OJS in an Hour

An Introduction to Open Journal Systems

Version 2.2.1.0

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

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

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

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

OJS Features

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

The following image is a screenshot of an OJS Demonstration Journal

Table of Contents:

Figure 1: OJS Table of Contents
The next image shows the HTML version of an article from the table of contents, including the Reading Tools in the right column. PDF documents can also be made available:

![OJS HTML Article](image)

**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.
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

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

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

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

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

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

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

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

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

Select Reviewers
Editor invites reviewers from database with interests, load

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

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

Proofreading

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

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

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

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

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

Submission Editing
Authors reviews copyedits and proofreads galleys

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

OJS in an Hour
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](image)
Site Settings

From the Site Administration menu, under “Site Management”, choose “Site Settings”:

![Site Administration Menu](Figures/Site_Administration_Menu.png)

This will allow you to add information regarding your overall OJS installation, not individual journals. This includes the name of your site, an introductory statement about your site, a redirect option (leave this blank if you do not need to redirect users), a description of your site, contact information, a minimum password length for registered users, and indexing registration. You will have the opportunity to provide details about your individual journal(s) at a later stage.
Figure 5: Site Settings
Creating a New Journal

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

![Image of journal list](image-url)

**Figure 6:** Creating a new journal

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

![Image of journal settings form](image-url)

**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](image)

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

![Figure 9: Import from OJS 1](image)
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):
  o If a user already exists with the same username as an imported user, all imported data will be associated with the existing user
  o 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”:

![Site Administration Menu](image)

**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.
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)

**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)
- Türkçe (Türkçe) (tr_TR)
- Tiếng Việt (vi_VN)
- 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.
To enable LDAP authentication, use the dropdown menu under Create Authentication Source. This will open a page of LDAP options and settings for your journal:

**Figure 14: LDAP options and settings**

### Version Checking

You can check which OJS version you are currently using from the Site Administrator menu. Select “System Information”.

**Figure 13: Authentication Sources**
From the System Information screen, you can see the current version information. This screen also allows you to check for OJS software 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.

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

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

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

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

Getting Started

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

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

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

**Step 1: Details**

1.1 General Information

This form provides general details about your journal, including the name, abbreviation, address, print or online ISSNs, and DOI. Use the link provided to obtain an ISSN or DOI.
Figure 22: General Information

1.2 Principal Contact

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 the journal system requires very little technical support, this should be seen as a part-time assignment. There may be occasions, for example, when authors and reviewers have difficulties with the instructions or file formats, or there's a need to ensure that the journal is regularly backed up on the server.

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

Figure 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.

1.5 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.
1.6 Sponsoring Organizations

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

1.7 Sources of Support

Figure 26: Publisher information

Figure 27: Sponsoring organization information

Figure 28: Sources of support information
Additional sources can be added by clicking the “Add Contributor” button.

1.8 Search Engine Indexing

![Figure 29: Search engine indexing information](image)

**Step 2: Policies**

2.1 Focus and Scope of Journal

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

![Figure 30: Focus and scope of the journal](image)
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.
Review Policy

Review Guidelines

The Review Guidelines will provide reviewers with criteria for judging a submission’s suitability for publication in the journal, and can include any special instructions for preparing an effective and helpful review. In conducting the review, reviewers are presented with two open text boxes, the first “for author and editor,” and the second “for editor.” Alternatively, the Journal Manager can create a peer review form under REVIEW FORMS. In all cases, editors will have the option of including the reviews in corresponding with the author.

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.
Review Process

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

Select one of the following:

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

- **Email-Attachment Review Process**
  Editors send Reviewers the request to review with the submission attached to the email. Reviewers email editors their assent (or regrets), as well as the review and recommendation. Editors enter Reviewers’ assent (or regrets), as well as the review and recommendation on the submission’s Review page, to record the review process.

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 automatically_sends_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 KEEPING 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.

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.

![Editor Decision](image)

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.

![Add Item to Appear in "About the Journal"](image)

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:

1. 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.

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.

Figure 39: Potential reviewer database
Step 3: Submissions

3.1 Author Guidelines

These guidelines will appear on the About the Journal page.

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.
3.2 Copyright Notice

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

Figure 41: Submission preparation checklist

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](image)

**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.

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.


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.

---

### Step 4. Managing the Journal

**Access to Journal Content**

- **Open Access Policy**
  - The journal will provide open access to its contents.

---

**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.

<table>
<thead>
<tr>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Additional Site and Article Access Restrictions</strong></td>
</tr>
<tr>
<td>□ Users must be registered and log in to view the journal site.</td>
</tr>
<tr>
<td>□ Users must be registered and log in to view open access content.</td>
</tr>
<tr>
<td><strong>User Registration</strong></td>
</tr>
<tr>
<td>□ Users can register themselves with the journal in one or more of the following roles:</td>
</tr>
<tr>
<td>- Readers (will receive notifications and be counted as equivalent to a subscriber)</td>
</tr>
<tr>
<td>- Authors (can submit materials to the journal)</td>
</tr>
<tr>
<td>- Reviewers (available for reviewing submissions)</td>
</tr>
<tr>
<td>□ Journal Manager registers all users, with Editors or Section Editors able to register Reviewers alone.</td>
</tr>
<tr>
<td><strong>Logging and Auditing</strong></td>
</tr>
<tr>
<td>□ Maintain a log of all actions taken with a submission on its History page.</td>
</tr>
<tr>
<td>□ Maintain a log of all emails sent in relation to a submission on its History page.</td>
</tr>
</tbody>
</table>

**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 issues/volumes.

<table>
<thead>
<tr>
<th>Number</th>
<th>Volume</th>
<th>Year</th>
<th>Issues per volume</th>
<th>Volumes per year</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**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).

- [x] Custom identifiers will be used to identify issues.
- [ ] Custom identifiers will be used to identify published items.
- [ ] Custom identifiers will be used to identify galeries (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.

*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.

**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 galleys in HTML, PDF, PS, etc., files which the journal has elected to use for electronic publication.

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

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](image)

**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](image)

**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/freextquery/

   ![CrossRef Text Query](image)

**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.

![Figure 55: Proofreaders](image)

The instructions will be made available to proofreaders, authors, layout editors, and section editors in the Submission Editing stage.
Step 5: The Look

5.1 Journal Homepage Header

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

Figure 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.

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.

![Journal Page Header Image]

**Figure 58: Journal Page Header**
5.4 Journal Page Footer

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

![5.4 Journal Page Footer](image)

**Figure 59:** Journal page footer

5.5 Navigation Bar

![5.5 Navigation Bar](image)

**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.
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:

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

...to this:

```css
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.

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.

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).

Figure 62: Information
If you have chosen the announcements option for your journal (see Setup 4.4), a link to manage announcements will appear under Management Pages.

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

Figure 63: Lists

Figure 64: Announcements
Fill in the name for a new 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.

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.

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

Figure 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’:
- Select ‘Create Section’:

![Figure 71: Create Section](image)

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

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>NAME</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

This Section’s Editors

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>NAME</th>
<th>REVIEW</th>
<th>EDITING</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

* 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.

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.

<table>
<thead>
<tr>
<th>TITLE</th>
<th>IN REVIEW</th>
<th>COMPLETED</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>No review forms have been created.</td>
</tr>
</tbody>
</table>

**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.

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

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.

Form Items

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.

Figure 82: Activate Review Form

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.

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:

![Form Language](image)

**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.
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).
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.

Figure 88: Creating a Position Title

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

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](image)

**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](image)

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

---

**Figure 96:** Related Item Sets
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:
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:
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.
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.
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:
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.

![Payment General Options](image)

**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.

- **Article Submission**
  - Fee: 0
  - Fee Name: Article Submission
  - Fee Description: Authors are required to pay an Article Submission Fee as part of the submission process to contribute to review costs.

- **Fast-Track Review**
  - Fee: 0
  - Fee Name: Fast-Track Review
  - Fee Description: 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**
  - Fee: 0
  - Fee Name: Article Publication
  - Fee Description: If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publications costs.
  - Waiver Policy: 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.

- **Purchase Article**
  - Fee: 0
  - Fee Name: Purchase Article
  - Fee Description: This will activate payments for Subscriptions, where types, cost, duration and subscribers are managed by the Subscription Manager.

- **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.

<table>
<thead>
<tr>
<th>Fee Name</th>
<th>Fee Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Association Membership</td>
<td>The payment of this fee will enroll you as a member in this association for one year and provide you with free access to this journal.</td>
</tr>
<tr>
<td>Donations to journal</td>
<td>Donations of any amount to this journal are gratefully received and provide a means for the editors to continue to provide a journal of the highest quality to its readers.</td>
</tr>
</tbody>
</table>

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:

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.

![Manual Payment Settings](image1.png)

**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:

![PayPal Settings](image2.png)

**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:

![Payment Details](image)

**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:
Select ‘Subscriptions’. From the Subscriptions page, you can choose between ‘Create New Subscription’, ‘Subscription Types’ or ‘Subscription Policies’:
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](image)

Next, fill in the details:
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 Information](image)

**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.

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 1 month(s) before subscription expiry.
- Notify subscribers by email 0 week(s) before subscription expiry.
- Notify subscribers by email 0 week(s) after subscription expiry.
- Notify subscribers by email 1 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 0 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 open_access_delay 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 editor interface]

HTML can be used in text (for font size, color, etc.), with "returns" treated as <br/>. 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:
Create New Subscriptions

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

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

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:

![Subscriptions Page](img)

**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.

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:

![Journal Management menu]

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

![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.

![Figure 128: User data page](image)
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:
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:
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.
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’:
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:
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’.
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:

Assigning Articles

Select “unassigned” and then click the article title link.
Figure 137: Selecting an unassigned article

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

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:

![Figure 139: Assigning a section editor](image)

OJS in an Hour 119
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:

![Email to the section editor]

**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:
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:

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”: 
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.

**Figure 145: Specify New Issue**

**Notify Users**

Allows you to send an email to users associated with your journal:
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" <elliottrichard@gmail.com>

Subject

[ ] New Issue Published

Body

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

Thanks for the continuing interest in our work;
Richard Elliott
elliottrichard@gmail.com

Send
Cancel

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:

![Figure 147: Future Issues](image)

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

![Figure 148: Table of Contents](image)

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

![Figure 150: Viewing back issues](image)

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

![Figure 151: Issue Table of Contents](image)
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](image)
Submissions

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

![Submissions in Review](image)

**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:

![Review details](image)

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:

![Select Reviewer Image](image1)

**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.

![Review Form Image](image2)

**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:

<table>
<thead>
<tr>
<th>Peer Review</th>
<th>Round 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reviewer A</strong></td>
<td>Rhona Macdonald</td>
</tr>
<tr>
<td><strong>Review Form</strong></td>
<td>Research Articles Review Form</td>
</tr>
<tr>
<td><strong>REQUEST</strong></td>
<td><strong>UNDER WAY</strong></td>
</tr>
<tr>
<td>2008-07-06</td>
<td>2008-07-06</td>
</tr>
<tr>
<td><strong>Recommendation</strong></td>
<td>Accept Submission</td>
</tr>
<tr>
<td><strong>Review Form Response</strong></td>
<td>None</td>
</tr>
</tbody>
</table>

**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”:

![Editor Decision Form]

**Figure 161**: Making your decision

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

![Confirming Message]

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

![Figure 163: Uploading the Editor Version](image)

![Figure 164: Selecting file for the Copyeditor](image)
Copyediting

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

![Figure 165: Assigning a copyeditor]

The following screen will allow you to pick from your list of copyeditors:
Once the copyeditor has been assigned, you can use the Request icon to send an email asking him or her to undertake the assignment:

The copyeditor will then review the document and correspond with the author. You will be notified when they are both satisfied with the article.
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:
Choose a layout editor from the list:

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

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:

![Proofreading Request](image)

**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:

![Assign Proofreader](image)

**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:

![Figure 175: Completing the proofreading process](image)

Finally, scroll down to the Scheduling section, and using the dropdown menu, select the issue in which this article will appear. Notice that the article can be placed in a current issue, a future issue, or even a back issue:

![Figure 176: Scheduling the submission](image)
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](image)
Reviewing Articles

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

![Active Submissions Table](image)

**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):

![Review Page](image)

**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  142-037-1 RV DOCK  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
   
   Browse  Upload

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  Choose One
   
   Submit Review To Editor

**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:
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:

![Review Form Response](image)

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:
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:
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:
Send Email

To: Rebecca Erickson <Rebecca.Erickson@winte
CC: 
BCC: 

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

Attachments: 

Browse... Upload

From: "Rhona Macdonald" <Rhona.Macdonald@med.monash.edu.au>
Subject: [Article Review Completed]
Body:

Rebecca Erickson:

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:

![Figure 188: Selecting an article for copyediting](image)

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

![Figure 189: Downloading an article for copyediting](image)
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](image)

**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’:

![Open Journal Systems](OJS in an Hour 156)

Figure 191: Signing in as a Layout Editor
Layout Editing

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

![Active Submissions](image)

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:

![Layout](image)

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):

**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):
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:
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:

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’:

![Open Journal Systems](Open%20Journal%20Systems.png)

*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.
### Layout

<table>
<thead>
<tr>
<th>Layout Editor</th>
<th>Theresa Bell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Galley Format</td>
<td>FILE</td>
</tr>
<tr>
<td>1. HTML VIEW PROOF</td>
<td>141-922-1-08.HTML 2008-07-06</td>
</tr>
<tr>
<td>2. PDF VIEW PROOF</td>
<td>141-923-1-08.PDF 2008-07-06</td>
</tr>
<tr>
<td>Supplementary Files</td>
<td>FILE</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

### Proofreading

<table>
<thead>
<tr>
<th>Proofreader</th>
<th>Lily Little</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQUEST</td>
<td>UNDERWAY</td>
</tr>
<tr>
<td>1. Author Comments</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>2. Proofreader Comments</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>3. Layout Editor Final</td>
<td></td>
</tr>
</tbody>
</table>

**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](image)

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

![Figure 202: Selecting the Journal Section](image)

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

![Figure 203: Submission Checklist](image)

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

![Figure 204: Comments and saving](image)
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:

![Figure 205: Adding author information](image-url)
2. Add the title and abstract, in multiple languages if appropriate:

![Figure 206: Adding title and abstract information](image1)

3. Complete the indexing:

![Figure 207: Indexing](image2)

4. Enter the names of any supporting agencies:

![Figure 208: Adding supporting agency information and saving](image3)

5. Select “Save and continue”.

**Step 3:** Upload the submission.
Step 3. Uploading the Submission

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.

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.
Step 4. 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.
Step 5. Confirming the Submission

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's website. Thank you for your interest in publishing with New OJS Journal.

File Summary

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<th>ID</th>
<th>ORIGINAL FILE NAME</th>
<th>TYPE</th>
<th>FILE SIZE</th>
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<td>PAPER DRAFT</td>
<td>Submission File</td>
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</tbody>
</table>

**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 publication 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.

[Finish Submission] [Cancel]

**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).

**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:

![Figure 214: Selecting the “Review” link](image)

**#141 Summary**

**Submission**

Authors: John Smith  
Title: Journal Publishing in North America  
Original file: [141-316-1-SM.DOCX](#) 2008-07-06  
Supp. files: None  
Submitter: John Smith  
Date submitted: July 6, 2008 - 04:17 PM  
Section: Articles  
Editor: Rebecca Ericksen
From here you can read the reviewer’s version and the editor’s version. Read or submit comments using the “Editor/Author” icon.

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

**Copyediting**

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

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

---

**Figure 215**: Following the review process
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:
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](image)

**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:

![Image of Reading Tools](image)

**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.)