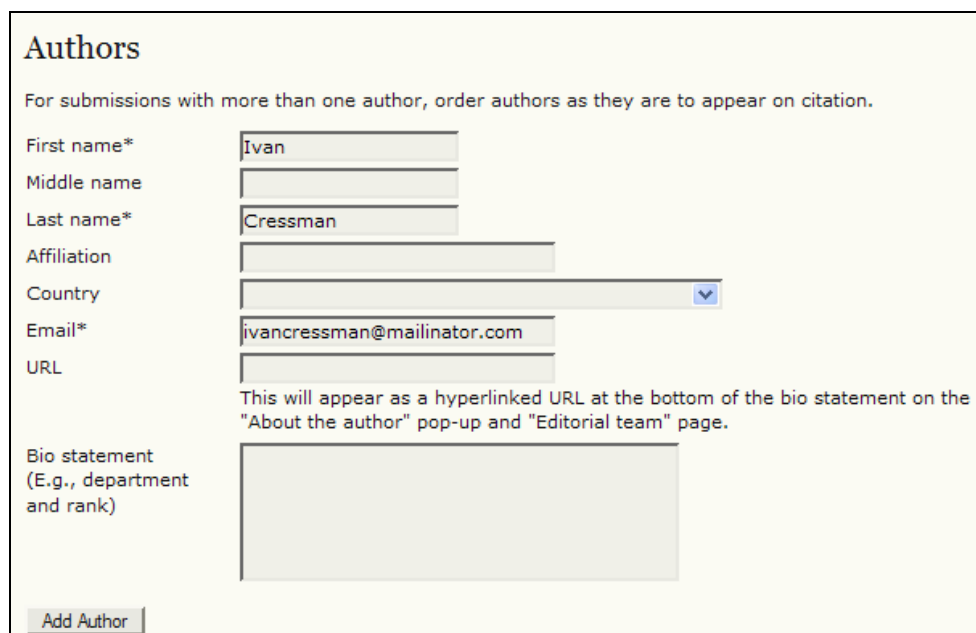
The screenshot shows a form titled "Comments for the Editor". Below the title is a text input field with the placeholder text "Enter text (optional)". At the bottom of the form are two buttons: "Save and continue" (highlighted in green) and "Cancel".

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:



The screenshot shows a form titled "Authors". Below the title is a note: "For submissions with more than one author, order authors as they are to appear on citation." The form contains several input fields: "First name*" (with "Ivan" entered), "Middle name", "Last name*" (with "Cressman" entered), "Affiliation", "Country" (a dropdown menu), "Email*" (with "ivanecressman@mailinator.com" entered), and "URL". Below these fields is a "Bio statement (E.g., department and rank)" text area. At the bottom left is an "Add Author" button. A note at the bottom right states: "This will appear as a hyperlinked URL at the bottom of the bio statement on the 'About the author' pop-up and 'Editorial team' page."

Figure 172: Adding author information

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

Title and Abstract

Title*	<input type="text" value="Publishing in latin america"/>
Title (Español (España))	<input type="text" value="El publicar en América latina"/>
Title (Français (Canada))	<input type="text"/>
Abstract	<input type="text" value="This is an article about the current state of publishing in Latin America."/>
Abstract (Español (España))	<input type="text" value="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

English=en; French=fr; Spanish=es. [Additional codes.](#)

Figure 174: Indexing

4. Enter the names of any supporting agencies:

Supporting Agencies

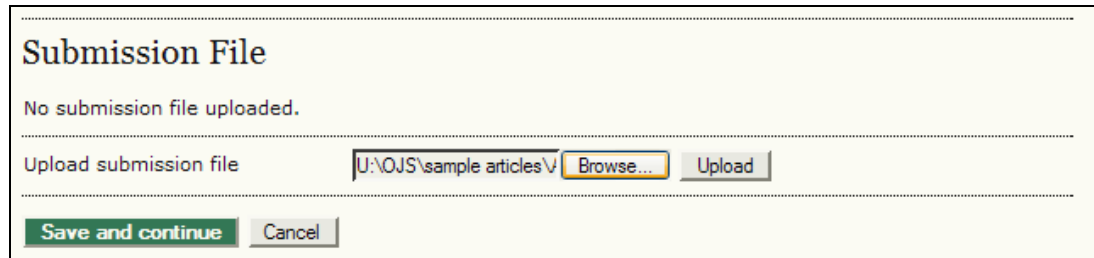
Identify agencies that provided funding or support for the work presented in this submission.

Agencies

Figure 175: Adding supporting agency information and saving

5. Select “Save and continue”.

Step 3: Upload the submission.

The screenshot shows a web form titled "Submission File". Below the title, it says "No submission file uploaded." There is a text input field containing "U:\OJS\sample articles\" followed by a "Browse..." button. To the right of this is an "Upload" button. At the bottom of the form are two buttons: "Save and continue" (highlighted in green) and "Cancel".

Submission File

No submission file uploaded.

Upload submission file

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.

File Summary				
ID	ORIGINAL FILE NAME	TYPE	FILE SIZE	DATE UPLOADED
1	ARTICLE.TXT	Submission File	0B	07-29

[Finish Submission](#) [Cancel](#)

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.

Home > User > Author > **Active Submissions**

Active Submissions

ACTIVE [ARCHIVE](#)

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
1	07-29	ART	Cressman	PUBLISHING IN LATIN AMERICA	Awaiting assignment

1 - 1 of 1 Items

[CLICK HERE TO START THE SUBMISSION PROCESS](#)

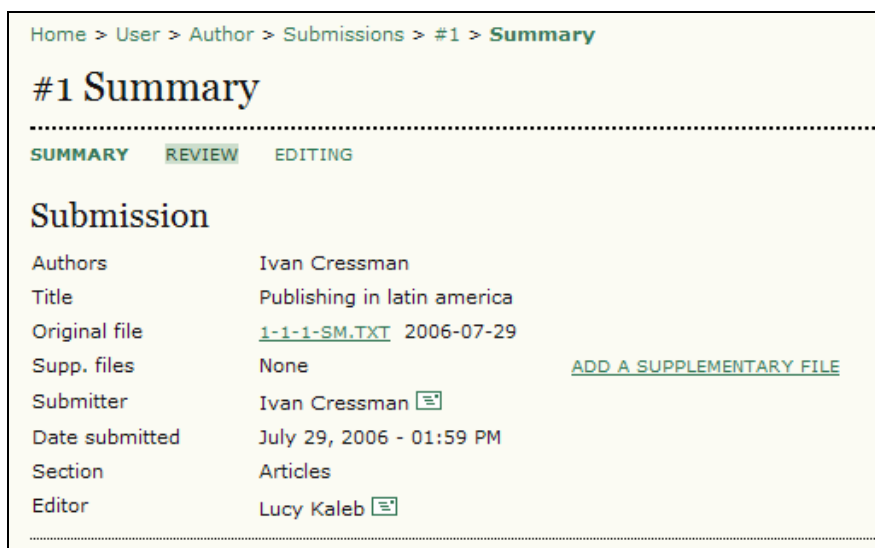
Figure 178: Active submissions

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:



Home > User > Author > Submissions > #1 > Summary

#1 Summary

SUMMARY **REVIEW** EDITING

Submission



Authors	Ivan Cressman
Title	Publishing in latin america
Original file	1-1-1-SM.TXT 2006-07-29
Supp. files	None ADD A SUPPLEMENTARY FILE
Submitter	Ivan Cressman 
Date submitted	July 29, 2006 - 01:59 PM
Section	Articles
Editor	Lucy Kaleb 

Figure 179: Selecting the "Review" link

Home > User > Author > Submissions > #1 > Review

#1 Review

SUMMARY **REVIEW** EDITING

Submission

Authors	Ivan Cressman 
Title	Publishing in latin america
Section	Articles
Editor	Lucy Kaleb 

Peer Review

Round 1

Review Version	1-2-1-RV.TXT 2006-07-29
Initiated	2006-07-29
Last modified	2006-07-29
Uploaded file	None

Editor Decision

Decision	Accept Submission 2006-07-29
Notify Editor	 Editor/Author Email Record  2006-07-29
Editor Version	1-3-1-ED.TXT 2006-07-29
Author Version	None
Upload Author Version	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>

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:

Home > User > Author > **Active Submissions**

Active Submissions

ACTIVE ARCHIVE

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
1	07-29	ART	Cressman	PUBLISHING IN LATIN AMERICA	QUEUED FOR EDITING

1 - 1 of 1 Items

[CLICK HERE TO START THE SUBMISSION PROCESS](#)

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:

Copyediting

Copyeditor Amelia Bennett

[REVIEW METADATA](#)

	REQUEST	UNDERWAY	COMPLETE
1. Initial Copyedit File: 1-4-2-CE.TXT 2006-07-29	2006-07-29	2006-07-29	2006-07-29
2. Author Copyedit File: None <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>	2006-07-29	—	
3. Final Copyedit File: None	—	—	—


Copyedit Comments  [COPYEDIT INSTRUCTIONS](#)

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:



Proofreading				
Proofreader		Rina Akers		
		REQUEST	UNDERWAY	COMPLETE
1.	Author	2006-07-29	2006-07-29	
2.	Proofreader	—	—	—
3.	Layout Editor	—	—	—
<hr/>				
Proofreading Corrections 		PROOFING INSTRUCTIONS		

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:

The screenshot displays the Open Journal Systems (OJS) interface. The main content area shows the article title "Scholarly Associations and the Economic Viability of Open Access Publishing" by John Willinsky, University of British Columbia. Below the title is the abstract, which discusses the shift from traditional publishing to online access. The introduction follows, discussing the challenges and opportunities of online publishing. The sidebar on the right contains a "Reading Tools" section with links for "Abstract", "About the author", "Bibliographic info", "Indexing info", "Go to print-version", "Definitions", "Send link to colleague", "Add comment to item", and "Email the author". There is also a "Find Related Items" section with a search box and a "Close" button.

Open Journal Systems Demonstration Journal, Vol 1, No 1 (2005)

HOME ABOUT USER HOME SEARCH CURRENT ARCHIVES

Home > Vol 1, No 1 (2005) > Willinsky

Scholarly Associations and the Economic Viability of Open Access Publishing

John Willinsky, *University of British Columbia*

Abstract

The information landscapes within which scholars work is undergoing a seismic shift. The computer monitor that rises out of the photocopy stacks, piles of journals, clippings and correspondence, now offers a new, rich vein of information that seems destined to eventually overwhelm the traditional trappings of desktops, filing cabinets, and bookshelves. After little more than a decade of Internet publishing, two-thirds of academic journals provide online access, while more than 1,000 peer-reviewed journals are published solely in digital form (Tenopir and King, 2001). Faculty and students are increasingly writing with their browsers open to online research sources. [1]

Introduction

In moving online, scholarly publishing appears to have taken the next in a long line of steps to increase the circulation of this particular form of knowledge. Yet rather than imagine, in this whiggish way, that advances in knowledge naturally unfold with each new communication technology, it is well to realize that the significant choices made by key players during the early and formative period of the technology will shape the future of each publishing medium. These choices for online publishing have now brought scholarship to a critical juncture. In a very short time, online journal publishing has developed two distinct and opposed economic models, one commercial and the other not, even as this publishing is in the unsustainable position of publishing in both print and digital forms. It may not be too much to say that the public standing of academic knowledge depends on

OJSDJ
Vol 1, No 1 (2005)

TABLE OF CONTENTS

Scholarly...

Willinsky

Reading Tools

FOR THIS PEER-REVIEWED ARTICLE

- Abstract
- About the author
- Bibliographic info
- Indexing info
- Go to print-version
- Definitions
- Send link to colleague
- Add comment to item
- Email the author

FIND RELATED ITEMS AMONG

- Author's work
- Book
- e-Journals
- Related theory
- Related studies
- Pay-per-view
- Online forums
- Multimedia
- Teaching files
- Portals
- Government policy
- Media reports
- Web search

FIND ITEMS IN THIS JOURNAL

All

Search

CLOSE

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.)