

OJS in an Hour

An Introduction to Open Journal Systems

Version 2.2.1.0

Last Updated: July 15, 2008

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>

This work is licensed under the Creative Commons Attribution–Share Alike 2.5 Canada License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-sa/2.5/ca/> or send a letter to Creative Commons, 559 Nathan Abbott Way, Stanford, California 94305, USA.



Table of Contents

| | |
|-------------------------------|----|
| Overview..... | 7 |
| OJS Features..... | 7 |
| The OJS Journal..... | 8 |
| Editorial Process..... | 10 |
| Editorial Roles | 10 |
| OJS Workflow Chart..... | 12 |
| System Requirements..... | 13 |
| Help Documentation..... | 13 |
| Community Contributions..... | 14 |
| Test-Drive OJS 2.2.1.0 | 14 |
| Site Administration..... | 15 |
| Getting Started..... | 15 |
| Site Settings..... | 16 |
| Creating a New Journal..... | 18 |
| Migrating from OJS 1.x..... | 19 |
| Languages..... | 22 |
| Authentication Sources..... | 25 |
| Version Checking..... | 26 |
| Expire User Sessions..... | 28 |
| Clear Data Caches..... | 28 |
| Clear Template Cache..... | 28 |
| Merge Users..... | 28 |
| COUNTER Statistics..... | 28 |
| Journal Managers..... | 30 |
| Getting Started..... | 30 |
| Setting up a New Journal..... | 31 |
| Step 1: Details..... | 32 |
| Step 2: Policies..... | 36 |
| Step 3: Submissions..... | 43 |
| Step 4: Management..... | 48 |

| | |
|--|-----|
| Step 5: The Look..... | 56 |
| Announcements..... | 63 |
| Files Browser..... | 66 |
| Journal Sections..... | 66 |
| Review Forms..... | 69 |
| Languages..... | 75 |
| Masthead..... | 77 |
| Prepared Email..... | 79 |
| Reading Tools..... | 81 |
| Statistics and Reports..... | 88 |
| Statistics..... | 88 |
| Reports..... | 89 |
| Payments..... | 90 |
| Payment Options..... | 90 |
| Fee Payment Methods..... | 93 |
| Fee Payment Records..... | 95 |
| Subscriptions..... | 95 |
| Create Subscription Types..... | 97 |
| Subscription Policies..... | 99 |
| Subscription Manager Information..... | 99 |
| Subscription Information..... | 99 |
| Subscription Expiry | 100 |
| Open Access Options for Subscription Journals..... | 101 |
| Author Self-Archiving Policy..... | 102 |
| Create New Subscriptions..... | 103 |
| System Plugins..... | 106 |
| Import/Export Data..... | 107 |
| METS XML Export Plugin | 108 |
| Erudit Article Export Plugin..... | 108 |
| Users XML Plugin..... | 108 |
| DOAJ Export Plugin..... | 109 |
| PubMed XML Export Plugin..... | 109 |
| CrossRef XML Export Plugin..... | 109 |
| Articles & Issues XML Plugin..... | 109 |

| | |
|--------------------------------------|-----|
| User Management..... | 111 |
| Emailing Users..... | 112 |
| Enrolling Existing Users..... | 112 |
| Creating Users..... | 113 |
| Merge Users..... | 114 |
| Editors..... | 116 |
| Getting Started..... | 116 |
| Submissions..... | 117 |
| Assigning Articles..... | 117 |
| Issues..... | 122 |
| Create a New Issue..... | 122 |
| Notify Users..... | 124 |
| View Future Issues..... | 126 |
| Back Issues..... | 128 |
| Section Editors..... | 130 |
| Getting Started..... | 130 |
| Submissions..... | 131 |
| Assigning Reviewers..... | 132 |
| Working with Reviewers..... | 135 |
| Making a Decision on an Article..... | 136 |
| Copyediting..... | 138 |
| Layout Editing..... | 140 |
| Proofreading..... | 143 |
| Reviewers..... | 145 |
| Getting Started..... | 145 |
| Reviewing Articles..... | 146 |
| Copyeditors..... | 153 |
| Getting Started..... | 153 |
| Copyediting..... | 154 |
| Layout Editors..... | 156 |
| Getting Started..... | 156 |
| Layout Editing..... | 157 |
| Proofreaders..... | 161 |
| Getting Started..... | 161 |

| | |
|----------------------------|-----|
| Proofreading..... | 161 |
| Authors..... | 163 |
| Getting Started..... | 164 |
| Submitting Articles..... | 164 |
| Responding to Reviews..... | 172 |
| Copyediting..... | 173 |
| Proofreading..... | 175 |
| Readers..... | 176 |
| Reading Tools..... | 176 |

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.
9. Payments module for accepting journal fees.

The OJS Journal

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

The screenshot shows the homepage of the Open Journal Systems Demonstration Journal. The page has a green header with the journal title and a navigation menu. The main content area is white and contains a table of contents for Volume 1, No 1 (2005). The table lists articles and reviews with links to abstracts, HTML versions, and PDFs. On the right side, there is a user login section and a search box.

Open Journal Systems Demonstration Journal

HOME ABOUT LOG IN REGISTER SEARCH CURRENT ARCHIVES

OPEN JOURNAL SYSTEMS

Journal Help

USER

Username

Password

Remember me

Log In

JOURNAL CONTENT

Search

All

Search

Browse

- By Issue
- By Author
- By Title

INFORMATION

- For Readers
- For Authors
- For Librarians

Home > **Open Journal Systems Demonstration Journal**

Open Journal Systems Demonstration Journal

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

Vol 1, No 1 (2005)

Table of Contents

Articles

| | |
|---|---|
| Understanding in the Absence of Meaning: Coming of Age Narratives of the Holocaust <i>Theresa Rogers</i> | ABSTRACT HTML PDF |
| Scholarly Associations and the Economic Viability of Open Access Publishing <i>John Willinsky</i> | ABSTRACT HTML PDF |
| Inverted Hollywood: The Pitch for e-Knowledge <i>Lisa Korteweg</i> | ABSTRACT HTML PDF |
| Copyright Contradictions in Scholarly Publishing <i>John Willinsky</i> | ABSTRACT HTML PDF |
| "Are they talking yet?" Online Discourse as Political Action <i>Shula Klinger</i> | ABSTRACT HTML PDF |
| Democracy and Education: The Missing Link May Be Ours <i>John Willinsky</i> | ABSTRACT HTML PDF |

Reviews

| | |
|---|---|
| Review of Karolides: Reader Response in Secondary and College Classrooms <i>Patrick Inglis</i> | ABSTRACT HTML PDF |
|---|---|

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 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
- 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

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.

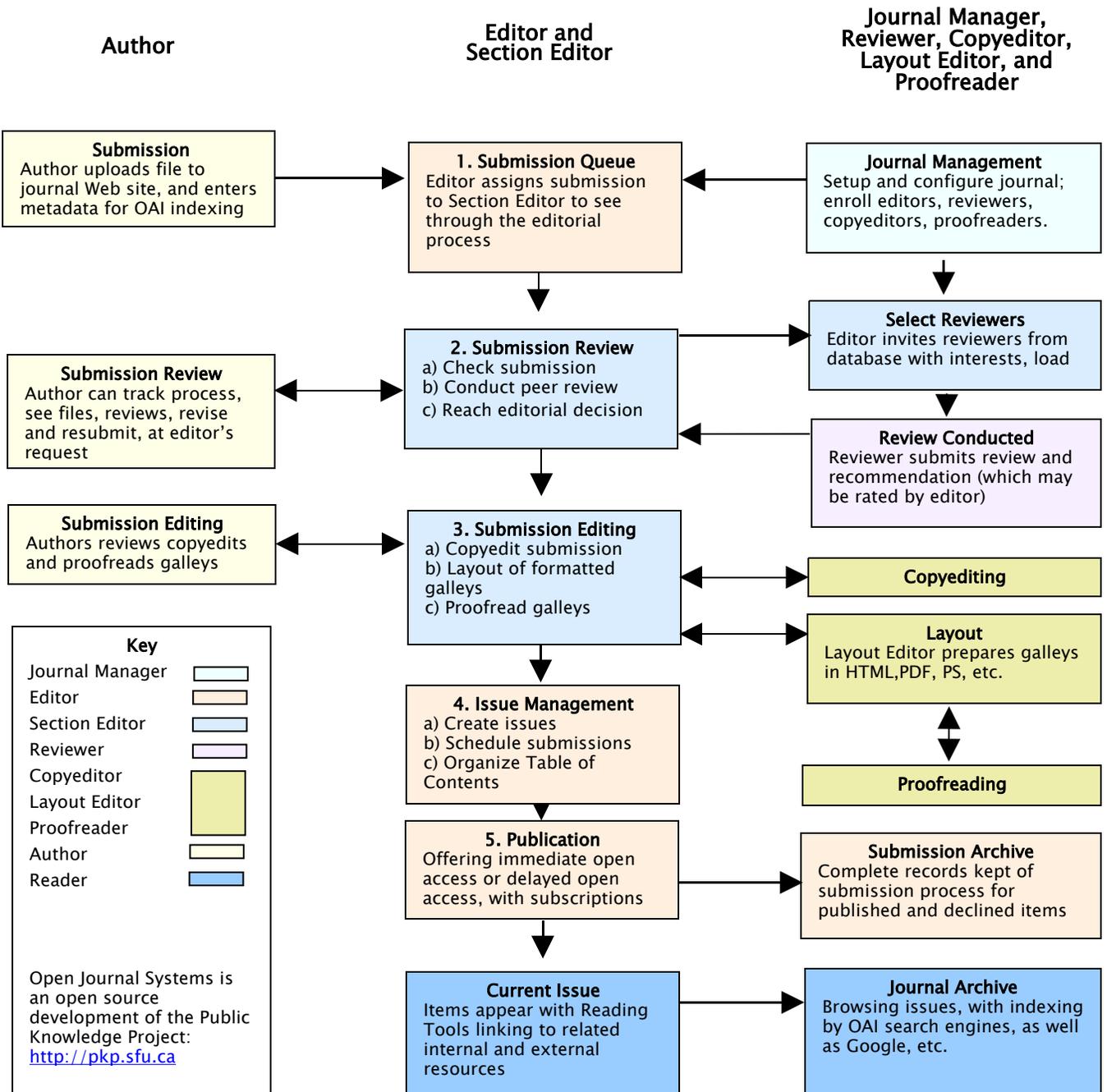
1. Submissions Queue: Items begin here and are assigned to an editor.
2. Submission Review: Items undergo peer review and editorial decision.
3. Submission Editing: Items undergo copyediting, layout, and proofreading.
4. Scheduling Queue: Items assigned to an issue and/or volume.
5. Table of Contents: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

Test-Drive OJS 2.2.1.0

A demonstration journal utilizing OJS 2.2.1.0 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

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

Form Language

To enter the information below in additional languages, first select the language.

Site title* Title text
 Title
 image

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

Site style sheet

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://test.deadcancon.org/ojs2/index.php/index/index> under **Site URL**, and <http://test.deadcancon.org/ojs2/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.

* Denotes required field

Figure 5: Site Settings

Creating a New Journal

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

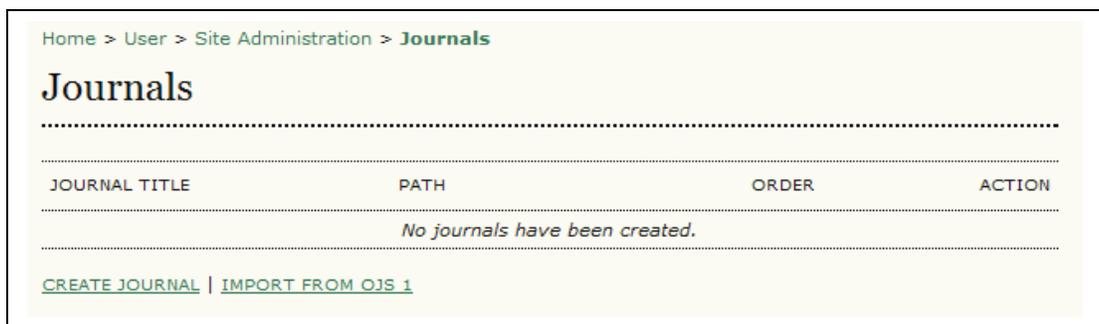


Figure 6: Creating a new journal

Select ‘Create Journal’ and fill in the resulting form:

Figure 7: Journal settings

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

Select the 'Enable' checkbox to allow this journal to appear publicly on your site. If you wish to limit access to the journal, do not check this box. You can return and make the journal public at a later date.

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):

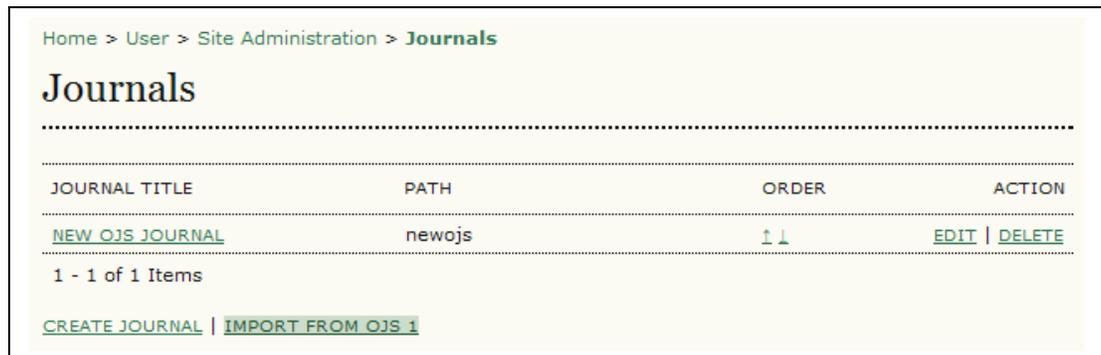


Figure 8: Import from OJS 1.x

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

Path*
Existing journal path or path to create (e.g., "ojs").

OJS 1 path*
Complete local filesystem path to the OJS 1 installation (e.g., "/var/www/ojs").

Options

- Import subscriptions
- Transcode article metadata from ISO8859-1
- Generate code to map OJS 1 URLs to OJS 2 URLs

* Denotes required field

Figure 9: Import from OJS 1

On the Form, fill in your new 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, transcode the article metadata from ISO8859-1, and generate code to map OJS 1 URLs to OJS 2 URLs, 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:

- 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.

Home > User > Site Administration > Languages

Languages

Language Settings

Primary locale

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

Supported locales

- English
- Deutsch (Deutschland)
- Español (España)
- Français (Canada)
- Hrvatski
- Italiano
- 日本語
- Português (Brasil)
- Russian
- Türkiye Türkçesi
- Tiếng Việt
- 繁體中文

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.

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”:

Manage Locales

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.

- Deutsch (Deutschland) (de_DE)
- Español (España) (es_ES)
- Français (Canada) (fr_CA)
- Hrvatski (hr_HR)
- Italiano (it_IT)
- 日本語 (ja_JP)
- Português (Brasil) (pt_BR)
- Russian (ru_RU)
- Türkiye Türkçesi (tr_TR)
- Tiếng Việt (vi_VN)
- 繁體中文 (zh_TW)

Download Locales

None

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 |
|----------------------------------|-------------------|---|-------------------------------------|
| | | <i>No authentication sources have been defined.</i> | |
| <input checked="" type="radio"/> | OJS User Database | | <input type="button" value="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:

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

E.g., "ldap.example.com", or "ldaps://ldap.example.com" (to use SSL)

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.

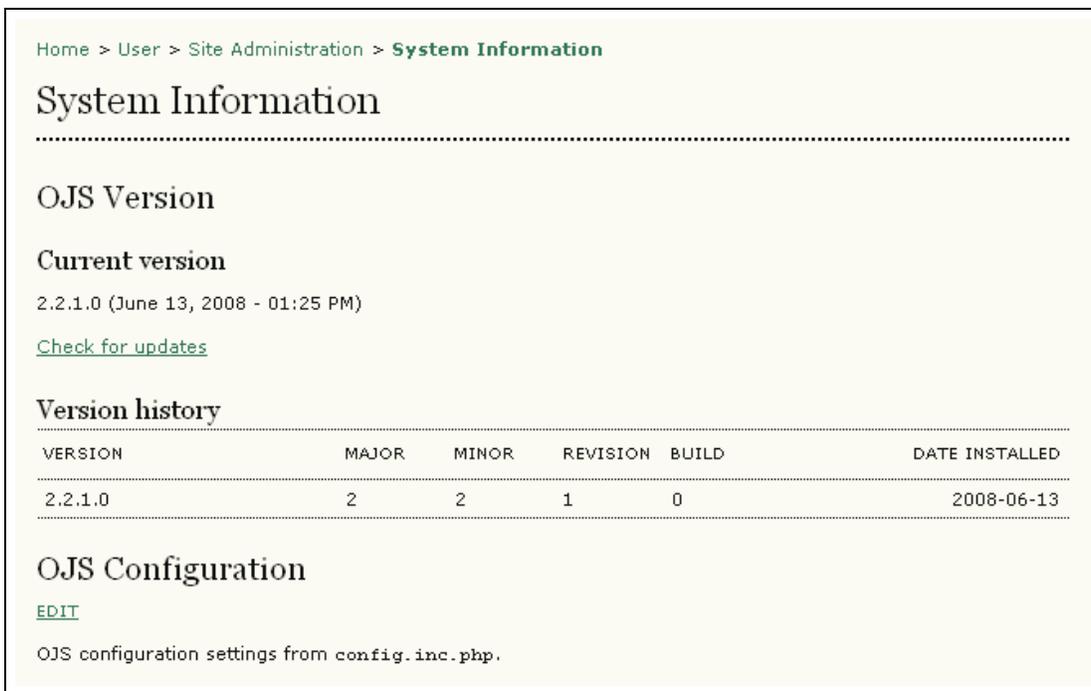


Figure 16: Checking for updates

You can also use this screen to edit your `config.inc.php` file, via the web interface, and to see your `php.ini` settings.

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.

Merge Users

This page allows you to merge two user accounts into one, handy if a user has accidentally created two accounts. The first selected account will be subsumed into the second account. The Site Administrator can merge users across the whole site; Journal Managers can also merge users, but only those enrolled with their journal.

COUNTER Statistics

Once COUNTER Statistics is enabled in System Plugins by Journal Manager, COUNTER Statistics link will show under Administrative

Functions on Site Administration page; also COUNTER Statistics link will show under Management Pages on Journal Management page.



Figure 17: COUNTER Statistics

The COUNTER plugin allows recording and COUNTER-compliant reporting on site activity.



Figure 18: COUNTER Statistics

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 19: Selecting your role

- You will see a menu of options to choose from:

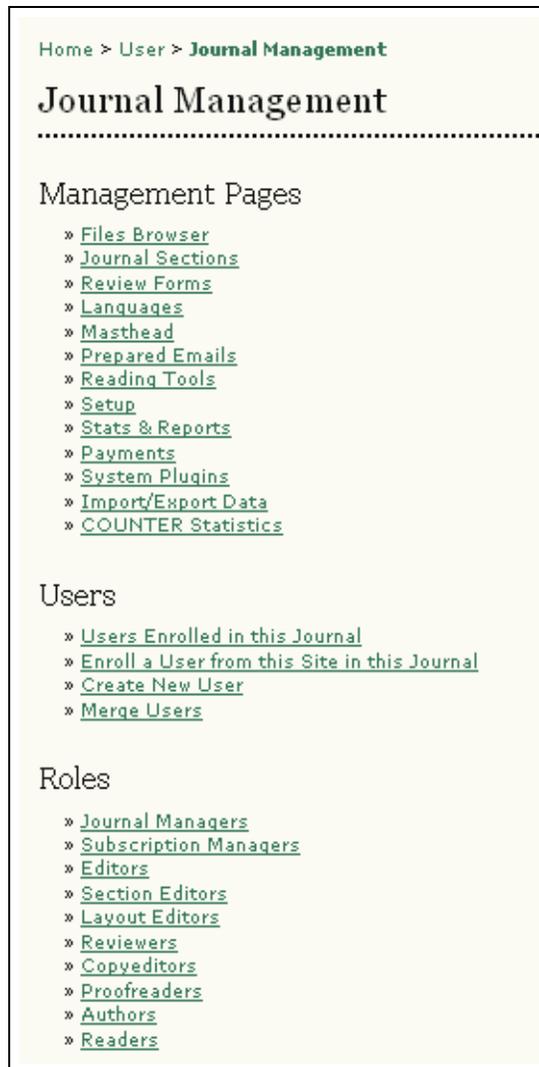


Figure 20: Journal Management options

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

Setting up a New Journal

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

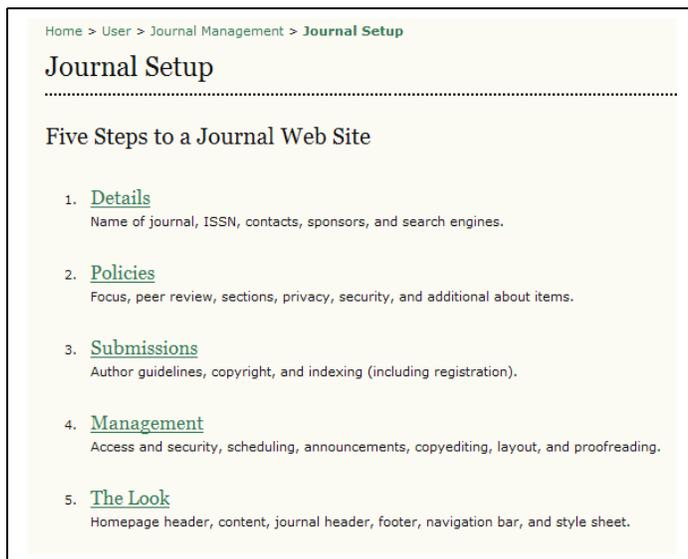


Figure 21: Five steps to setting up a journal web site

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

Form Language 
To enter the information below in additional languages, first select the language.

1.1 General Information

Journal title*

Journal initials*

Journal Abbreviation*

Print ISSN

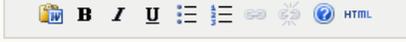
Online ISSN

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

The DOI (Digital Object Identifier) Prefix is assigned by [CrossRef](#) and is in the format 10.xxxx (e.g. 10.1234).

Mailing Address



The journal's physical location and mailing address.

Figure 22: 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*

Title

Affiliation

Email*

Phone

Fax

Mailing Address

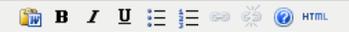


Figure 23: Principal Contact

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*

Email*

Phone

Figure 24: 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

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 25: 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

URL

Figure 26: 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 27: 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 28: 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 29: 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.

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

Step 2. Journal Policies

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

Form Language
To enter the information below in additional languages, first select the language.

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.

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

Figure 30: 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 31: Peer review

Review Policy

This will be visible on the About the Journal section.

Review Guidelines

These instructions will be available to reviewers at the time of review.

The screenshot shows a web interface with two main sections. The first section is titled "Review Policy" and contains a large, empty text area with a rich text editor toolbar below it. The toolbar includes icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, and HTML. The second section is titled "Review Guidelines" and contains a paragraph of text. The text explains that review guidelines provide criteria for judging submissions and can include special instructions. It mentions that reviewers are presented with two open text boxes: one for the author and one for the editor. It also notes that the Journal Manager can create a peer review form under "REVIEW FORMS" and that editors can choose to include reviews in correspondence with the author. Below the text is another large, empty text area with the same rich text editor toolbar.

Figure 32: Review policy and 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.

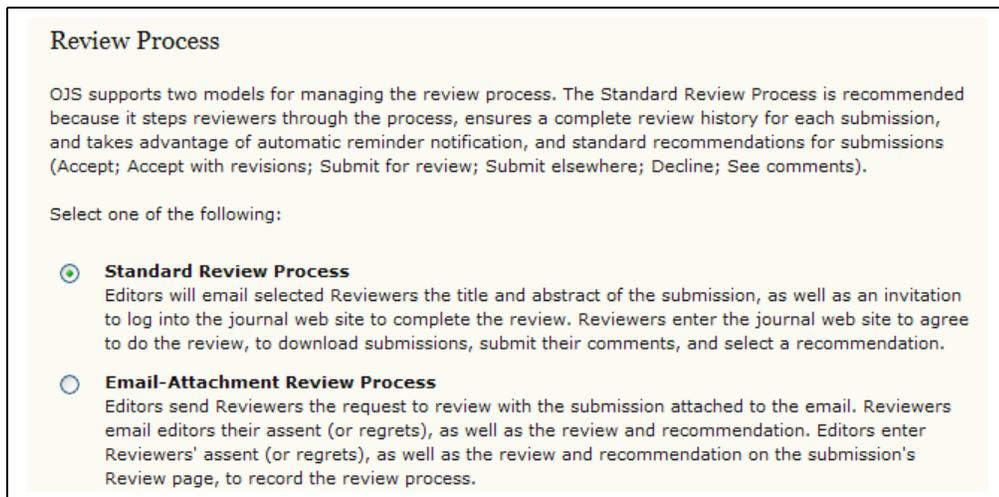


Figure 33: Review process

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.

Blind Review

- Provide links to [ENSURING A BLIND REVIEW](#) on pages where authors and reviewers upload files.

Figure 34: 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

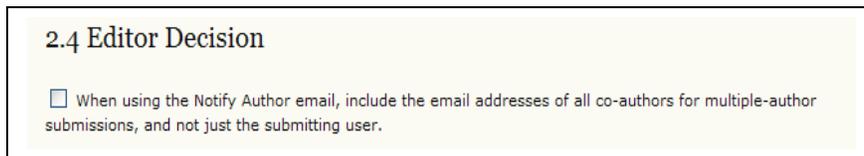
The names and email addresses entered in this journal site will be used exclusively for the stated purposes of this journal and will not be made available for any other purpose or to any other party.

🔗 **B** *I* U ☰ ☰ 🔗 🌐 HTML

Figure 35: Privacy statement

2.4 Editor Decision

Check this box to add all co-authors to the include list when an Editor sends a Notify Author email.



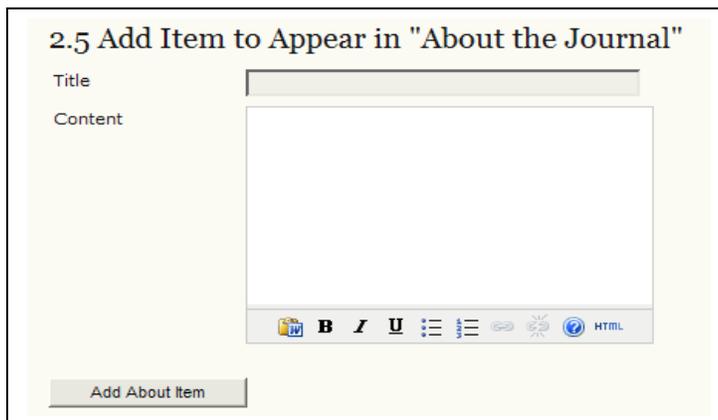
2.4 Editor Decision

When using the Notify Author email, include the email addresses of all co-authors for multiple-author submissions, and not just the submitting user.

Figure 36: Editor decision

2.5 Add Item to Appear in "About the Journal"

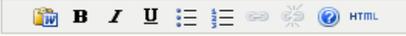
If you wish to add more information to the "About the Journal" section, this section allows you to enter content.



2.5 Add Item to Appear in "About the Journal"

Title

Content



Add About Item

Figure 37: Add Item to Appear in "About the Journal"

2.6 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.

2.6 Journal Archiving

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

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

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

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

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



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

Figure 38: Journal Archiving

2.7 Potential Reviewer Database

You can add a link to a relevant Reviewer database here.

2.7 Potential Reviewer Database

Add to the Select Reviewer page a link to a relevant literature database that can be searched for potential reviewers and is open to editors without subscription.

Title

URL

Figure 39: Potential reviewer database

Step 3: Submissions

3.1 Author Guidelines

These guidelines will appear on the About the Journal page.

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

Step 3. Guiding Submissions

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

Form Language
To enter the information below in additional languages, first select the language.

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.

HTML

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

Figure 40: 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

| | | |
|---|---|--------|
| 1 | The submission has not been previously published, nor is it before another journal | Delete |
| 2 | The submission file is in Microsoft Word, RTF, or WordPerfect document file format. | Delete |
| 3 | Where available, URLs for the references have been provided. | Delete |
| 4 | The text is single-spaced; uses a 12-point font; employs italics, rather than | Delete |
| 5 | The text adheres to the stylistic and bibliographic requirements outlined in the | Delete |
| 6 | If submitting to a peer-reviewed section of the journal, the instructions in Ensuring a | Delete |

Add Checklist Item

Figure 41: Submission preparation checklist

3.2 Copyright Notice

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

3.2 Copyright Notice

The Copyright Notice entered below will appear in About the Journal and in each published item's metadata. While it is up to the journal to determine the nature of its copyright agreement with authors, the Public Knowledge Project recommends the use of the [CREATIVE COMMONS](#) license. To that end, it provides [SAMPLE COPYRIGHT NOTICE WORDING](#) that can be cut and pasted into the space below for journals that (a) offer open access, (b) offer delayed open access, or (c) do not offer open access.

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

For journals that offer immediate or delayed open access, include a Creative Commons license with all published work at the appropriate time.

Figure 42: Copyright notice

3.3 Competing Interests

This allows for the option of requiring authors and/or reviewers to file a Competing Interests statement.

3.3 Competing Interests

Biomedical journals typically require authors and reviewers to declare if they have any competing interests with regard to their research (see [PLoS Policy](#)).

Require submitting Authors to file a Competing Interest (CI) statement with their submission.

Require Reviewers to file a CI statement with each peer review they submit.

Guidelines for filing a Competing Interest statement

Rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, Unlink, and HTML.

Figure 43: Competing interests

3.4 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.

3.4 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:

(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:

(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:

(E.g., Iberian Peninsula; Stratosphere; Boreal Forest; etc.)
Provide examples of relevant chronological or historical terms for this field:

(E.g., European Renaissance; Jurassic Period; Third Trimester; etc.)
Provide examples of research sample characteristics for this field:

(E.g., Age; Gender; Ethnicity; etc.)
- Type (Method/Approach)**
Provide examples of relevant research types, methods, and approaches for this field:

(E.g., Historical Inquiry; Quasi-Experimental; Literary Analysis; Survey/Interview)

Figure 44: For authors to index their work

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

3.5 Register Journal for Indexing

You can register the contents of your journal with the Public Knowledge Project Metadata Harvester, which will allow for comprehensive searching among sites that adhere to the OAI Protocol for metadata harvesting.

3.5 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/checkout2/index.php/newojs> under **Site URL**, and <http://pkp.sfu.ca/ojs/checkout2/index.php/newojs/oai> under **Base URL for OAI Archive**.

Figure 45: Register journal for indexing

3.6 Notification of Author Submission

You can request a notification email be sent to the journal's primary contact, or another address, whenever an author has completed the submission process.

3.6 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 46: Notification of author submission

Here you can set the journal's Open Access policy, control how users register on the site and for what, and enable user action and email logging.

Step 4: Management

4.1 Access and Security Settings

Here are you can decide between full open access and the use of subscriptions to control access to some or all content. If you enable subscription control, you can allow for delayed open access to content.

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

Step 4. Managing the Journal

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

Form Language: English

To enter the information below in additional languages, first select the language.

4.1 Access and Security Settings

Access to Journal Content

The journal will provide open access to its contents.

Open Access Policy

If the journal will provide readers with immediate free access to all published content, enter an Open Access Policy which will appear in About the Journal under Policies.

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.

This requires the assignment of a Subscription Manager who has access to the subscription module, which includes additional open access, self-archiving, and email notification options.

Always show galley links and indicate restricted access.

Figure 47: Setting the Open Access policy

You can then further restrict site- and article-level access through the use of user registration, and decide how users are

allowed to register themselves. Finally, you can enable logging of submission actions and user emails sent by the system.

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

Additional Site and Article Access Restrictions

- Users must be registered and log in to view the journal site.
- Users must be registered and log in to view open access content.

User Registration

- Users can register themselves with the journal in one or more of the following roles:
 - Readers (will receive notifications and be counted as equivalent to a subscriber)
 - Authors (can submit materials to the journal)
 - Reviewers (available for reviewing submissions)
- Journal Manager registers all users, with Editors or Section Editors able to register Reviewers alone.

Logging and Auditing

- Maintain a log of all actions taken with a submission on its History page.
- Maintain a log of all emails sent in relation to a submission on its History page.

Figure 48: Additional site and article restrictions; logging and auditing

4.2 Publication Scheduling

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

4.2 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.



Format

The journal will use the following elements to identify issues (which can be overridden for individual issues).

- Volume
- Number
- Year
- Title

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="0"/> |
| Volume | <input type="text" value="0"/> |
| Year | <input type="text" value="0"/> |
| Issues per volume | <input type="text"/> |
| Volumes per year | <input type="text"/> |

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

Figure 49: Publication scheduling

4.3 Identification of Journal Content

4.3 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 galleys (e.g. HTML or PDF files) for 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 50: 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.

4.4 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.

Rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, and HTML.

Figure 51: 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:

A Copyeditor will be assigned to work with each submission.

Copyediting will be undertaken by an Editor or Section Editor assigned to the submission.

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, from the Harvard Educational Review. The journal editor is in a

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

Figure 52: 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 galley files 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:

- A Layout Editor will be assigned to prepare the HTML, PDF, etc., files for electronic publication.
- An Editor or Section Editor assigned to the submission will prepare the HTML, PDF, etc., files.

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.)

[Empty text area]

[Rich text editor toolbar with icons for Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, and HTML]

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: [Text input field]

Template File: [Text input field] [Browse...] [Upload]

Figure 53: Layout Editors

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

Under the Layout Editors section, you also have the option of supporting reference linking, and providing editable instructions to your Layout Editors.

Reference Linking

To enable readers to locate online versions of the work cited by an author, the following options are available.

- 1. Add a Reading Tool**

The Journal Manager can add "Find References" to the Reading Tools that accompany published items, which enables readers to paste a reference's title and then search pre-selected scholarly databases for the cited work.
- 2. Embed Links in the References**

The Layout Editor can add a link to references that can be found online by using the following instructions (which can be edited).

Provide Layout Editors with instructions.

Layout Instructions for Reference Linking



using Word's Insert Hyperlink tool and the URL prepared in #2.

C. Enabling Readers to Search for References with a DOI

1. While the submission is still in Word, copy a batch of references into CrossRef Text Query <http://www.crossref.org/freeTextQuery/>
2. Paste each DOI that the Query provides in the following

Figure 54: Reference linking

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:

A Proofreader will be assigned to check (along with the authors) the galleys prior to publication.

An Editor or Section Editor assigned to the submission will check 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

Correct the problem word or phrase of words and paste them into

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

Figure 55: 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.

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

Step 5. Customizing the Look

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

Form Language
To enter the information below in additional languages, first select the language.

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

Figure 56: 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.

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.

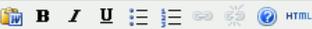


Figure 57: Journal Homepage Content

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.

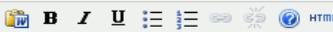


Figure 58: Journal Page Header

5.4 Journal Page Footer

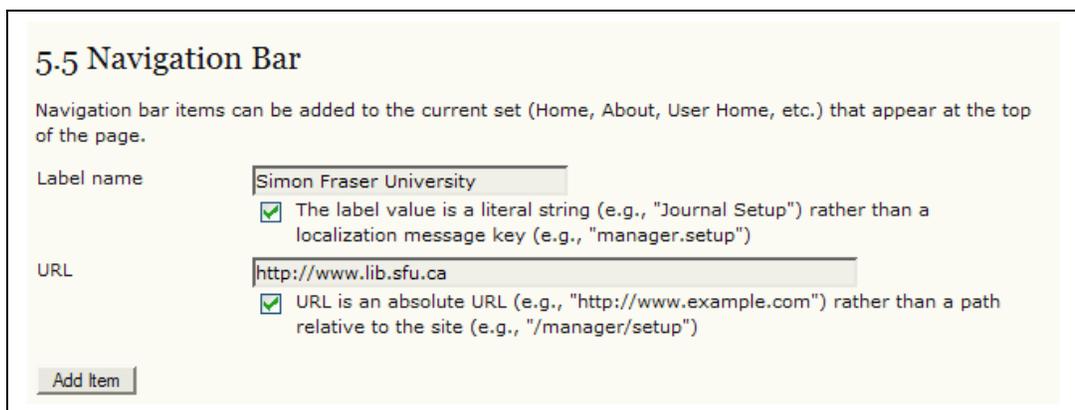
Footers can also be added to each page of your journal.



The screenshot shows a web interface for configuring the journal page footer. At the top, the heading "5.4 Journal Page Footer" is displayed. Below the heading, a text block explains: "This is the footer of your journal. To change or update the footer, paste the HTML code in the textbox below. Examples could be another navigation bar, a counter, etc. This footer will appear on every page." A large, empty text input area is provided for pasting HTML code. At the bottom of the input area, there is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), bulleted list, numbered list, link, unlink, and a help icon, along with the text "HTML".

Figure 59: Journal page footer

5.5 Navigation Bar



The screenshot shows a web interface for configuring the navigation bar. The heading "5.5 Navigation Bar" is at the top. Below it, a text block states: "Navigation bar items can be added to the current set (Home, About, User Home, etc.) that appear at the top of the page." The interface includes two input fields: "Label name" with the value "Simon Fraser University" and "URL" with the value "http://www.lib.sfu.ca". Between these fields, there are two checked checkboxes with labels: "The label value is a literal string (e.g., 'Journal Setup') rather than a localization message key (e.g., 'manager.setup')" and "URL is an absolute URL (e.g., 'http://www.example.com') rather than a path relative to the site (e.g., '/manager/setup)". At the bottom left, there is an "Add Item" button.

Figure 60: 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 Layout

Under Journal Layout you can choose a journal theme or upload a style sheet of your own. You can also move content blocks from left to right sidebars.

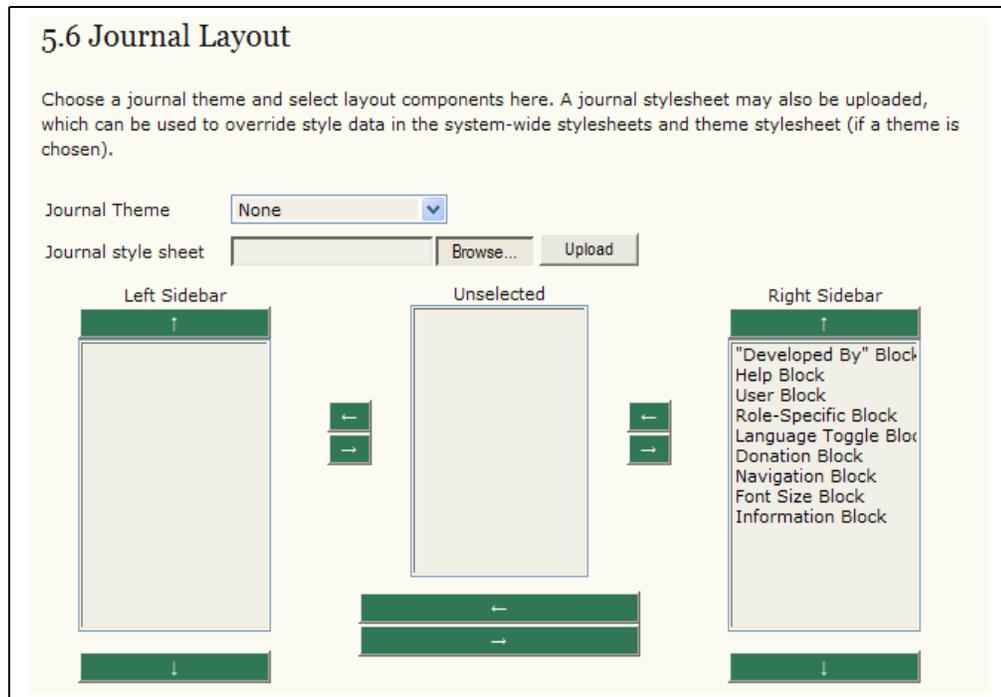


Figure 61: Journal Layout

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

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

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

to this

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

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

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

5.7 Information

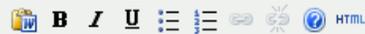
Each of these descriptions will appear on your journal's web site, on the right sidebar at the bottom by default.

5.7 Information

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

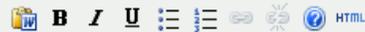
For Readers

We encourage readers to sign up for the publishing notification service for this journal. Use the [Register](#) link 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 [Privacy Statement](#) which assures readers that their name and email address will not be used for other purposes.

 **B** *I* U      HTML

For Authors

Interested in submitting to this journal? We recommend that you review the [About the Journal](#) page for the journal's section policies, as well as the [Author Guidelines](#). Authors need to [register](#) with the journal prior to submitting, or if already registered can simply [log in](#) and begin the 5 step process.

 **B** *I* U      HTML

For Librarians

We encourage research librarians to list this journal among their library's electronic journal holdings. As well, it may be worth noting that this journal's open source publishing system is suitable for libraries to host for their faculty members to use with journals they are involved in editing (see [Open Journal Systems](#)).

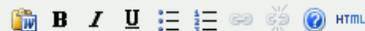
 **B** *I* U      HTML

Figure 62: 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 | <input type="text" value="25"/> |
| Page links | <input type="text" value="10"/> |

Figure 63: Lists

Announcements

If you have chosen the announcements option for your journal (see Setup 4.4), a link to manage announcements will appear under Management Pages.

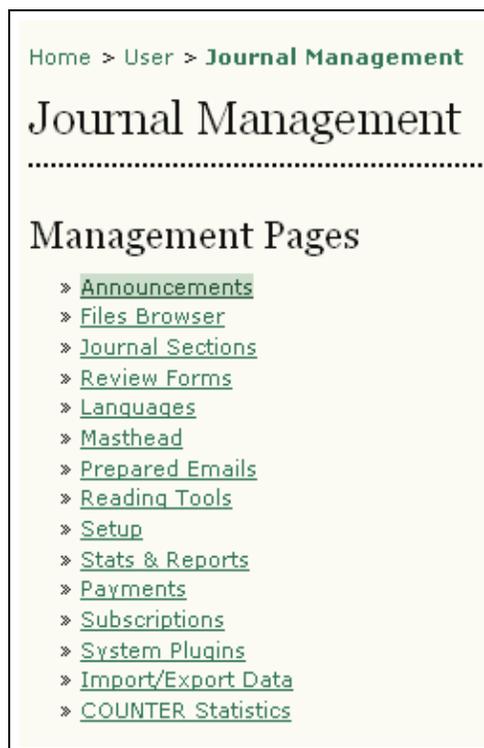


Figure 64: Announcements

First, create a new Announcement Type by selecting “Announcement Types” and then “Create Announcement Type”.



Figure 65: Announcement Types

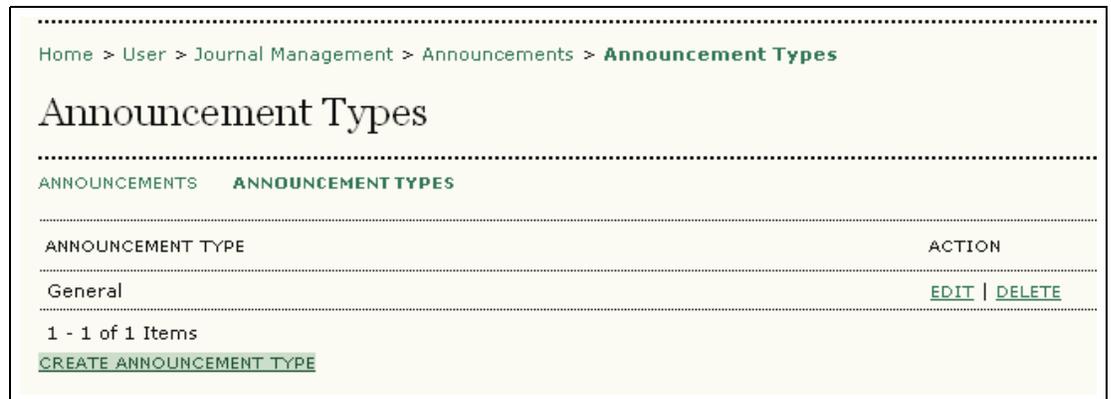


Figure 66: Announcement Types

Fill in the name for a new announcement type.



Figure 67: Create Announcement Type

Next, you can create and post an announcement using “Create New Announcement” link. Select announcement type from the dropdown

menu, fill in the announcement title, provide the short and detailed descriptions for the announcement, and specify the expiry date for the announcement to display.

Home > User > Journal Management > Announcements > Create

Create New Announcement

Form Language: English

Type: [dropdown]

Title*

Short Description*

Description*

Expiry Date: [dropdown] [dropdown] [dropdown]

Save Save and Create Another Cancel

* Denotes required field

Figure 68: Create New Announcement

This announcement will now be visible by clicking on the journal Home or Announcements link on the top navigation bar, and remain there until the expiry date selected.

Files Browser

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

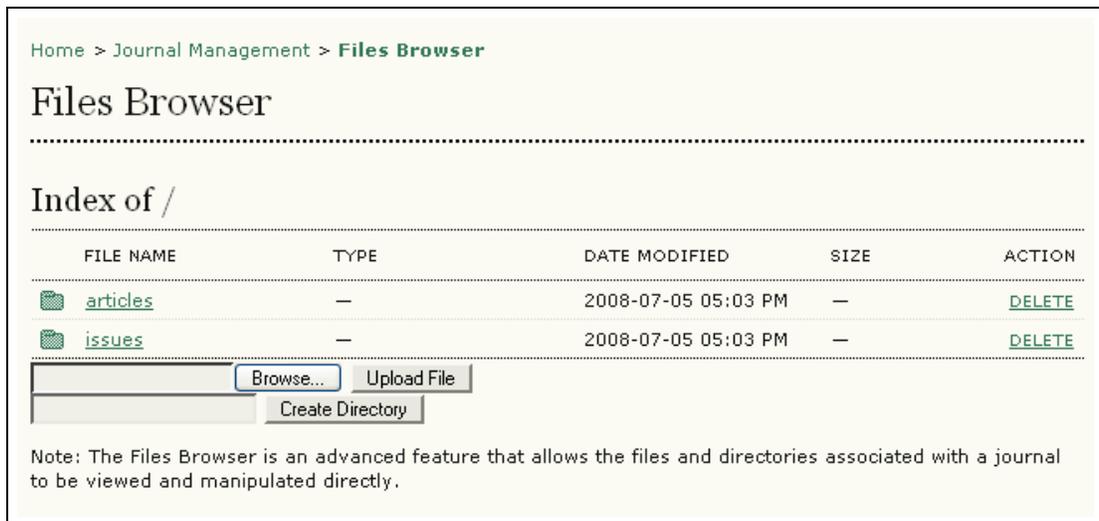


Figure 69: File Browsing

Journal 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 (all journals start with a default “Articles” section that can be edited). 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 (this may be handy for things like introductions and editorials, for example).

To create a new section:

- Go to ‘Management Pages’ and select ‘Journal Sections’:



Figure 70: Sections

- Select 'Create Section':

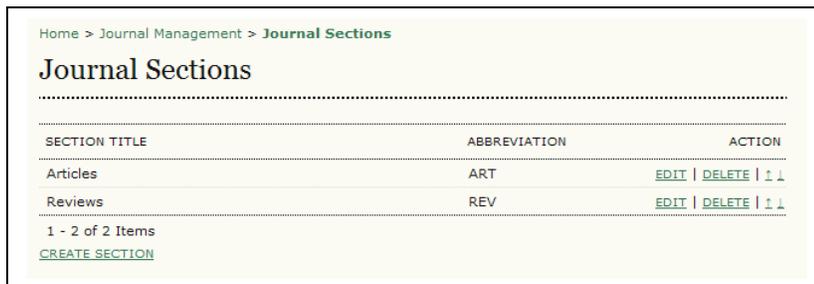


Figure 71: Create Section

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

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

Section

Form Language: English
To enter the information below in additional languages, first select the language.

Section title*

Abbreviation* (For example, Articles=ART)

Section Policy

Review Form: None / Free Form Review

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
Identify items published in this section as a(n)
(For example, "Peer-reviewed Article", "Non-refereed Book Review", "Invited Commentary", 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.
 Omit author names for section items from issues' table of contents.

About: Omit this section from About the Journal.

Figure 72: 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

Add a Section Editor to this section from the available Section Editors. Once added, designate whether the Section Editor will oversee the REVIEW (peer review) and/or the EDITING (copyediting, layout and proofreading) of submissions to this section. Section Editors are created by clicking [Section Editors](#) under Roles in Journal Management.

Available Section Editors

| USERNAME | NAME | ACTION |
|-------------|------|--------|
| <i>None</i> | | |

This Section's Editors

| USERNAME | NAME | REVIEW | EDITING | ACTION |
|-------------|------|--------|---------|--------|
| <i>None</i> | | | | |

* Denotes required field

Figure 73: Assigning Section Editors

Review Forms

If no review forms are created here, a default form will appear which consists of two text boxes for “author and editor” and for “editor” only; otherwise personalized review forms can be made for a specific journal section, and editors can choose a review form when assigning the review.

[Home](#) > [User](#) > [Journal Management](#) > **Review Forms**

Review Forms

The peer review forms created here will be presented to reviewers to complete, instead of the default form which consists of two open text boxes, the first "for author and editor," and the second "for editor." Review forms can be designated for a specific journal section, and editors will have the option to choose which form to use in assigning the review. In all cases, editors will have the option of including the reviews in corresponding with the author.

| TITLE | IN REVIEW | COMPLETED | ACTION |
|---|-----------|-----------|--------|
| <i>No review forms have been created.</i> | | | |

[CREATE REVIEW FORM](#)

Figure 74: Review Forms

Click on “Create Review Form” link, fill in title and description for a review form, then press “Save” button.

Figure 75: Create Review Form

Back to the previous page, the title of a newly-created review form appears.

| TITLE | IN REVIEW | COMPLETED | ACTION |
|-------------------------------|-----------|-----------|--|
| Research Articles Review Form | 0 | 0 | EDIT ACTIVATE PREVIEW DELETE ↑ ↓ |

[CREATE REVIEW FORM](#)

Figure 76: Created Review Form

Click on “Edit” link next to the title of review form, and then on Review Form page select “Form Items” to embody this review form.

Figure 77: Form Items

Clicking on “Create New Item” on Form Items page leads one to Create New Item page, where one is able to describe the item, pre-define whether the item is obligatory to be completed to the reviewer, and choose an item type from the dropdown menu: single word text box, single line text box, extended text box, checkboxes, radio buttons, drop-down box.

Figure 78: Create New Item

Home > User > Journal Management > Review Forms > Research Articles Review Form > **Create New Item**

Create New Item

Item*

Reviewers required to complete item

Item type*

- Choose item type
- Single word text box
- Single line text box
- Extended text box
- Checkboxes (you can choose one or more)
- Radio buttons (you can only choose one)
- Drop-down box

* Denotes required field

Figure 79: Create New Item

All created items can be edited, deleted or reordered. Additional item can be added by clicking on “Create New Item”. Selecting “Preview Form” will enable one to view the review form at this point.

Home > User > Journal Management > Review Forms > Research Articles Review Form > **Form Items**

Form Items

REVIEW FORM **FORM ITEMS** PREVIEW FORM

| ITEM | ACTION |
|---|---|
| <input type="checkbox"/> Paper Number | EDIT DELETE ↑ ↓ |
| <input type="checkbox"/> Paper Title | EDIT DELETE ↑ ↓ |
| <input type="checkbox"/> Provide a rating of the paper's acceptability | EDIT DELETE ↑ ↓ |
| <input type="checkbox"/> Expertise: Rate your expertise in the topic area of this paper. | EDIT DELETE ↑ ↓ |
| <input type="checkbox"/> Identify what contribution the paper aims to make to this field | EDIT DELETE ↑ ↓ |
| <input type="checkbox"/> Identify aspects of the paper's written presentation that need improvement | EDIT DELETE ↑ ↓ |
| <input type="checkbox"/> Write your review of the paper here. | EDIT DELETE ↑ ↓ |

1 - 7 of 7 Items

Copy to:

[CREATE NEW ITEM](#)

Figure 80: Created Items

Preview Form

REVIEW FORM FORM ITEMS **PREVIEW FORM**

Research Articles Review Form

This review form is for research articles

Paper Number*

Paper Title*

Provide a rating of the paper's acceptability*

Definite accept: I would argue strongly for accepting this paper. ▾

Expertise: Rate your expertise in the topic area of this paper.*

Expert
 Knowledgeable
 Passing knowledge
 No knowledge

Identify what contribution the paper aims to make to this field*

Significance of the paper's contribution
 Validity of the work presented
 Originality of the work

Identify aspects of the paper's written presentation that need improvement*

statements or passages that could be expressed more clearly and concisely
 figures that are redundant, difficult to understand, or missing
 incomplete or missing references, or citations that lack references
 changes that could make the paper more understandable to an international readership
 problems in formatting, layout, or legibility

Write your review of the paper here.*

Figure 81: Preview Form

Once a review form is activated, it is ready to be used by editors when assigning a reviewer.

Home > User > Journal Management > **Review Forms**

Review Forms

The peer review forms created here will be presented to reviewers to complete, instead of the default form which consists of two open text boxes, the first "for author and editor," and the second "for editor." Review forms can be designated for a specific journal section, and editors will have the option to choose which form to use in assigning the review. In all cases, editors will have the option of including the reviews in corresponding with the author.

| TITLE | IN REVIEW | COMPLETED | ACTION |
|-------------------------------|-----------|-----------|--|
| Research Articles Review Form | 0 | 0 | EDIT ACTIVATE PREVIEW DELETE ↑ ↓ |

[CREATE REVIEW FORM](#)

Figure 82: Activate Review Form

The created form items of one review form can be selected and copied to another review form. Once done, these form items will be migrated to the target review form.

Home > User > Journal Management > Review Forms > Research Articles Review Form > **Form Items**

Form Items

REVIEW FORM **FORM ITEMS** PREVIEW FORM

| ITEM | ACTION |
|--|---|
| <input checked="" type="checkbox"/> Paper Number | EDIT DELETE ↑ ↓ |
| <input checked="" type="checkbox"/> Paper Title | EDIT DELETE ↑ ↓ |
| <input checked="" type="checkbox"/> Provide a rating of the paper's acceptability | EDIT DELETE ↑ ↓ |
| <input checked="" type="checkbox"/> Expertise: Rate your expertise in the topic area of this paper. | EDIT DELETE ↑ ↓ |
| <input checked="" type="checkbox"/> Identify what contribution the paper aims to make to this field | EDIT DELETE ↑ ↓ |
| <input checked="" type="checkbox"/> Identify aspects of the paper's written presentation that need improvement | EDIT DELETE ↑ ↓ |
| <input checked="" type="checkbox"/> Write your review of the paper here. | EDIT DELETE ↑ ↓ |

1 - 7 of 7 Items

Copy to: [Copy](#) [Select All](#)

[CREATE NEW ITEM](#)

Figure 83: Copy Form Items

Languages

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

| | |
|--|---|
| <input type="checkbox"/> Deutsch (Deutschland) | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input checked="" type="checkbox"/> English | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Español (España) | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Français (Canada) | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Hrvatski | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Italiano | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Português (Brasil) | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Russian | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Tiếng Việt | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> Türkiye Türkçesi | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> 日本語 | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |
| <input type="checkbox"/> 繁體中文 | RELOAD LOCALE-SPECIFIC DEFAULT SETTINGS |

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.

Figure 84: Languages

In this example, English has already been enabled as a supported locale. After checking off other languages and clicking Save, users will now be able to enter form data in multiple languages. If a user encounters a form that accepts data in more than one language, they will be able to toggle between form languages, as in the following screenshot:

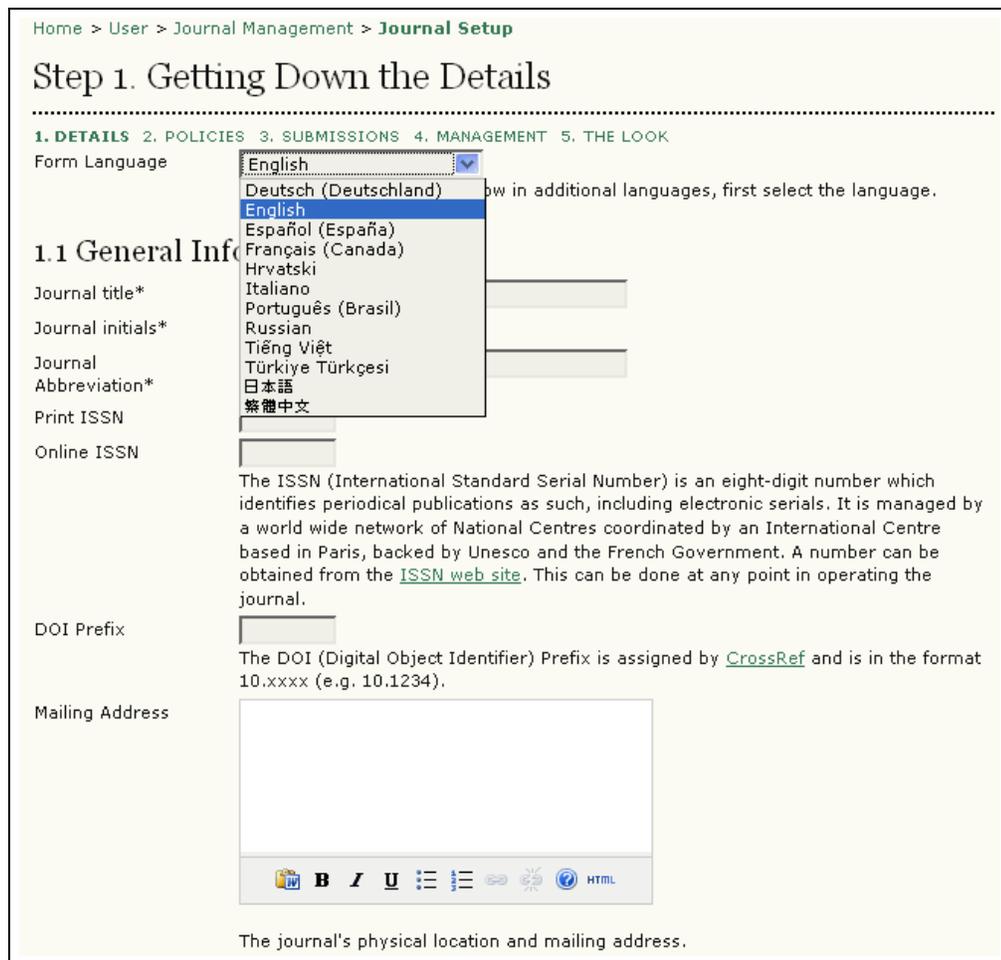


Figure 85: Form Language

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



Figure 86: Language Toggle

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

Masthead

This option provides two methods of displaying the members of your journal's Editorial Team, which will appear under People in About the Journal: either automatically (generated from assigned user roles), or manually (using the Create Position Title option).

Home > User > Journal Management > Masthead

Masthead

Under [People](#) in About the Journal:

OJS lists people in Editorial Team under assigned roles (Journal Manager, Copyeditor, etc.)

The Journal Manager creates titles and adds people under each title.

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

[CREATE POSITION TITLE](#)

Figure 87: Editorial Team

After clicking on “Create a Position Title”, you can fill out the title form and choose whether the title will appear under the Editorial Team or under People on its own in About the Journal.

Home > User > Journal Management > Masthead > Create Title

Create Title

Form Language: English
To enter the information below in additional languages, first select the language.

Title*:

Type:

Have title appear under Editorial Team in People section of About the Journal (e.g. Editor)

Have title appear as its own category under People (e.g. Editorial Board)

* Denotes required field

Figure 88: Creating a Position Title

After you entered the Position Titles used by your journal, you will be presented with the list:

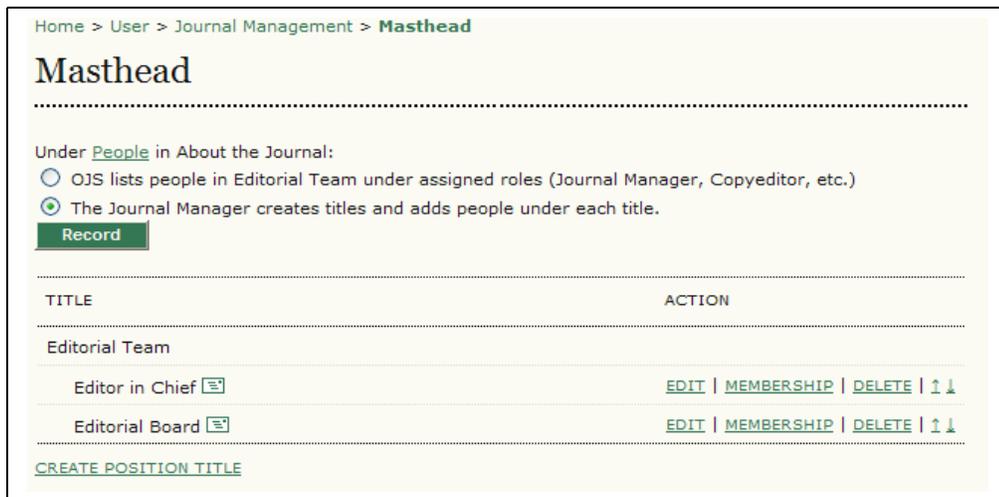


Figure 89: Masthead Options

From here you can add members to each title by clicking on 'Membership'; rearrange their display order by using the up and down arrows; or send an email to all members of a group by clicking on the email icon next to the title name.

Prepared Email

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':

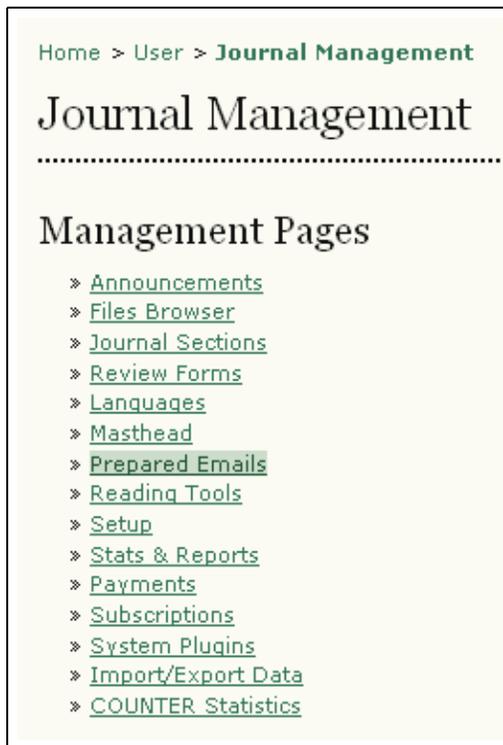


Figure 90: Emails

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

Home > Journal Management > **Prepared Emails**

Prepared Emails

| 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 91: Email templates

- Make your changes to the selected template. Avoid changing any of the embedded programming (anything that looks like `{ $this }`) 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 | <pre> { \$copyeditorName } : Thank you for copyediting the manuscript, "{ \$articleTitle }," for { \$journalName }. It will make an important contribution to the quality of this journal. { \$editorialContactSignature } </pre> |

Enable this email template

Figure 92: Editing email templates

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:

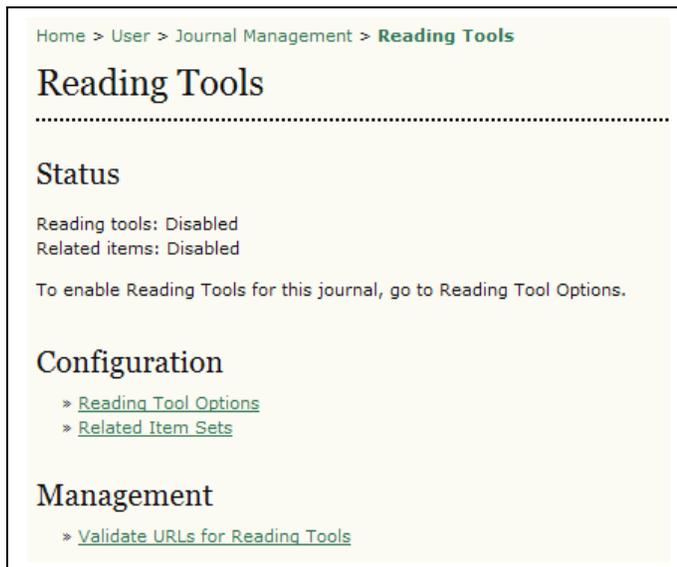


Figure 93: Activating Reading Tools

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).

Indexing metadata (displays item's indexing metadata provided by author and system).

Supplementary files (displays list of files author included with submission).

Print version (provides 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).

Find References

Add comment (enables readers to post comments, with Journal Manager able to delete).

- Users must be registered and log into to post, with anonymity not permitted.
- Users must be registered and log into to post, with anonymity permitted.
- Users do not need to be registered to post, with anonymity permitted.

Related Item Tools

Field:

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

Figure 94: Reading Tool Options

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

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

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

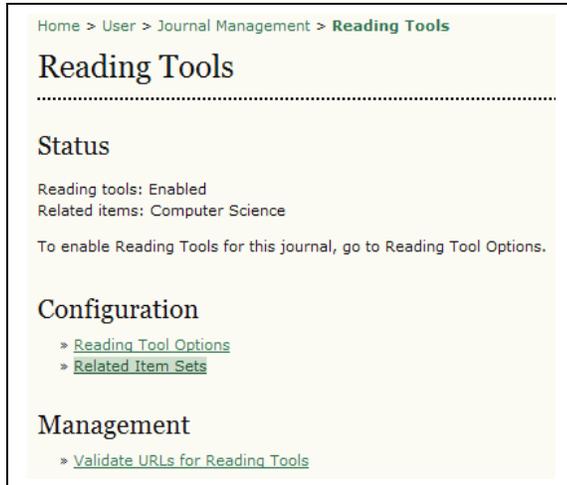


Figure 95: Related Item Sets

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 96: Related Item Sets

For each subject, you will see a series of options: 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 97: 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 | | |
|---|--------------------------------|---|
| TITLE | URL | |
| Google Scholar | http://scholar.google.com | ↑ ↓ EDIT DELETE |
| OAister (Open Archives Initiative research databases) | http://oaister.umdl.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 98: 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 99: Creating Item Sets

Statistics and Reports

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



Figure 100: Journal Management menu

Statistics

OJS provides a summary of your journal's usage.

Journal Statistics

OJS calculates the following statistics for each journal. The "days to review" is calculated from date of submission (or designation of Review Version) to the initial Editor Decision, while the "days to publish" is measured for accepted submissions from its original uploading to its publication.

Select the sections for calculating this journal's peer-reviewed statistics.

Articles

Record

Year << 2008 >>

| | |
|--|-----------|
| <input checked="" type="checkbox"/> Issues published | 0 |
| <input checked="" type="checkbox"/> Items published | 0 |
| <input checked="" type="checkbox"/> Total submissions | 0 |
| <input checked="" type="checkbox"/> Peer reviewed | 0 |
| <input checked="" type="checkbox"/> Accept | 0 (0%) |
| <input checked="" type="checkbox"/> Decline | 0 (0%) |
| <input checked="" type="checkbox"/> Resubmit | 0 (0%) |
| <input checked="" type="checkbox"/> Days to review | 0 |
| <input checked="" type="checkbox"/> Days to publication | 0 |
| <input checked="" type="checkbox"/> Registered users | 1 (0 new) |
| <input checked="" type="checkbox"/> Registered readers | 0 (0 new) |
| <input checked="" type="checkbox"/> Article View Counts (for Authors only) | |

Note: Percentages for peer reviewed submissions may not add up to 100%, as items resubmitted are either accepted, declined, or still in process.

Check items to be made available to readers in About the Journal.

Record

Figure 101: 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 requires a spreadsheet application to view.

» [Articles Report](#)

Figure 102: Reports

Payments

OJS comes with a Payment module that allows for the charging of various fees. Fees can be charged for author actions (fees for article submission, fast-track peer review, and article publication); article access (subscriptions and pay-per-view options); and for donations and membership dues.

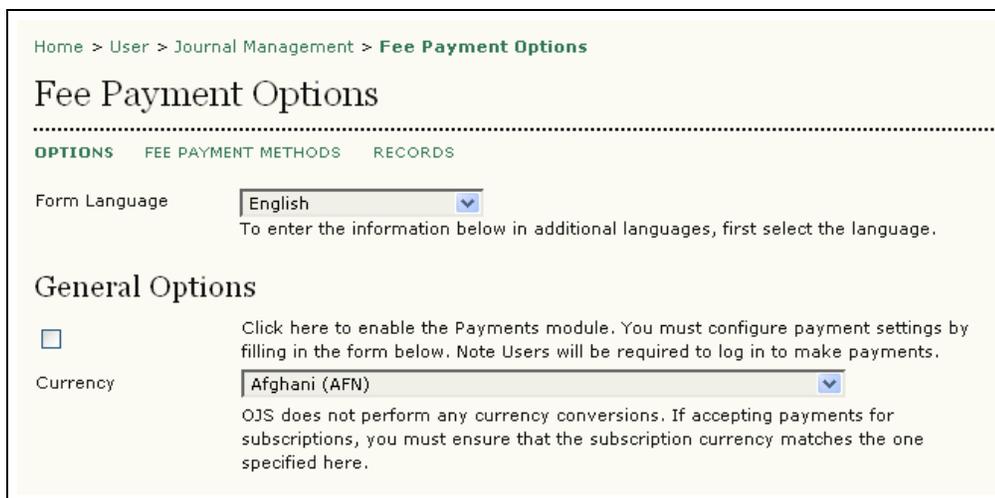
Payment Options

To enable the Payment Module, click on the Payments link listed under Management Pages:



Figure 103: Journal Management Menu

You can enable the Payments Module by clicking the box under General Options. You can also choose your currency here. You should ensure that the currency you select here matches up with the currency selected under Subscriptions, if subscriptions are also being used.



Home > User > Journal Management > **Fee Payment Options**

Fee Payment Options

OPTIONS FEE PAYMENT METHODS RECORDS

Form Language ▼
To enter the information below in additional languages, first select the language.

General Options

Click here to enable the Payments module. You must configure payment settings by filling in the form below. Note Users will be required to log in to make payments.

Currency ▼
OJS does not perform any currency conversions. If accepting payments for subscriptions, you must ensure that the subscription currency matches the one specified here.

Figure 104: Payment General Options

You can then enable and customize author fees for article submission, fast-track peer review, and article publication:

Author Fees

Selected options, along with their descriptions and fees (which can be edited below), will appear in Step 1 of the submission process and in About the Journal under Submissions, as well as at points where payment is required.

| | |
|--------------------------|--|
| <input type="checkbox"/> | Article Submission |
| Fee | <input type="text" value="0"/> |
| Fee Name | <input type="text" value="Article Submission"/> |
| Fee Description | <input type="text" value="Authors are required to pay an Article Submission Fee as part of the submission process to contribute to review costs."/> |
| <input type="checkbox"/> | Fast-Track Review |
| Fee | <input type="text" value="0"/> |
| Fee Name | <input type="text" value="Fast-Track Review"/> |
| Fee Description | <input type="text" value="With the payment of this fee, the review, editorial decision, and author notification on this manuscript is guaranteed to take place within 4 weeks."/> |
| <input type="checkbox"/> | Article Publication |
| Fee | <input type="text" value="0"/> |
| Fee Name | <input type="text" value="Article Publication"/> |
| Fee Description | <input type="text" value="If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publications costs."/> |
| Waiver Policy | <input type="text" value="If you do not have funds to pay such fees, you will have an opportunity to waive each fee. We do not want fees to prevent the publication of worthy work."/> |

Figure 105: Enabling Author Fees

Reader fees can also be enabled:

Reader Fees

Selected options, along with their descriptions and fees (which can be edited below), will appear in About the Journal under Policies, as well as at points where payment is required.

| | |
|--------------------------|---|
| <input type="checkbox"/> | This will activate payments for Subscriptions, where types, cost, duration and subscribers are managed by the Subscription Manager. |
| <input type="checkbox"/> | Purchase Article |
| Fee | <input type="text" value="0"/> |
| Fee Name | <input type="text" value="Purchase Article"/> |
| Fee Description | <input type="text" value="The payment of this fee will enable you to view, download, and print this article."/> |
| <input type="checkbox"/> | Only Restrict Access to PDF version of articles |

Figure 106: Enabling Reader Fees

As can general fees for donations and association membership:

General Fees

The Association Membership will appear in About the Journal under Policies, and the donations link will appear above the search function in the right-hand frame.

Association Membership

Fee:

Fee Name:

Fee Description:

Donations to journal

Fee Name:

Fee Description:

Figure 107: Enabling General Fees

Fee Payment Methods

You can edit fee payment options by clicking the Fee Payment Methods link at the top of the Fee Payment Options page choosing between Manual and PayPal fee payment:

Home > User > Journal Management > **Fee Payment Methods**

Fee Payment Methods

OPTIONS **FEE PAYMENT METHODS** RECORDS

You may configure any of the following Payment Method Plugins from this screen.

Fee Payment Methods

Manual Fee Payment

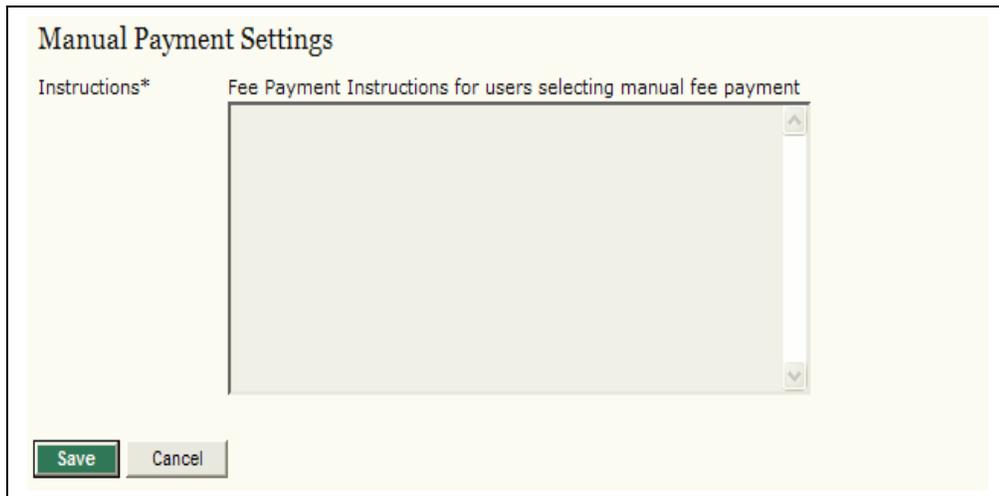
The manager will manually record receipt of a user's payment (outside of this software).

PayPal Fee Payment

PayPal enables users, whether or not they are PayPal members, to use all major credit cards. The Manager will need to set up a [PayPal Business Account](#).

Figure 108: Fee Payment Methods

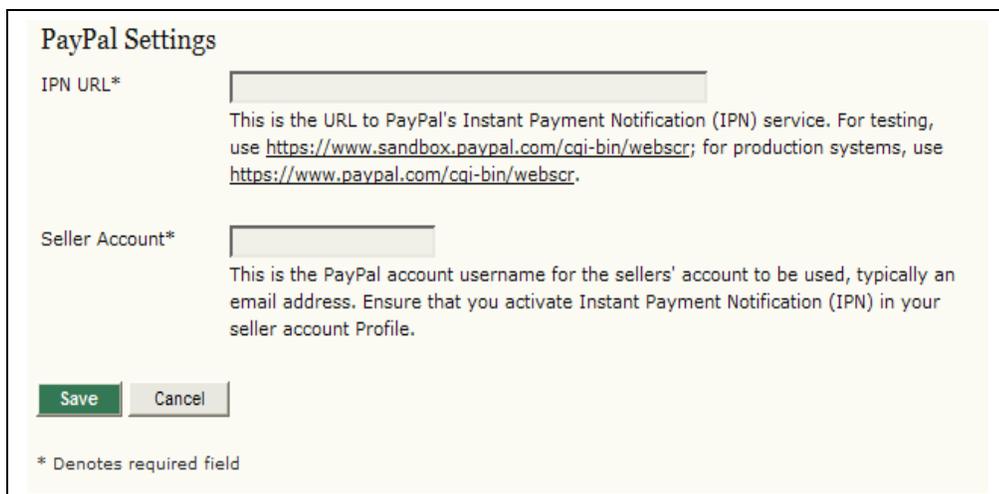
If you choose Manual payment, you can enter instructions on how to pay fees to the journal. These instructions will be displayed whenever a user needs to pay a fee.



The screenshot shows a web form titled "Manual Payment Settings". It features a label "Instructions*" and a text area with the placeholder text "Fee Payment Instructions for users selecting manual fee payment". Below the text area are two buttons: "Save" and "Cancel".

Figure 109: Manual Payment Settings

If you choose the PayPal payment method, you must enter the appropriate PayPal account information for the service to work correctly:



The screenshot shows a web form titled "PayPal Settings". It contains two required fields, both marked with an asterisk (*): "IPN URL*" and "Seller Account*". Each field has a text input box and a descriptive paragraph below it. The IPN URL description includes links for testing and production. The Seller Account description notes that it should be an email address and that IPN must be activated. At the bottom, there are "Save" and "Cancel" buttons, and a note: "* Denotes required field".

Figure 110: PayPal Settings

Fee Payment Records

The Payment module tracks system payments, and provides records on the Records page. You can access this page by clicking the Records link at the top of the Fee Payment Options page.

You will be provided a list of users who have made payments to your journal, with payment types and timestamps listed. If you click on the Details link next to a listed item, you will see a more comprehensive summary of the payment record:

| USER | PAYMENT TYPE | TIMESTAMP | ACTION |
|--------------------------|---------------------|---------------------|-------------------------|
| JMACGREG | Article Publication | 2007-12-27 14:36:02 | DETAILS |
| JPAYMENT | Fast-Track Review | 2007-12-11 19:55:02 | DETAILS |
| JPAYMENT | Article Submission | 2007-12-11 19:54:02 | DETAILS |

1 - 3 of 3 Items

Figure 111: Payment Details

Subscriptions

If you have chosen the subscription option for your journal (see Setup section 4.1), a link to manage your subscriptions will appear on your menu:

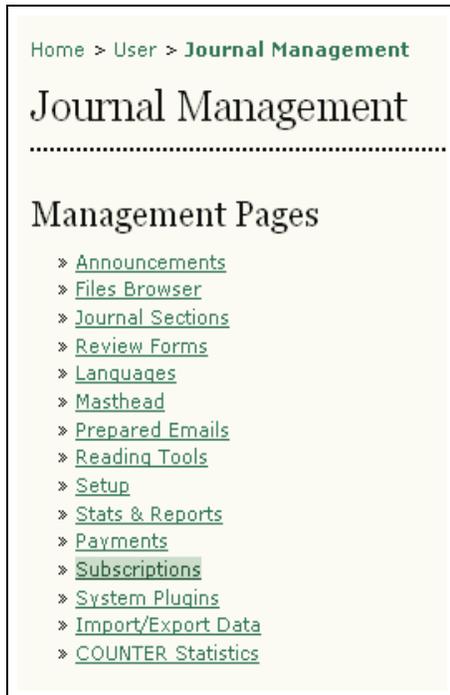


Figure 112: Managing subscriptions

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

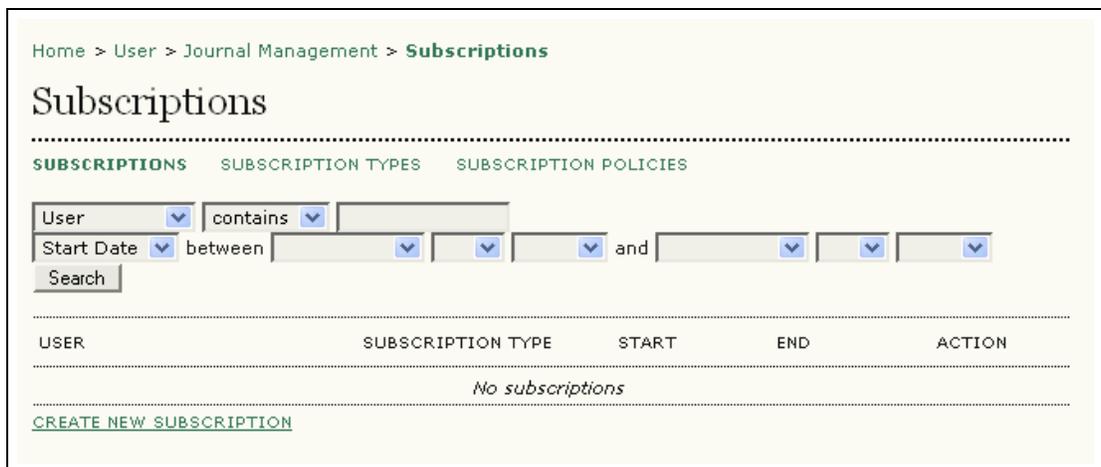


Figure 113: Subscription choices

Create Subscription Types

The first step in setting up 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 114: Creating a new subscription type

Next, fill in the details:

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

Create New Subscription Type

Form Language: English
 To enter the information below in additional languages, first select the language.

Name of Type*

Description

Cost*
 Enter a numeric value (e.g. 40 or 40.00) without symbol (e.g., \$).

Currency* Afghani (AFN)

Duration*
 The number of months the subscription lasts (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 be publicly visible (e.g., under Subscriptions in About the Journal).

* Denotes required field

Figure 115: 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. Under the Subscription Policies heading you will have to enter Subscription Manager and Subscription information. You can also enable subscription expiry reminders if you wish.

Subscription Manager Information

This information will be publicly available under About the Journal:

Subscription Manager

The contact listed under Subscriptions in About the Journal.

Form Language: English

To enter the information below in additional languages, first select the language.

Name: [Text Field]

Email: [Text Field]

Phone: [Text Field]

Fax: [Text Field]

Mailing Address: [Text Area]

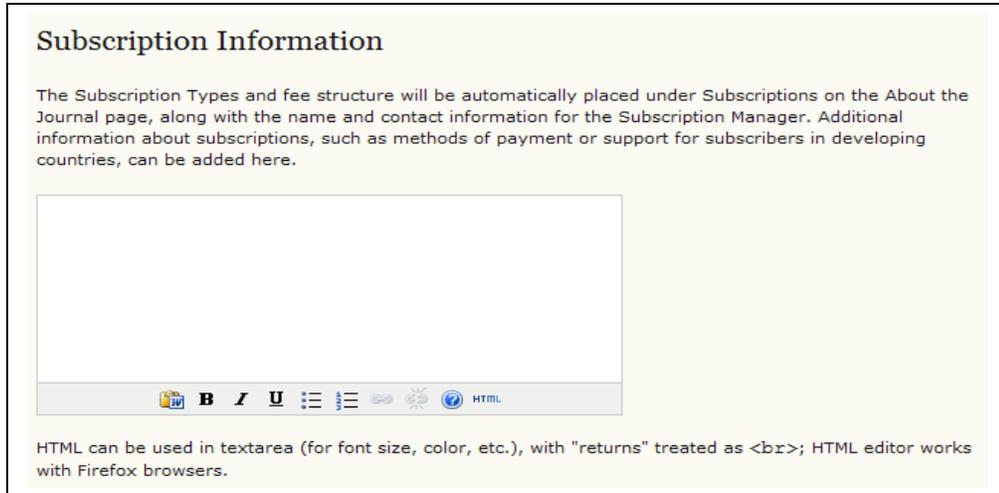
Rich text editor toolbar: [Icons for Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, HTML]

Figure 116: 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 Information

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.

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

Figure 117: Subscription Information

Subscription Expiry

Upon subscription expiry, readers may be denied access to all subscription content, or to those published after subscription expiry date. Useful reminders can be sent out to your subscribers, informing them of expiry dates.

Subscription Expiry

Upon subscription expiry, readers may be denied access to all subscription content or may continue to retain access to subscription content published prior to the subscription expiry date.

Select one of the following:

Full expiry
Readers are denied access to all subscription content upon subscription expiry.

Partial expiry
Readers are denied access to recently published subscription content, but retain access to subscription content published prior to the subscription expiry date.

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 118: 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 over time. 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" to their published content, as well as permit "author self-archiving" (both of which increase readership and citation of content).

Delayed Open Access

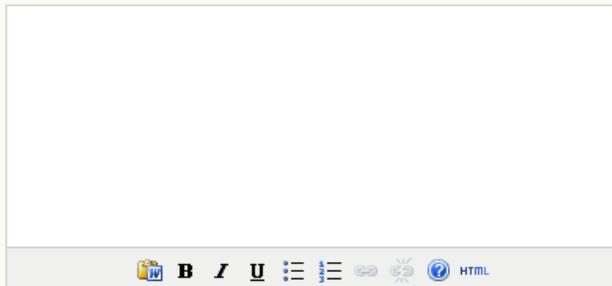
With delayed open access, editors are still able to designate specific articles within an issue for immediate open access.

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 Delayed Open Access Policy will be posted in About the Journal under Policies.



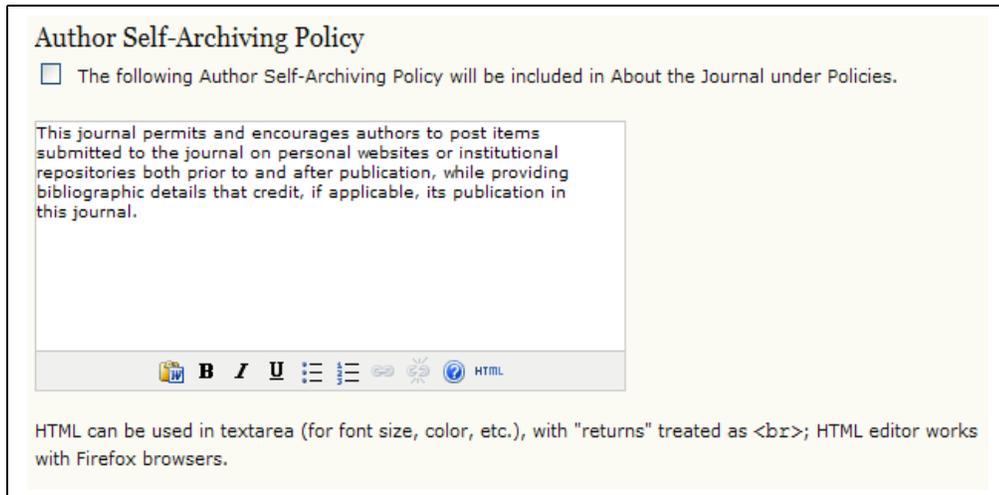
HTML can be used in textarea (for font size, color, etc.), with "returns" treated as `
`; HTML editor works with Firefox browsers.

Figure 119: 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:



Author Self-Archiving Policy

The following Author Self-Archiving Policy will be included in About the Journal under Policies.

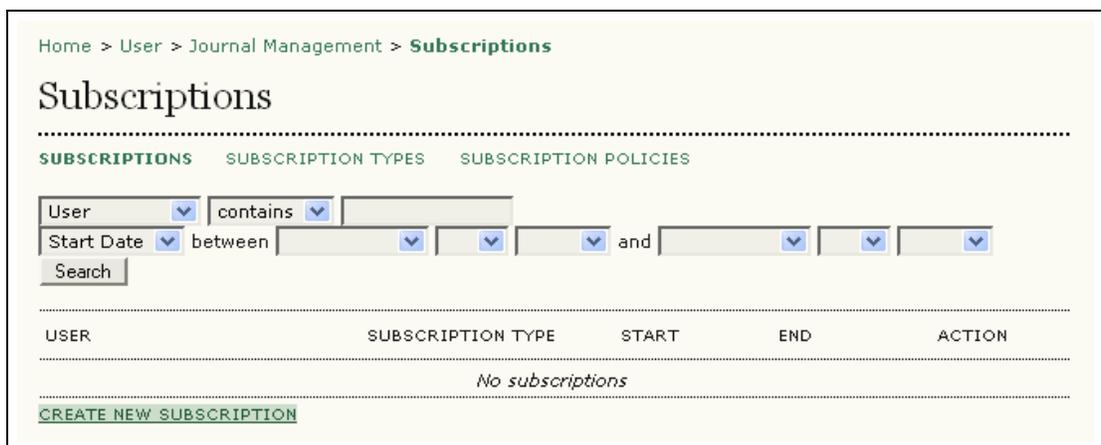
This journal permits and encourages authors to post items submitted to the journal on personal websites or institutional repositories both prior to and after publication, while providing bibliographic details that credit, if applicable, its publication in this journal.

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

Figure 120: Author self-archiving policy

Create New Subscriptions

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



Home > User > Journal Management > **Subscriptions**

Subscriptions

SUBSCRIPTIONS SUBSCRIPTION TYPE SUBSCRIPTION POLICIES

User [v] contains [v] [v]

Start Date [v] between [v] [v] [v] and [v] [v] [v]

Search [v]

| USER | SUBSCRIPTION TYPE | START | END | ACTION |
|-------------------------|-------------------|-------|-----|--------|
| <i>No subscriptions</i> | | | | |

[CREATE NEW SUBSCRIPTION](#)

Figure 121: 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 Search

[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 |
| AMELIABENNETT | Bennett, Amelia | ameliabennett@mai... | ENROLL |
| HALCLARKE | Clarke, Hal | halclarke@mailina... | ENROLL |
| IVAN CRESSMAN | Cressman, Ivan | ivancressman@mail... | ENROLL |

Figure 122: 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.*)

[Save](#) [Save and Create Another](#) [Cancel](#)

* Denotes required field

Figure 123: 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 [v] contains [v] []

Start Date [v] between [v] [v] [v] and [v] [v] [v]

Search []

| USER | SUBSCRIPTION TYPE | START | END | ACTION |
|---------------------|-------------------|------------|------------|---|
| Nahrizul Adib Kadri | individual | 2008-07-01 | 2009-06-30 | EDIT DELETE |

1 - 1 of 1 Items

[CREATE NEW SUBSCRIPTION](#)

Figure 124: 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.

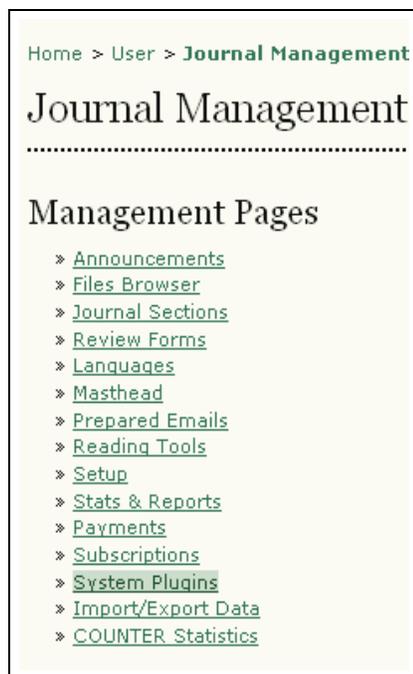


Figure 125: Journal Management menu

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, themes, block plugins for UI extensions, and more.

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:

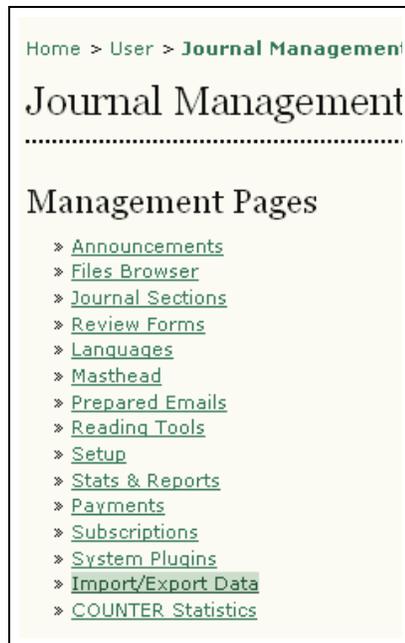


Figure 126: Journal Management menu

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

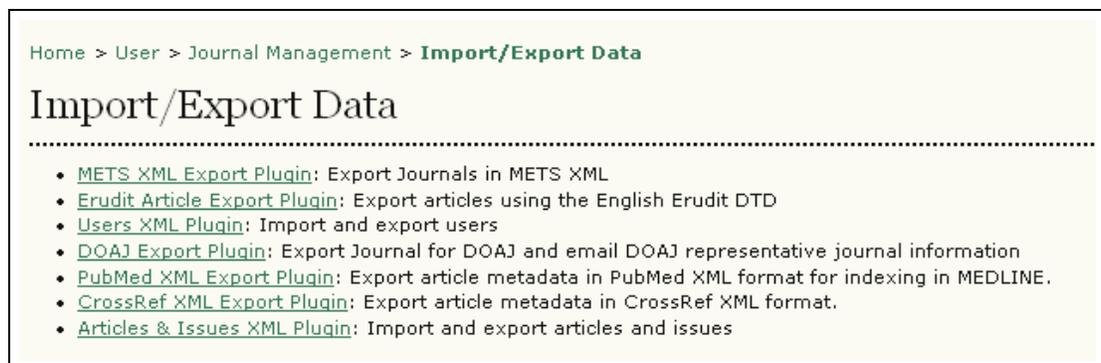


Figure 127: Import/Export Data page

METS XML Export Plugin

Exports Journals in METS XML.

Erudit Article Export Plugin

This plugin allows 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.

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 the 'Users XML Plugin' interface. It is divided into two main sections: 'Export Users' and 'Import Users'.
 In the 'Export Users' section, there is a sub-section 'Export By Role' with a list of roles: Journal Manager, Editor, Section Editor, Layout Editor, and Reviewer. Each role has a small blue button with an arrow. Below the list is an 'Export Users' button.
 Below the 'Export By Role' section is a link for 'Export All'.
 The 'Import Users' section contains instructions: '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.' It also includes a note: '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.'
 There is a text input field for 'User data file' with a 'Browse...' button. Below this are two checkboxes: 'Send a notification email to each imported user containing the user's username and password.' and 'Continue to import other users if a failure occurs.'
 At the bottom of the form are 'Upload' and 'Cancel' buttons.

Figure 128: 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.

DOAJ Export Plugin

Exports Journal for DOAJ and email DOAJ representative journal information.

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.

Articles & Issues XML Plugin

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

Click the [Export Issues](#) link or [Export Articles](#) link to download this information from your journal:

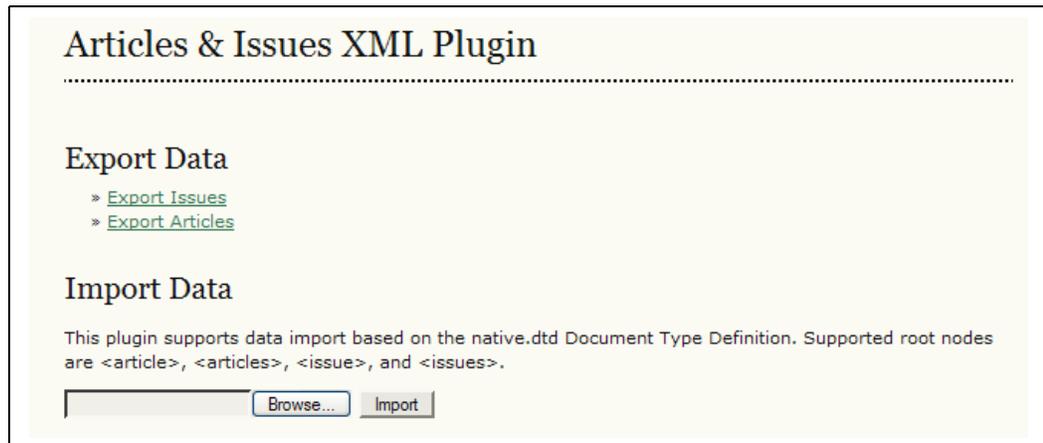


Figure 129: Importing or exporting articles and issues

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

User Management

To see a list of all of your journals registered users, go to the 'Users' section and select 'Users Enrolled in this Journal':

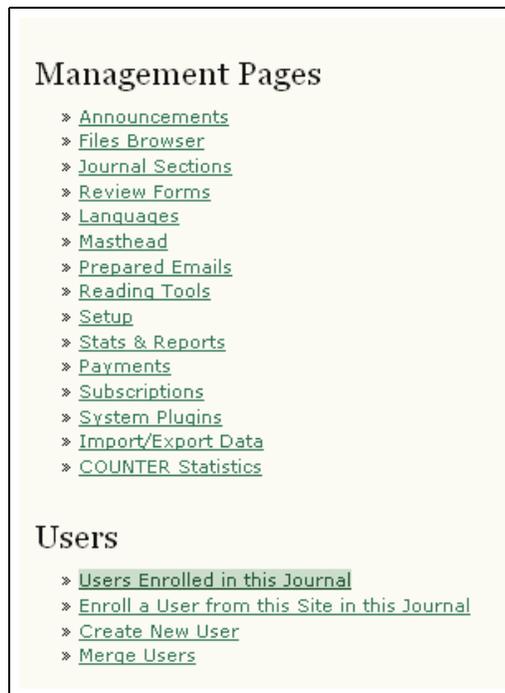


Figure 130: Users Menu

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

All Users | First name | contains | Search

[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 131: All users

Emailing 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.

Enrolling Existing Users

Users already enrolled in the journal can be given additional roles, and users registered to the site with other journals can be enrolled with your journal. To do so, click on 'Enroll a User from this Site in this Journal' from the Journal Management Page under User, or click on 'Enroll Existing User' from the 'Users Enrolled in this Journal' page. You will be provided with a list of all site-wide users.

| | | | | |
|--------------------------|--------------------------------|-----------------|-----------------|---|
| <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

[Send Email](#) [Select All](#)

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

Figure 132: 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.

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':

Home > User > Journal Management > **People**

People

Create New User

Form Language
To enter the information below in additional languages, first select the language.

Salutation

First name*

Middle name

Last name*

Gender M F

Initials

Enroll user as
 Journal Manager
 Editor
 Section Editor
 Layout Editor
 Reviewer
 Copyeditor
 Proofreader
 Author
 Reader
 Subscription Manager

Users can be assigned to, or removed from, a role at any point.

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.

Figure 133: Part of the Create New User interface

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 contains Search

[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](#)
- [Copeditors](#)
- [Proofreaders](#)
- [Reviewers](#)
- [Authors](#)
- [Readers](#)
- [Subscription Managers](#)

| USERNAME | NAME | EMAIL | ACTION |
|-------------------------------|----------------|-----------------|----------------------------|
| ADMIN | admin | alec@smecher... | |
| RINAAKERS | Rina Akers | rinaakers@ma... | MERGE USER |
| AMELIABENNETT | Amelia Bennett | ameliabennet... | MERGE USER |
| HALCLARKE | Hal Clarke | halclarke@ma... | MERGE USER |
| IVANCRESSMAN | Ivan Cressman | ivancressman... | MERGE USER |

Figure 134: 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'.

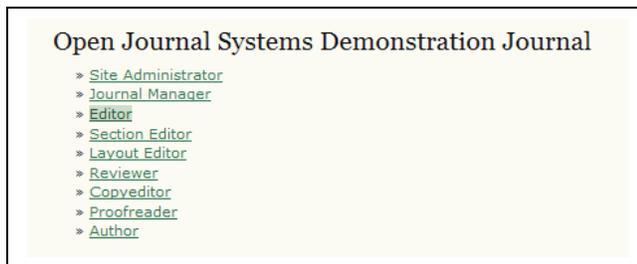


Figure 135: Signing in as an editor

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:

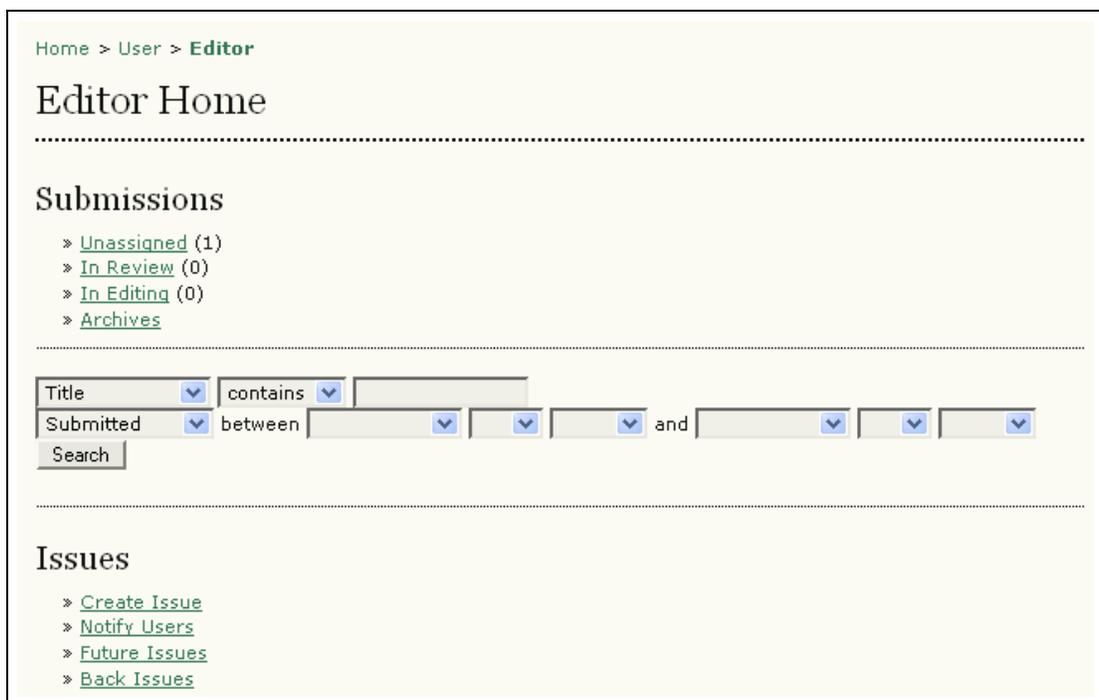


Figure 136: Editor’s Menu

Assigning Articles

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

Home > User > Editor > Submissions > **Unassigned**

Unassigned

UNASSIGNED IN REVIEW IN EDITING ARCHIVES

Assigned To: In Section:

Title contains

Submitted between and

| ID | MM-DD SUBMIT | SEC | AUTHORS | TITLE |
|-----|-----------------|-----|---------|---|
| 141 | 07-06 | ART | Smith | JOURNAL PUBLISHING IN NORTH AMERICA |

1 - 1 of 1 Items

Figure 137: Selecting an unassigned article

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

Home > User > Editor > Submissions > #141 > **Summary**

#141 Summary

SUMMARY REVIEW EDITING HISTORY

Submission

Authors John Smith

Title Journal Publishing in North America

Original file [141-316-1-SM.DOCX](#) 2008-07-06

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

Submitter John Smith

Date submitted 2008-07-06

Section Articles Change to

Editors

REVIEW EDITING REQUEST ACTION

None assigned

[ADD SECTION EDITOR](#) | [ADD EDITOR](#) | [ADD SELF](#)

Status

Status Awaiting assignment [ARCHIVE SUBMISSION](#)

Initiated 2008-07-06

Last modified 2008-07-06

Submission Metadata

[EDIT METADATA](#)

Authors

Name John Smith

URL

Affiliation -

Figure 138: 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.
- 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.
- Report author fee payments as paid, or optionally, waive those payments, if the Payments module has been enabled.
- 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:

Home > User > Editor > Submissions > #141 > Summary > **Section Editors**

Section Editors

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 |
|----------------------------------|------------------|-----------|--------|------------------------|
| REBECCA ERICKSEN | — | 0 | 0 | ASSIGN |
| HUGH GRANTHAM | — | 0 | 0 | ASSIGN |

1 - 2 of 2 Items

Figure 139: Assigning a section editor

- Once the “Assign” link next to a Section Editor is clicked, an email will be generated to the selected Section Editor informing them of your decision:

Home > User > Editor > Submissions > #141 > Summary > **Email**

Send Email

To

CC

BCC

Send a copy of this message to my address (elliotrichard@gmail.com)

Attachments

From "Richard Elliott" <elliotrichard@gmail.com>

Subject [] Editorial Assignment

Body

Rebecca Ericksen:

The submission, "Journal Publishing in North America," to New OJS 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/checkout2/index.php/newojs/sectionEditor/sub>
 Username: rebecca

Thank you,
 Richard Elliott
 elliotrichard@gmail.com

Figure 140: 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 > #141 > Summary > **Edit Metadata**

Edit Metadata

Form Language: English
To enter the information below in additional languages, first select the language.

Authors

| | |
|--|--|
| First name* | <input type="text" value="John"/> |
| Middle name | <input type="text"/> |
| Last name* | <input type="text" value="Smith"/> |
| Affiliation | <input type="text"/> |
| Country | <input type="text" value="v"/> |
| Email* | <input type="text" value="jsmith@mailiator.com"/> |
| URL | <input type="text"/> |
| Bio statement (E.g., department and rank) | <div style="border: 1px solid #ccc; padding: 5px;"><p style="text-align: center;">[Rich Text Editor]</p></div> |

Title and Abstract

| | |
|--------|--|
| Title* | <input type="text" value="Journal Publishing in North America"/> |
|--------|--|

Figure 141: 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 > #141 > **Summary**

#141 Summary

SUMMARY REVIEW EDITING HISTORY

Figure 142: Summary Links

Issues

Return to the Editor Home page:

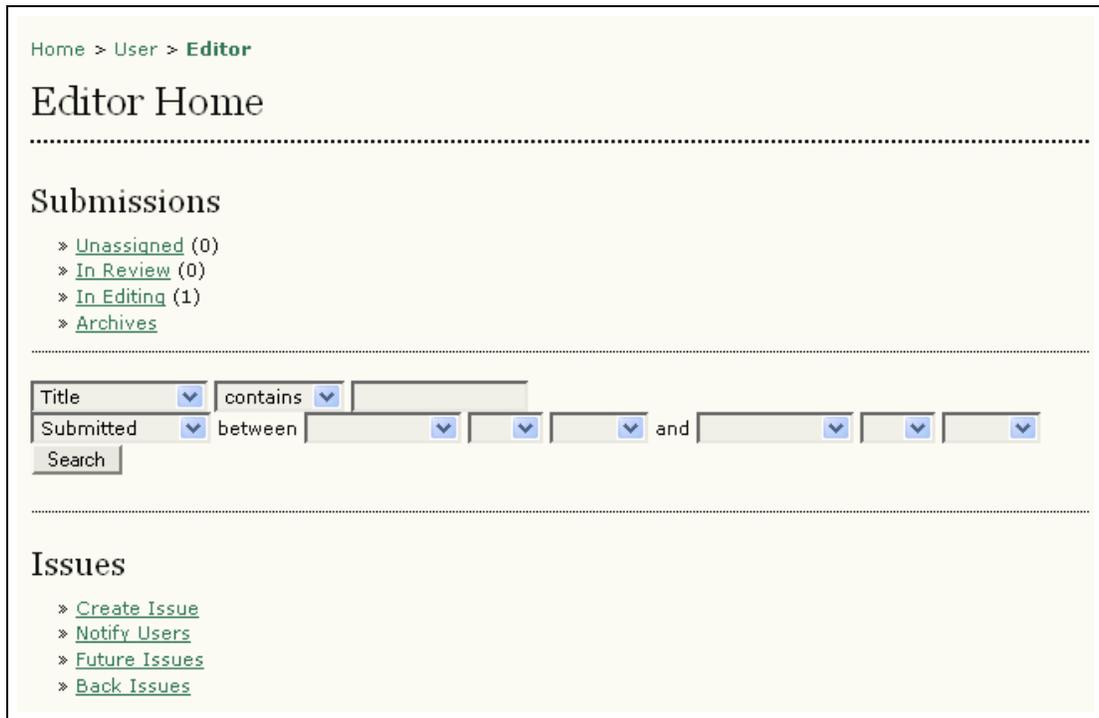


Figure 143: Editor's Menu

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: ▼

Identification

Form Language: ▼
 To enter the information below in additional languages, first select the language.

Volume:

Number:

Year:

Issue identification:

- Volume
- Number
- Year
- Title

Title:

Description:

Figure 144: 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.

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.

If the Journal Manager has enabled subscriptions, you will be able to set an Open Access date at this point for the issue as a whole as well.

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

The screenshot shows a web form titled 'Specify New Issue' with two main sections: 'Access' and 'Cover'.
Access section:
- 'Access status' is a dropdown menu set to 'Open access'.
- 'Open access date' consists of three dropdown menus: 'July', '06', and '2008'.
Cover section:
- A checkbox labeled 'Create a cover for this issue with the following elements.' is checked.
- 'Cover image' has a text input field, a 'Browse...' button, and the text 'Use Save to upload file. (Allowed formats: .gif, .jpg, or .png)'.
- 'Stylesheet' has a text input field, a 'Browse...' button, and the text 'Use Save to upload file.'. Below it, 'Uploaded: -' is displayed.
- 'Cover caption' has a large empty text area.
- Below the text area is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, Unlink, and HTML.
Display section:
- Two checkboxes are present:
 - 'Do not display cover image thumbnail in issue listing.' (unchecked)
 - 'Do not display cover image prior to table of contents.' (unchecked)
At the bottom of the form are 'Save' and 'Cancel' buttons.

Figure 145: Specify New Issue

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)

Issue

Include the table of contents from this issue: Vol 1, No 1 (2008) ▼

From "Richard Elliott" <elliotrichard@gmail.com>
Subject
Body

Readers:

New [OJS Journal](http://pkp.sfu.ca/ojs/checkout2/index.php/newojs) has just published its latest issue at <http://pkp.sfu.ca/ojs/checkout2/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,
Richard Elliott
elliotrichard@gmail.com

Figure 146: Notifying users

View Future Issues

Selecting Future Issues results in a list of all issues you have so far created, that have not been published:

| ISSUE | ITEMS | ACTION |
|------------------------------------|-------|------------------------|
| VOL 1, NO 1 (2008) | 1 | DELETE |

1 - 1 of 1 Items

Figure 147: Future Issues

Select the issue you wish to publish by clicking on the issue title:

| ORDER | AUTHORS | TITLE | REMOVE | PROOFED |
|-------|---------|-------|---|-------------------------------------|
| 1. | ↑ ↓ | Smith | JOURNAL PUBLISHING IN NORTH AMERICA | <input checked="" type="checkbox"/> |

Save Publish Issue

Figure 148: Table of Contents

You can review each issue article by clicking its linked title:

Home > User > Editor > Submissions > #141 > **Summary**

#141 Summary

SUMMARY REVIEW EDITING HISTORY

Submission

| | |
|----------------|---|
| Authors | John Smith |
| Title | Journal Publishing in North America |
| Original file | 141-316-1-SM.DOCX 2008-07-06 |
| Supp. files | None ADD A SUPPLEMENTARY FILE |
| Submitter | John Smith |
| Date submitted | 2008-07-06 |
| Section | Articles Change to <input type="button" value="Articles"/> <input type="button" value="Record"/> |
| Abstract Views | 0 |

Editors

| | REVIEW | EDITING | REQUEST | ACTION |
|--------------------------------------|-------------------------------------|-------------------------------------|------------|------------------------|
| Section Editor Rebecca Ericksen | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2008-07-06 | DELETE |

 [ADD SECTION EDITOR](#) | [ADD EDITOR](#) | [ADD SELF](#)

Figure 149: 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.

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 150: 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:

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"/> |

Figure 151: 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 been assigned responsibility. If the article is accepted for publication, the Section Editor may also oversee the editing process; but more often than not, this workflow falls to the Editor. 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':

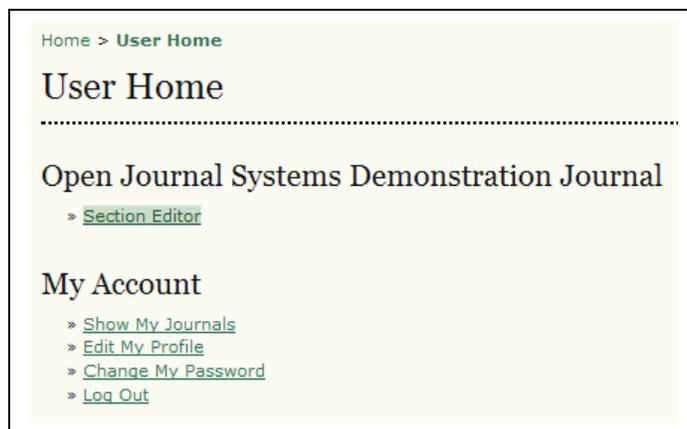


Figure 152: Signing in as a section editor

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

In Section:

Title

Submitted and

| ID | MM-DD SUBMIT | SEC | AUTHORS | TITLE | PEER REVIEW ASK | DUE | DONE | RULING |
|-----|-----------------|-----|---------|---|--------------------|-----|------|--------|
| 141 | 07-06 | ART | Smith | JOURNAL PUBLISHING IN NORTH AMERICA | - | - | - | - |

1 - 1 of 1 Items

Notes

1. Highlighted items indicate action is required by editor.
2. "Due" is filled in when reviewer accepts request to review; it displays number of weeks to review's due date or (-) weeks that it is overdue.

Figure 153: 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 > #141 > Review

#141 Review

SUMMARY **REVIEW** EDITING HISTORY

Submission

| | |
|----------------|---|
| Authors | John Smith  |
| Title | Journal Publishing in North America |
| Section | Articles |
| Editor | Rebecca Ericksen  |
| Review Version | 141-317-1-RV.DOCX 2008-07-06 |
| | 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 |  <input type="checkbox"/> Editor/Author Email Record  |
| Review Version | 141-317-1-RV.DOCX 2008-07-06 |
| Author Version | None |
| Editor Version | None |
| | <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/> |

Figure 154: 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 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 > #141 > 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 AN EXISTING USER AS REVIEWER](#) | [CREATE NEW REVIEWER](#)

| NAME | REVIEWING INTERESTS | DONE | WEEKS | LATEST | ACTIVE | ACTION |
|---------------------------------|---------------------|------|-------|--------|--------|------------------------|
| FRANK ARCHER | | 0 | — | — | 0 | ASSIGN |
| RHONA MACDONALD | | 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 155: 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 on “Select Review Form”, and on Review Forms page assign an appropriate review form.

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

Reviewer A Rhona Macdonald [CLEAR REVIEWER](#)

Review Form None / Free Form Review [SELECT REVIEW FORM](#)

| REQUEST | UNDER WAY | DUE | ACKNOWLEDGE |
|--------------------------|-----------|----------------------------|--------------------------|
| <input type="checkbox"/> | — | 2008-08-03 | <input type="checkbox"/> |

Figure 156: Selecting Review Form

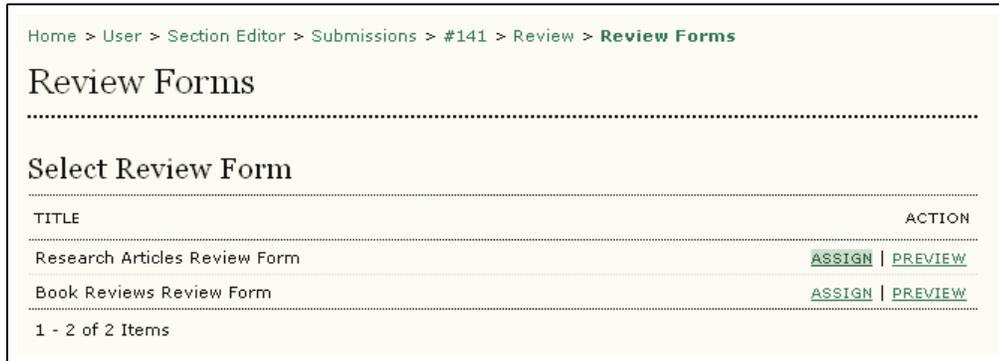


Figure 157: Assigning Review Form

- Click the “Request” icon to generate an email message to each reviewer:



Figure 158: Requesting a review

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

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

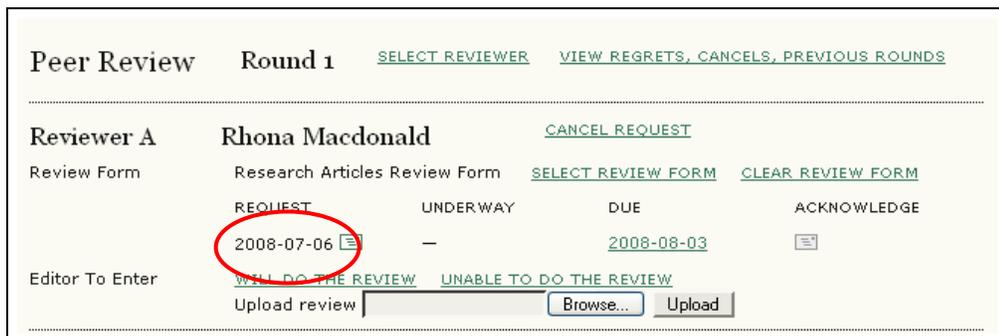


Figure 159: Review Request Date

Working with Reviewers

You can 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 Form” 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:

| Peer Review | | Round 1 | | SELECT REVIEWER | VIEW REGRETS, CANCELS, PREVIOUS ROUNDS |
|----------------------|---|------------|----------------------------|---|--|
| Reviewer A | Rhona Macdonald | | | | |
| Review Form | Research Articles Review Form | | | | |
| | REQUEST | UNDERWAY | DUE | ACKNOWLEDGE | |
| | 2008-07-06 | 2008-07-06 | 2008-08-03 |  | |
| Recommendation | Accept Submission | 2008-07-06 | | | |
| Review Form Response |  | | | | |
| Uploaded files | None | | | | |

Figure 160: 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 161: Making your decision

Once press “Record Decision”, a window pops up to ask for confirming the director decision.

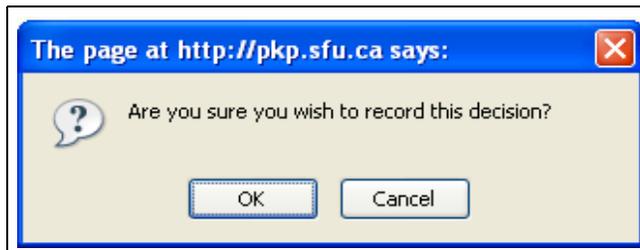


Figure 162: Confirming Message

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:

| | |
|----------------|---|
| Review Version | <input type="radio"/> 141-317-1-RV.DOCX 2008-07-06 |
| Author Version | None |
| Editor Version | None |
| | <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/> |

Figure 163: Uploading the Editor Version

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

| | |
|------------------------|---|
| Editor Decision | |
| Select decision | <input type="button" value="Accept Submission"/> <input type="button" value="Record Decision"/> |
| Decision | Accept Submission 2008-07-06 |
| Notify Author | <input type="checkbox"/> Editor/Author Email Record <input type="button" value="Send"/> 2008-07-06 |
| Review Version | <input type="radio"/> 141-317-1-RV.DOCX 2008-07-06 |
| Author Version | None |
| Editor Version | <input checked="" type="radio"/> 141-318-1-ED.DOCX 2008-07-06 <input type="button" value="DELETE"/> |
| | <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/> |

Figure 164: 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:

Home > User > Section Editor > Submissions > #141 > Editing

#141 Editing

SUMMARY REVIEW **EDITING** HISTORY

Submission

Authors: John Smith [✉]
 Title: Journal Publishing in North America
 Section: Articles
 Editor: Rebecca Ericksen [✉]

Copyediting

Copyeditor: [ASSIGN COPYEDITOR](#)

| REVIEW METADATA | REQUEST | UNDERWAY | COMPLETE | ACKNOWLEDGE |
|---|---------|----------|----------|-------------|
| 1. Initial Copyedit File: 141-319-1-CE.DOCX 2008-07-06 | [✉] | — | — | [✉] |
| 2. Author Copyedit File: | [✉] | — | — | [✉] |
| 3. Final Copyedit File: | [✉] | — | — | [✉] |

Upload file to Step 1, Step 2, or Step 3

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

Figure 165: Assigning a copyeditor

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

Home > User > Section Editor > Submissions > #141 > Editing > Copyeditors

Copyeditors

Assign Copyeditor

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 |
|-------------------------------|-----------|--------|--------|------------------------|
| ARCHER, FRANK | 0 | 0 | — | ASSIGN |

Figure 166: 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: Frank Archer [ASSIGN COPYEDITOR](#)

| | REQUEST | UNDERWAY | COMPLETE | ACKNOWLEDGE |
|---|---------|----------|----------|-------------|
| 1. Initial Copyedit File: 141-319-1-CE.DOCX 2008-07-06 | | — | — | |

Figure 167: 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: Frank Archer [ASSIGN COPYEDITOR](#)

| | REQUEST | UNDERWAY | COMPLETE | ACKNOWLEDGE |
|---|------------|------------|------------|-------------|
| 1. Initial Copyedit File: 141-319-2-CE.DOCX 2008-07-06 | 2008-07-06 | 2008-07-06 | 2008-07-06 | |
| 2. Author Copyedit File: 141-319-3-CE.DOCX 2008-07-06 | 2008-07-06 | 2008-07-06 | 2008-07-06 | |
| 3. Final Copyedit File: | 2008-07-06 | 2008-07-06 | 2008-07-06 | |

Upload file to Step 1, Step 2, or Step 3

Copyedit Comments [COPYEDIT INSTRUCTIONS](#)

Figure 168: 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. 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](#)

File: None (Upload final copyedit version as Layout Version prior to sending request)

Galley Format [FILE](#) [ORDER](#) [ACTION](#) [VIEWS](#)

Supplementary Files [FILE](#) [ORDER](#) [ACTION](#)

Upload file to Layout Version, Galley, Supp. files

Layout Comments

Figure 169: Assigning the layout editor

Choose a layout editor from the list:

Home > User > Section Editor > Submissions > #141 > 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 |
|-------------------------------|-----------|--------|--------|------------------------|
| BALL, THERESA | 0 | 0 | — | ASSIGN |

Figure 170: Assigning the Layout Editor

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

Figure 171: Request Layout Editing

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

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

Figure 172: 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:

| Proofreader | ASSIGN PROOFREADER | REQUEST | UNDER WAY | COMPLETE | ACKNOWLEDGE |
|------------------|------------------------------------|---------|-----------|----------|-------------|
| 1. Author | | | — | — | |
| 2. Proofreader | | | — | — | |
| 3. Layout Editor | | | — | — | |

Proofreading Corrections [PROOFING INSTRUCTIONS](#)

Figure 173: 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 > #141 > Editing > **Proofreaders**

Proofreaders

Assign Proofreader

First name contains

[All](#)

| NAME | COMPLETED | ACTIVE | LATEST | ACTION |
|------------------------------|-----------|--------|--------|------------------------|
| LITTLE, LILY | 0 | 0 | — | ASSIGN |

Figure 174: Selecting a proofreader

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

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

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

| Proofreader | REQUEST | UNDERWAY | COMPLETE | ACKNOWLEDGE |
|------------------|------------|------------|------------|-------------|
| Lily Little | | | | |
| 1. Author | 2008-07-06 | 2008-07-06 | 2008-07-06 | |
| 2. Proofreader | 2008-07-06 | 2008-07-06 | 2008-07-06 | |
| 3. Layout Editor | 2008-07-06 | 2008-07-06 | 2008-07-06 | |

Proofreading Corrections [PROOFING INSTRUCTIONS](#)

Figure 175: 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:

Scheduling

Schedule for publication in To Be Assigned Record

Layout Editor Theresa Ball [ASSIGN LAYOUT EDITOR](#)

Figure 176: 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 177: 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 |
|-----|-------------------|-----|---|-------|-----------------|
| 141 | 07-06 | ART | JOURNAL PUBLISHING IN NORTH AMERICA | 08-03 | 1 |

1 - 1 of 1 Items

Figure 178: 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 > #141 > **Review**

#141 Review

Submission To Be Reviewed

| | |
|---------------------|---------------------------------------|
| Title | Journal Publishing in North America |
| Journal Section | Articles |
| Abstract | abstract |
| Submission Editor | Rebecca Ericksen <input type="text"/> |
| Submission Metadata | VIEW METADATA |

Review Schedule

| | |
|------------------|------------|
| Editor's Request | 2008-07-06 |
| Your Response | — |
| Review Submitted | — |
| Review Due | 2008-08-03 |

Figure 179: 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.
Submission Manuscript [141-317-1-RV.DOCX](#) 2008-07-06
Supplementary File(s) None
3. Click on icon to fill in the review form.
Review Form
4. In addition, you can upload files for the editor and/or author to consult.
Uploaded files None
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 180: 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: Rebecca Ericksen <Rebecca.Ericksen@winte>
CC:
BCC:

Send a copy of this message to my address
(Rhona.Macdonald@med.monash.edu.au)

Attachments:

From: "Rhona Macdonald" <Rhona.Macdonald@med.monash.edu.au>
Subject: Able to Review
Body: Rebecca Ericksen:
I am able and willing to review the submission, "Journal Publishing in North America," for New OJS Journal. Thank you for thinking of me, and I plan to have the review completed by its due date, 2008-08-03, if not before.
Rhona Macdonald

Figure 181: 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 Form” icon to record your review. You need to enter text, check boxes, make selections of all required fields:

The screenshot shows a web interface for a 'Review Form Response'. At the top, there is a breadcrumb trail: 'Home > User > Reviewer > #141 > Review Form Response'. Below this is the title 'Review Form Response' followed by a dotted line. The main heading is 'Research Articles Review Form'. A sub-heading states 'This review form is for research articles'. The form contains several required fields, each marked with an asterisk: 'Paper Number *' (text input), 'Paper Title *' (text input), 'Provide a rating of the paper's acceptability *' (dropdown menu), 'Expertise: Rate your expertise in the topic area of this paper. *' (radio button selection with options: Expert, Knowledgeable, Passing knowledge, No knowledge), 'Identify what contribution the paper aims to make to this field *' (checkbox selection with options: Significance of the paper's contribution, Validity of the work presented, Originality of the work), 'Identify aspects of the paper's written presentation that need improvement *' (checkbox selection with options: statements or passages that could be expressed more clearly and concisely, figures that are redundant, difficult to understand, or missing, incomplete or missing references, or citations that lack references, changes that could make the paper more understandable to an international readership, problems in formatting, layout, or legibility), and 'Write your review of the paper here. *' (text input).

Figure 182: Review Form

If no review forms are created or the created review forms are deactivated, a “Review” icon appears, and the default form for the reviewer looks like below:

The screenshot shows a web form titled "Review". At the top, it says "No Reviews" followed by a horizontal dotted line. Below this, there are two main sections for entering comments. The first section is labeled "Subject" and "For author and editor", and contains a small text input field and a large, empty text area. The second section is labeled "For editor" and contains a large, empty text area. At the bottom left of the form, there are two buttons: a green "Save" button and a grey "Close" button. Below the buttons, there is a small asterisk followed by the text "* Denotes required field".

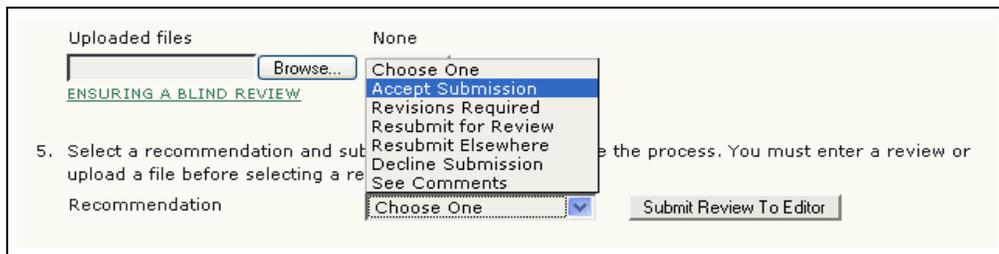
Figure 183: Review Comments

Save your reviews. 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:



The screenshot shows a web form for submitting a review. At the top, there is a section for 'Uploaded files' with a 'Browse...' button and a text input field containing 'ENSURING A BLIND REVIEW'. Below this, there is a numbered instruction: '5. Select a recommendation and submit your review. You must enter a review or upload a file before selecting a recommendation.' To the right of this instruction is a dropdown menu with a 'Choose One' label. The dropdown menu is open, showing the following options: 'Accept Submission', 'Revisions Required', 'Resubmit for Review', 'Resubmit Elsewhere', 'Decline Submission', and 'See Comments'. Below the dropdown menu is another 'Choose One' dropdown menu. To the right of these elements is a 'Submit Review To Editor' button.

Figure 184: 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:

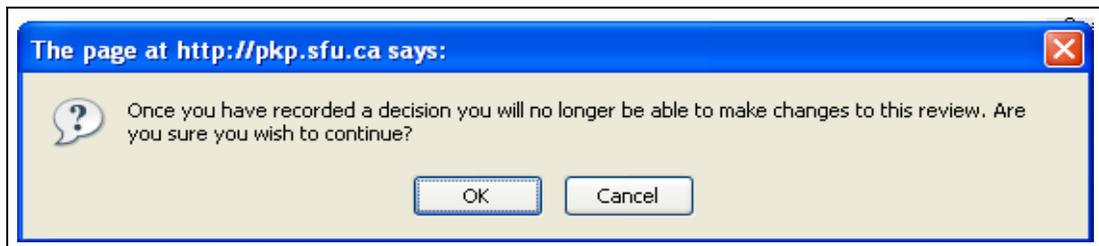


Figure 185: Warning message

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
(Rhona.Macdonald@med.monash.edu.au)

Attachments

From "Rhona Macdonald" <Rhona.Macdonald@med.monash.edu.au>

Subject

Body

Rebecca Ericksen:

I have now completed my review of "Journal Publishing in North America" for New OJS Journal, and submitted my recommendation, "Accept Submission."

Rhona Macdonald

Figure 186: 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 187: 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 |
|-----|-----------------|-----|---------|---|--------|
| 141 | 07-06 | ART | Smith | JOURNAL PUBLISHING IN NORTH AMERICA | Step 1 |

1 - 1 of 1 Items

Figure 188: Selecting an article for copyediting

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

Home > User > Copyeditor > #141 > **Editing**

#141 Editing

Submission

Authors: John Smith

Title: Journal Publishing in North America

Section: Articles

Editor: Rebecca Ericksen

Copyedit

Copyeditor: Frank Archer

| | REVIEW METADATA | REQUEST | UNDERWAY | COMPLETE |
|---------------------|--|--|---------------------------------------|----------|
| 1. Initial Copyedit | | 2008-07-06 | 2008-07-06 | |
| | File: 141-319-1-CE.DOCX 2008-07-06 | | | |
| | <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 189: 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 and Author that you have finished with the submission:

Copyedit

Copyeditor: Frank Archer

[REVIEW METADATA](#) REQUEST UNDERWAY COMPLETE

| | | | | |
|----|--|--|---------------------------------------|--|
| 1. | Initial Copyedit | 2008-07-06 | 2008-07-06 |  2008-07-06 |
| | File: 141-319-2-CE.DOCX 2008-07-06 | | | |
| | <input type="text"/> | <input type="button" value="Browse..."/> | <input type="button" value="Upload"/> | |
| 2. | Author Copyedit | 2008-07-06 | 2008-07-06 | 2008-07-06 |
| | File: 141-319-3-CE.DOCX 2008-07-06 | | | |
| 3. | Final Copyedit | 2008-07-06 | 2008-07-06 |  2008-07-06 |
| | File: None | | | |
| | <input type="text"/> | <input type="button" value="Browse..."/> | <input type="button" value="Upload"/> | |

Copyedit Comments  [COPYEDIT INSTRUCTIONS](#)

Figure 190: 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 191: Signing in as a Layout Editor

Layout Editing

From the “Active Submission” page, select the title of the article:

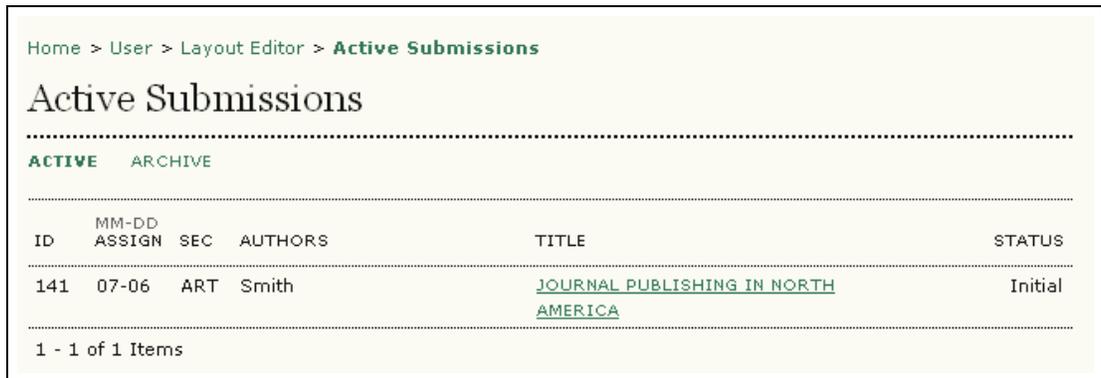


Figure 192: Selecting an article for editing

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

Use the upload galley format tool to submit these documents:

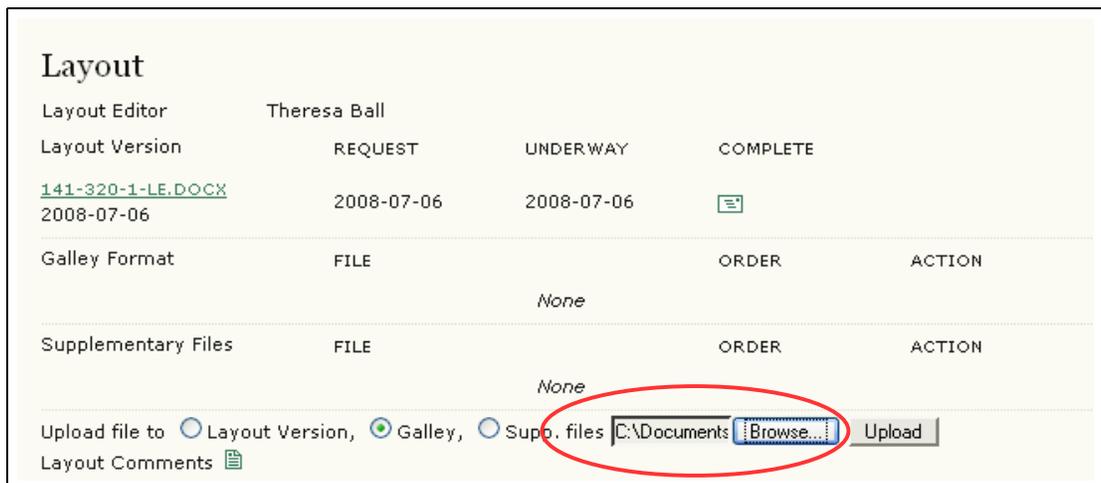


Figure 193: Uploading galley files

For HTML documents, you will add a label (e.g., HTML; OJS may already have guessed the correct label, so you may not have to change this):

Home > User > Layout Editor > #141 > Editing > Galley

Galley

Edit a Layout Galley

Galley File Information

| | | |
|--------------------|---|---|
| Label* | <input type="text" value="HTML"/> | The galley label is used to identify the item's file format (e.g. HTML, PDF, etc.). |
| Language* | <input type="text" value="English"/> | |
| File name | 141-322-1-PB.HTML | |
| Original file name | paper.html | |
| File type | text/html | |
| File size | 16KB | |
| Date uploaded | 2008-07-06 | |
| Replace File | <input type="text"/> <input type="button" value="Browse..."/> | Use Save to upload file. |

* Denotes required field

Figure 194: 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 > #141 > Editing > Galley

Galley

Edit a Layout Galley

Galley File Information

| | | |
|--------------------|---|---|
| Label* | <input type="text" value="PDF"/> | The galley label is used to identify the item's file format (e.g. HTML, PDF, etc.). |
| Language* | <input type="text" value="English"/> <input type="button" value="v"/> | |
| File name | 141-323-1-PB.PDF | |
| Original file name | paper.pdf | |
| File type | text/html | |
| File size | 19KB | |
| Date uploaded | 2008-07-06 | |
| Replace File | <input type="text"/> <input type="button" value="Browse..."/> | Use Save to upload file. |

* Denotes required field

Figure 195: Adding the PDF 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 Theresa Ball

| Layout Version | REQUEST | UNDERWAY | COMPLETE |
|---|------------|------------|----------|
| 141-320-1-LE.DOCK 2008-07-06 | 2008-07-06 | 2008-07-06 | |

| Galley Format | FILE | ORDER | ACTION |
|------------------------------------|--|-------|---|
| 1. HTML VIEW PROOF | 141-322-1-PB.HTML 2008-07-06 | ↑ ↓ | EDIT DELETE |
| 2. PDF VIEW PROOF | 141-323-1-PB.PDF 2008-07-06 | ↑ ↓ | EDIT DELETE |

Supplementary Files FILE ORDER ACTION

None

Upload file to Layout Version, Galley, Supp. files

Layout Comments

Figure 196: Editing the galley files

When you have finished, select the “Complete” email 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 Lily Little

[REVIEW METADATA](#)

| | REQUEST | UNDERWAY | COMPLETE |
|------------------|------------|------------|------------|
| 1. Author | 2008-07-06 | 2008-07-06 | 2008-07-06 |
| 2. Proofreader | 2008-07-06 | 2008-07-06 | 2008-07-06 |
| 3. Layout Editor | 2008-07-06 | 2008-07-06 | |

Proofreading Corrections [PROOFING INSTRUCTIONS](#)

Figure 197: 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 198: 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 Theresa Ball

Galley Format FILE

| | | | | |
|----|------|----------------------------|-----------------------------------|------------|
| 1. | HTML | VIEW PROOF | 141-322-1-PB.HTML | 2008-07-06 |
| 2. | PDF | VIEW PROOF | 141-323-1-PB.PDF | 2008-07-06 |

Supplementary Files FILE

None

Layout Comments 

Proofreading

Proofreader Lily Little

[REVIEW METADATA](#)

| | | REQUEST | UNDERWAY | COMPLETE |
|----|----------------------|------------|------------|---|
| 1. | Author Comments | 2008-07-06 | 2008-07-06 | 2008-07-06 |
| 2. | Proofreader Comments | 2008-07-06 | 2008-07-06 |  |
| 3. | Layout Editor Final | — | — | — |

Proofreading Corrections  [PROOFING INSTRUCTIONS](#)

Figure 199: 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.

The Author may also be required to pay Author Submission and/or Publication fees, and may also optionally be able to pay a Fast-Track Review fee, depending on whether the journal charges for such fees.

Getting Started

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



Figure 200: Selecting your role as an author

Submitting Articles

Step 1: Start the submission process by selecting the “Click here” link at the bottom of the page:

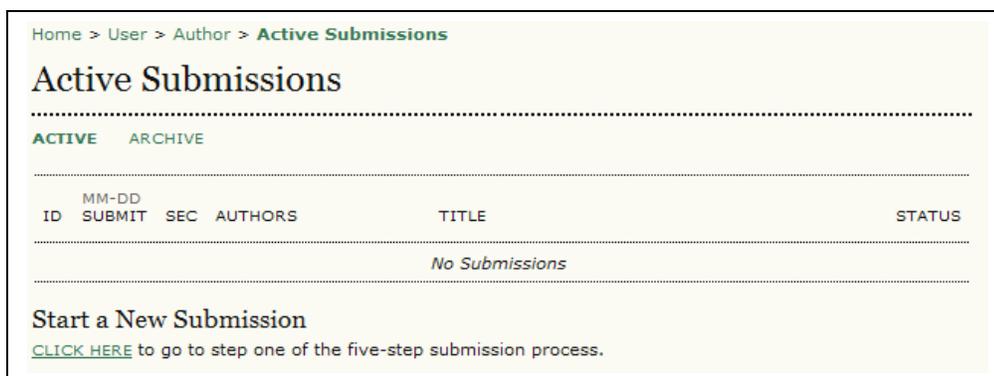


Figure 201: Starting a new submission

1. Select which section you feel is most appropriate for your article from the drop-down menu:

Home > User > Author > Submissions > New Submission

Step 1. Starting the Submission

1. START 2. ENTER METADATA 3. UPLOAD SUBMISSION 4. UPLOAD SUPPLEMENTARY FILES 5. CONFIRMATION

Encountering difficulties? [Contact for assistance.](#)

Journal Section

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

Section*

Figure 202: Selecting the Journal Section

2. 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.
- Where available, URLs for the references have been provided.
- 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 203: Submission Checklist

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

Comments for the Editor

Enter text (optional)

B I U HTML

Figure 204: Comments and saving

4. Select “Save and continue”.

Please note that, depending on how the journal has been set up, you may be required to agree to a copyright notice and/or a competing interests statement. You may also see fee descriptions at this stage as well, although you will not have to pay for anything until you finalize the submission.

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:

Home > User > Author > Submissions > **New Submission**

Step 2. Entering the Submission's Metadata

1. START 2. **ENTER METADATA** 3. UPLOAD SUBMISSION 4. UPLOAD SUPPLEMENTARY FILES 5. CONFIRMATION

Form Language: English (dropdown)

To enter the information below in additional languages, first select the language.

Authors

First name*

Middle name

Last name*

Affiliation

Country

Email*

URL

Bio statement (E.g., department and rank)

Figure 205: Adding author information

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

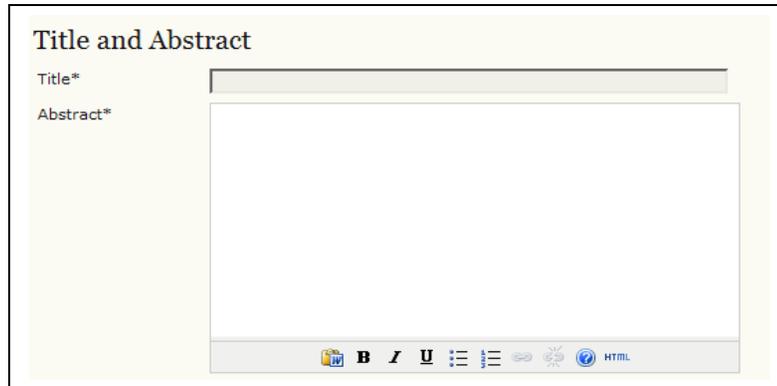


Figure 206: Adding title and abstract information

3. Complete the indexing:

Additional codes.'" data-bbox="216 431 671 507"/>

Figure 207: Indexing

4. Enter the names of any supporting agencies:



Figure 208: Adding supporting agency information and saving

5. Select "Save and continue".

Step 3: Upload the submission.

Home > User > Author > Submissions > **New Submission**

Step 3. Uploading the Submission

1. START 2. ENTER METADATA 3. **UPLOAD SUBMISSION** 4. UPLOAD SUPPLEMENTARY FILES 5. CONFIRMATION

To upload a manuscript to this journal, complete the following steps.

1. On this page, click Browse (or Choose File) which opens 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 at the bottom of this page.

Encountering difficulties? [Contact for assistance.](#)

Submission File

No submission file uploaded.

Upload submission file

Figure 209: 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.

Home > User > Author > Submissions > **New Submission**

Step 4. Uploading Supplementary Files

1. START 2. ENTER METADATA 3. UPLOAD SUBMISSION 4. **UPLOAD SUPPLEMENTARY FILES** 5. CONFIRMATION

This optional step allows Supplementary Files to be added to a submission. The files, which can be in any format, might include (a) research instruments, (b) data sets, which comply with the terms of the study's research ethics review, (c) sources that otherwise would be unavailable to readers, (d) figures and tables that cannot be integrated into the text itself, or other materials that add to the contribution of the work.

| ID | TITLE | ORIGINAL FILE NAME | DATE UPLOADED | ACTION |
|---|-------|--------------------|---------------|--------|
| <i>No supplementary files have been added to this submission.</i> | | | | |

Upload supplementary file

Figure 210: Uploading 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.

Home > User > Author > Submissions > **New Submission**

Step 5. Confirming the Submission

1. START 2. ENTER METADATA 3. UPLOAD SUBMISSION 4. UPLOAD SUPPLEMENTARY FILES **5. CONFIRMATION**

To submit your manuscript to New OJS Journal click Finish Submission. The submission's principal contact will receive an acknowledgement by email and will be able to view the submission's progress through the editorial process by logging in to the journal web site. Thank you for your interest in publishing with New OJS Journal.

File Summary

| ID | ORIGINAL FILE NAME | TYPE | FILE SIZE | DATE UPLOADED |
|-----|----------------------------|-----------------|-----------|---------------|
| 316 | PAPER.DOCX | Submission File | 32KB | 07-06 |

Finish Submission Cancel

Figure 211: Completing the submission process

If the journal requires author fees to be paid, you can pay from this page. Clicking on the 'Pay Now' link beside a payment will take you to either a PayPal or Manual payment page, depending how the journal manages payments. Please note that the only mandatory payment at this stage is the Submission Fee, if requested. If a Fast-Track Review Fee is requested, it is optional; and if an Article Publication Fee is requested, you will be requested to log in and pay once your article has been approved for publishing. You can also request a waiver for any of these fees if you wish.

Author Fees

This journal charges the following author fees.

Article Submission: 100.00 (CAD) [PAY NOW](#)
 Authors are required to pay an Article Submission Fee as part of the submission process to contribute to review costs.

Fast-Track Review: 120.00 (CAD) [PAY NOW](#)
 With the payment of this fee, the review, editorial decision, and author notification on this manuscript is guaranteed to take place within 4 weeks.

Article Publication: 150.00 (CAD)
 If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publications costs.

If you do not have funds to pay such fees, you will have an opportunity to waive each fee. We do not want fees to prevent the publication of worthy work.

Request Waiver

Please consider waiving the Article Submission Fee for this article

Please use the comments box below to indicate why fees should be waived.

Figure 212: Pay Author Fees

Each time you log in, you will be presented with a list of all of your outstanding submissions, including their status (both editorially and payment-wise).

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

Active Submissions

ACTIVE ARCHIVE

| ID | MM-DD SUBMIT | SEC | AUTHORS | TITLE | STATUS |
|-----|-----------------|-----|---------|---|---------------------|
| 141 | 07-06 | ART | Smith | JOURNAL PUBLISHING IN NORTH AMERICA | Awaiting assignment |

1 - 1 of 1 Items

Start a New Submission
[CLICK HERE](#) to go to step one of the five-step submission process.

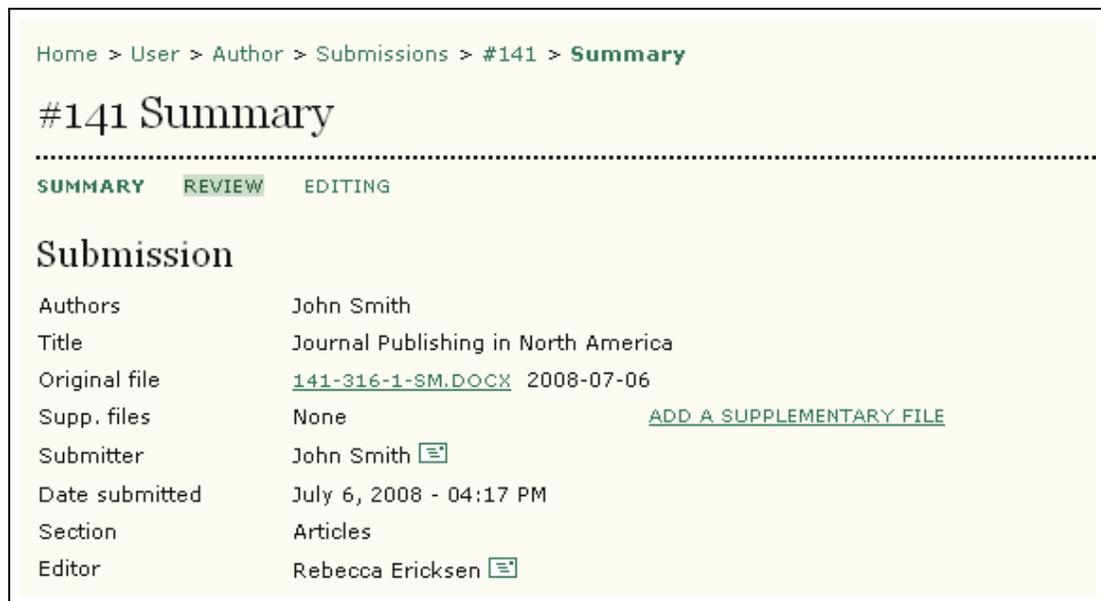
Figure 213: Active submissions

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 > #141 > Summary

#141 Summary

SUMMARY REVIEW EDITING

Submission

| | |
|----------------|--|
| Authors | John Smith |
| Title | Journal Publishing in North America |
| Original file | 141-316-1-SM.DOCX 2008-07-06 |
| Supp. files | None ADD A SUPPLEMENTARY FILE |
| Submitter | John Smith  |
| Date submitted | July 6, 2008 - 04:17 PM |
| Section | Articles |
| Editor | Rebecca Ericksen  |

Figure 214: Selecting the "Review" link

Home > User > Author > Submissions > #141 > **Review**

#141 Review

SUMMARY **REVIEW** EDITING

Submission

| | |
|---------|--|
| Authors | John Smith  |
| Title | Journal Publishing in North America |
| Section | Articles |
| Editor | Rebecca Ericksen  |

Peer Review

Round 1

| | |
|----------------|--|
| Review Version | 141-317-1-RV.DOCX 2008-07-06 |
| Initiated | 2008-07-06 |
| Last modified | 2008-07-06 |
| Uploaded file | None |

Editor Decision

| | |
|-----------------------|---|
| Decision | Accept Submission 2008-07-06 |
| Notify Editor |  Editor/Author Email Record  2008-07-06 |
| Editor Version | 141-318-1-ED.DOCX 2008-07-06 |
| Author Version | None |
| Upload Author Version | <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/> |

Figure 215: 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 |
|-----|-----------------|-----|---------|---|------------------------------------|
| 141 | 07-06 | ART | Smith | JOURNAL PUBLISHING IN NORTH AMERICA | QUEUED FOR EDITING |

1 - 1 of 1 Items

Start a New Submission
[CLICK HERE](#) to go to step one of the five-step submission process.

Figure 216: 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: Frank Archer

[REVIEW METADATA](#)

| | REQUEST | UNDERWAY | COMPLETE |
|---|------------|------------|------------|
| 1. Initial Copyedit File: 141-319-2-CE.DOCX 2008-07-06 | 2008-07-06 | 2008-07-06 | 2008-07-06 |
| 2. Author Copyedit File: 141-319-3-CE.DOCX 2008-07-06 <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/> | 2008-07-06 | 2008-07-06 | |
| 3. Final Copyedit File: None | — | — | — |

Copyedit Comments [COPYEDIT INSTRUCTIONS](#)

Figure 217: 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 | | REQUEST | UNDERWAY | COMPLETE |
|--|---------------|---------------------------------------|------------|---|
| Proofreader | None | | | |
| REVIEW METADATA | | | | |
| 1. | Author | 2008-07-06 | 2008-07-06 |  |
| 2. | Proofreader | — | — | — |
| 3. | Layout Editor | — | — | — |
| Proofreading Corrections  | | PROOFING INSTRUCTIONS | | |

Figure 218: 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 shows a web page for an article in the Open Journal Systems Demonstration Journal, Vol 1, No 1 (2005). The article title is "Scholarly Associations and the Economic Viability of Open Access Publishing" by John Willinsky, University of British Columbia. The page includes an abstract and an introduction. On the right side, there is a sidebar titled "OJSDJ Vol 1, No 1 (2005)" which contains a "TABLE OF CONTENTS", a "Scholarly..." section with the author's name "Willinsky", and a "Reading Tools" section. The "Reading Tools" section lists various options for interacting with the article, such as "About the author", "Bibliographic info", "Indexing info", "Go to print-version", "Definitions", "Send link to colleague", "Add comment to item", and "Email the author". Below this, there is a "FIND RELATED ITEMS AMONG" section with a list of categories like "Author's work", "Book", "e-Journals", etc. At the bottom of the sidebar, there is a "FIND ITEMS IN THIS JOURNAL" section with a search box and a "Search" button. The main content area has a navigation menu at the top with links for HOME, ABOUT, USER HOME, SEARCH, CURRENT, and ARCHIVES. Below the navigation menu, there is a breadcrumb trail: Home > Vol 1, No 1 (2005) > Willinsky.

Figure 219: 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.)