

Open Journal Systems: A Complete Guide to Online Publishing

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1st Edition

Published June 9 2010

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Preface

The Public Knowledge Project is a research and development initiative directed toward improving the scholarly and public quality of academic research through the development of innovative online publishing and knowledge-sharing environments.

Begun in 1998, PKP has developed [Open Journal Systems](#), [Open Conference Systems](#), and [Open Monograph Press](#) -- free software for the management, publishing, and indexing of journals and conferences, as well as [Open Archives Harvester](#) and [Lemon8-XML](#) -- to facilitate the indexing of research and scholarship. This open source software is being used around the world to increase access to knowledge and improve its scholarly management, while considerably reducing publishing costs. See [the PKP website](#) for demos, downloads, and information about these systems.

Located at the [University of British Columbia](#), [Simon Fraser University](#), [Stanford University](#), and [Arizona State University](#), the PKP also sustains an active research program on the impact of increased access to knowledge, with the resulting publications, dating back to 1998, available on the website.

For more information, please see the [Public Knowledge Project website](#). For contact information, please see the [contact page](#).



Part I. Concepts and Overview

Chapter 1. Overview

Open Journal Systems (OJS) is an open source solution to managing and publishing scholarly journals online. It 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

OJS includes the following features:

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

System Overview

By default, Open Journal Systems is installed with a very simple, functional user interface. This includes a top header, a top navigation bar, a series of navigation blocks to the right, and a main content block in the middle of the page.

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

Figure 1.1. Open Journal Systems Table of Contents



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

Figure 1.2. Open Journal Systems HTML Article View



The OJS interface can be extensively customized by uploading new stylesheets at the site, journal, and article level, and by various other journal-specific customizations. For the advanced user, the underlying template system can also be modified. As open source software, you are free to customize OJS as you wish.

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.

More detailed information on installing and administering OJS is available in the section on [system administration](#).

Getting Help

If you need help with OJS, there are several resources at your disposal.

The Open Journal Systems platform has a help document that is contextually embedded within itself, with the relevant pages displayed depending on the page you are currently viewing. You can find this context-sensitive help by clicking the Journal Help link (typically located on the right navigation bar). You can also view the help document at <http://pkp.sfu.ca/ojs/demo/present/index.php/index/help/>.

You will also find relevant documentation on our [OJS Documentation page](#), and tutorials on our [Tutorials page](#).

Our [support forum](#) is an active place to find help with common and uncommon problems. We highly recommend you search the forum for past answers to questions, and post your own question if you can't find an answer.

Finally, our [development wiki](#) is increasingly becoming a storehouse of developer-centric information, including specialized documentation on extending OJS theme- and plugin-wise; information on translating OJS; and roadmaps and general software milestone information.

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.

Excellent examples of community contributions include the vast array of [languages](#) that OJS is available in; and our growing collection of third-party [plugins](#) available. We also welcome software testing and bug reporting contributions.

Test-Drive OJS

A demonstration journal utilizing OJS 2.2.2 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 log in as an assigned reviewer.

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

Chapter 2. Basics: Navigation and Roles

Navigating OJS

Open Journal Systems has been designed as a multi-journal system which can host any number of journals on a single installation. Visitors have access to overall site-level pages, and can navigate to any journals' individual pages from the site's home page.

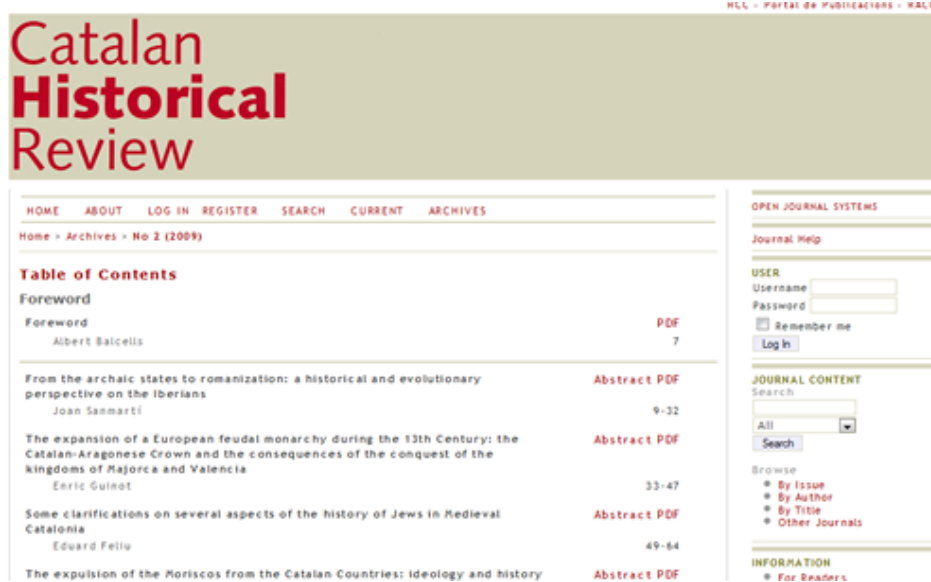
Figure 2.1. Example Multi-Journal Site Page



The system can also be set up to [redirect visitors to a single journal\[21\]](#), which is helpful if the site is only hosting one journal.

You will see a list of all the journals on the system from the site-level main page, and can visit a journal by clicking on the View Journal link.

Figure 2.2. Example Journal Page



To navigate back to the Site level, you can click the Other Journals link on the right navigation bar (in the Journal Content section, under Browse).

Common Interface Elements

You will find a number of common interface elements at the Site and Journal levels of any default OJS system.

The Top Navigation Bar

The topmost navigation bar includes Home, About, Login, Register and Search links. If you are logged in, the Login and Register links are replaced with a User Home link.

Figure 2.3. Top Navigation Bar, Site-level and Not Logged In

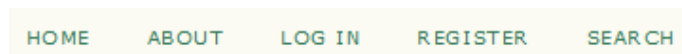
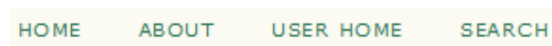


Figure 2.4. Top Navigation Bar, Site-level and Logged In



- The Home link takes you to the site homepage if you are navigating at the site-level; if you are looking at a journal, it will take you to the journal's homepage.
- If you are browsing at the site level, the About link takes you to the site's About page, which may include a description of the site as a whole, and also includes links to the About pages for every journal on the system. If you are browsing at the journal level, clicking the About link will take you to that journal's About page only.
- If you click the Login link you will be taken to a login page, where you will be asked to provide your username and password. You will also be prompted to register with the site if you are not a user. If you have forgotten

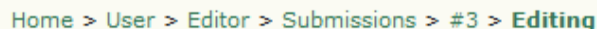
your password, you can click [Forgot Your Password?](#) to begin the retrieval process. If you log in from the site level, you will be taken to your site-wide User Home page, which provides information on which journals you are registered with, and in which role. If you log in from the journal level, you will be taken to your journal-specific User Home page, which lists only role information regarding that journal.

- If you click the Register link while browsing at the site level, you will be asked to choose a journal to register with. If you click the Register link while browsing at the journal level, you will be presented with a registration form, or a message stating that registrations are not being accepted at this time if registration has been disabled.
- Clicking the Search link will bring you to a comprehensive search page. If you are currently browsing at the site level, you will be able to choose whether to search across all journals on the site, or only against a particular journal. If you are browsing at the journal level, your search will only be performed against that journal's contents.
- If you have already logged in, you will see a User Home link rather than the Login and Register links. Clicking this will take you to your site- or journal-specific User Home page.

The Breadcrumb

Directly under the topmost navigation bar you will find a series of breadcrumb links, one for the the site- or journal-level homepage, and one for each subpage that you have navigated to, culminating on one for the page you are on, which is highlighted in bold. Each link will bring you back to that specific subpage.

Figure 2.5. The Breadcrumb



Home > User > Editor > Submissions > #3 > **Editing**

In this example, the Editor is viewing the Editing page for Submission #3. You can return to any of these pages by clicking the relevant breadcrumb link.

The Sidebar

The right sidebar actually consists of a set of "blocks", described below.

Note

By default, these sidebar blocks are placed on the right. However, a Journal Manager can move any of these blocks to the left to create a new sidebar, and can also prevent any block from displaying entirely. The Journal Manager can also reorder the vertical position of these blocks. For more information on arranging blocks, see the section on Journal Setup [Step 5.6](#). Journal Managers can also create their own blocks, enter any content they wish, and add them to the sidebar. For more information, see the section on [System Plugins](#).

Figure 2.6. The Sidebar



- The "Developed By" block at the very top of the navigation bar provides a link to the Public Knowledge Project [website](#).
- The "Journal Help" block provides a link to the system's context-sensitive help. No matter where you are in the system, you can click this link to access help specific to the matter at hand.
- The "User" block provides useful user-specific information and options. If you have not logged in, you can enter your username and password information to log in. If you have logged in, it displays your username, and provides links to journals you have registered with; to your profile; and to log out.
- The "Language" block only appears if there is more than one language installed on the system or for the particular journal you are browsing. You can toggle between these languages by choosing from the dropdown menu.
- The "Journal Content" block allows you to search journal content. You can search all fields, or you can pick a particular field (for example, authors) to search against. If you are browsing at the site level, you can search against all journals; if you are browsing a specific journal, you will only be able to search against that particular journal.
- The "Font Size" block allows you to increase or decrease the entire website's font size.

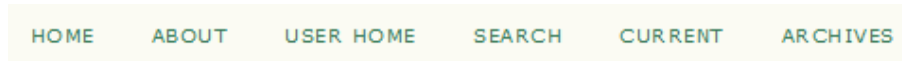
Journal-Specific Interface Elements

There are a number of interface elements that are only seen when you are browsing at the journal level.

Journal-Specific Top Navigation Bar Elements

When browsing at the journal level, the topmost navigation bar includes two extra links by default:

Figure 2.7. A Journal Navigation Bar



- The Current link takes you to the table of contents of the most-recently published issue. If the journal has no current material published, the page you see when clicking the link will say so.
- The Archives link takes you to a listing of all published issues, including the most-recently published issue. You will be able to visit each issues' table of contents by clicking the issue title.

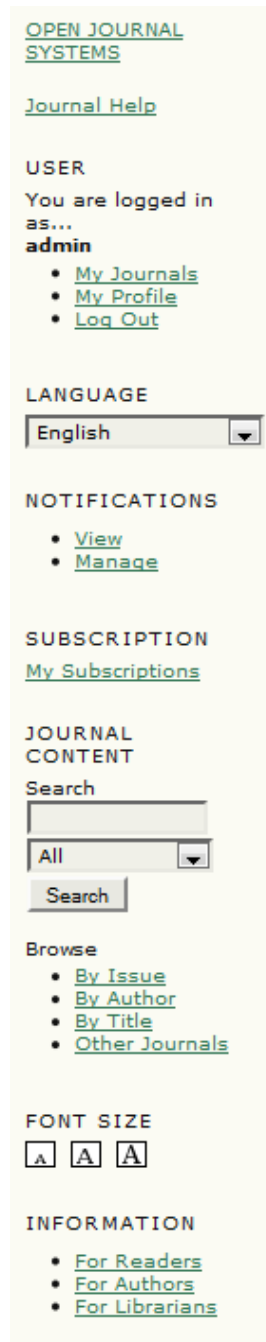
Note

Sometimes you may see even more links in the topmost navigation bar. For example, you may see an Announcements link, which will take you to a page containing journal-specific announcements. The Journal Manager may also have created custom links to appear here, taking you to specific pages within the system, or even to other websites (see Journal Setup for more information). Neither the Announcements link nor the custom links are on by default.

Journal-Specific Sidebar Elements

You will notice some new sidebar blocks when browsing at the journal level:

Figure 2.8. A Journal's Sidebar



- The "Notifications" block allows you to manage and view your journal-specific notifications.
- The "Subscription" block will only appear for subscription journals, and display information about the user's account.
- The "Browse" block allows you to browse lists of journal content. You can browse by Issue, Author and Title. Additionally, if you click the Other Journals link, you will be brought to the site-level journal list.

- The "Information" block displays the For Readers, For Authors, and For Librarians links. The content for these pages is added in the Journal Setup. If the content is deleted, these links will automatically disappear.

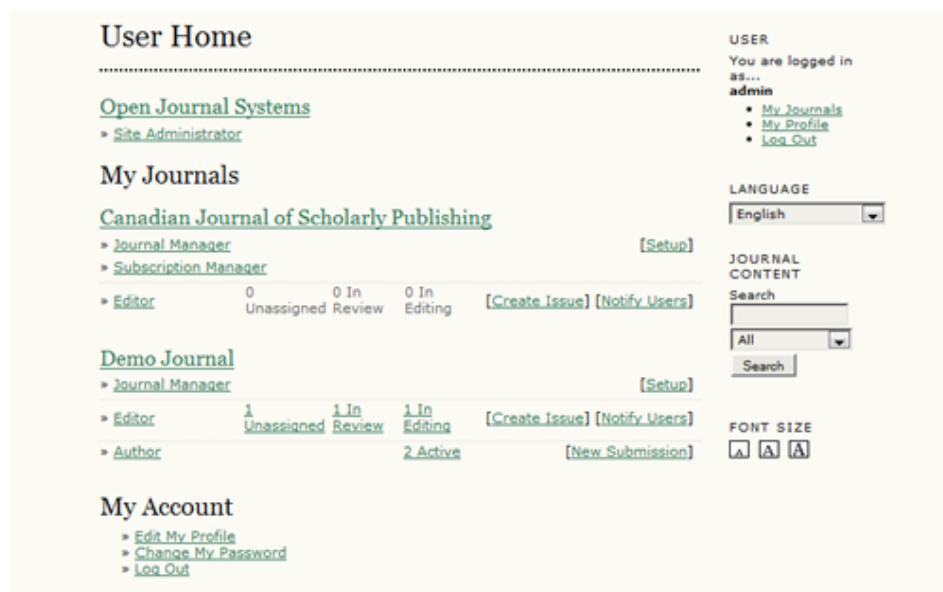
User Roles

About User Roles

OJS uses a comprehensive roles system to divide work between users, assign workflows, and limit access to different parts of the system. Since one installation of OJS can host multiple journals, users can be enrolled in different roles for more than one journal.

When a user logs into the system, they will be taken to their User Home page. From here, they will see a list of the roles they belong to for each journal in the system (along with user-specific links to edit their profile, change their password, etc.). In the example below, the user has been enrolled a Site Administrator; as a Journal Manager, Subscription Manager and Editor for the Canadian Journal of Scholarly Publishing; and as a Journal Manager, Editor and Author for Demo Journal. A user might be an Editor in one journal (with all of the accompanying permissions), but only an Author on another (and limited to only performing Author tasks for that journal).

Figure 2.9. Site-Wide User Home



Users can subsequently return to this listing by clicking either the My Journals link in the User block in the sidebar, or the User Home link in the topmost navbar; either link will return them to their site-wide User Home.

Journals can be configured to allow users to self-enroll as Readers, Authors, and/or Reviewers, or self-registration can be disabled completely. Access to journal content, or even to the journal itself, can be limited to registered users, and subscription support can also be enabled. See [Journal Management Step 4.1](#) for more information on access control.

Available Roles within OJS

Site Administrator

The Site Administrator is responsible for the overall OJS installation, ensuring the server settings are accurate, adding language files, and creating any new journals on the installation. The Site Administrator account is created as part of the installation process. Unlike all other OJS roles, there can only be one Site Administrator.

See the [Site Administrator](#) role section for more details.

Journal Manager

The Journal Manager is responsible for [setting up](#) the journal web site, configuring the system options, and managing the user accounts. This does not involve any advanced technical skills, but entails filling out web-based forms and uploading files. The Journal Manager also [enrolls](#) the Editors, Section Editors, Copyeditors, Layout Editors, Proofreaders, Authors, and Reviewers. Alternately, if the names and email addresses of potential users already exist in another database (e.g., a spreadsheet), they can be [imported](#) into the system. The Journal Manager also has access to the journal's other management features, and can create new [Sections](#) for the journal, set up [Review Forms](#), edit the [default Emails](#), manage the [Reading Tools](#), view [Statistics and Reports](#), and more.

Note

Although the Journal Manager is a per-journal role, journal managers should generally be considered system-wide trusted users, as they have the ability to assume the identities of other users who may be enrolled in other journals.

See the [Journal Manager](#) role section for more details.

Reader

The Reader role is the simplest role in OJS, and has the fewest capabilities. Readers include both subscribers for journals for which access is subscription-based, and readers who choose to register for open access journals (whether immediately open access or open after a period of time). Registered Readers receive a notification email with the publication of each issue, which includes the Table of Contents for that particular issue.

See the [Reader](#) role section for more details.

Author

Authors are able to [submit manuscripts](#) to the journal directly through the journal's website. The Author is asked to [upload a submission file](#) and to [provide metadata or indexing information](#). (The metadata improves the search capacity for research online and for the journal.) The Author can [upload 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 [review](#) and [editorial](#) process — as well as participate in the [copyediting](#) and [proofreading](#) of submissions accepted for publication — by logging in to the journal's website.

See the [Author](#) role section for more details.

Editor

The Editor oversees the entire [review](#), [editing](#) and [publishing](#) process. The Editor, working with the Journal Manager, typically establishes the [policies and procedures](#) for the journal. In the [editorial process](#), the Editor assigns submissions

to the Section Editors to see through [Submission Review](#) and [Submission Editing](#). The Editor keeps an eye on the submission's progress and assists with any difficulties. Once review is completed, the Editor typically sees the submission through the Editing process (including [copyediting](#), [layout editing](#), and [proofreading](#)) although in some journals this remains the responsibility of the Section Editor in charge of the submission's review process. The Editor also creates the journal issues, [schedules submissions for publication](#), arranges the Table of Contents, and publishes the issue as part of the [Publishing Process](#). The Editor can restore archived submissions to the active In Review or In Editing lists.

See the [Editor](#) role section for more details.

Section Editor

The Section Editor manages the [review](#) and [editing](#) of submissions to which they have been assigned. In some cases, a Section Editor who is assigned to see submissions through the Review Process will also be responsible for seeing the submissions that are accepted through the Editing process (that is, through [copyediting](#), [layout editing](#), and [proofreading](#)). Often, however, Section Editors only work with the review process, and an Editor, acting in the role of Section Editor, sees the submissions through the Editing process. The journal will have a policy on how the tasks are divided.

See the [Section Editor](#) role section for more details.

Reviewer

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](#)) 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.

See the [Reviewer](#) role section for more details.

Subscription Manager

The Subscription Manager manages the journal's Subscriptions and Subscription Types, and can also configure where and how payments are handled within the system.

The Subscription Manager does not have pages of their own in this guide; since they only see a small subset of the Journal Manager's pages, namely the [Subscriptions](#) and [Payment](#) pages, you can see them for more details.

Copyeditor

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. Some journals [have an Editor or Section Editor play this role](#).

See the [Copyeditor](#) role section for more details.

Layout Editor

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. 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 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 publishers of online journals, such as [Highwire Press](#), for example, in the life sciences or [Project Muse](#) in the humanities). In some cases, the Editor or Section Editor will also [serve as Layout Editor](#).

See the [Layout Editor](#) role section for more details.

Proofreader

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) record any typographic and formatting errors for the Layout Editor to fix. In the case of some journals, the Editor or Section Editor will also [serve as Proofreader](#).

See the [Proofreader](#) role section for more details.

Registering with a Journal

Unregistered visitors to a journal can normally register as a Reader, Author, and/or Reviewer. Journal Managers are able to remove the ability for visitors to self-register (in which case a notice will appear stating that registration is currently closed; see [Journal Setup Step 4.1](#)), but can always register users from the Journal Management Home page at any time, and for any role.

To register with a journal, click the Register link on the topmost navigation bar, select the journal you want to register with if asked, and fill out the ensuing form. You will not be able to self-register for an Editorial Role (Editor; Section Editor; Copyeditor; Layout Editor; Proofreader; Subscription Manager; or Journal Manager); if you need to be enrolled at that level, ask a current Journal Manager or Site Administrator.

All fields with an asterisk beside them (Username; Password; Repeat Password; First Name; Last Name; Email) are mandatory. If the journal is multilingual, you will need to select your preferred language.

Figure 2.10. Filling out the Registration Form

Your username and your email address must be unique; furthermore, while you can change your email address at a later date, you will be unable to change your username.

You may be able to register as a Reader, an Author and/or a Reviewer, depending on how the journal has been configured. All you have to do is check the box next to each role available to you. If you register as a Reviewer, you can also supply your reviewing interests.

Figure 2.11. Selecting Roles

The screenshot shows a registration form with the following sections:

- (E.g., department and rank)**: A text input field.
- Confirmation**: Send me a confirmation email including my username and password.
- Working languages**: English, Español (España).
- Register as**:
 - Reader: Notified by email on publication of an issue of the journal.
 - Author: Able to submit items to the journal.
 - Reviewer: Willing to conduct peer review of submissions to the journal. Identify reviewing interests (substantive areas and research methods). [libraries, scholarly publi
- Buttons**: Register (green), Cancel (grey).
- * Denotes required field**
- Privacy Statement**: The names and email addresses entered in this journal site will be used exclusively for the stated purposes of this journal and will not be made available for any other purpose or to any other party.

In some cases, the journal you are trying to register with may not be allowing registrations; if that is so, you will see a note to that effect.

If you want to register in another role within the same journal (for example, if you are already a Reader, but also want to become an Author) you can log in; go to Edit My Profile (under My Account on your User Home page); and check off the checkboxes next to any available roles, near the bottom of the page.

If you want to unenroll yourself from a journal completely, all you have to do is visit your profile and uncheck all role checkboxes. If you are enrolled at an editorial level, you will have to ask the Journal Manager to unenroll you.

Note

Please be aware that you can't completely delete your account from the system yourself. If you would like to delete your account you should contact the Journal Manager or take a look at the section on [merging accounts](#).

Viewing and Changing your Profile

To view and edit your profile, log in and click the Edit My Profile link from your User Home page. Alternatively, once logged in you can always click the My Profile link from the User Navigation block on the sidebar, if available. From here, you can update your email address, change your personal information, or change your password.

Resetting your Password

Resetting your password is a simple process if you remember it and just want to change it to something else: log in, and from your User Home page click the Change Password link. You will have to enter your current password, and then your new password twice.

Resetting your password if you have forgotten it is still a simple process, but it takes a few more steps:

1. Click the Log In link on the topmost navigation bar.
2. Click the Forgot Your Password? link.
3. Enter your email address in the box provided, and click the Reset Password link. This will send a confirmation email to your email address (if you do not see an email in your Inbox, check your spam folder).
4. The email will include a link to reset your password: click it, and you should return to the journal web site.
5. On returning to the journal web site, you should be notified that an email containing a new password has been sent to your email address. Check for that second email, and use your new credentials to log into the site.
6. After successfully logging in, you will be asked to immediately change your password. Enter the emailed password first (Current Password), and then a new, secret password twice (New Password, Repeat New Password).

Figure 2.12. Change Password

Demo Journal

HOME ABOUT LOG IN REGISTER SEARCH CURRENT OPEN JOURNAL SYSTEMS ARCHIVES

Home > [Change Password](#)

Change Password

You must choose a new password before you can log in to this site.

Please enter your username and your current and new passwords below to change the password for your account.

Username*

Current password*

New password*

Repeat new password*

The password must be at least 6 characters.

* Denotes required field

USER
Username
Password
 Remember me

LANGUAGE
English

NOTIFICATIONS
• [View](#)
• [Subscribe / Unsubscribe](#)

SUBSCRIPTION
Login to verify subscription

JOURNAL CONTENT

Part II. OJS Pages in Detail

Chapter 3. Site Administrator

Overview

As part of [installing OJS](#), you will have created a Site Administrator user account. When you log into OJS with that account, you will have access to Site Administration Settings from your User Home. You will be able to create new hosted journal instances; manage language support across your system; and perform other administrative functions.

To access Site Administration pages, log in as a Site Administrator and from your User Home Page, click the Site Administrator link.

Figure 3.1. Site Admin Home



Site Management

The following sections will explain each option available from the Site Administration menu in detail.

Site Settings

To change your site's title, any text on the home page, or your principal contact information, among other things, you will want to review your Site Settings.

From the Site Administration menu, under the Site Management heading, choose Site Settings:

Figure 3.2. Selecting Site Settings from the Site Administration Menu



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

Figure 3.3. Site Settings

Home > User > Site Administration > **Site Settings**

Site Settings

Form Language: English

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

Site title*
 Title text: Open Journal Systems
 Title image: [Browse...] [Upload]

Introduction: [Empty text area with rich text editor toolbar]

Journal redirect: Do not redirect

A detailed breakdown of all options are as follows:

- **Form Language:** This will not appear if your site is unilingual. If you have multiple languages, however, you will need to fill in each form in the first language, save your changes, return to the form, change this dropdown to the second language, complete the form in the second language, and save again.
- **Site Title:** This option is mandatory, and comes with "Open Journal Systems" as the default text. You can upload a header image if you would prefer. This will appear on the overall site.
- **Introduction:** Any text entered into the Introduction field will appear on your site's home page, above your hosted journal list.
- **Journal Redirect:** You can choose to have any attempts at accessing your website redirect to a particular hosted journal. This is useful if you only have one journal, and would prefer attempted access to your site pages be redirected. This will not redirect access to the Site Administration pages (although these pages will still need Site Administrator credentials to be accessed).
- **About the Site Description:** Any text entered here will be displayed on the Site-level About page, just above links pointing to any hosted journal About pages.
- **Name of Principal Contact:** This is a mandatory field, and by default is populated with "Open Journal Systems".
- **Email of Principal Contact:** This is a mandatory field, and by default is populated with the Site Administrator's email address as specified during the install process.
- **Minimum Password Length:** This is a mandatory field, and by default is set at 6 characters. This sets the length site-wide.

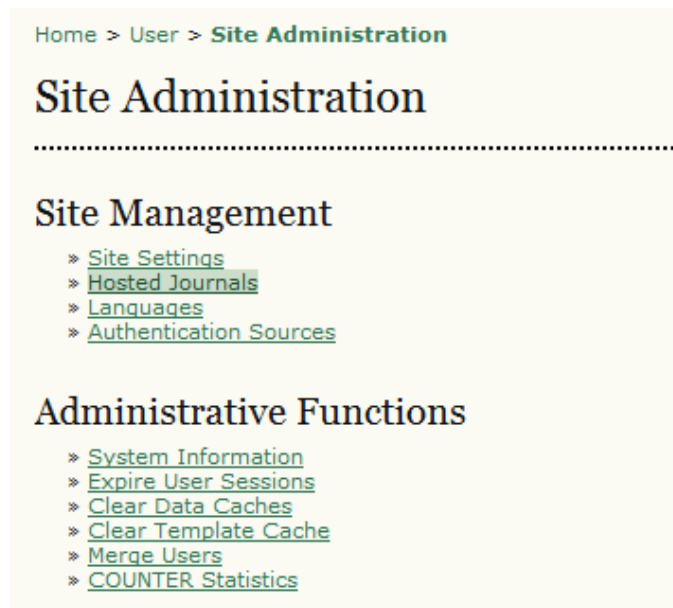
- **Site Style Sheet:** If you would like to implement a style sheet for site-level pages, you can upload one here. Hosted journals will not use this style sheet unless you upload it specifically for them.
- **Register Site for Indexing (Metadata Harvesting):** Information is provided that will allow you to register your site with the PKP's demo harvester, though you are encouraged to register with any/all relevant OAI-compliant harvesters you can find. If you register with an OAI-compliant harvester using the site URLs included on this page, every journal on your site will be harvested.

Hosted Journals

From the Hosted Journals page you can create, edit and delete hosted journal sites. You can also migrate old journals from OJS 1 installations and manually sort the order by which the journals are displayed on the main site page.

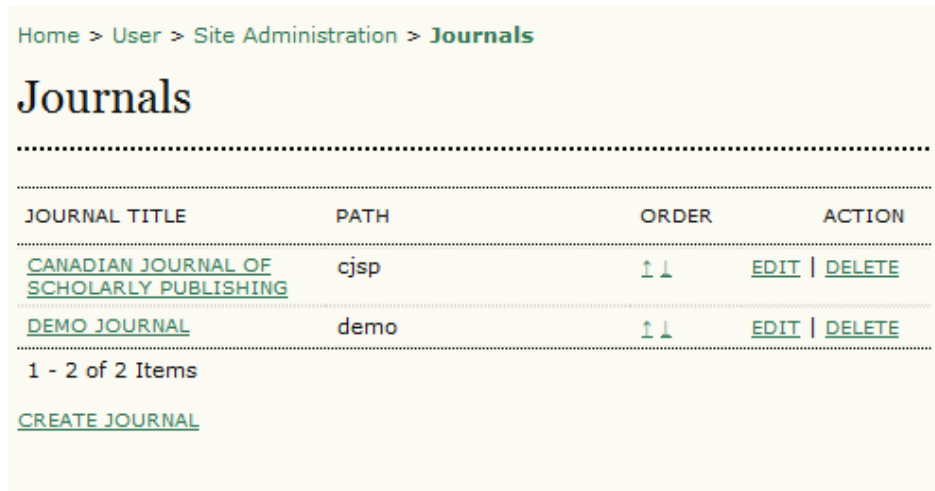
From the Site Administration menu, under the Site Management heading, choose Hosted Journals:

Figure 3.4. Selecting Hosted Journals from the Site Administration Menu



Your Hosted Journals page will look like so (if you haven't created any journals yet, it will be empty):

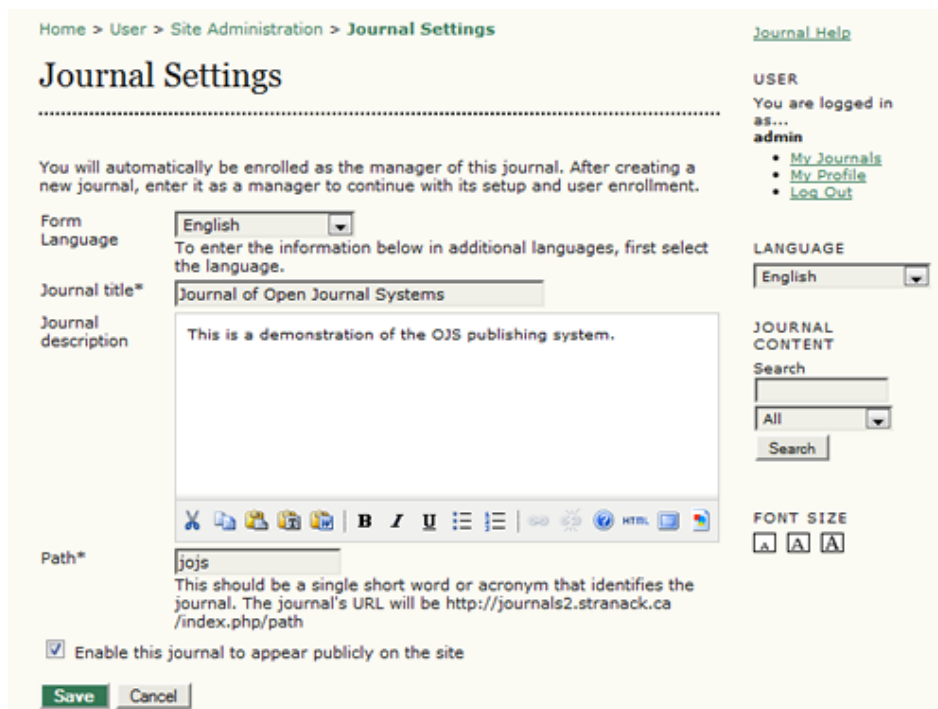
Figure 3.5. Hosted Journals Page



Creating a New Journal

To create a new journal, simply click the Create Journal link and fill out the following Journal Settings form.

Figure 3.6. Filling in Basic Journal Settings



Form Options are as follows:

- Form Language: If you are working in a multilingual journal, you will need to complete this form in all languages.

- **Journal Title:** This field is mandatory. What you enter here will appear as the new journal's title in it's header. You can change the journal title at a later date, and Journal Managers will be able to change it, and upload header images, from their journal management pages as well.
- **Journal Description:** Anything entered in this field will appear on the new journal's home page. You can change this information at a later date, and Journal Managers will be able to change the information as well from their journal management pages.
- **Path:** This field is mandatory. The path you enter here will become part of the new journal's URL, listed after [index.php](#). For example, if your journal title was Journal of Canadian Studies, you may want your path to be 'jcs', or perhaps 'canstudies'. If you enter 'js', that journal's URL will be <http://example.com/index.php/jcs>. You can come back to this page and change the path value at a later date; be aware, however, that you may break search engine and other links by doing so.
- **Enable This Journal to Appear Publicly on the Site:** Checking this box will display the journal title as a hyperlink on the site's home page. If you uncheck the box the journal will not be listed -- but the URL will still be accessible by non-privileged users.

Your new journal will be created once you have filled in all appropriate information and clicked the Save button. Additionally, you will have been enrolled as a Journal Manager for this new journal. At this point you will be the only registered user for that journal, and you should either register an appropriate Journal Manager for initial setup, or undertake initial setup yourself.

Editing, Deleting and Ordering Hosted Journals

Once you have created a journal you will find your hosted journal list will look like so:

Figure 3.7. Populated Hosted Journals Page

Home > User > Site Administration > Journals

Journals

JOURNAL TITLE	PATH	ORDER	ACTION
JOURNAL OF OPEN JOURNAL SYSTEMS	jojs	↑ ↓	EDIT DELETE
CANADIAN JOURNAL OF SCHOLARLY PUBLISHING	cjsp	↑ ↓	EDIT DELETE
DEMO JOURNAL	demo	↑ ↓	EDIT DELETE

1 - 3 of 3 Items

[CREATE JOURNAL](#)

You will notice that the journal title is hyperlinked. Clicking it will take you to the journal's [Journal Management](#) pages, where you can complete basic journal setup, or enroll another Journal Manager to do so.

To the right of the hyperlinked journal title you will also see Edit and Delete links. Clicking Edit will bring you back to the same page you saw when you created the journal, if you need to edit the journal's title, description, and other preferences. Clicking Delete will delete the journal and all of its contents permanently.

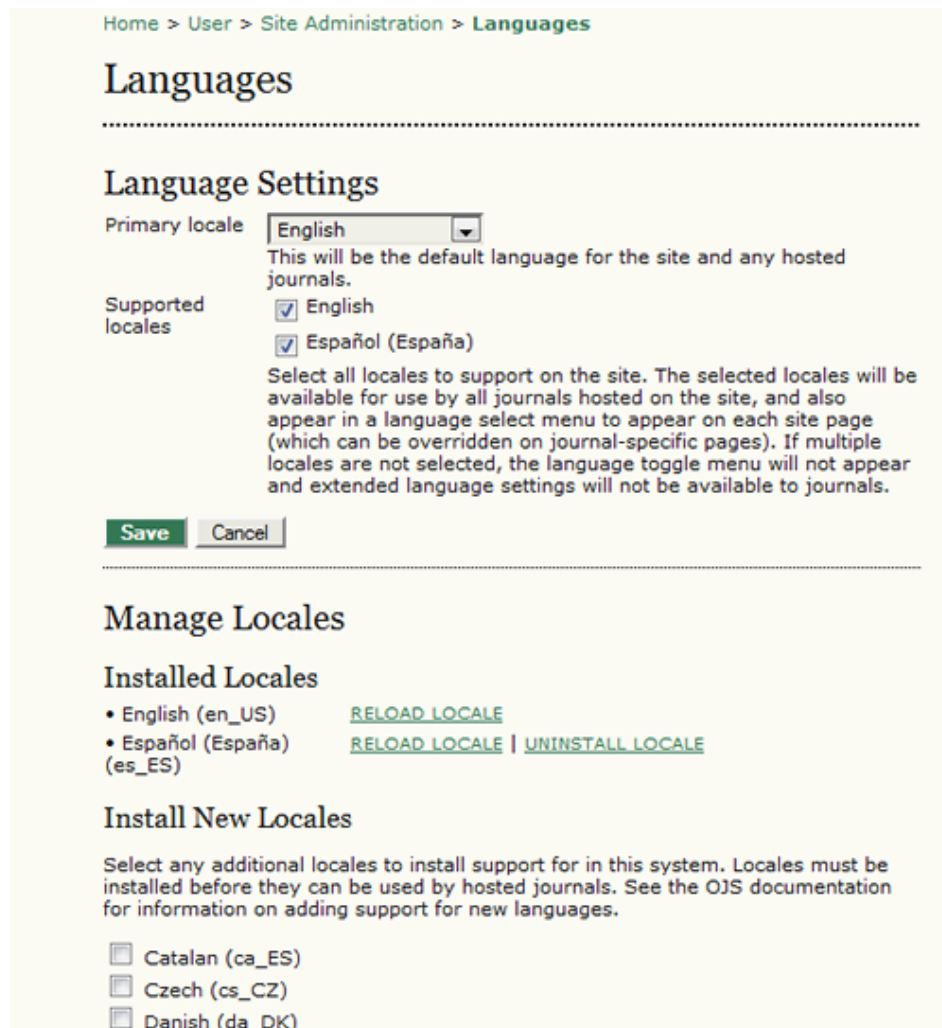
Sitewide Language Settings

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. Journal Managers can then [manage their own language settings](#).

Additional language packages will typically be available for download from the Open Journal Systems [language page](#) as user-contributed translations are received. These packages can be installed into an existing OJS system to make them available to journals.

To access your site's language settings, click the Languages link where you can subsequently manage any languages already installed, or download languages to install them.

Figure 3.8. Site Administrator Language Options



The Languages page is divided into three sections: Language Settings, Manage Locales, and Download Locales.

The Download Locales section allows you to download new locales straight from the OJS website to your OJS install as they become available. To download locales, your server must be able to execute the [GNU tar utility](#), and must be able to modify the locale registry file (`registry/filename.xml`). Locales can always be downloaded and installed manually -- see the [online documentation](#) for more information.

The Manage Locales section allows you to install new locales, reload existing locales in case you have updated locale files, and uninstall locales if they are no longer necessary. To install a new locale, check the box next to the locale name and click the Install Locale button. If you have modified a previously installed locale and would like to reload it, click the Reload link. To remove the locale from the list of installed locales, click the Uninstall Locale link.

The Language Settings section allows you to enable locales to be used across the site as a whole, and also with journals. Locales that have been installed will appear in this section, with checkboxes next to their name. To enable locales to be available on-site, check the box next to their name and click the Save button. Users will then be able to choose the locale from the drop-down on the right sidebar on all general site pages; Journal Managers will also now have the option of for their journal (these locales will not be enabled at the journal level by default). to users on the site, check the box next to

You can also choose the site's primary locale -- this is the locale that users will first see the site in when first visiting the web site, and will be the default language for any hosted journal.

Authentication Sources

By default, OJS authenticates users against its internal database. It is possible, however, to use other methods of authentication, such as LDAP. Additional authentication sources are implemented as OJS plugins; refer to the documentation shipped with each plugin for details.

To access authentication settings, click the Authentication Sources link from the Site Administration page; you will be presented with the following options.

Figure 3.9. Site Administrator Authentication Sources



By default only the OJS User Database is listed. To add a new source, choose one from the drop-down menu and click the Create button. You will then be asked to configure the source.

Administrative Functions

System Information

To access detailed system information, click the System Information link from the Site Administration page. You will be presented with the following information.

Figure 3.10. System Information

Home > User > Site Administration > **System Information**

System Information

OJS Version

Current version

2.3.0.0 (October 14, 2009 - 03:32 PM)

[Check for updates](#)

Version history

VERSION	MAJOR	MINOR	REVISION	BUILD	DATE INSTALLED
2.3.0.0	2	3	0	0	2009-10-14

OJS Configuration

[EDIT](#)

OJS configuration settings from `config.inc.php`.

general

installed	On
base_url	http://journals2.stranack.ca
registry_dir	registry
session_cookie_name	OJSSID
session_lifetime	30

The first section includes OJS version information: it shows you the version you currently have installed, and your version history including any upgrades. You can also click the Check for updates link to see if you are using the most recent version of OJS.

The OJS Configuration section that follows displays all of the configuration options and their values as they are in `config.inc.php`. You can click the Edit link to edit your `config.inc.php` file directly from the web. You will be warned that you should not make any changes unless you know exactly what you are doing, which of course is a reasonable course to follow. You can find more information about `config.inc.php` configuration parameters in the file itself.

The final section on this page displays server information: your operating system, PHP version, server and database information. You can also view extended PHP information by clicking the Extended PHP information link (this displays the output of [phpinfo\(\)](#)). All of this information can be useful when trying to troubleshoot a problem.

Sessions and Caches

The Site Administrator has a final few administrative tools available: the Expire User Settings, Clear Data Caches, and Clear Template Cache options, as well as the Merge Users feature (described below).

Clicking the Expire User Settings clears all active user sessions in the system, requiring any user that is currently logged in to sign in to the system again.

Clicking the Clear Data Caches link clears all cached data, including locale information, help cache, and search cache. This function may be useful to force data to be reloaded after customizations have been made.

Clicking the Clear Template Cache link clears all cached versions of HTML templates. This function may be useful to force templates to be reloaded after customizations have been made.

Merging 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. Comprehensive information on merging users can be found in the Journal Manager's [Merge Users](#) section.

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.

Chapter 4. Journal Management

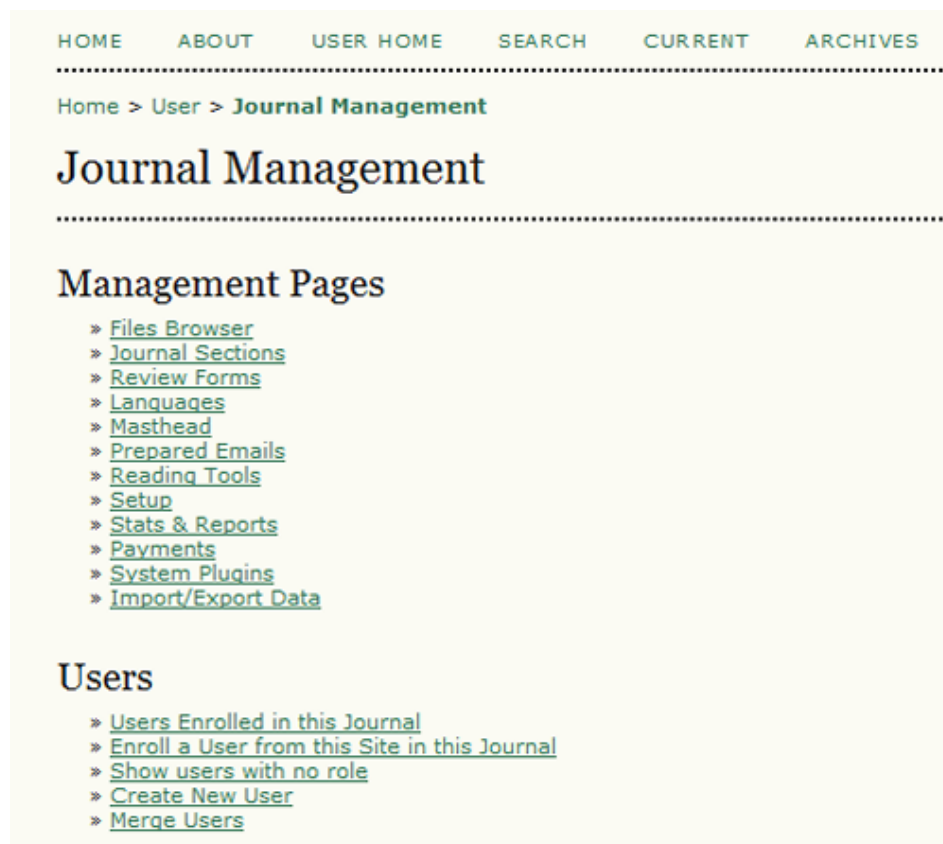
Overview

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

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

The following will explain every page found under Journal Management in detail.

Figure 4.1. Journal Management Page



Journal Management Pages

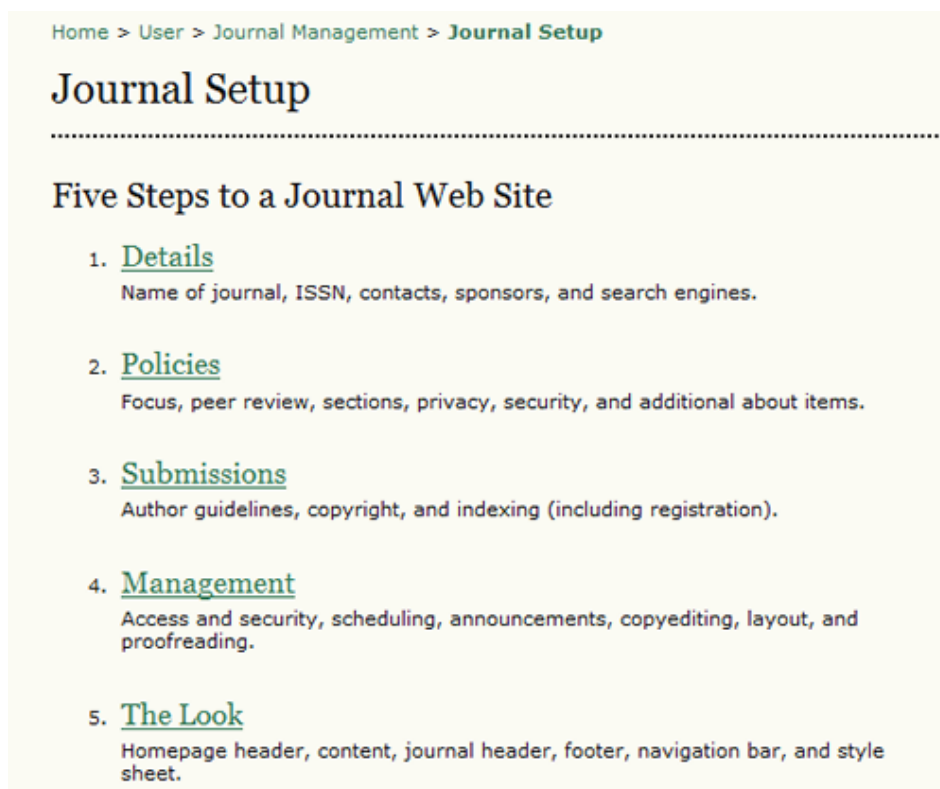
The Journal Manager's Management Pages allow you to configure the journal's web site, policies, and workflow. We'll start with the Five-Step Setup Process, found by selecting Setup.

The Five-Step Setup Process

The Journal Manager sets up the journal, after the system has been installed on a web server, by working through five steps, filling in web-based forms and configuring the management of the journal. The setup does not have to be done all at once: the forms can be filled in and saved; then you can return to Setup to complete the task or make changes at any time.

Setup is available to the Journal Manager on the Journal Management page, and contains its own set of Help texts built into each of the forms. Setting up the journal's web site will require decisions and text for the following items, among others, which can be prepared in advance in consultation with the Editors or added at a later point.

Figure 4.2. Journal Setup



Complete as many of the sections in the five steps 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 One: Details

General Information

This form provides general details about your journal, including the name, abbreviation, address, print or online ISSNs, and DOI. The Journal Title, Journal Initials, and Journal Abbreviation fields are mandatory. OJS provides links to the ISSN web site and CrossRef, if you wish to learn more about ISSNs and DOIs.

Figure 4.3. Setup Step 1.1: General Information

.....

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

1.1 General Information

Journal title*

Journal initials*

Journal Abbreviation*

Print ISSN

Online ISSN

The ISSN (International Standard Serial Number) is an eight-digit number which identifies periodical publications as such, including electronic serials. It is managed by a world wide network of National Centres coordinated by an International Centre based in Paris, backed by Unesco and the French Government. A number can be obtained from the [ISSN web site](#). This can be done at any point in operating the journal.

DOI Prefix

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

DOI Suffix

Use the pattern entered below to generate DOI suffixes. Use %j for journal initials, %v for the volume number, %i for the issue number, %a for the OJS article ID, and %p for the page number.

For example, vol%viss%iipp%p could create a DOI such as 10.1234/vol3iss2pp230

Use default pattern (%j.v%vi%i.%a).

Use the "Custom Identifier" for published items as the DOI suffix (must be enabled in Step 4).

A DOI suffix can take any form, but must be unique for each published item.

Mailing Address

Principal Contact

You must list the primary journal contact here. Any outgoing emails will typically be sent care of this person. Name and email fields are mandatory.

Figure 4.4. Setup Step 1.2: Principal Contact

1.2 Principal Contact

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

Name*

Title

Affiliation

Email*

Phone

Fax

Mailing Address

Technical Support Contact

You must supply a name and email for your technical support contact. This contact information will be presented for contact purposes in key areas throughout the system, and will be available from About the Journal.

Figure 4.5. Setup Step 1.3: Technical Support Contact

1.3 Technical Support Contact

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

Name*

Email*

Phone

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 (if the `allow_envelope_sender` configuration option is enabled in `config.inc.php`) where any undeliverable email messages will be sent.

Figure 4.6. Setup Step 1.4: Email Identification

1.4 Email Identification

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

Signature

Journal of Open Journal Systems
http://jojs.org/

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

Bounce Address

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

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.

You can specify publisher information in the first form.

Figure 4.7. Setup Step 1.5: Publisher

1.5 Publisher

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

Note

The Journal of Open Journal Systems is published by:

This text will appear below the "Publisher" heading and above the publisher name/url under "Journal Sponsorship" on the "About" page.

Institution

Simon Fraser University

URL

http://www.sfu.ca

Sponsoring Organizations

You can add information about any sponsoring organizations your journal might have in Step 1.6. Additional organizations can be added by clicking the "Add Sponsoring Organization" button

Figure 4.8. Setup Step 1.6: Sponsoring Organizations

1.6 Sponsoring Organizations

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

Note

The Journal of Open Journal Systems is generously sponsored by the following organizations:

✂ 📄 📁 📧 📧 📧 📧 | **B** *I* U | ☰ ☰ | 🔗 🌐 🌐 HTML 📧

This text will appear below the "Sponsors" heading and above the list of sponsor names and urls under "Journal Sponsorship" on the "About" page.

Institution

URL

Institution

URL

Sources of Support

You can add any sources of support in Step 1.7. Additional sources can be added by clicking the "Add Contributor" button

Figure 4.9. Setup Step 1.7: Sources of Support

1.7 Sources of Support

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

Note

We would like to thank the following organizations for their support:

✂ 📄 📁 📧 📧 📧 📧 | **B** *I* U | ☰ ☰ | 🔗 🌐 🌐 HTML 📧

This text will appear below the "Sources of Support" heading and above the list of names and urls for supporting organizations under "Journal Sponsorship" on the "About" page.

Contributor

URL

Search Engine Indexing

This optional section will allow you to add hidden HTML metatags to your journal's web pages. Accurate information here can increase your visibility in search engines such as Google.

Figure 4.10. Setup Step 1.8: Search Engine Indexing

1.8 Search Engine Indexing

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

Description:

Keywords:

Custom tags:

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

Journal History

This section will display information about the history of your journal on the About page.

Figure 4.11. Setup Step 1.9: Journal History

1.9 Journal History

This text will appear in the "About" section of the journal website and can be used to describe changes in titles, editorial board, and other items of relevance to the journal's publication history.

Journal History

Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, HTML, Print.

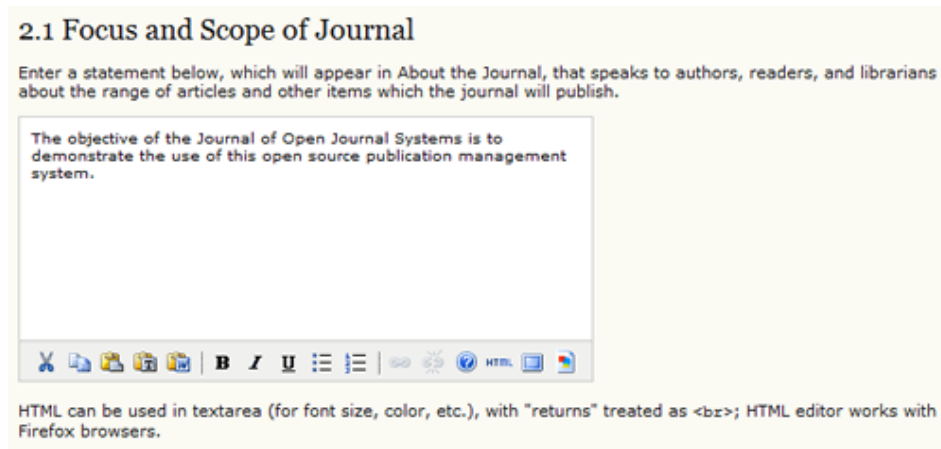
Step Two: Policies

Setup Step Two allows you to configure many different policy aspects of your journal: the journal's scope; review policy; author guidelines; and so on.

Focus and Scope of Journal

This form will add information to the About the Journal section of your journal web site, under its own Focus and Scope section.

Figure 4.12. Setup Step 2.1: Focus and Scope

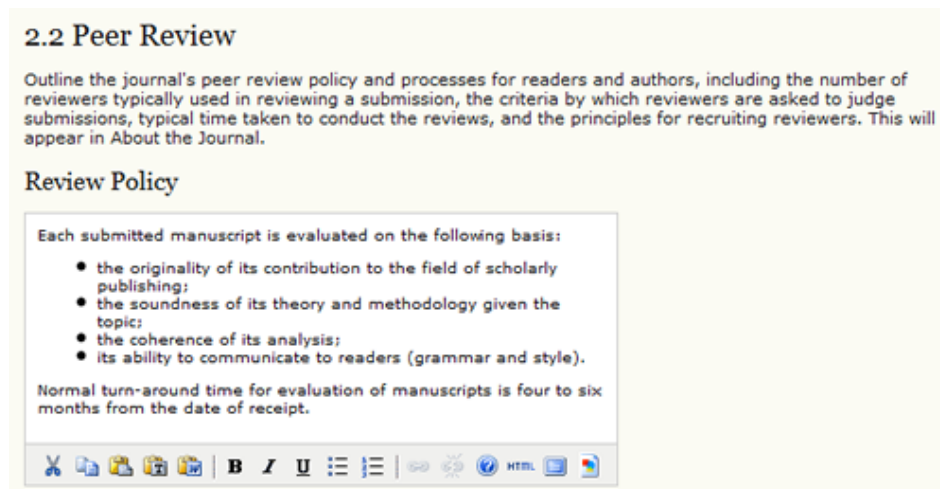


Peer Review

The Peer Review section is split into different components:

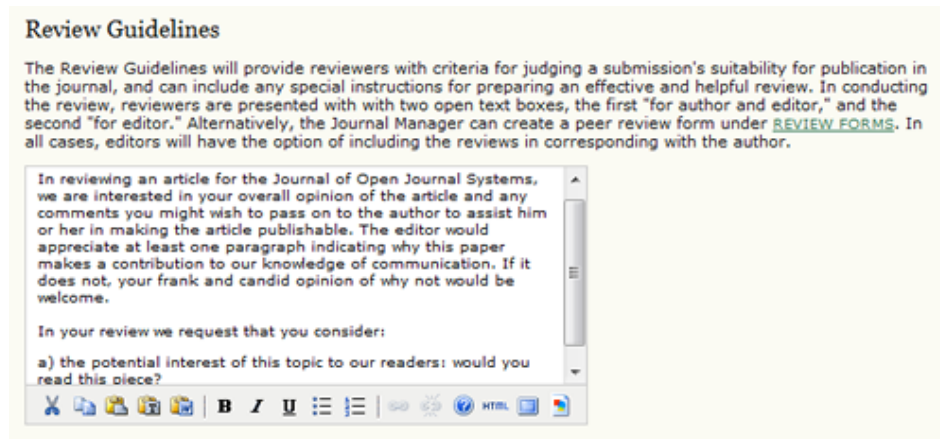
- Review Policy: This public policy will be visible on the About the Journal section. Whatever is entered here should clearly explain the kind of review process your journal undertakes.

Figure 4.13. Setup Step 2.2: Peer Review



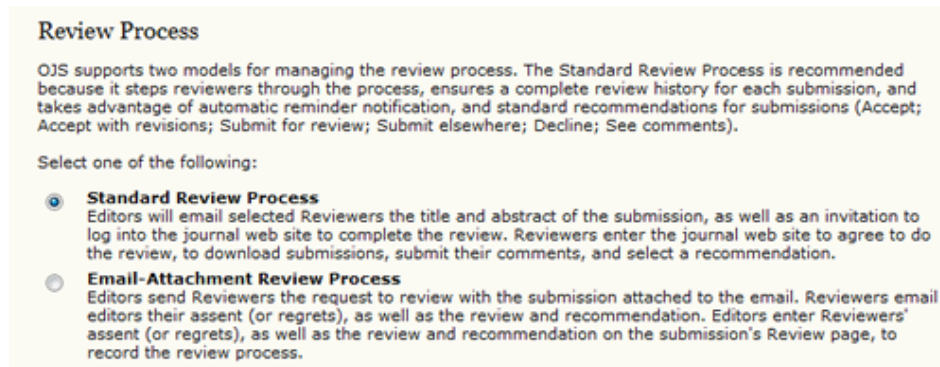
- Review Guidelines: These instructions will be available to reviewers at the time of review. They should be clear, detailed step-by-step instructions for your reviewers.

Figure 4.14. Setup Step 2.2: Review Guidelines



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

Figure 4.15. Setup Step 2.2: 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; whether to use a rating system for reviewers (visible only to the editors); and one-click access for reviewers.

One-click access allows editors to send reviewers an email message with a URL that goes directly to the review page for the article in question, without the need to create an account or login. This option is meant to reduce any technical barriers to reviewer participation, however it is somewhat insecure as anyone who might be able to guess the URL could navigate to the review page.

The Blind Review option will add links to the Ensuring a Blind Review document to both Author and Reviewer pages. This document describes the importance of removing any identifying information in the submission file or review file, and describes how to do so in various ways.

Figure 4.16. Setup Step 2.2: Review Options

Review Options

Review Time
 The typical period of time allowed for reviews: weeks
 Note: Can be modified during the editorial process.

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

- If reviewer has not responded to a review request within days.
- If reviewer has not submitted a recommendation within days after review's due date.

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

Reviewer Ratings

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

Reviewer Access

- Enable one-click reviewer access.

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

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

Blind Review

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

Privacy Statement

The privacy statement will appear on the About the Journal section of your web site. Because you will be asking people to register with your journal and collecting their personal information, it is important to let them know of your policies in this regard.

Figure 4.17. Setup Step 2.3: Privacy Statement

2.3 Privacy Statement

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

Editor Decision

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

Figure 4.18. Setup Step 2.4: Editor Decision

2.4 Editor Decision

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

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. Multiple entries are permitted, using the Add About Item button.

Figure 4.19. Setup Step 2.5: Add Item

2.5 Add Item to Appear in "About the Journal"

Title: Advertising Policy

Content: The Journal of Open Journal Systems accepts online advertising.

Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, HTL, Color Picker.

Add About Item

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 participating libraries.

Figure 4.20. Setup Step 2.6: Journal Archiving

2.6 Journal Archiving

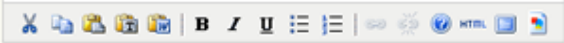
Open Journal Systems supports the [LOCKSS](#) (Lots of Copies Keep Stuff Safe) system to ensure a secure and permanent archive for the journal. LOCKSS is open source software developed at Stanford University Library that enables libraries to preserve selected web journals by regularly polling registered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

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

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

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

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



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

Potential Reviewer Database

You can add a link to an external Reviewer database here. This will provide a quick reference source for Section Editors or Editors looking for potential new reviewers for the journal.

Figure 4.21. Setup Step 2.7: Potential Reviewer Database

2.7 Potential Reviewer Database

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

Title

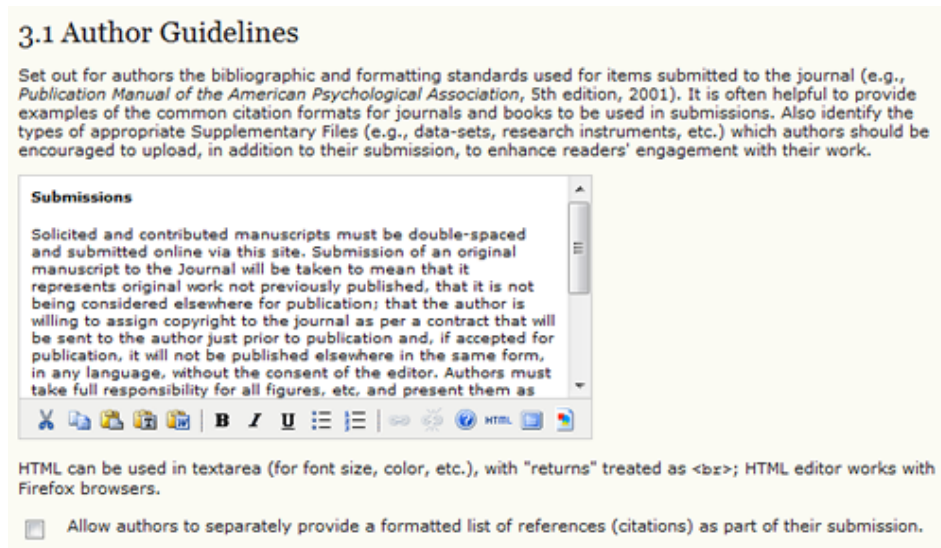
URL

Step Three: Submissions

Author Guidelines

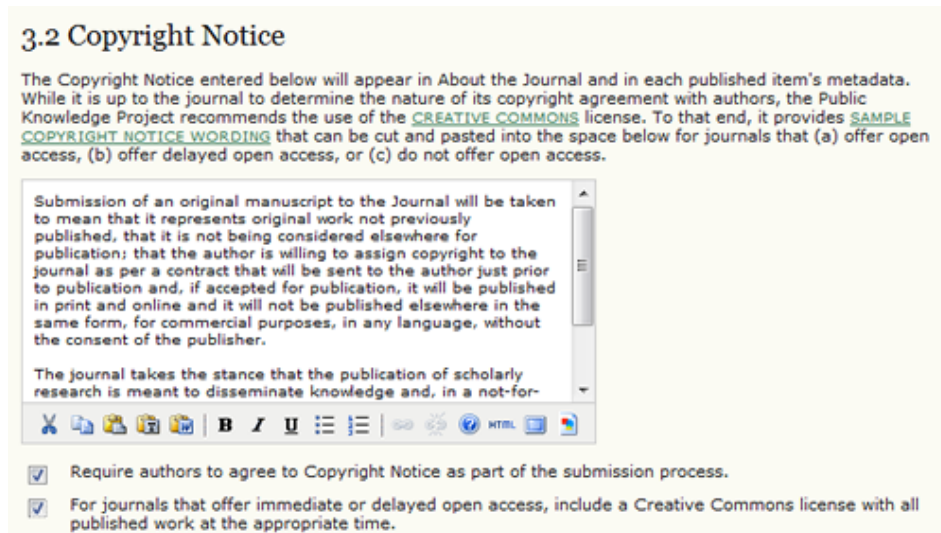
These guidelines will appear on the About the Journal page and be available for potential authors to consult before submitting.

Figure 4.22. Setup Step 3.1: Author Guidelines



You can also configure the Submission Preparation Checklist in this section. When submitting an article to your journal, authors will be asked to ensure certain conditions are met using this submission preparation checklist. Authors will not be able to proceed past the first submission step until they agree to all checklist conditions. Default items are provided, but you may add new ones or delete any that do not apply to your journal by using the Add Checklist Item or Delete buttons.

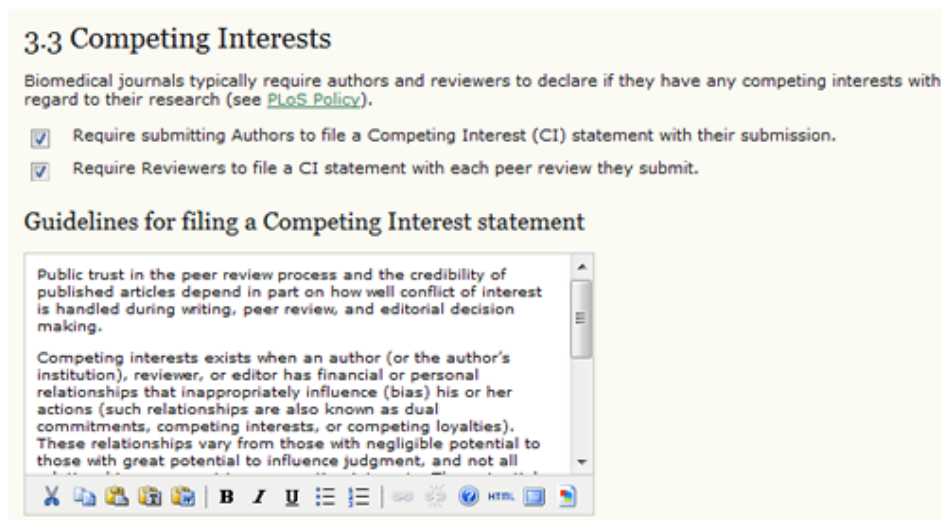
Figure 4.24. Setup Step 3.2: Copyright Notice



Competing Interests

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

Figure 4.25. Setup Step 3.3: Competing Interests



For Authors to Index Their Work

Carefully selecting the most appropriate disciplines, classification system, and keywords will enhance the ability of others to find your articles. In OJS, Authors index their own submissions, but this information can be checked over and changed by Editors at any time. This form allows you to select from a number of indexing formats, add relevant examples to guide the authors, and provide them with a link to a subject classification system (such as the Library of Congress).

Figure 4.26. Setup Step 3.4: For Authors to Index Their Work

3.4 For Authors to Index Their Work

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

Academic Discipline and Sub-Disciplines
Useful when journal crosses disciplinary boundaries and/or authors submit multidisciplinary items. Provide examples of relevant academic disciplines for this journal:

(E.g., History; Education; Sociology; Psychology; Cultural Studies; Law)

Subject Classification
Title
URL
(E.g., Mathematics Subject Classification; Library of Congress Classification)

Keywords
Provide examples of keywords or topics as a guide for authors:

(E.g., Photosynthesis; Black Holes; Four-Color Map Problem; Bayesian Theory)

Coverage
Refers to geo-spatial location, chronological or historical coverage, and/or characteristics of research sample.

Register Journal for Indexing

You can register the contents of your journal with the Public Knowledge Project Metadata Harvester or other OAI-compliant services (e.g., OAIster), which will allow for comprehensive searching among sites that adhere to the OAI Protocol for metadata harvesting.

Figure 4.27. Setup Step 3.5: Register Journal for Indexing

3.5 Register Journal for Indexing (Metadata Harvesting)

To have the contents of this journal indexed within a globally distributed system of research databases, please read [the steps to becoming a data contributor](#) and register your journal with the official [Open Archives registry](#). To register, you will need the base URL for your repository: <http://journals3.stranack.ca/index.php/jojs/oai>. Afterwards, you can register your journal at the [UIUC OAI registry](#) and [OAIster](#).

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

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.

Figure 4.28. Setup Step 3.6: Notification of Author Submission



Step Four: Management

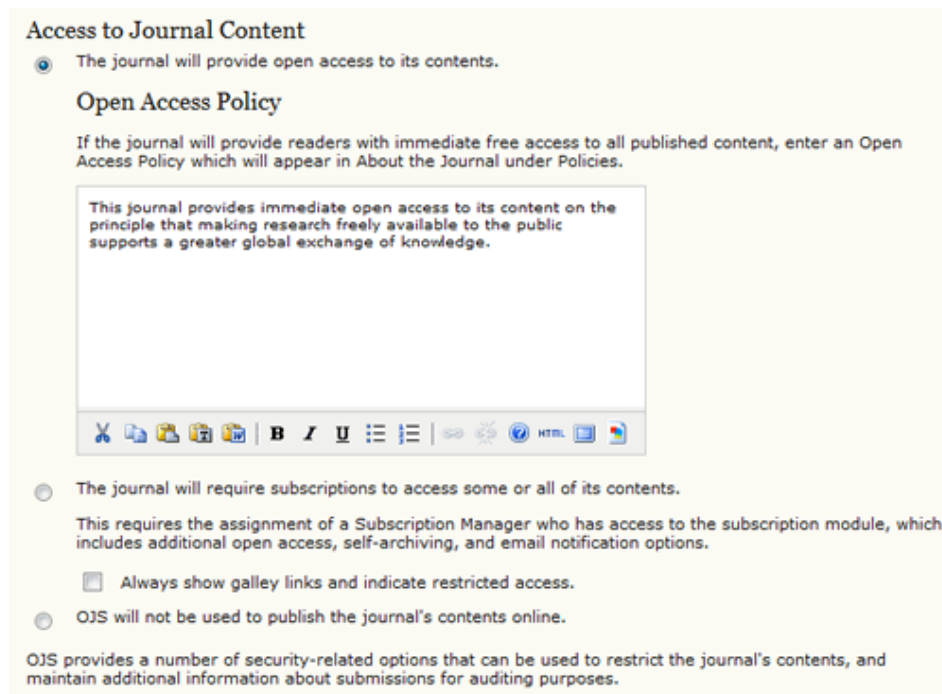
Here you can set the journal's Open Access policy, control how users register on the site and for what, and enable user action and email logging.

Access and Security Settings

This section provides a number of options for access to your journal's content.

- **Access to Journal Content:** Here you can decide between full open access or 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. You may also target individual articles as openly-available within a subscription issue. If subscription access is chosen, the role of Subscription Manager will be created, allowing for the creation/management of subscriptions, subscription types, and subscription policies.

Figure 4.29. Setup Step 4.1: Access to Journal Content



- **Additional Site and Article Access Restrictions:** You can further restrict site- and article-level access through the use of user registration, and decide how users are allowed to register themselves. The advantage of

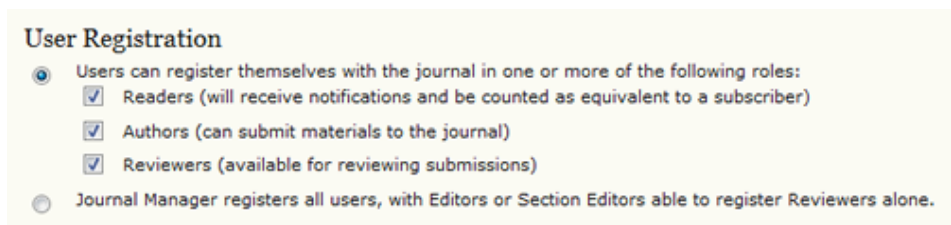
selecting these options is that anyone wanted to read your content will need to register, providing you with reliable readership statistics (especially in the absence of subscriptions). The disadvantage, however, is that some potential readers will simply click away from your site rather than creating yet another user account.

Figure 4.30. Setup Step 4.1: Additional Site and Article Access Restrictions



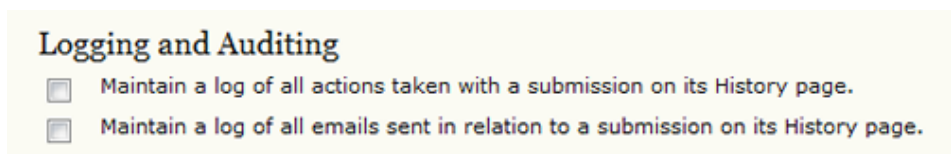
- User Registration: Select these options to allow visitors to enroll themselves as Authors, Reviewers, or Readers.

Figure 4.31. Setup Step 4.1: User Registration



- Logging and Auditing: This option enables logging of submission actions and user emails sent by the system. Although this will consume more disk space on your server, it does provide for a valuable record of these activities.

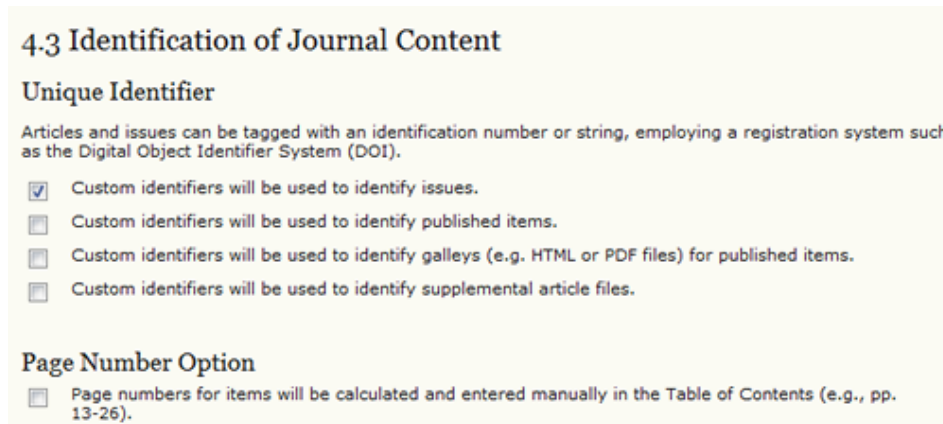
Figure 4.32. Setup Step 4.1: Logging and Auditing



Publication Scheduling

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

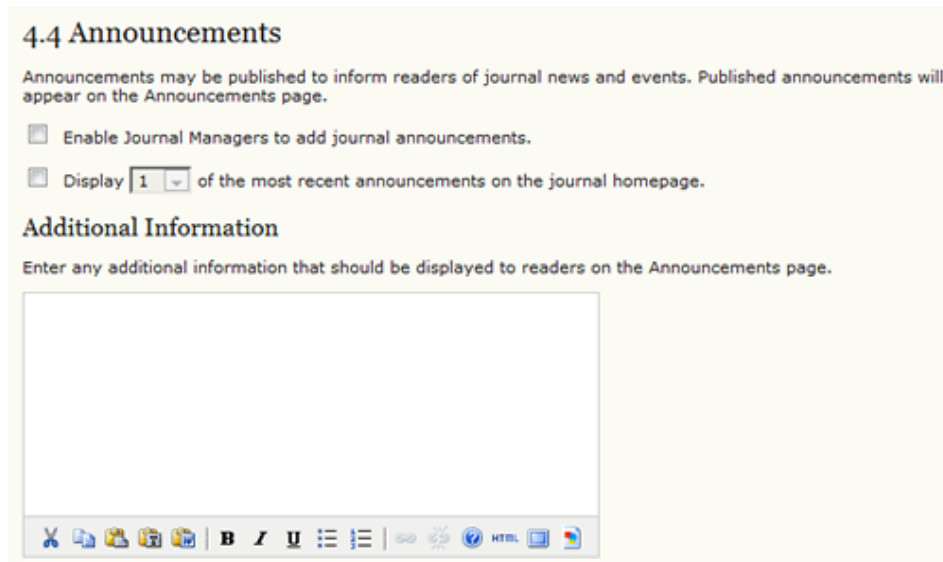
Figure 4.34. Setup Step 4.3: Identification of Journal Content



Announcements

This allows you to create an Announcements page for your journal web site, and post messages to your readers. Once this is activated, an Announcements link will automatically appear in the navigation bar of the journal, and an [Announcement section](#) will be added to the Journal Manager's Management Pages menu.

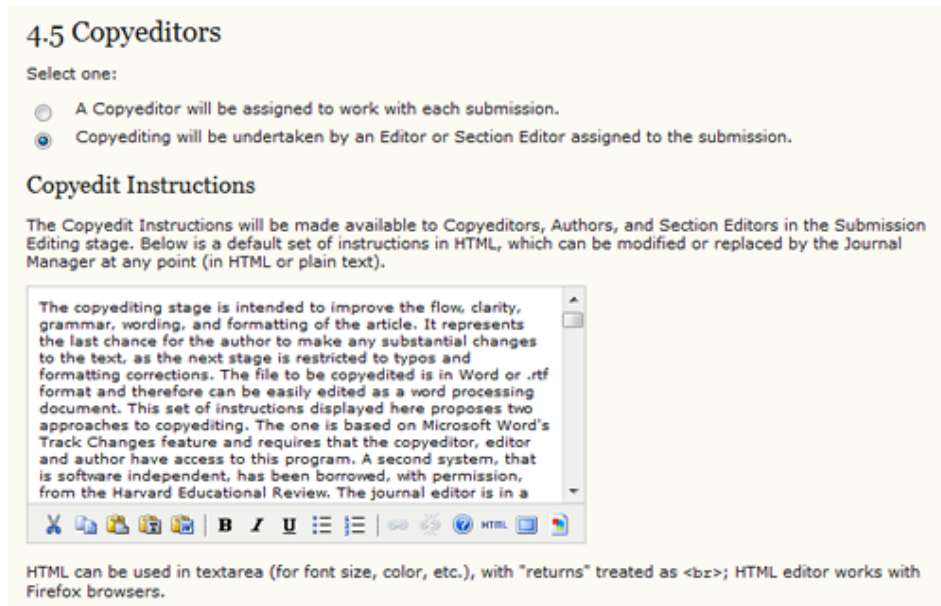
Figure 4.35. Setup Step 4.4: Announcements



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

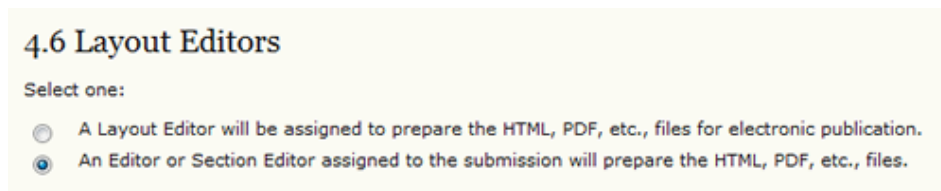
Figure 4.36. Setup Step 4.5: Copyeditors



Layout Editors

The Layout Editor transforms the copyedited versions of the submission into galleys in HTML, PDF, PS, etc., files which the journal has elected to use for electronic publication. If you have individuals to act as layout editors, select the first option. If your editors will be acting as layout editors, select the second option.

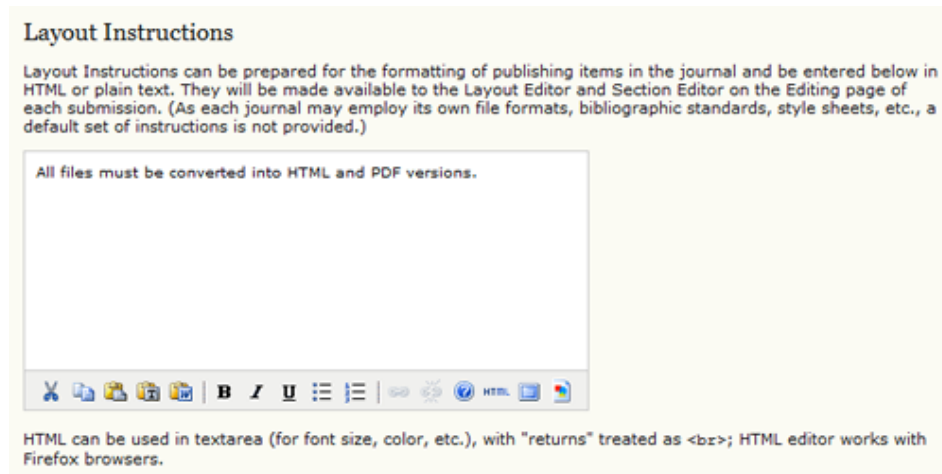
Figure 4.37. Setup Step 4.6: Layout Editors



Further options in this section include:

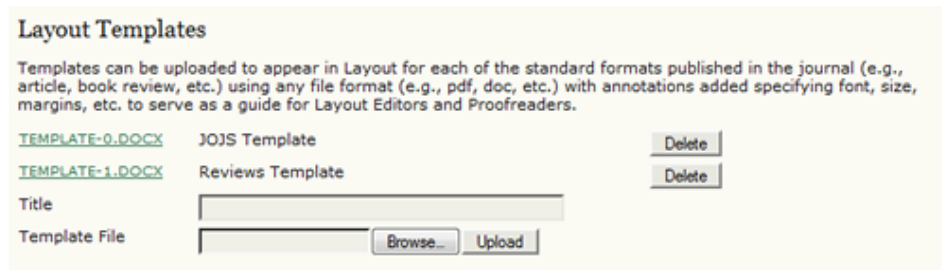
- Layout Instructions: The instructions will be made available to layout editors and section editors on the Editing page of each submission.

Figure 4.38. Setup Step 4.6: Layout Instructions



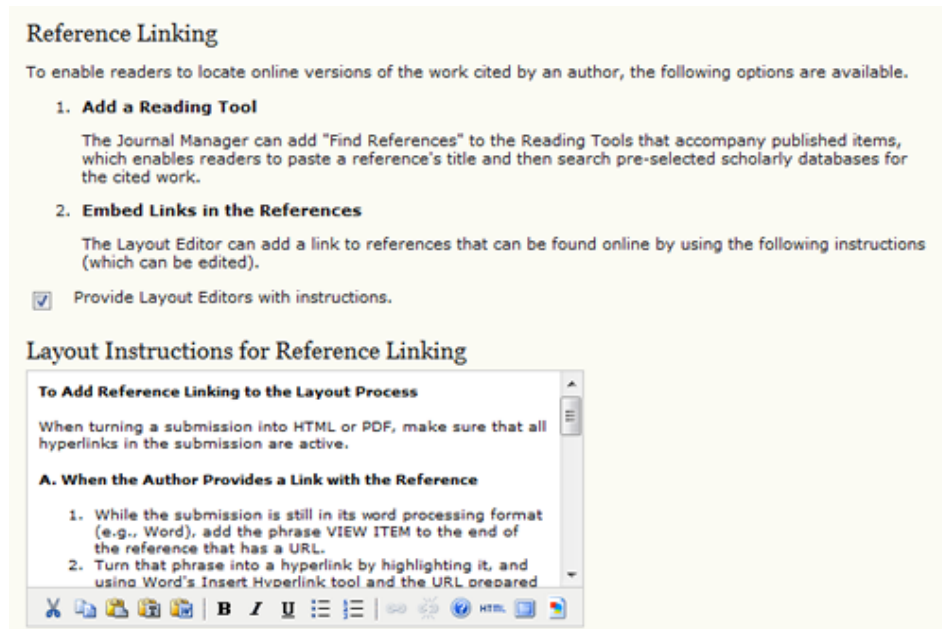
- Layout Templates: These templates can be created in any file format (e.g., Microsoft Word) and be used by the Layout Editor to ensure a consistent design.

Figure 4.39. Setup Step 4.6: Layout Templates



- Reference Linking: This option allows you to provide instructions to your Layout Editors to add reference links to articles. This is not a requirement, but is a very useful feature to make available to your readers.

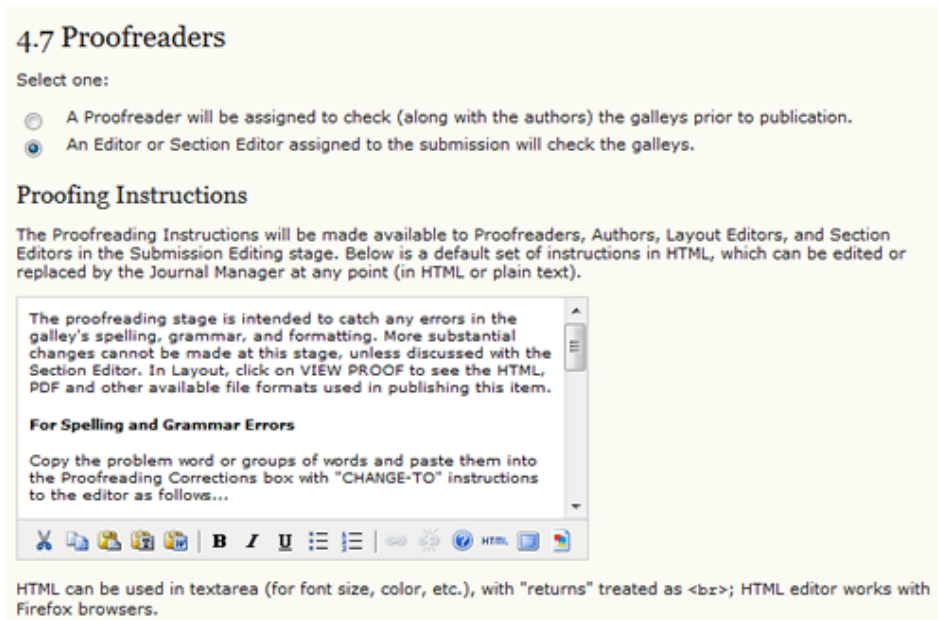
Figure 4.40. Setup Step 4.6: Reference Linking



Proofreaders

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

Figure 4.41. Setup Step 4.7: Proofreaders

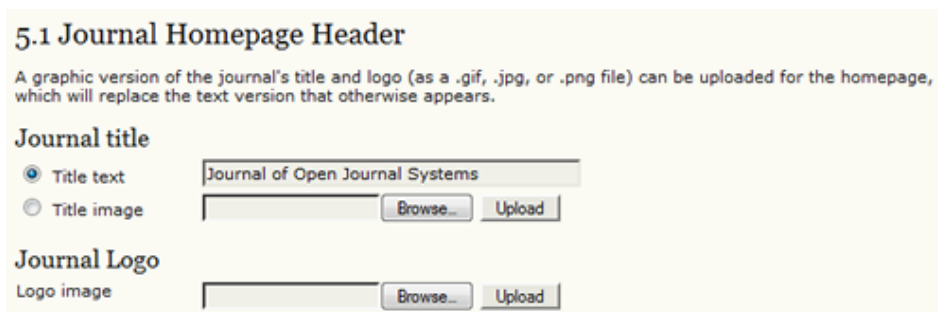


Step Five: The Look

Journal Homepage Header

Titles and images can be added to give your journal a unique appearance and identity. Title Text will add the text to the top of your journal web site's home page (NOT to all the other pages -- see below). Title Image allows you to upload an image-based header (.gif, .jpg, .png). A common size is 800px X 150px, but it can be as large or as small as you wish. The Logo Image allows you to add an image to the upper left corner of your site's home page. Often these are square image (e.g., 125px X 125px). Whether using Title Images or Logo Images, remember to hit the Upload button before moving on to the next step.

Figure 4.42. Setup Step 5.1: Journal Homepage Header



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. Experiment with what looks good, but be careful not to make it too busy! The appearance of your home page will be the first impression many have of your journal, and if it

Figure 4.44. Setup Step 5.3: Journal Page Header

5.3 Journal Page Header

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

Journal title

Title text

Title image

Journal Logo

Logo image

Journal Favicon

Add a favicon for this journal to display alongside the navigation bar when users are visiting your site.

Logo image

Alternate Header

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

Journal Page Footer

Footers can also be added to each page of your journal. It can be a good place to add your ISSN or a copyright statement.

Figure 4.45. Setup Step 5.4: Journal Page Footer

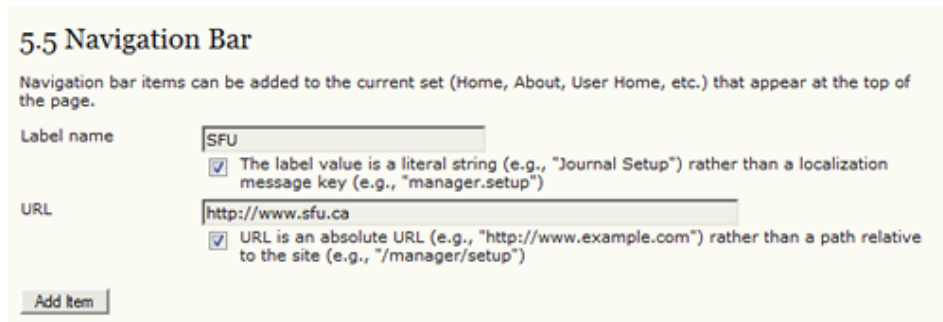
5.4 Journal Page Footer

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

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. Be sure to check the boxes if you are typing in plain text and a full URL. Otherwise, it will appear as ##SFU##.

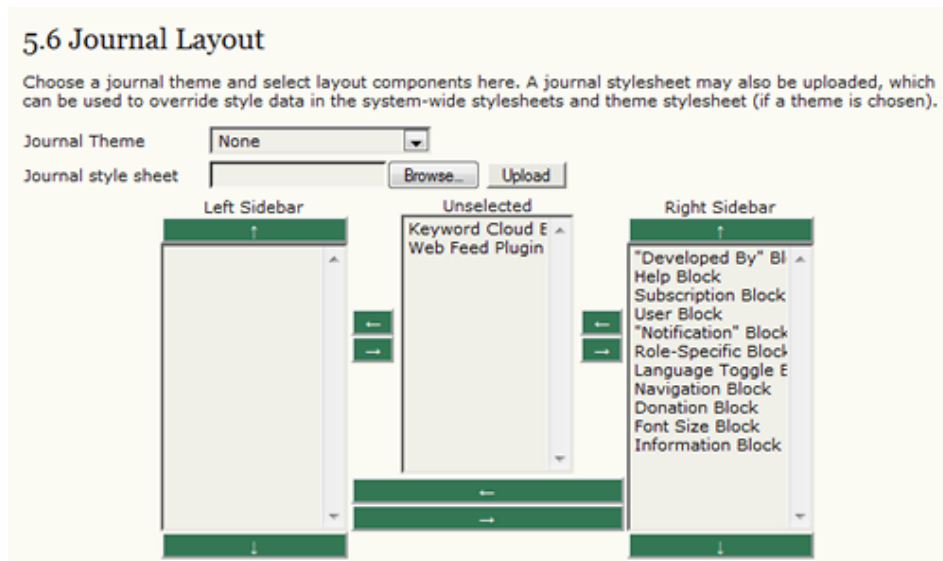
Figure 4.46. Setup Step 5.5: Navigation Bar



Journal Layout

Under Journal Layout you can choose a journal theme or upload a style sheet of your own. You can also move content blocks from left to right sidebars, move them up or down the sidebar, or eliminate them altogether. A copy of the general OJS v.2.x style sheet is available at: <http://pkp.sfu.ca/ojs/download/common.css> You can also find a thorough guide on customing your journal's style and using themes in the [online documentation](#).

Figure 4.47. Setup Step 5.6: Journal Layout



Information

Each of these descriptions will appear on your journal's web site, on the right sidebar at the bottom by default. If you can change the information here, and if you delete the information, the link will automatically disappear from your site's sidebar.

Figure 4.48. Setup Step 5.7: Information

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](#)).

Lists

You can control the number of items to appear on any given list (e.g., 100 items will appear 25 per page over 4 pages), and the number of page links shown at the bottom of any list (e.g., 1, 2, 3, 4, Next).

Figure 4.49. Setup Step 5.8: Lists

5.8 Lists

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

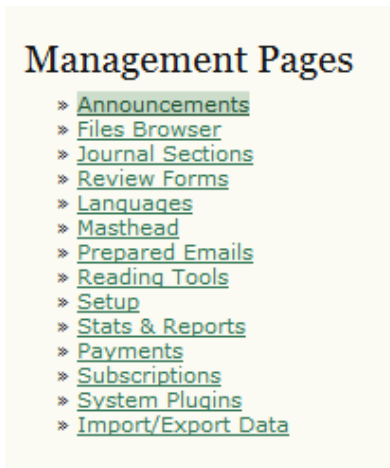
Items per page

Page links

Announcements

If you have [chosen the announcements option for your journal](#), a link to manage announcements will appear under Management Pages.

Figure 4.50. Management Pages: Announcements



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

Figure 4.51. Announcements



Figure 4.52. Announcement Types



Fill in the name for a new announcement type and save.

Figure 4.53. Create Announcement Type

You may only have one for now (e.g., Standard), but this does give you the opportunity to create others at any time. You can also return here to edit this announcement type. Return to the main Announcement page by selecting Announcements.

Figure 4.54. Edit Announcement Types

ANNOUNCEMENT TYPE	ACTION
Standard	EDIT DELETE

You can create and post an announcement using "Create New Announcement" link.

Figure 4.55. Announcement Page

EXPIRY	TYPE	TITLE
<i>No announcements have been created.</i>		

Select announcement type from the dropdown, fill in the announcement title, provide the short and detailed descriptions for the announcement, and specify the expiry date for the announcement to display.

Figure 4.56. Create New Announcement

Home > User > Journal Management > Announcements > Create

Create New Announcement

Type:

Title*:

Short Description*:

Description: Online Submissions page for more information."/>

Expiry Date:

The announcement will be displayed to readers until this date. Leave blank if the announcement should be displayed indefinitely.

* Denotes required field

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.

Figure 4.57. View Announcements on Home Page

Home > Announcements

Announcements

Standard: Open for submissions

The JOJS is now accepting submissions.

Posted: 2009-12-24 [More...](#)

1 - 1 of 1 Items

To see the full announcement, click on the More link.

Figure 4.58. Viewing Announcement Page



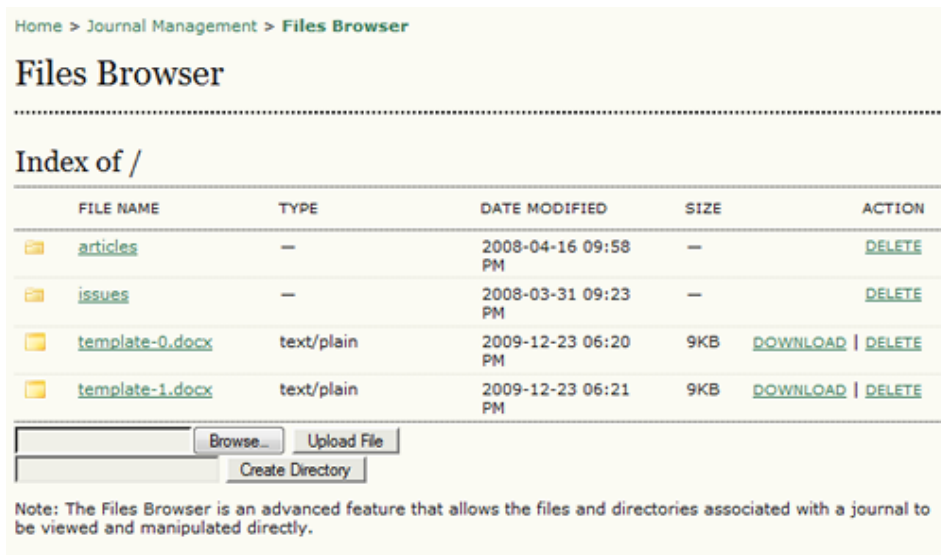
The Files Browser

The Files Browser is an advanced feature that allows the files and directories associated with a journal to be viewed and manipulated directly. In addition to directories for article and issue files, you can also see the layout templates that were uploaded during the Journal Setup.

Note

The Files Browser does not currently allow access to the journal's `public/` directory.

Figure 4.59. Files Browser



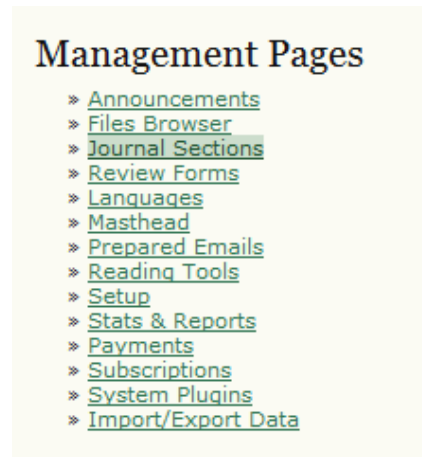
Journal Sections

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, which can be edited). If you do not wish for the section title to be visible to your readers, you can choose to omit it from the Table of Contents (this may be handy for things like introductions and editorials, for example).

To create a new section:

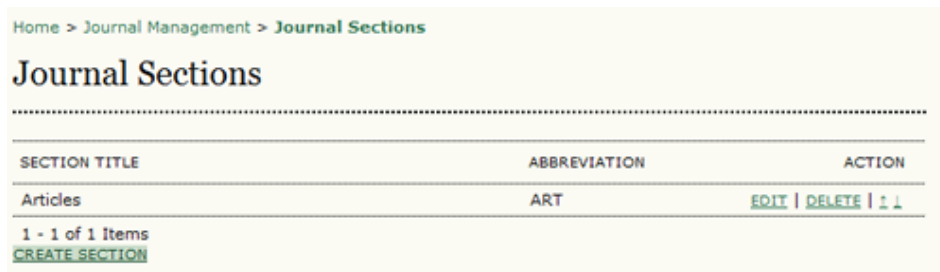
- Go to Management Pages and select Journal Sections:

Figure 4.60. Management Pages: Journal Sections



- Select Create Section:

Figure 4.61. Journal Sections



- Complete the form with the new section's information, and check the appropriate options. In the example below, the new section is for editorials, so options have been selected that will indicate that peer-review is not required, an abstract is not required, that only editors can submit to this section (it will not be available for authors to choose when submitting), the author name will not show on the table of contents, and it will not appear in the list of Sections on the About page. Remember, you can go back and edit this section at anytime if you wish to make changes. It is also possible to add a unique review form to a section. See [Review Forms](#) for more information about setting these up.

Figure 4.62. Create New Section

Home > User > Journal Management > Journal Sections > Section

Section

Section title*

Abbreviation* (For example, Articles=ART)

Section Policy

This section is only for editors.

Review Form

Indexing

Submissions made to this section of the journal

Will not be peer-reviewed

Do not require abstracts

Will not be included in the indexing of the journal

Identify items published in this section as a(n)
 (For example, "Peer-reviewed Article", "Non-refereed Book Review", "Invited Commentary", etc.)

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

Word Count Limit abstract word counts for this section (0 for no limit):

Table of Contents

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

Omit author names for section items from issues' table of contents.

About Omit this section from About the Journal.

- Further down this same form, choose a user as the Section Editor. If you haven't set up your journal's users yet, go to [Create Users](#) to do so. Until a Section Editor is assigned to a section, notification of submissions will go to the Editor, who will need to manually select a Section Editor. Once a Section Editor has been added here, however, all submissions to this section will go directly to her, bypassing the editor completely.

Figure 4.63. Add Section Editors

Section Editors

Add a Section Editor to this section to have submissions automatically assigned to the Section Editor. (Otherwise, Section Editors can be assigned manually, after a submission comes in.) If added, a Section Editor can be automatically assigned to oversee the REVIEW (peer review) and/or the EDITING (copyediting, layout and proofreading) of submissions to this section. Section Editors are created by clicking Section Editors under Roles in Journal Management.

Available Section Editors

USERNAME	NAME	ACTION
sjones	Sally Jones	ADD

This Section's Editors

USERNAME	NAME	REVIEW	EDITING	ACTION
None				

[Save](#) [Cancel](#)

This is designed to speed up the workflow and save the editor's time, but in some cases, journal Editors may want to have all submissions come through them. If this is the case, simply remove the Section Editor from the section using the Remove link.

Figure 4.64. Remove Section Editors

Section Editors

Add a Section Editor to this section to have submissions automatically assigned to the Section Editor. (Otherwise, Section Editors can be assigned manually, after a submission comes in.) If added, a Section Editor can be automatically assigned to oversee the REVIEW (peer review) and/or the EDITING (copyediting, layout and proofreading) of submissions to this section. Section Editors are created by clicking Section Editors under Roles in Journal Management.

Available Section Editors

USERNAME	NAME	ACTION
None		

This Section's Editors

USERNAME	NAME	REVIEW	EDITING	ACTION
sjones	Sally Jones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REMOVE

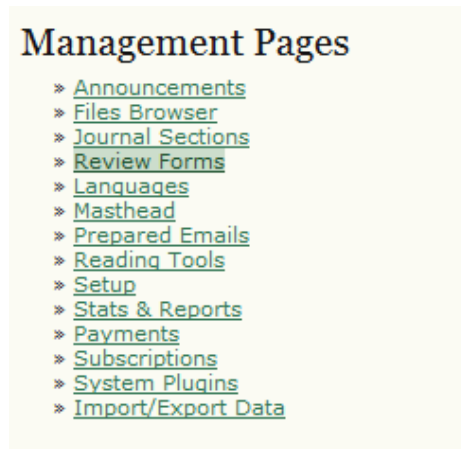
[Save](#) [Cancel](#)

Review Forms

By default, Reviewers will have a text form to add their comments on the submission, with a text field for Authors and Editors, and a separate field for Editors only. By using the Review Forms, however, you can create web-based forms that include a variety of pre-set questions to guide your Reviewers and result in more consistent commentary. Setting up a new Review Form for the first time can be a little tricky, so follow these steps carefully.

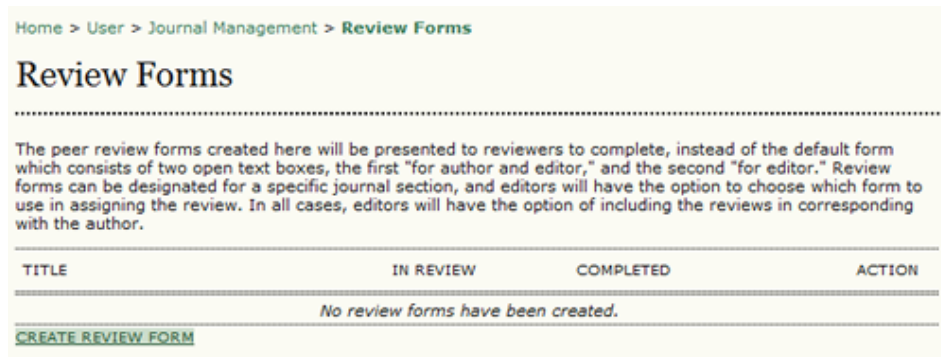
To create a new Review Form, select Review Forms from the Management Pages menu.

Figure 4.65. Management Pages: Review Forms



Click on Create Review Form link

Figure 4.66. Review Forms



Fill in title and description for a review form, then press the Save button. Remember, you can have many Review Forms, targeting them to specific sections or even to specific reviewers.

Figure 4.67. Create Review Forms

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

Figure 4.68. New Review Form Entry

TITLE	IN REVIEW	COMPLETED	ACTION
Articles Form	0	0	EDIT ACTIVATE PREVIEW DELETE ↑ ↓

[CREATE REVIEW FORM](#)

Click on the Edit link next to the title of review form, and then on the Review Form page select Form Items to start adding questions (i.e., "items") to this review form.

Figure 4.69. View Form Items

From the Form Items page, select Create New Item.

Figure 4.70. Form Items

On the resulting New Item page, you can configure your first question for this form.

Figure 4.71. Create New Item

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

Create New Item

Item*

Reviewers required to complete item

Item type*

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

* Denotes required

In the Item box, type in the question. You can then select whether or not to make the question required. Finally, choose an item type from the dropdown menu: single word text box, single line text box, extended text box (this is a larger text box allowing for a more detailed response), checkbox (this would allow reviewers to check off one or more choices), radio button (this limits reviewers to selecting a single answer), or drop-down box (this also limits reviewers to selecting a single answer, but does so using a dropdown menu rather than a list of buttons). If you choose the radio button or checkbox option you have the option to Add Selection. Selections are possible checkbox or radio button answers to the question. Remember to Save!

Figure 4.72. Adding Form Item Selections

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

Create New Item

Item*

Reviewers required to complete item

Item type*

Order	Selection	
<input type="text" value="1"/>	<input type="text" value="Very Good"/>	<input type="button" value="Delete"/>
<input type="text" value="2"/>	<input type="text" value="Good"/>	<input type="button" value="Delete"/>
<input type="text" value="3"/>	<input type="text" value="Average"/>	<input type="button" value="Delete"/>
<input type="text" value="4"/>	<input type="text" value="Below Average"/>	<input type="button" value="Delete"/>
<input type="text" value="5"/>	<input type="text" value="Poor"/>	<input type="button" value="Delete"/>

All created items can be edited, deleted or reordered. Additional items (i.e., questions) can be added by clicking on Create New Item. Notice that you can also copy the question to another Review Form if you have more than one.

Figure 4.73. View Form Items



Selecting Preview Form allows you to view the review form before activating it.

Figure 4.74. Preview Form



To return to the main Review Form menu, select Review Forms from the breadcrumbs at the top of your screen.

Figure 4.75. Return to Review Forms

Back at the main Review Forms page, you can create another form (perhaps for your Book Review section), or edit, activate, preview, delete, or re-order existing forms. Once a review form is activated, it is ready to be used by editors when assigning a reviewer.

Figure 4.76. Activate Review Form

TITLE	IN REVIEW	COMPLETED	ACTION
Articles Form	0	0	EDIT ACTIVATE PREVIEW DELETE ↑ ↓

[CREATE REVIEW FORM](#)

Note

Once a Review Form has been activated and used in at least one review, it cannot be deleted, deactivated, or modified. This is to preserve data consistency within OJS. You can always stop using a form, or copy previous form items to new forms.

From this page you can also quickly see how many forms are currently "In Review" (i.e., part of review that is still in process) or "Completed" (were used as part of a review that is now finished).

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. Here is an example of a Russian journal using OJS.

Figure 4.77. OJS in Greek



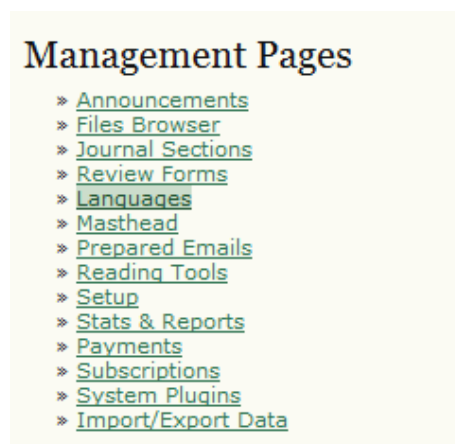
Using the language toggle in the sidebar, readers can switch from Russian to English. You can see that all of the OJS terms (About, Log In, Register, Search, etc.) have been translated (the system takes care of this). The content, however, must be translated by the journal. In the example below, the journal has not translated the titles for two of the journals, so they continue to appear in Russian.

Figure 4.78. OJS in English



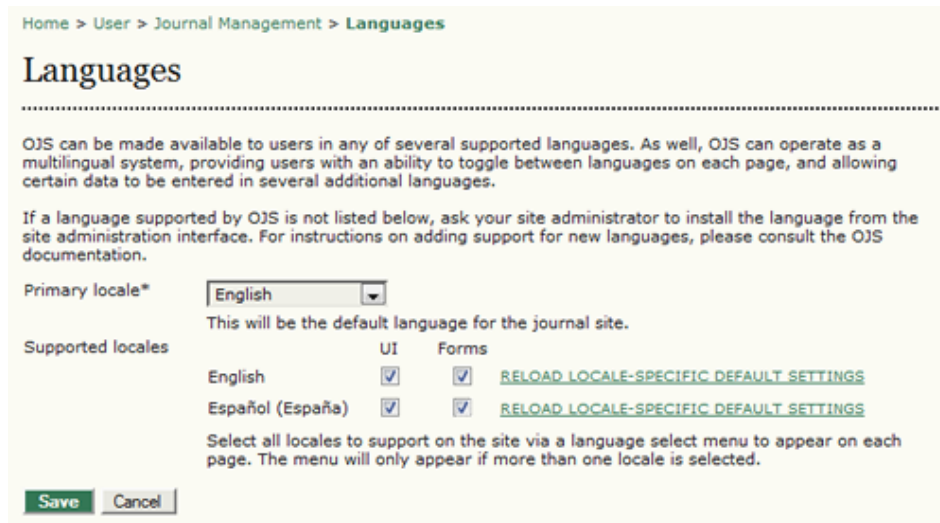
To activate another language for your journal, go to the Management Pages.

Figure 4.79. Management Pages: Languages



From here you will see all of the languages available for your journal. If you do not see any additional languages to choose, have your [Site Administrator](#) add them for you.

Figure 4.80. Languages

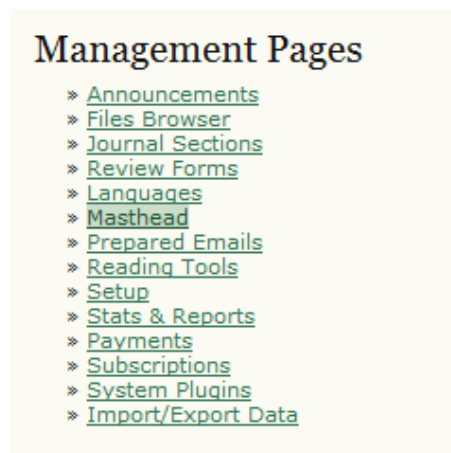


You will be able to enable any installed language to be used as part of the overall user interface, or with user-filled web forms, or both.

Masthead

The Masthead is used to list of people associated with the journal. You can access this from the Journal Manager's Management Pages. The Masthead information will appear in About the Journal, under People.

Figure 4.81. Management Pages: Masthead



The Masthead configuration page provides two methods of displaying the members of your journal's Editorial Team: either automatically (generated from assigned user roles -- e.g., anyone enrolled as an Editor will appear on the page), or manually (using the Create Position Title option). This can be useful if you wish to have titles other than those provided by OJS (e.g., Editor-in-Chief, Managing Editor, etc.). To use this second option, change the radio button and hit Record (note, that last step is commonly overlooked, so be sure to hit it if you wish to change from one option to the other).

Figure 4.82. Masthead



Next, select "Create a Position Title", 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. It could be the position of a single person (e.g., Managing Editor) or of a group (e.g., Board Members).

Figure 4.83. Create Title



After saving, you will be able to use the Membership link to add a name or names to the position. Note the email icon next to the Managing Editor title. Once this group has been populated with members, you can use this icon to quickly email everyone in that group.

Figure 4.84. Membership



On the resulting page, you will see a list of existing members of this group. From here you can also add members by clicking on 'Membership'.

Figure 4.85. Add Member



From the list of user accounts, use the Add Member link to add them to the group. send an email to all members of a group by clicking on the email icon next to the title name.

Figure 4.86. Adding the Member



Once this is done, you can see the results on the About page, under Editorial Team.

Figure 4.87. Masthead Display

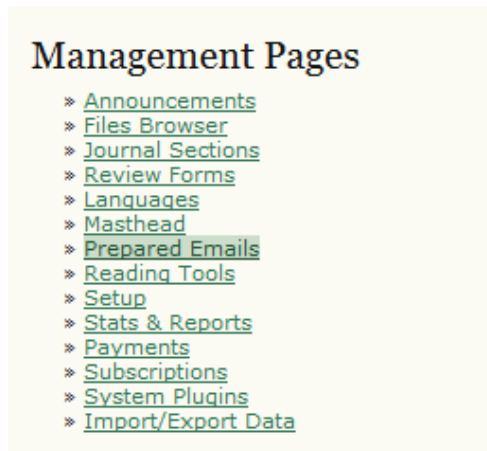


Prepared Email

OJS facilitates work flow communication through the use of prepared email messages. The wording of these messages has been added to get you started, but they can be easily modified.

- Go to Management Pages section and select Prepared Emails:

Figure 4.88. Management Pages: Prepared Email



- From the Prepared Emails page, select the template you wish to edit by using the Edit link. You will probably have 3 pages of templates, not just 1.

Figure 4.89. List of Prepared Emails

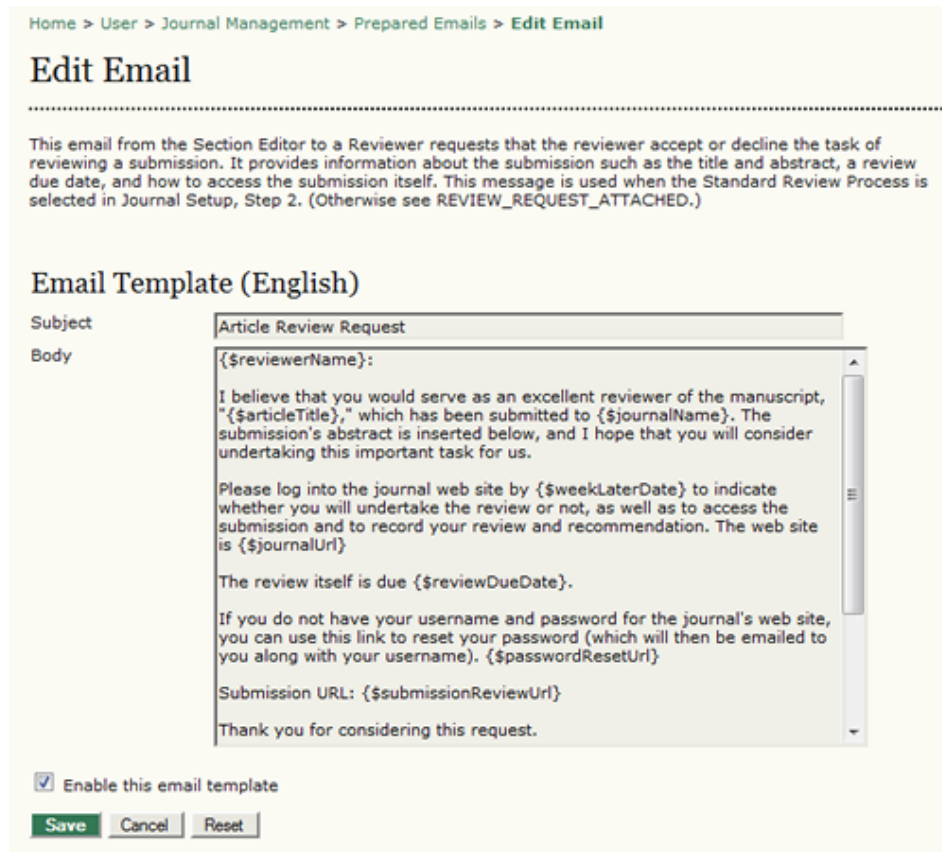
Home > Journal Management > Prepared Emails

Prepared Emails

EMAIL TEMPLATES	SENDER	RECIPIENT	SUBJECT	ACTION
REVIEW REQUEST 	Section Editor	Reviewer	Article Review Request	EDIT DISABLE RESET
REVIEW REQUEST ATTACHED 	Section Editor	Reviewer	Article Review Request	EDIT RESET
REVIEW REQUEST ONECLICK 	Section Editor	Reviewer	Article Review Request	EDIT DISABLE RESET

- Make your changes to the selected template. Avoid changing any of the embedded program variables (anything that looks like {*\$this*}) however, as these will dynamically generate appropriate information. (For example, {*\$reviewerName*} in the figure below will insert the Reviewer recipient's name into the email.) Remember to Save your changes.

Figure 4.90. Edit a Prepared Email



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. These optional 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. Here is an example from Postcolonial Text. You can see a list of resources in the right menu (under Related Items). The steps below will also show you how to configure the list of links above the Related Items (Review Policy, About the Author, etc.).

Figure 4.91. Reading Tools Display



If you click on one of the resource links (e.g., Web Search), it will open a popup window with links to a variety of resources (e.g., Google, etc.) to search. Note the use of the article keywords as the search terms. All of the resources and resource categories are completely configurable.

Figure 4.92. Reading Tools: Web Search

Web Search

.....

The Hidden Life of Things: Commodification, Imperialism, and Environmental Feminism in Arundhati Roy's *The God of Small Things*

The search terms have been selected by the author(s). They can be altered or deleted by the reader, as two or three short, precise terms or phrases produced the best Boolean (AND) searches. To learn more about the resources searched, click on ABOUT. These resources have been selected for their relevance and open (free) access to all or part of their contents.

Search Terms

.....

<input type="button" value="Search"/>	1.	Google ABOUT
<input type="button" value="Search"/>	2.	Google Scholar ABOUT
<input type="button" value="Search"/>	3.	Clusty the Clustering Engine ABOUT
<input type="button" value="Search"/>	4.	Vivisimo ABOUT

.....

[SUGGEST A SOURCE](#)

Configuring the Reading Tools

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

- Go to Management Pages section and select Reading Tools.

Figure 4.93. Managment Pages: Reading Tools

Management Pages

- » [Announcements](#)
- » [Files Browser](#)
- » [Journal Sections](#)
- » [Review Forms](#)
- » [Languages](#)
- » [Masthead](#)
- » [Prepared Emails](#)
- » [Reading Tools](#)
- » [Setup](#)
- » [Stats & Reports](#)
- » [Payments](#)
- » [Subscriptions](#)
- » [System Plugins](#)
- » [Import/Export Data](#)

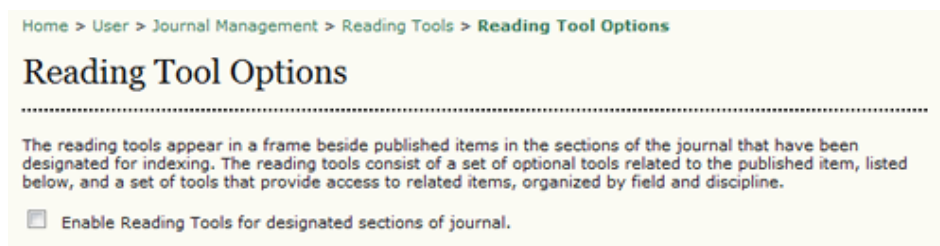
- Choose Reading Tool Options.

Figure 4.94. Activating Reading Tools



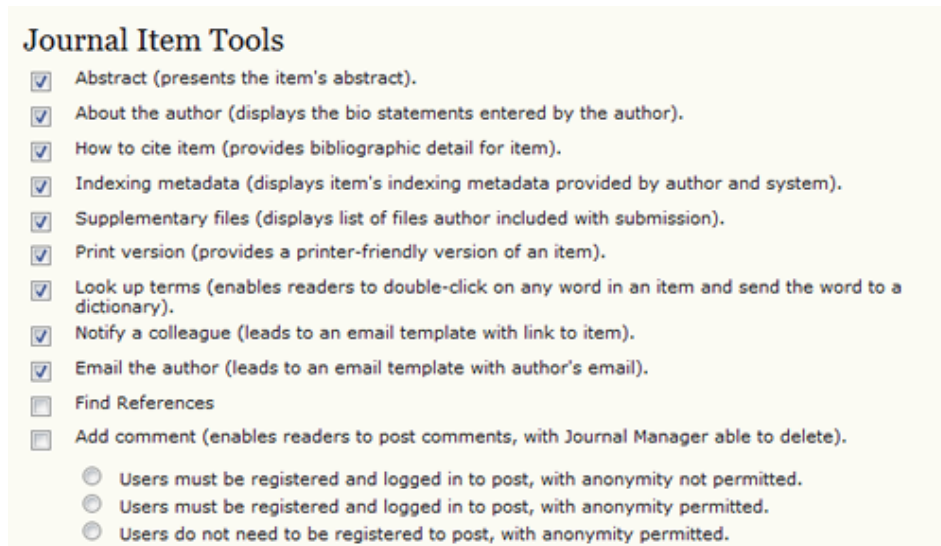
Checking the "Enable Reading Tools ..." checkbox will activate them for your journal.

Figure 4.95. Reading Tool Options



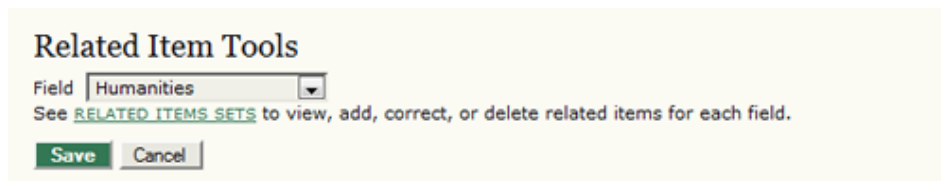
You can also configure which tools will be available to your readers. You may wish to experiment with these yourself to see if some or all of them will be useful to your audience.

Figure 4.96. Journal Item Tools



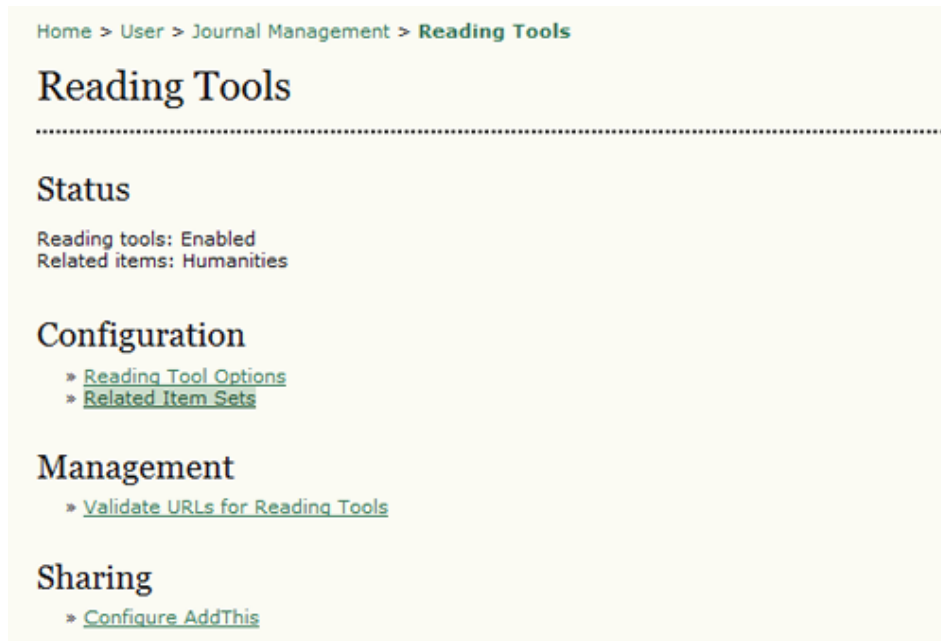
Under "Related Item Tools", you will find a dropdown menu of subject areas. You can select the subject that best matches your journal to provide additional reading tools that are specific to that discipline. For example, if you choose Humanities, you will not see search options for the Health Science index PubMed.

Figure 4.97. Related Item Tools



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

Figure 4.98. Related Item Sets



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

Figure 4.99. List of Related Item Sets

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

Related Item Sets

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

1 - 19 of 19 Items

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

For each subject, you will see a series of options: Validate, Metadata, Contexts, Export, and Delete. While scrolling down the page of subject items, you will also see the option to create your own set for a discipline not listed here.

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 4.100. Contexts

Home > User > Journal Management > Reading Tools > Related Item Sets > Humanities > Contexts

Contexts

METADATA CONTEXTS

TITLE	ABBREV	
Author's work	Other Works	↑ ↓ METADATA SEARCHES DELETE
Look up terms	Look up terms	↑ ↓ METADATA SEARCHES DELETE
Gov't policy	Gov't policy	↑ ↓ METADATA SEARCHES DELETE
Book searches	Book searches	↑ ↓ METADATA SEARCHES DELETE
Lit critics	Literary Critics	↑ ↓ METADATA SEARCHES DELETE
Book reviews	Book reviews	↑ ↓ METADATA SEARCHES DELETE
Related studies	Related studies	↑ ↓ METADATA SEARCHES DELETE
Dissertations	Dissertations	↑ ↓ METADATA SEARCHES DELETE
Databases	Databases	↑ ↓ METADATA SEARCHES DELETE
Relevant portals	Relevant portals	↑ ↓ METADATA SEARCHES DELETE
Pay-per-view	Pay-per-view	↑ ↓ METADATA SEARCHES DELETE
Related texts	Related texts	↑ ↓ METADATA SEARCHES DELETE
Online forums	Online forums	↑ ↓ METADATA SEARCHES DELETE
Teaching files	Instructional	↑ ↓ METADATA SEARCHES DELETE
Media reports	Media reports	↑ ↓ METADATA SEARCHES DELETE
Web search	Web search	↑ ↓ METADATA SEARCHES DELETE

1 - 16 of 16 Items

[CREATE CONTEXT](#)

The Up and Down arrows allow you to reposition the contexts -- or you can click on the title or abbrev and drag the entry to a new position (this is easier than using the up and down arrows!). The Metadata link allows you to configure the context. The Searches link lets you view, edit, add, or delete the various resources associated with the context.

Figure 4.101. Searches

Home > User > Journal Management > Reading Tools > Related Item Sets > Humanities > Contexts > Web search > Searches

Searches

METADATA SEARCHES

TITLE	URL	
Google	http://www.google.com/	↑ ↓ EDIT DELETE
Google Scholar	http://scholar.google.com	↑ ↓ EDIT DELETE
Clusty the Clustering Engine	http://clusty.com/about	↑ ↓ EDIT DELETE
Vivisimo	http://vivisimo.com	↑ ↓ EDIT DELETE

1 - 4 of 4 Items

[CREATE SEARCH](#)

Remember the example from Postcolonial Text? Here is how they would revise the options available under Web Search. You can use the Create Search link to add a new one, or use the Edit link to modify an existing one.

Figure 4.102. Edit Search

Home > User > Journal Management > Reading Tools > Related Item Sets > Humanities > Contexts > Web search > Searches > Google > **Edit Search**

Edit Search

Title	<input type="text" value="Google"/>
URL	<input type="text" value="http://www.google.com/"/>
Search URL	<input type="text" value="http://www.google.com/search?q={\$formKeywords}"/>
Post data	<input type="text"/>
Description	<div style="border: 1px solid #ccc; padding: 5px;">Search using the popular Google search engine.</div>

You may need to contact the search service directly to find out the appropriate Search URL.

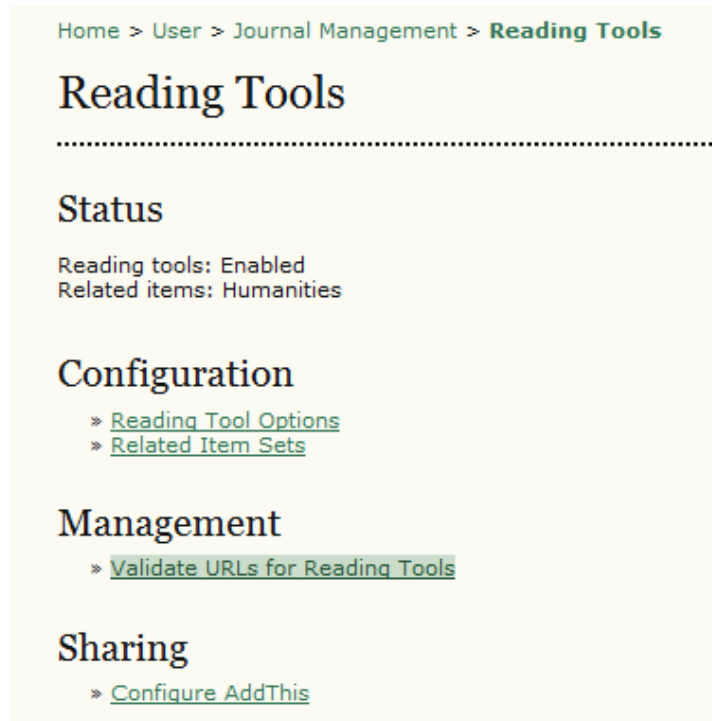
Export creates an XML file of the items.

Delete removes the item.

Managing the Reading Tools

Returning to the Reading Tools menu, you can now choose Validate URLs for Reading Tools under the Management heading to test all of the Reading Tool URLs.

Figure 4.103. Validating URLs for Reading Tools

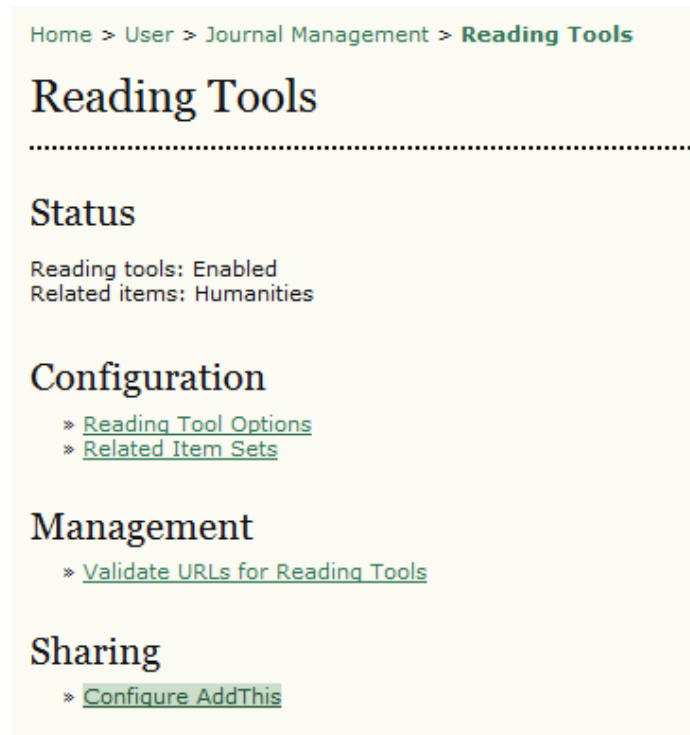


This can take a few minutes, as all of the URLs are tested. Use the configuration options outlined previously to fix any broken URLs (and delete any non-function search services).

Sharing

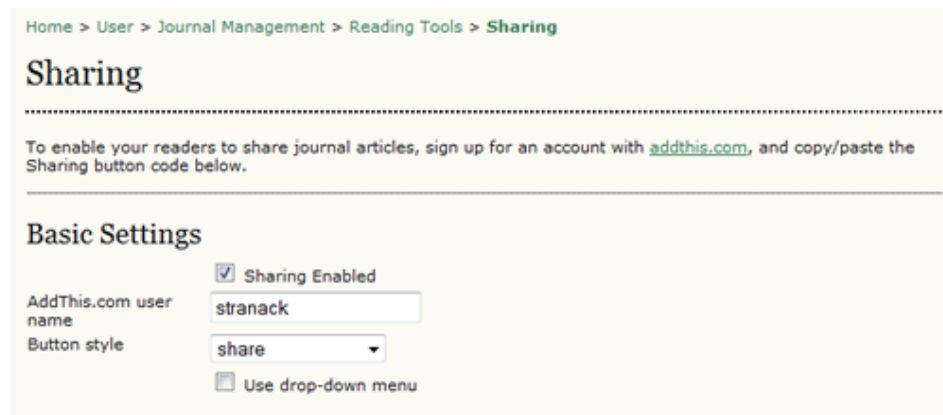
This option will allow you to add social networking links (Facebook, Delicious) to your Reading Tools via the AddThis (<http://addthis.com/>) service. First, select Configure AddThis.

Figure 4.104. Configure AddThis



Next, fill in the form with your AddThis information (you'll need to visit their site and create an account first).

Figure 4.105. Sharing with AddThis



Once this is saved, the sharing image/link will appear in your sidebar.

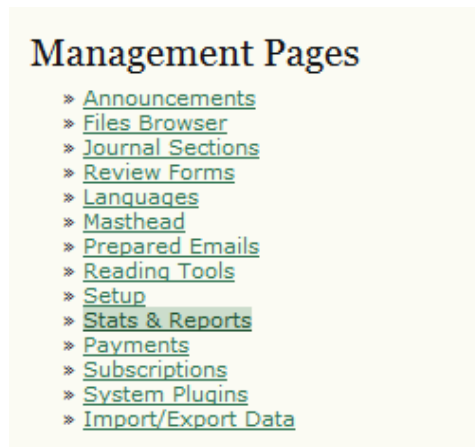
Figure 4.106. AddThis Image Display



Statistics and Reports

OJS provides a number of statistical and reporting features for your journal. To access them, go to the Journal Manager's Management Pages.

Figure 4.107. Management Pages: Statistics and Reports



This will take you to the Stats & Reports page.

Statistics

The Statistics section provides a summary of your journal's usage. You can use the checkboxes to make these statistics available to readers in About the Journal.

Figure 4.108. Journal Statistics

Journal Statistics

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

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

Articles
Editorials

Record

Year << 2009 >>

<input type="checkbox"/> Issues published	0
<input type="checkbox"/> Items published	0
<input type="checkbox"/> Total submissions	0
<input type="checkbox"/> Peer reviewed	0
<input type="checkbox"/> Accept	0 (0%)
<input type="checkbox"/> Decline	0 (0%)
<input type="checkbox"/> Resubmit	0 (0%)
<input type="checkbox"/> Days to review	0
<input type="checkbox"/> Days to publication	0
<input type="checkbox"/> Registered users	2 (2 new)
<input type="checkbox"/> Registered readers	0 (0 new)
<input type="checkbox"/> Subscriptions	
<input type="checkbox"/> Article View Counts (for Authors only)	

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

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

Record

Reports

The Reports section lists available spreadsheet reports about different aspects of your journal's activity. The Review Report summarizes the review activities (reviewer names, comments, decisions, etc.). The Articles Report summarizes all of the articles in your journal (titles, authors, abstracts, etc.).

Figure 4.109. Report Generator

Report Generator

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

- > [Review Report](#)
- > [Articles Report](#)

Note

While OJS only comes with two reports by default, you may be able to find other report plugins in the [Plugin Gallery](#).

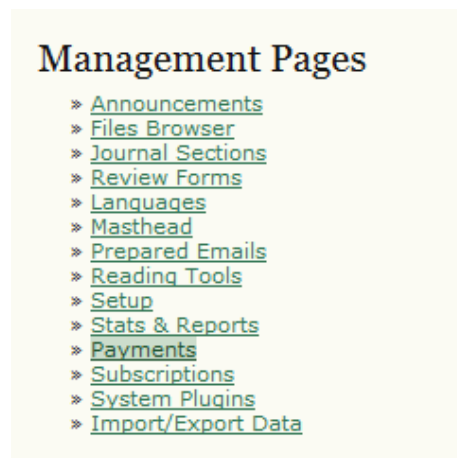
Payments

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

Payment Options

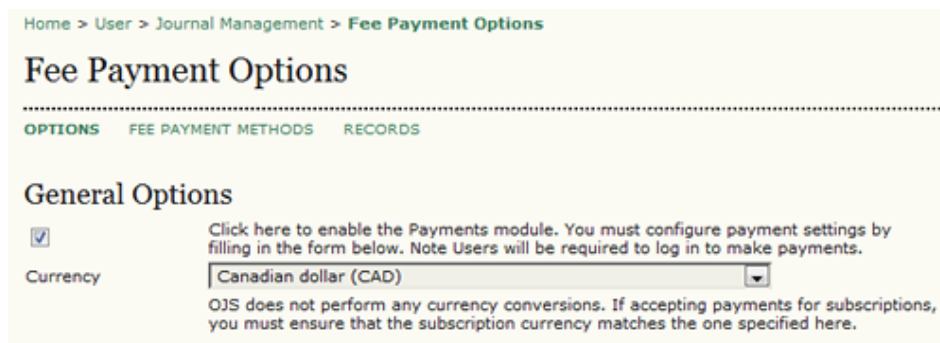
To enable the Payment Module, click on the Payments link listed under Management Pages.

Figure 4.110. Management Pages: Payments



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 the subscriptions component is also being used.

Figure 4.111. Fee Payment Options



Further down the page, you can enable and customize author fees for article submission, fast-track peer review, and article publication. Note the Waiver Policy. If filled in, this will display along with the Submission Checklist in article Submission [Step One](#), and in About the Journal, under Submissions.

Figure 4.112. Author Fees

Author Fees

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

<input checked="" type="checkbox"/>	Article Submission
Fee	<input type="text" value="100"/>
Fee Name	<input type="text" value="Article Submission"/>
Fee Description	<input type="text" value="Authors are required to pay an Article Submission Fee as part of the submission process to contribute to review costs."/>
<input checked="" type="checkbox"/>	Fast-Track Review
Fee	<input type="text" value="100"/>
Fee Name	<input type="text" value="Fast-Track Review"/>
Fee Description	<input type="text" value="With the payment of this fee, the review, editorial decision, and author notification on this manuscript is guaranteed to take place within 4 weeks."/>
<input checked="" type="checkbox"/>	Article Publication
Fee	<input type="text" value="100"/>
Fee Name	<input type="text" value="Article Publication"/>
Fee Description	<input type="text" value="If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publications costs."/>
Waiver Policy	<input type="text" value="If you do not have funds to pay such fees, you will have an opportunity to waive each fee. We do not want fees to prevent the publication of worthy work."/>

Reader fees can also be enabled. This can be used for either subscriptions or pay-per-view.

Figure 4.113. Reader Fees

Reader Fees

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

<input checked="" type="checkbox"/>	This will activate payments for Subscriptions, where types, cost, duration and subscriptions are managed by the Journal (Subscription) Manager.
<input checked="" type="checkbox"/>	Purchase Article
Fee	<input type="text" value="50"/>
Fee Name	<input type="text" value="Purchase Article"/>
Fee Description	<input type="text" value="The payment of this fee will enable you to view, download, and print this article."/>
<input type="checkbox"/>	Only Restrict Access to PDF version of articles

As can general fees for association membership and/or donations can also be added. The Association Membership information will appear in About the Journal under Policies, and the Donation link will appear above the search function in the right-hand frame (it is a sidebar block that can be re-positioned -- see Journal Setup for details).

Figure 4.114. General Fees

General Fees

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

Association Membership
 Fee: 100
 Fee Name: Association Membership
 Fee Description: 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.

Donations to journal
 Fee Name: Donations to journal
 Fee Description: 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.

[Save](#) [Cancel](#)

Payment Methods

You can edit fee payment options by clicking the Fee Payment Methods link at the top of the Fee Payment Options page.

Figure 4.115. Fee Payment Options

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

Fee Payment Options

.....

[OPTIONS](#) [FEE PAYMENT METHODS](#) [RECORDS](#)

General Options

[Click here to enable the Payments module. You must configure payment settings by](#)

If you choose the Manual payment option, 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.

Figure 4.116. Fee Payment Methods: Manual

Home > User > Journal Management > Fee Payment Methods

Fee Payment Methods

.....

OPTIONS **FEE PAYMENT METHODS** RECORDS

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

Fee Payment Methods

PayPal Fee Payment

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

Manual Fee Payment

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

Manual Payment Settings

Instructions* **Fee Payment Instructions for users selecting manual fee payment**

Please send a cheque or money order to:

Journal of Open Journal Systems
 1234 Main Street
 Burnaby, BC Canada
 V5A 1S6

* Denotes required field

If you choose the PayPal payment method, you must enter the appropriate PayPal account information for the service to work correctly. The advantage of this option is that readers can make immediate payments and have immediate access to your content. With the Manual Payment Method, readers will need to wait until you have approved their payment.

Figure 4.117. Fee Payment Methods: Paypal

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

Fee Payment Methods

OPTIONS FEE PAYMENT METHODS RECORDS

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

Fee Payment Methods

PayPal Fee Payment

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

Manual Fee Payment

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

PayPal Settings

IPN URL*

This is the URL to PayPal's Instant Payment Notification (IPN) service. For testing, use <https://www.sandbox.paypal.com/cgi-bin/webscr>; for production systems, use <https://www.paypal.com/cgi-bin/webscr>.

Seller Account*

This is the PayPal account username for the sellers' account to be used, typically an email address. Ensure that you activate Instant Payment Notification (IPN) in your seller account Profile.

* Denotes required field

Payment Records

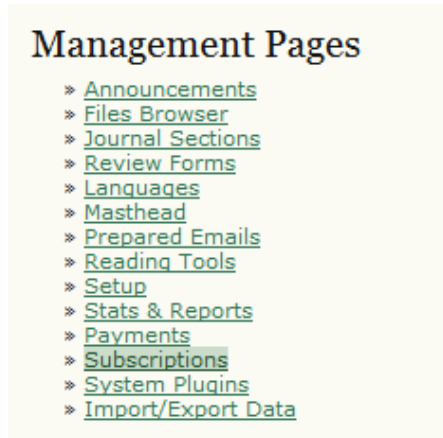
The Payment module tracks system payments, and provides records on the Records page. You can access this page by clicking the Records link at the top of the Fee Payment Options page.

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.

Subscriptions

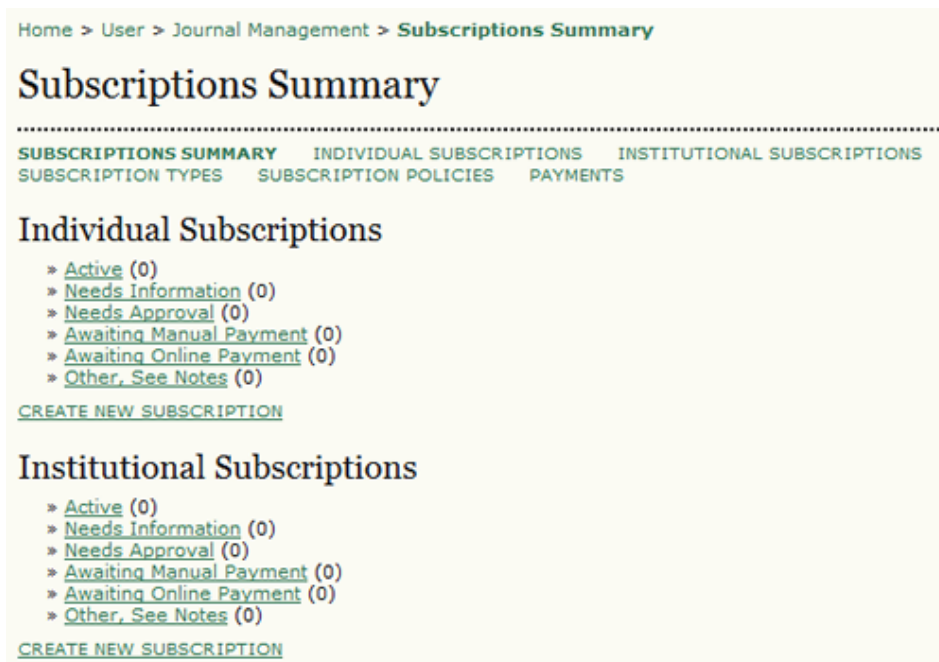
If you have chosen the subscription option for your journal (see Journal Setup [section 4.1](#)), a link to manage your subscriptions will appear on your menu.

Figure 4.118. Management Pages: Subscriptions



On the resulting page, you will see an overview of the subscription activity for your journal, and a set of choices to configure and manage your subscriptions, including Subscription Types, Subscription Policies, Payments, Individual Subscriptions, and Institutional Subscriptions. From this page you can also create a new subscription.

Figure 4.119. Subscription Summary

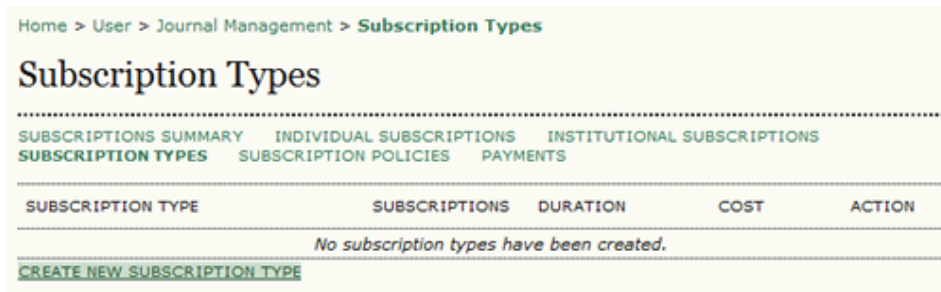


Subscription Types

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).

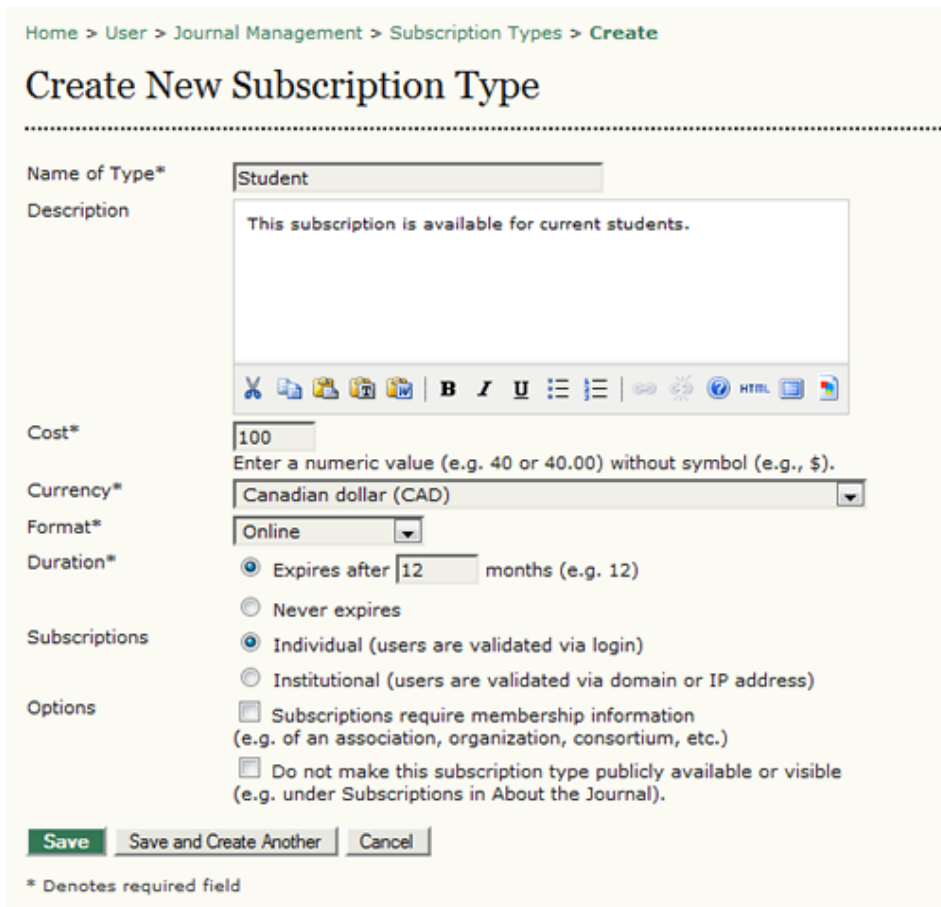
To begin, select Subscription Type and from the resulting page, click Create New Subscription Type.

Figure 4.120. Subscription Types



Next, fill in the details, including a unique name, a description, cost, and currency. You can also determine if it is for online, print, or online + print. You can also set the duration of the subscription, and whether it is individual (login required) or institutional (access via IP address or domain name -- e.g., sfu.ca). Lastly, you can require a membership for the subscription (perhaps for a reduced fee) and hide the subscription type from being published on the About page.

Figure 4.121. Create New Subscription Type



Subscription Policies

Under the Subscription Policies heading you will have to enter information in several sections.

- Subscription Manager: Add the contact information for the journal's Subscription Manager. This will appear on the About page.

Figure 4.122. Subscription Manager

- Subscription Information: The [Subscription Types](#) and fee structure will be automatically placed under Subscriptions on the About the Journal page, along with the name and contact information for the Subscription Manager. Additional information about subscriptions, such as methods of payment or support for subscribers in developing countries, can be added here.

Figure 4.123. 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. The Site Administrator will need to [enable and configure](#) `scheduled_tasks` within `config.inc.php` to allow for these options to be enabled.

Figure 4.124. Subscription Expiry Reminders

Subscription Expiry Reminders

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

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

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

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

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

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

- Online Payment Notifications: Use this option to allow for automatic notification of online payments for the Subscription Manager.

Figure 4.125. Online Payment Notifications

Online Payment Notifications

Automated email notifications (available for editing by Journal Managers in OJS's Prepared Emails) can be sent to the Subscription Manager upon the completion of subscription online payments.

Notify Subscription Manager by email upon online purchase of an Individual subscription.

Notify Subscription Manager by email upon online purchase of an Institutional subscription (recommended).

Notify Subscription Manager by email upon online renewal of an Individual subscription.

Notify Subscription Manager by email upon online renewal of an Institutional subscription.

Note: Institutional subscriptions purchased online require approval of the provided domain and IP ranges and activation of the subscription by the Subscription Manager.

- 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. 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.

Figure 4.126. Delayed Open Access

Delayed Open Access

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

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

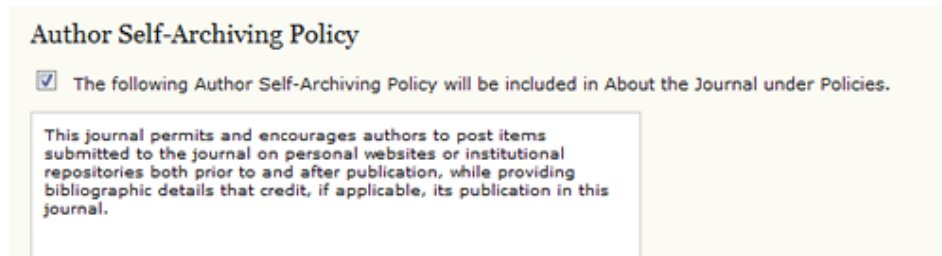
Registered readers will have the option of receiving the table of contents by email when an issue becomes open access.

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

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

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

Figure 4.127. Author Self-Archiving Policy



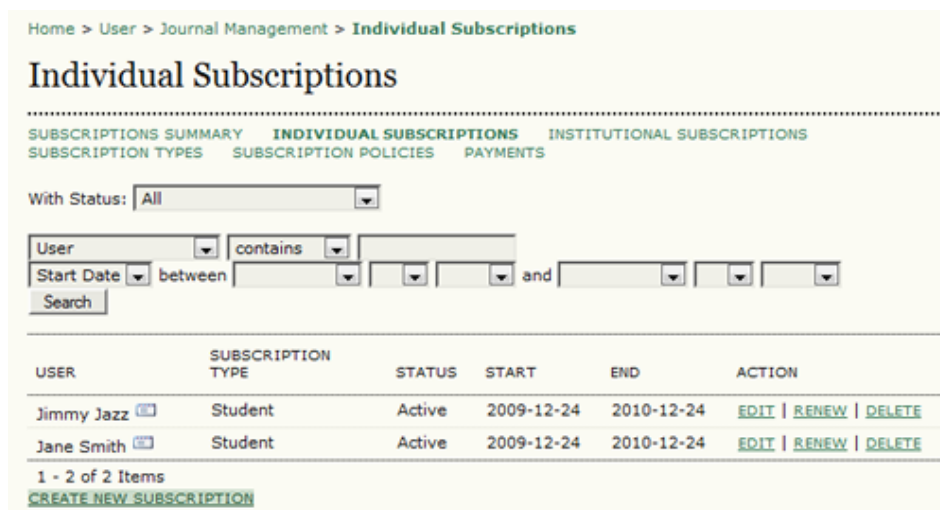
Payments

Selecting the Payments option here will take you immediately to the [Fee Payment Option](#) page.

Individual Subscriptions

The Individual Subscriptions section allows you to see all individual subscribers, edit their accounts, and create new ones.

Figure 4.128. Individual Subscriptions



To create a new individual subscription, select the Create New Subscription link. If the user already has an account with the journal, you can sign them up here using their Select link.

Figure 4.129. Select User

Select User

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

First name contains Search

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

USERNAME	NAME	EMAIL	
ADMIN	Smith, Jane	stranack@gmail.com	SELECT
SJONES	Jones, Sally	sj@mailinator.com	SELECT
JJAZZ	Jazz, Jimmy	jjazz@mailinator.com	SELECT

1 - 3 of 3 Items
[CREATE NEW USER](#)

Once that is selected, fill in the resulting form.

Figure 4.130. Create New Subscription

Home > User > Journal Management > Individual Subscriptions > **Create**

Create New Subscription

Status*

Subscription type*

Start date

End date

Membership

Reference Number

User* [SELECT](#)

Note: All changes below are to user's system-wide profile.

Salutation

First name*

Middle name

Last name*

Initials

Gender

If the new subscriber does not already have an account, you can create one for them by selecting the Create New User link at the bottom of the screen. You then need to fill in the resulting form.

Figure 4.131. People

Home > User > Journal Management > People

People

Create New User

Salutation

First name*

Middle name

Last name*

Gender

Initials Joan Alice Smith = JAS

Enroll user as

- With no role
- Journal Manager
- Editor
- Section Editor
- Reviewer
- Author
- Reader
- Subscription Manager

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

Username*

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

Password*

The password must be at least 6 characters.

Repeat password*

Generate a random password.

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

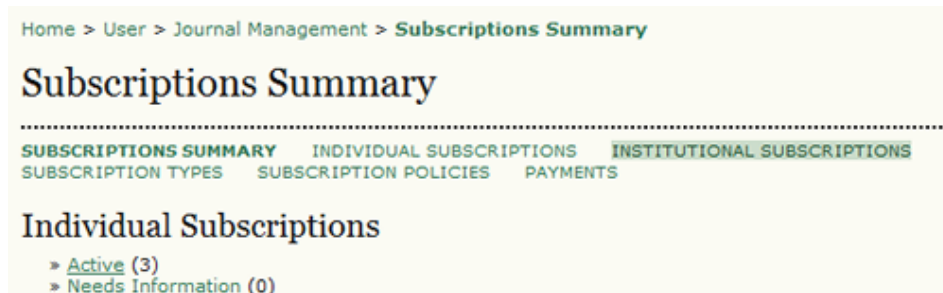
After filling in the form, you will then need to Select them from the list of existing users and fill in their subscription details (as in the previous section).

Institutional Subscriptions

Institutional Subscriptions differ from Individual Subscriptions in a number of important ways. Obviously, one is for entire institutions and the other is just for single users. Individual Subscribers access the content of your journal by logging in with their username and password. Institutional Subscribers, however, will access the content on a computer from a recognized IP address or domain. No logging in is required for these institutional readers.

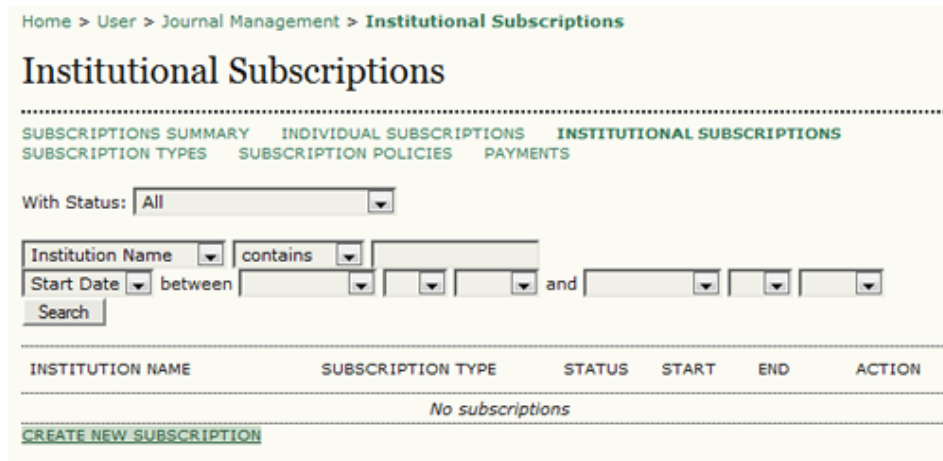
Select Institutional Subscriptions to configure or manage institutional subscriptions.

Figure 4.132. Subscription Summary



On the resulting page, you can view/edit any existing institutional subscriptions, or use the Create New Subscription link to create a new one.

Figure 4.133. Institutional Subscriptions



In the same way as in Individual Subscriptions, you will have the option to select from a list of existing users. Institutional Subscriptions cover entire organizations, but still must be *owned* by an individual account holder from your journal.

Figure 4.134. Select Subscription Contact

Home > User > Journal Management > Institutional Subscriptions > **Select Subscription Contact**

Select Subscription Contact

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

First name contains

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

USERNAME	NAME	EMAIL	
ADMIN	Smith, Jane	stranack@gmail.com	SELECT
SJONES	Jones, Sally	sj@mailinator.com	SELECT
JJAZZ	Jazz, Jimmy	jjazz@mailinator.com	SELECT
JBROWN	Brown, Joe	jbrown@mailinator...	SELECT

1 - 4 of 4 Items
[CREATE NEW USER](#)

If there is no current account holder, use Create New User to make one. This will open the same New User form seen previously. This would filled in with information about the representative from the institution (often a librarian).

Figure 4.135. People

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

People

Create New User

Salutation

First name*

Middle name

Last name*

Gender

Initials Joan Alice Smith = JAS

Enroll user as

- With no role
- Journal Manager
- Editor
- Section Editor
- Reviewer
- Author
- Reader
- Subscription Manager

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

Username*

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

Password*

The password must be at least 6 characters.

Repeat password*

Generate a random password.

Once completed, this new user can then be selected as a new institutional subscriber.

Figure 4.136. Select Subscription Contact

Home > User > Journal Management > Institutional Subscriptions > **Select Subscription Contact**

Select Subscription Contact

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

First name contains

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

USERNAME	NAME	EMAIL	
ADMIN	Smith, Jane	stranack@gmail.com <input type="checkbox"/>	SELECT
SJONES	Jones, Sally	sj@mailinator.com <input type="checkbox"/>	SELECT
JJAZZ	Jazz, Jimmy	jjazz@mailinator.com <input type="checkbox"/>	SELECT
JBROWN	Brown, Joe	jbrown@mailinator... <input type="checkbox"/>	SELECT
VOLDMAN	Oldman, Vincent	vo@anywhere.ca <input type="checkbox"/>	SELECT

1 - 5 of 5 Items
[CREATE NEW USER](#)

Once selected, you must fill in the resulting form, including the domain and IP information (this is what will allow readers from that institution to access your content with logging in). If you are unsure what the IP range is, the contact should be able to tell you.

Figure 4.137. Create New Subscription

Home > User > Journal Management > Institutional Subscriptions > Create

Create New Subscription

Status*

Subscription type*

Start date

End date

Membership

Reference Number

Institution name*

Mailing address

Domain
If a domain is entered here, IP ranges are optional.
Valid values are domain names (e.g. lib.sfu.ca).

IP ranges •

If IP ranges are entered here, the domain is optional.
Valid values include an IP address (e.g. 142.58.103.1), IP range (e.g. 142.58.103.1 - 142.58.103.4), IP range with wildcard "*" (e.g. 142.58.*.*), and an IP range with CIDR (e.g. 142.58.100.0/24).

Contact* Note: All changes below are to user's system-wide profile.

Salutation

First name*

Middle name

Last name*

System Plugins

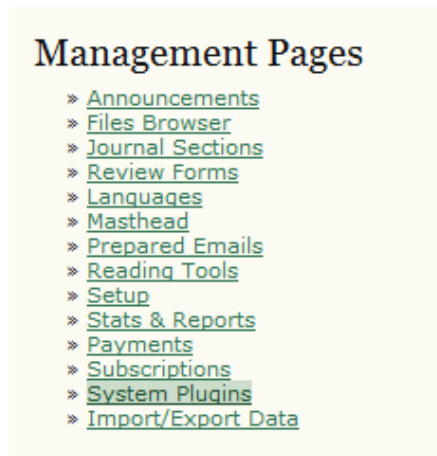
System plugins allow OJS to expand its functionality, and accept contributions from participating developers, without altering the core of the program. If you are interested in writing a plugin for OJS, please contact us using the [Support Forum](#). There is a [special plugin gallery](#) on the forum dedicated to new plugins. The most widely used plugins are shipped with OJS by default, but it is always a good idea to check this gallery for new ones particular to your needs, as well as updated plugins. You can use the Upgrade Plugin option for each to upload the new files found on the forum. Most journals wait for any new plugins to be included with a new release of OJS, but if you need a new feature right away, this is the way to upgrade it.

As a Journal Manager, you can decide which plugins to add to your journal, and which to leave out.

Currently included 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.

To see all of the available plugins, select System Plugins from the Journal Manager's Management pages.

Figure 4.138. Management Pages: System Plugins



On the resulting page, you will see all categories of plugins.

Figure 4.139. Plugin Management



Authorization Plugins

Authorization Plugins allow for alternative systems of user authentication. Most journals do not make use of these plugins.

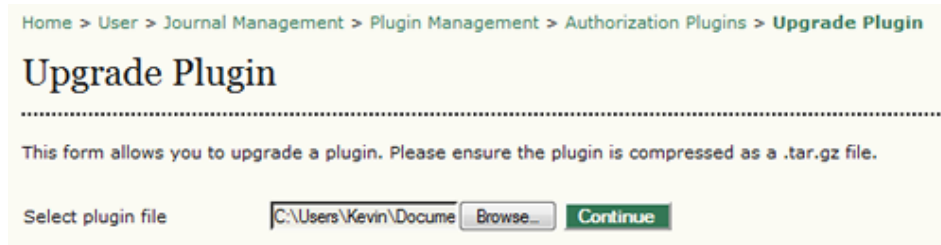
Figure 4.140. Authorization Plugins



Note

in the above figure, note the Upgrade Plugin option mentioned earlier. Clicking this will provide an upload tool for the latest LDAP plugin files found on the forum.

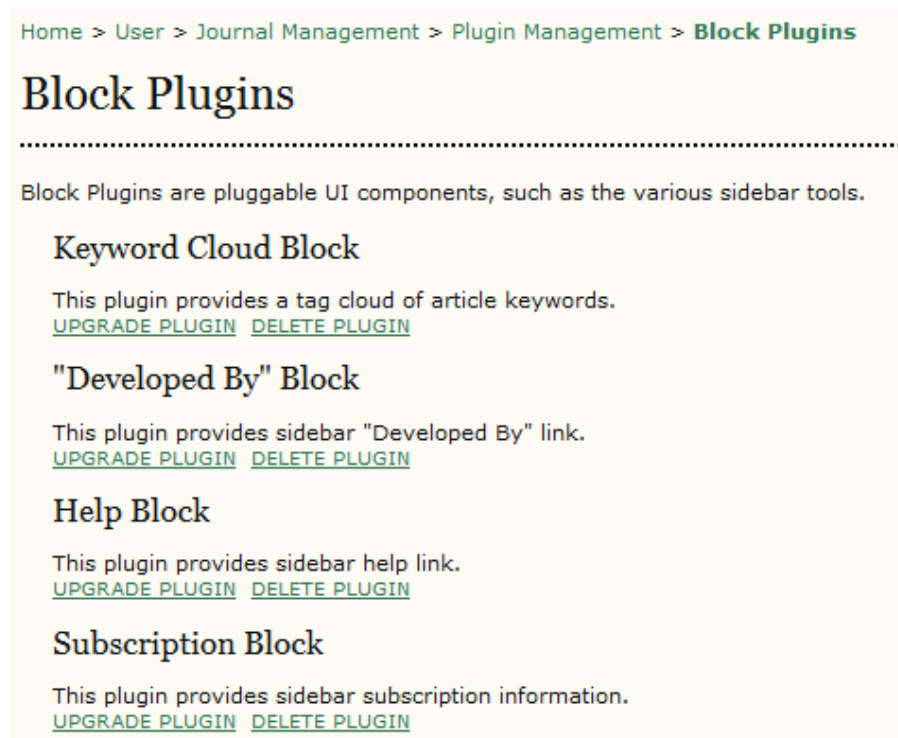
Figure 4.141. Upgrade Plugin



Block Plugins

Block Plugins add components to the user interface. For example, the Donation block controls the display of the Donation link on the sidebar, if donations have been activated for the journal. Most journals do not modify these plugins.

Figure 4.142. Block Plugins



Citation Format Plugins

Citation Format Plugins are used as part of the Reading Tools, allowing readers to export the article citation in a variety of formats. Most journals do not modify these plugins.

Figure 4.143. Citation Format Plugins

Home > User > Journal Management > Plugin Management > Citation Format Plugins

Citation Format Plugins

Citation format plugins provide users with various formats in which to access article citations.

RefWorks citation format plugin

This plugin implements the RefWorks citation format.
[UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Turabian citation format plugin

This plugin implements the Turabian citation format.
[UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

CBE citation format plugin

This plugin implements the CBE citation format.
[UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

ProCite citation format plugin

This plugin implements the ProCite citation format.
[UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Gateway Plugins

Gateway Plugins provide your data to external systems. Most journals do not modify these plugins.

Figure 4.144. Gateway Plugins

Home > User > Journal Management > Plugin Management > Gateway Plugins

Gateway Plugins

Gateway Plugins provide live data to external systems.

Resolver Plugin

This plugin resolves issues and articles based on citation information.
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

METS Gateway Plugin

This plugin provides raw XML data in METS format for a specified journal. **NOTE: This is intended to be used by Web Services and enabling this plugin has a security issue in that it provides unrestricted access to the journal in XML form (content is base64 encoded).**
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Generic Plugins

Generic Plugins cover a wide range of functionality. The more commonly-used ones are the Static Pages, Web Feeds, Custom Block Manager and Google Analytics plugins.

Figure 4.145. Generic Plugins

Home > User > Journal Management > Plugin Management > **Generic Plugins**

Generic Plugins

Generic plugins are used to extend Open Journal Systems in a variety of ways that are not supported by the other plugin categories.

phpMyVisites Plugin
 Integrate OJS with phpMyVisites, a free and open source web site traffic analysis application. Requires that phpMyVisites is already installed. Please see the [phpMyVisites site](#) for more information.
[ENABLE](#)

XML Galley Plugin
 This plugin generates XHTML galleys from an XML article using XSLT.
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Translator Plugin
 This plugin allows web-based maintenance of translation files.
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Custom Locale Plugin
 This plugin enables customization of the default user interface text used by OJS.
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

phpMyVisites

Integrates OJS with phpMyVisites, a free and open source web site traffic analysis application. Requires that phpMyVisites is already installed on the server. (phpMyVisites has been deprecated in favour of Piwik, which also has a plugin.)

XML Galleys

This plugin automatically generates HTML and PDF galleys from XML files. [NLM 2.3](#) XML is supported by default, but custom XSLT files are also supported.

Translator Plugin

This plugin allows web-based maintenance of translation files, which are used to provide text for the OJS interface. You must first use the Enable link to activate the plugin, and then hit the Translate link to see the list of available locale files.

Figure 4.146. Available Locales

KEY	LOCALE NAME	ACTION
de_DE	Deutsch (Deutschland)	CHECK EDIT EXPORT
el_GR	Greek	CHECK EDIT EXPORT
en_US	English	EDIT EXPORT
es_ES	Español (España)	CHECK EDIT EXPORT
fa_IR	Persian	CHECK EDIT EXPORT
fr_CA	Français (Canada)	CHECK EDIT EXPORT

Use the Edit link for the language you wish to update. There are many.

Figure 4.147. Locale Files

FILENAME	ACTION
lib/pkp/locale/fa_IR/common.xml	EDIT
lib/pkp/locale/fa_IR/admin.xml	EDIT
lib/pkp/locale/fa_IR/installer.xml	EDIT
lib/pkp/locale/fa_IR/manager.xml	EDIT
lib/pkp/locale/fa_IR/reader.xml	EDIT
lib/pkp/locale/fa_IR/submission.xml	EDIT
lib/pkp/locale/fa_IR/user.xml	EDIT

You will be shown a list of all locale files for that given locale. Click on the Edit link next to a locale file to modify one. You will see the English text in the top box, and the translated text in the lower box. Change the appropriate text and save. Your changes will be visible immediately.

Figure 4.148. Locale Editing

fa_IR Locale

Key Enter an entire locale key to search for.

Editing lib/pkp/locale/fa_IR/common.xml

KEY	VALUE	ACTION
about.aboutSite	Reference Version <input type="text" value="About the Site"/> Translation <input type="text" value="درباره سایت"/>	DELETE
about.contact	Reference Version <input type="text" value="Contact"/> Translation <input type="text" value="تماس"/>	DELETE
about.contact.email	Reference Version <input type="text" value="Email"/> Translation <input type="text" value="ایمیل"/>	DELETE

Custom Locale Plugin

Similar to the Translator Plugin, this allows you to modify the OJS text for your default language (e.g., to change "About the Site" to "About this Site"). However, it doesn't change the locale file itself, but rather stores the change in the OJS database. You can also make custom changes on a per-journal basis using this plugin, whereas using the Translator plugin will change the locale site-wide, across all journals.

OpenAds Plugin

The OpenAds plugin allows dynamic ads from the OpenAds ad server to be inserted into OJS. This plugin requires the installation of OpenAds (now known as [OpenX](#)) on the server.

COUNTER Statistics Plugin

This plugin allows for the export of [COUNTER](#) formatted statistics for the journal (Journal Report 1: Full-Text Article Requests by Month and Journal). This does not provide COUNTER statistics for libraries (e.g., how many times an IP range has accessed your content).

This plugin tracks incoming reback URLs to articles (i.e., when a reader follows an external link to an article), allowing Authors to maintain and potentially publish an automatically-updated list of rebacks to an article.

COinS Plugin

The COinS plugin adds an OpenURL descriptor to article pages (abstract and HTML) that can be used e.g. for extraction to citation tools such as [Zotero](#).

TinyMCE Plugin

This plugin enables WYSIWYG editing of OJS textareas using the [TinyMCE](#) content editor.

Static Pages Plugin

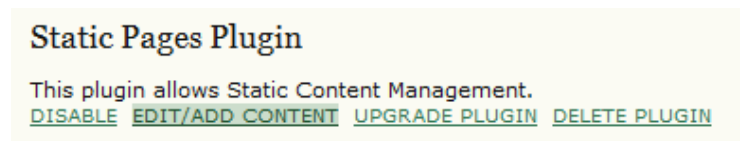
This plugin allows you to create new OJS pages for additional content (e.g., an Advertising page).

Figure 4.149. Enabling the Static Pages Plugin



Once you have enabled the plugin, an Edit/Add Content link will appear.

Figure 4.150. Edit/Add Content



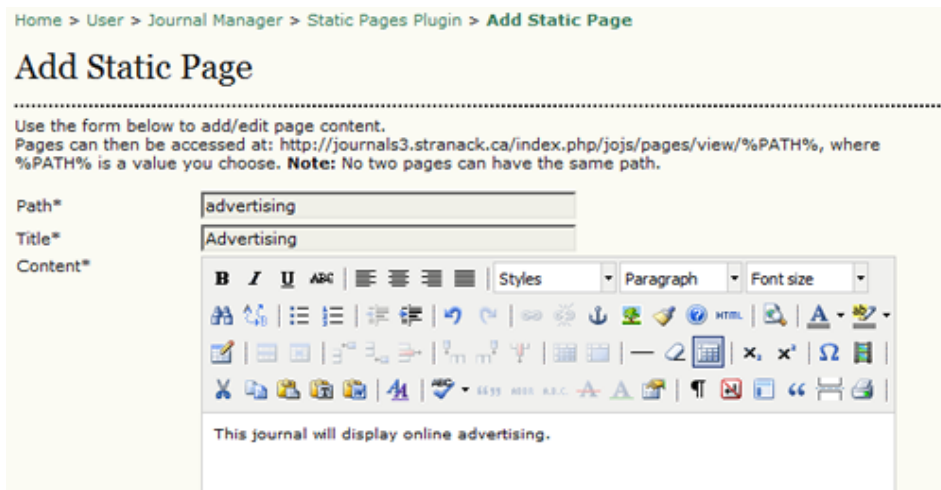
After clicking Edit/Add Content, you can either edit any existing pages (e.g., the previously-added "Links" page shown in the figure below) by using the Edit link next to the existing page; or you can create a new one by selecting Add New Page link.

Figure 4.151. Add New Page



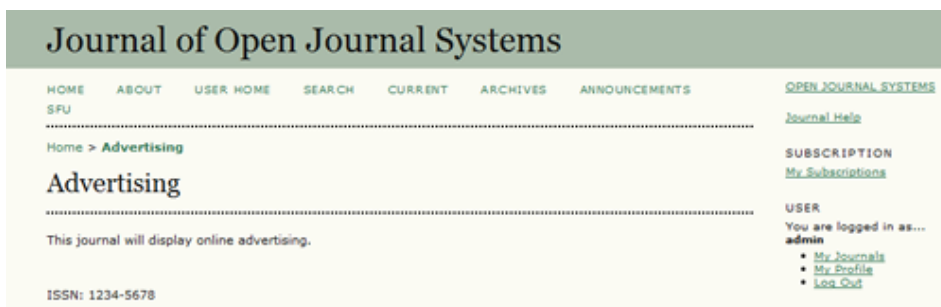
After selecting the Add New Page link, fill in the resulting form. The "path" will be used as part of the page URL and the title will appear as the page title.

Figure 4.152. Adding a New Static Page



After saving the form, you can view the page at the URL indicated.

Figure 4.153. Displaying a Static Page



Any time you need to update this page, simply return to the Static Page plugin and edit the page.

Web Feed Plugin

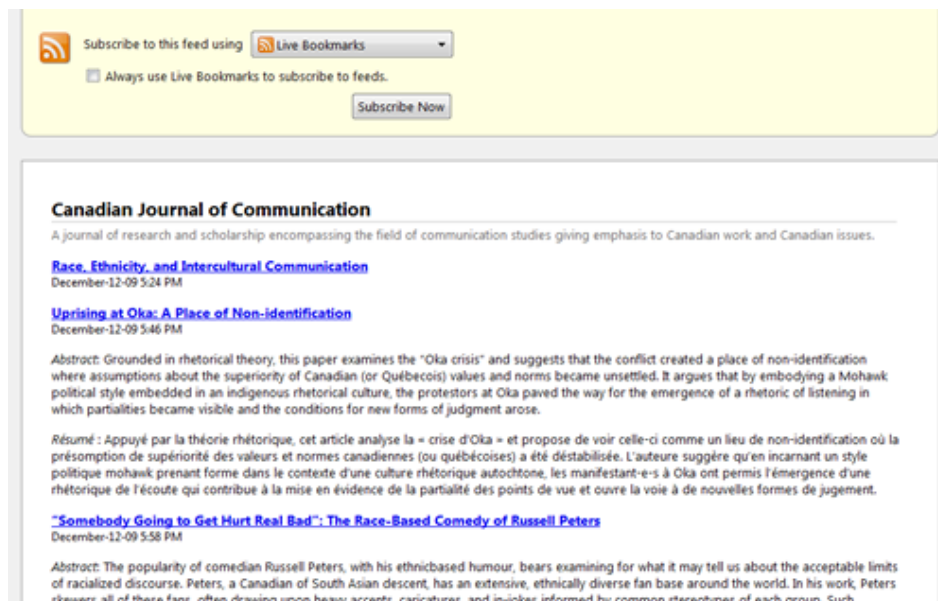
Activating this plugin produces [RSS/Atom web syndication feeds](#) for the current issue and displays RSS/Atom links in the sidebar.

Figure 4.154. Web Feeds



When a user selects one of the RSS/Atom links from the sidebar, it will produce a list of current issues and the option of adding it to their [feed reader](#) or [live bookmarks](#).

Figure 4.155. Web Feeds Display



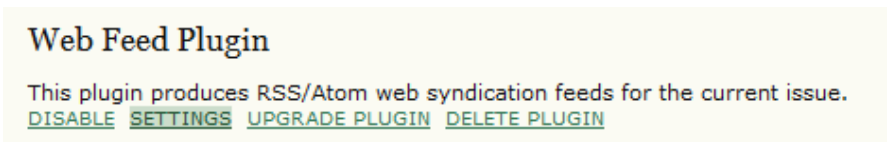
To activate the current issue Web Feeds, select the Enable link.

Figure 4.156. Enabling Web Feed Plugin



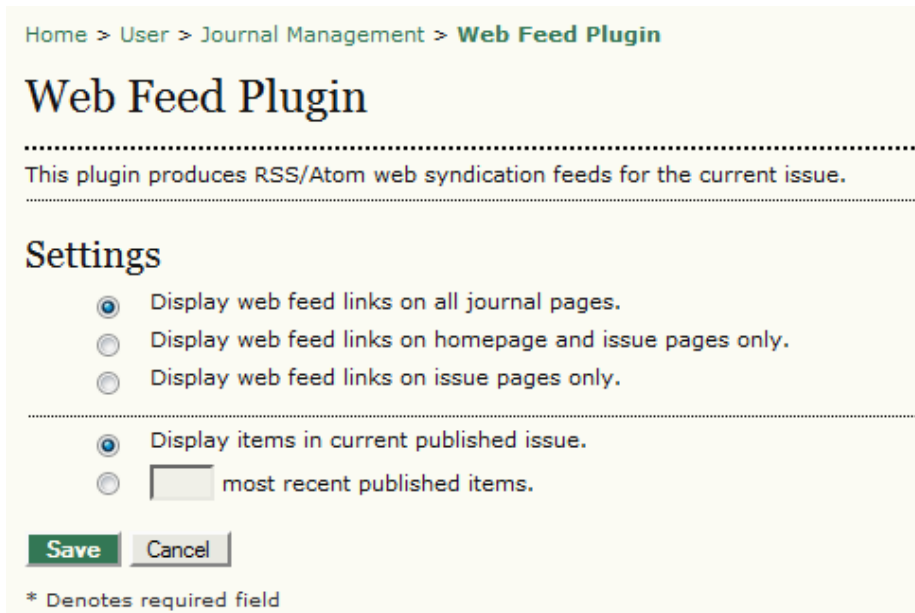
You can then select Settings.

Figure 4.157. Access Web Feed Settings



This page allows you to determine where the feeds will display and how many items will display (e.g., the entire current issue, or just the first few articles).

Figure 4.158. Web Feed Settings



JQuery Plugin

This plugin enables javascript interaction and styling of OJS content using the [jQuery](#) framework. This is enabled by default, and doesn't need configuring.

Figure 4.159. jQuery Plugin

jQuery Plugin

This plugin enables javascript interaction and styling of OJS content using the [jQuery](#) framework.
[DISABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

SEHL Plugin

This plugin implements Search Engine HighLighting (SEHL) so that when a search engine locates an HTML article, the sought-after keywords are highlighted in the article text. This can be enabled by selecting the Enable link.

Figure 4.160. SEHL Plugin

SEHL Plugin

This plugin implements Search Engine HighLighting (SEHL) so that when a search engine locates an HTML article, the sought-after keywords are highlighted.
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Thesis Abstracts Feed Plugin

This plugin will produce an RSS/Atom feed (see the Web Feed Plugin, above, for an explanation on RSS feeds) for Thesis Abstracts. Only journals publishing Thesis Abstracts (see below) should consider enabling this feature.

Figure 4.161. Thesis Abstracts Feed Plugin

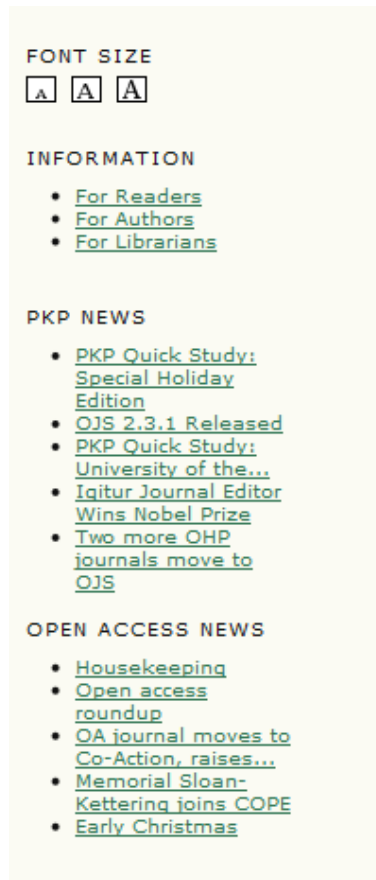
Thesis Abstracts Feed Plugin

This plugin produces RSS/Atom web syndication feeds for thesis abstracts.
[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

External Feeds Plugin

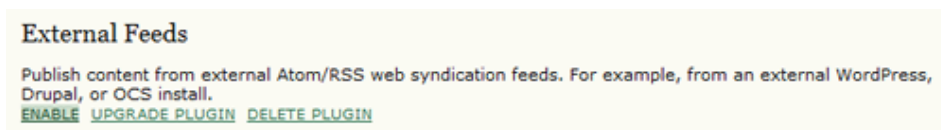
This plugin will allow you to display the content of external RSS feeds from other sources in your journal. For example, you can display the latest posts from the PKP News blog or the Open Access News blog in your sidebar.

Figure 4.162. External Feeds



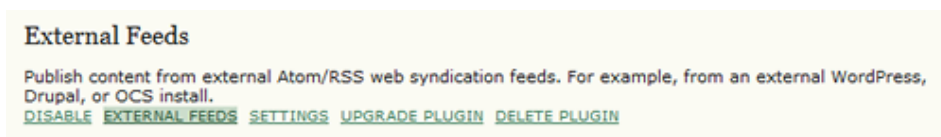
To enable this feature, select the Enable link.

Figure 4.163. Enable External Feeds



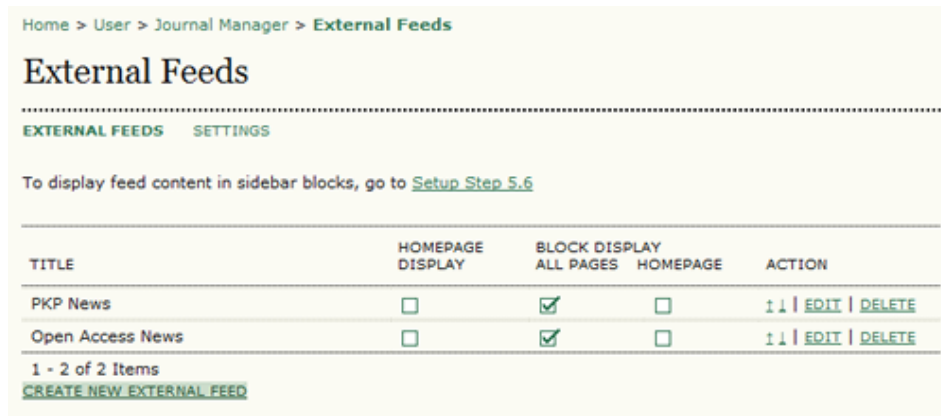
This will provide you with an External Feeds link and a Settings link.

Figure 4.164. Accessing External Feeds



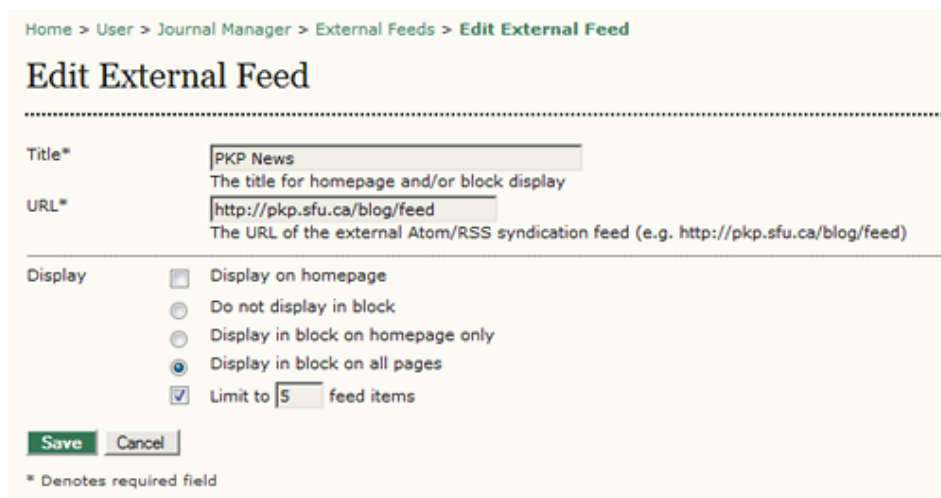
Next, select External Feeds. On the resulting page, you can edit any existing feeds or add a new one.

Figure 4.165. External Feeds Listing



Selecting Edit opens a new form. Here, you can change the title, modify the feed URL, or revise how the feed will display on your journal.

Figure 4.166. Edit External Feed



For example, if you select Display on Homepage, the feed will appear like so:

Figure 4.167. Home Page External Feed Display

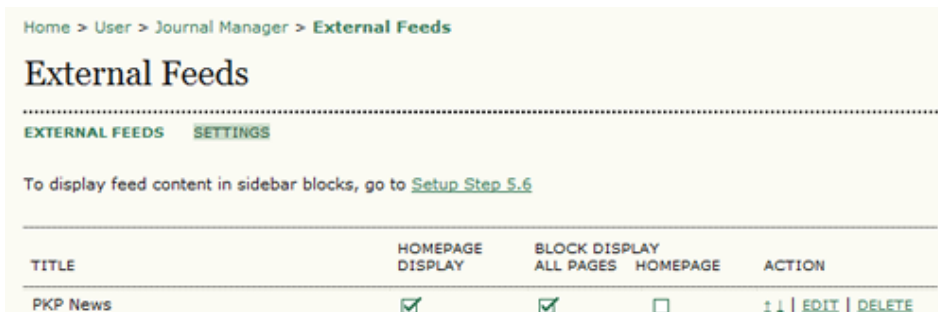


Selecting Do Not Display in Block will prevent the blocks from displaying in the sidebar (for example, you may only wish to have the feeds appear on your home page and not in the sidebar). If you do wish to have the feeds display in the sidebar, you can also choose Display in Block on Homepage Only -- and this will limit the feeds only appear in the sidebar of the homepage and nowhere else. You can also limit the number of items that will appear in the feed on your journal.

Note: you can control where on the sidebar the feeds will display in [Journal Setup Step 5.6](#).

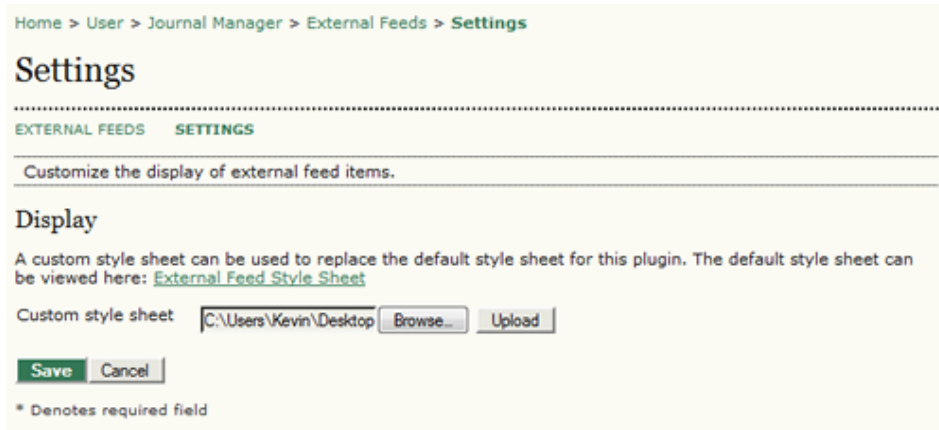
Next, select Settings.

Figure 4.168. Block External Feed Display



From here, you can upload a style sheet that will allow you to customize how the feeds display (e.g., to change the fonts, colours, etc.).

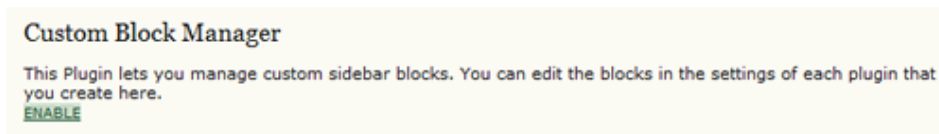
Figure 4.169. External Feed Styling



Custom Block Manager Plugin

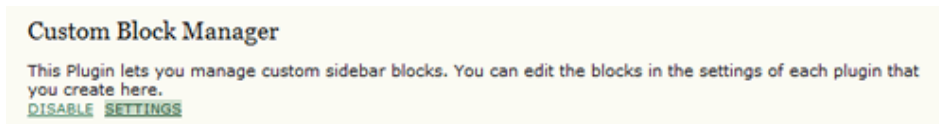
This plugin allows you to add new items to the sidebar. You might want to use this to emphasize your editorial board members or direct potential authors to your online submissions. To enable, select the Enable link.

Figure 4.170. Enabling Custom Block Manager



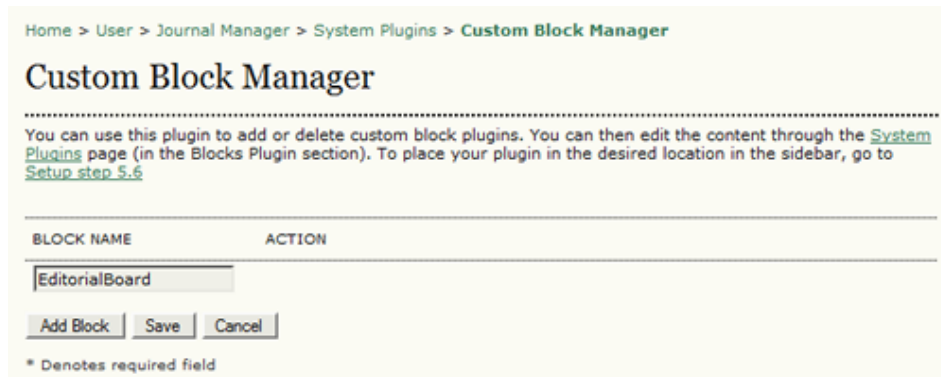
You can then select Settings.

Figure 4.171. Custom Block Manager



On the resulting page, give your new block a name and hit the Save button. If you wish to create another, use the Add Block button. Remember that once a block is created, you can change its position in [Journal Setup Step 5.6](#).

Figure 4.172. Adding a Custom Block



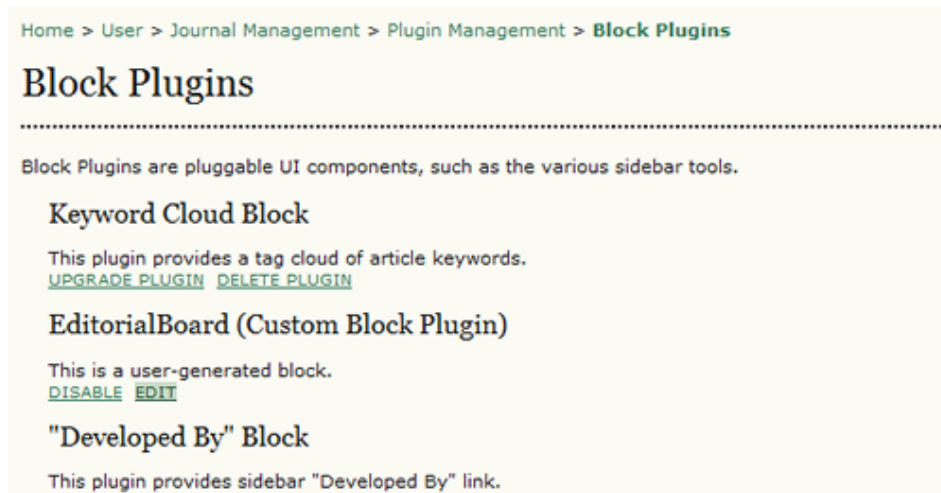
To edit the new block, go to System Plugins > Plugin Management > Block Plugins from your Journal Management User Home page.

Figure 4.173. Accessing Block Plugins



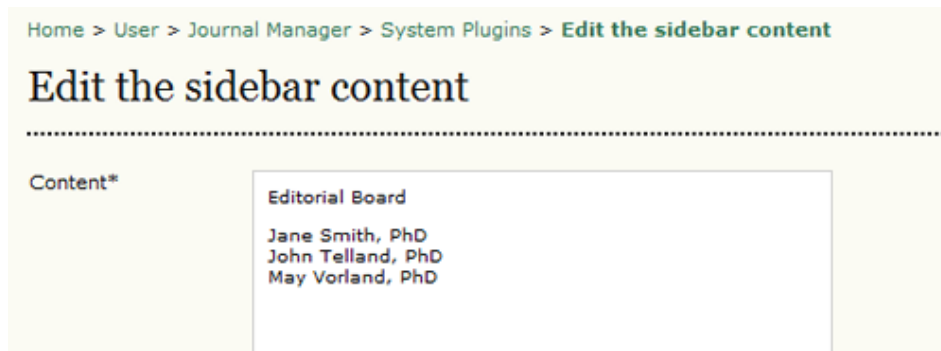
After selecting Block Plugins, you will now see that your new custom block has been listed as a block - e.g., EditorialBoard (Custom Block Plugin) in the example below.

Figure 4.174. Block Plugins List



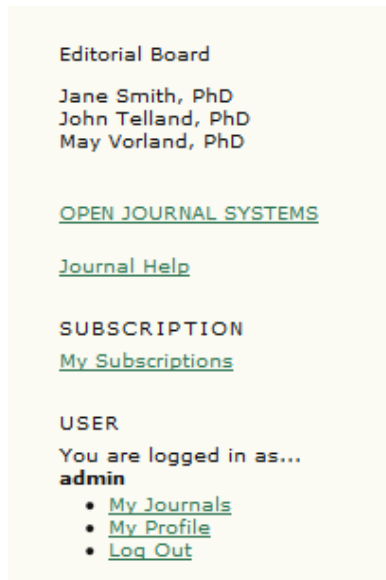
Select Edit to add or edit content to the new block. Remember to Save.

Figure 4.175. Edit Custom Block



The content will then appear in your sidebar.

Figure 4.176. Custom Block Display

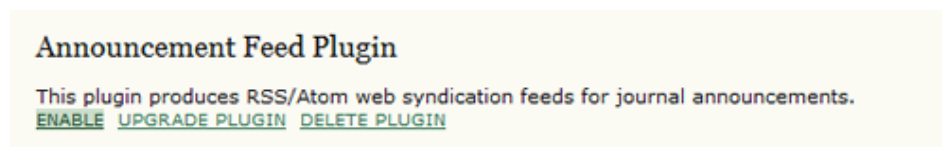


Remember, you can re-position the block in [Journal Setup Step 5.6](#).

Announcement Feed Plugin

This plugin produces RSS/Atom web syndication feeds for journal announcements, similar to the Web Feeds plugin above. Only journals that have activated Announcements would consider using this plugin. To activate it, select the Enable link.

Figure 4.177. Enabling Announcement Feed Plugin



In the resulting form, you can modify where the feeds will appear.

Figure 4.178. Announcement Feed Plugin Settings



Thesis Abstracts Plugin

This plugin allows your journal to solicit and publish thesis abstracts. You can see this in action at the [Canadian Journal of Communication](#) by selecting the Thesis Abstracts link in their navigation bar.

Figure 4.179. Thesis Abstract Plugin at CJC



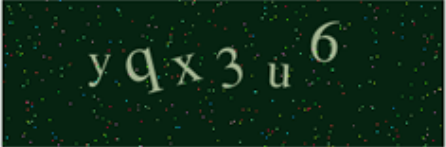
From here, you can view the thesis abstracts or submit a new one.

Figure 4.180. Submitting a Thesis Abstract

[Home](#) > [Thesis Abstracts](#) > [Submit Thesis Abstract](#)

Submit Thesis Abstract

Upon submission of the following form, the thesis supervisor will be emailed and asked to verify the accuracy of the submitted information. Once this verification has been received by the journal, the thesis abstract will be published online.

Validation* 

Please enter the letters as they appear in the image above.

Degree*

Degree name*

The name of the degree (i.e. Master's of Arts, Doctor of Philosophy, etc.).

Department*

University*

Approval date*

Title*

URL

If thesis is published online. Include http:// or ftp:// at the start (i.e.

Upon submission, the thesis senior supervisor is automatically notified by email and asked to confirm the accuracy of the submitted information by sending an email response to the Thesis Abstracts Contact. Once the confirmation is received, the Thesis Abstracts Contact can activate the thesis abstract submission by editing its corresponding record and changing the Status from 'Inactive' to 'Active'. The thesis abstract will then become available to journal readers.

Select the Enable link to activate this plugin for your journal.

Figure 4.181. Enabling Thesis Abstracts

Thesis Abstracts

Solicit and publish thesis abstracts.

[ENABLE](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Once you have enabled the plugin, you can edit its Settings.

Figure 4.182. Accessing Thesis Abstracts Settings

Thesis Abstracts

Solicit and publish thesis abstracts.

[DISABLE](#) [THESES ABSTRACTS](#) [SETTINGS](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

On the Setting form, fill in the relevant details. The Thesis Abstracts Contact must be enrolled as a Journal Manager with your journal.

Figure 4.183. Thesis Abstracts Settings

Home > User > Journal Manager > Thesis Abstracts > Settings

Settings

THEISIS ABSTRACTS SETTINGS

With this plugin enabled students may submit their thesis abstracts to the journal using an online submission form.

Upon submission, the thesis senior supervisor is automatically notified by email of the abstract submission and asked to confirm the accuracy of the submitted information by sending an email response to the Thesis Abstracts Contact listed below, who needs to be a Journal Manager. Once this confirmation is received, the Thesis Abstracts Contact can activate the thesis abstract submission by editing its corresponding record and changing the Status from 'Inactive' to 'Active'. The thesis abstract will then become available to journal readers.

Submissions

An upload code (a sequence of letters or numbers) can be distributed to departments that wish to upload thesis abstracts on behalf of students. When the upload code is submitted by a department, an automatic email will not be sent to the supervisor for verification of the submission.

Use the following upload code for department submissions:

Publishing

Publish Order*

Thesis Abstracts Contact

Name*
 Email*

To manage the theses, select Thesis Settings. You will see a list of existing theses to be edited, or use the Create New Thesis Abstract to add a new one.

Figure 4.184. Accessing Create New Thesis Abstract

Home > User > Journal Manager > Thesis Abstracts

Thesis Abstracts

THEISIS ABSTRACTS SETTINGS

First name contains
 Approval Date between and

STATUS	APPROVAL DATE	STUDENT NAME	TITLE	ACTION
Inactive	2009-12-27	Andy Kamar	Global Governance and the Political Economy of Common Resources	EDIT DELETE

1 - 1 of 1 Items
[CREATE NEW THESIS ABSTRACT](#)

On the resulting form, fill in all of the required information and save.

Figure 4.185. Create New Thesis Abstract

Home > User > Journal Manager > Thesis Abstracts > Create

Create New Thesis Abstract

Status*

Degree*

Degree name
The name of the degree (i.e. Master's of Arts, Doctor of Philosophy, etc.).

Department*

University*

Approval date*

Title*

URL

If thesis is published online. Include http://, ftp://, etc. at the start (i.e. http://www.sfu.ca/path/to/thesis.pdf).

Abstract*

Rounded Corners Plugin

Rounded Corners: This Plugin puts a background on each sidebar block and rounds its corners. Changes can be made to the colours used by editing the CSS stylesheet found in the plugin. Select Enable to use this plugin.

Figure 4.186. Enabling Rounded Corners Plugin

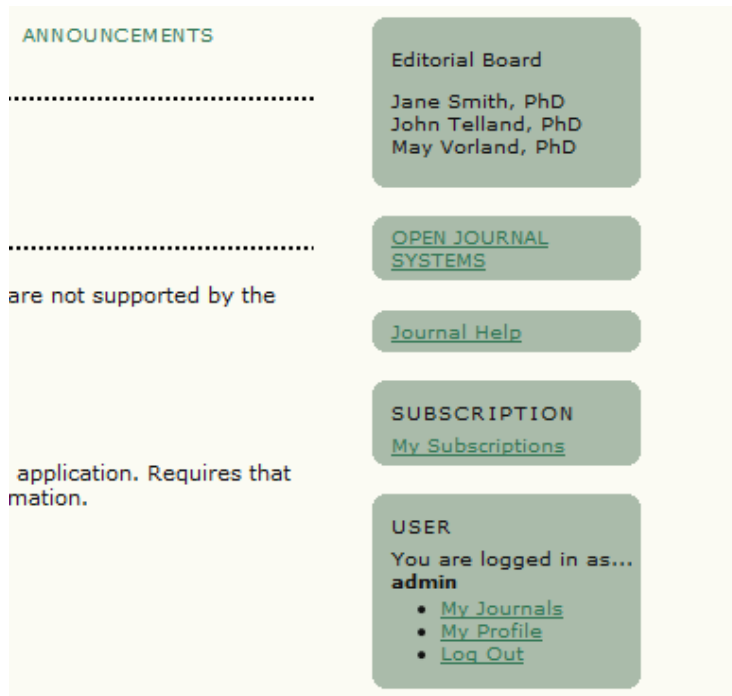
Rounded Corners

This Plugin puts a background on each sidebar block and rounds its corners. Changes can be made to the colours used by editing the CSS stylesheet found in the plugin.

[ENABLE](#)

Here is an example of the results:

Figure 4.187. Rounded Corners Display



Google Analytics Plugin

This plugin integrates OJS with [Google Analytics](#), Google’s web site traffic analysis application. It provides an excellent way to track the web traffic to your journal. It requires that you have already setup a Google Analytics account. To activate this plugin, select Enable.

Figure 4.188. Enabling Google Analytics Plugin



This will create a Settings link, which you can click to configure the plugin.

Figure 4.189. Accessing Google Analytics Plugin Settings



Fill in the account number provided when you set up your Google Analytics account. Remember to click Save. In a few hours, Google will start tracking your web traffic and generating a report.

Figure 4.190. Google Analytics Plugin Settings

Google Analytics Settings

With this plugin enabled Google Analytics may be used to collect and analyze web site usage and traffic for this journal. Please note that this plugin requires that you have already setup a Google Analytics account. Please see the [Google Analytics site](#) for more information.

Please note that Google Analytics may require up to 24 hours before statistics are collected and reported. During this period, the 'Check Status' function may not accurately report whether it has detected the required tracking code for the journal.

Account number*

Within Google Analytics, click on 'Check Status' to view the tracking code for your site. For legacy tracking code, the account number is displayed within the tracking code as: `_uacct = "###"`. For new tracking code, the account number is displayed within the tracking code as: `var pageTracker = _gat._getTracker("###")`. Enter the text that corresponds to `###`.

Tracking code* Legacy tracking code (urchin.js) New tracking code (ga.js)

* Denotes required field

Implicit Authentication Plugins

These plugins provide your data to external systems. Most journals do not modify these plugins.

Import/Export Plugins

Import/Export Plugins: These plugins share information between systems. Details on these plugins are provided in the section on [Importing and Exporting](#).

Figure 4.191. Import/Export Plugins

Home > User > Journal Management > Plugin Management > **Import/Export Plugins**

Import/Export Plugins

Import/Export Plugins can be used to transfer content to and from other systems.

Erudit Article Export Plugin
 Export articles using the English Erudit DTD
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Users XML Plugin
 Import and export users
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

QuickSubmit Plugin
 One-step submission plugin
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

METS XML Export Plugin
 Export Journals in METS XML
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Articles & Issues XML Plugin
 Import and export articles and issues
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

DOAJ Export Plugin
 Export Journal for DOAJ and email DOAJ representative journal information
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

PubMed XML Export Plugin
 Export article metadata in PubMed XML format for indexing in MEDLINE.
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

CrossRef XML Export Plugin
 Export article metadata in CrossRef XML format.
[IMPORT/EXPORT DATA](#) [UPGRADE PLUGIN](#) [DELETE PLUGIN](#)

Payment Plugins

These plugins allow you to enable different payment types for your journal's subscriptions, author fees, donations, and so on. Details on configuring payments can be found in the [Payment section](#).

Report Plugins

These plugins allows you to export content from your journal into a .csv (comma separated value) format suitable for opening in a spreadsheet programs such as Excel or Calc.

Figure 4.192. Report Plugins

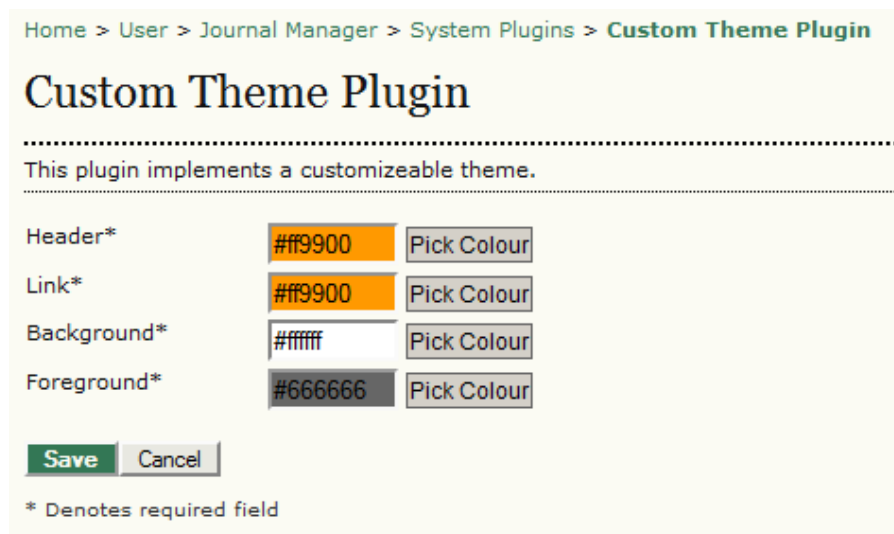


The Review Report will provide information about the review process (reviewer names, reviewer decisions, reviewer comments, etc.). The Articles Report provides information about submissions (e.g., authors, titles, abstracts, keywords, etc.). Select Report Generator to build the report. These reports are also available from the Journal Manager's [Stats and Reports](#) page.

Theme Plugins

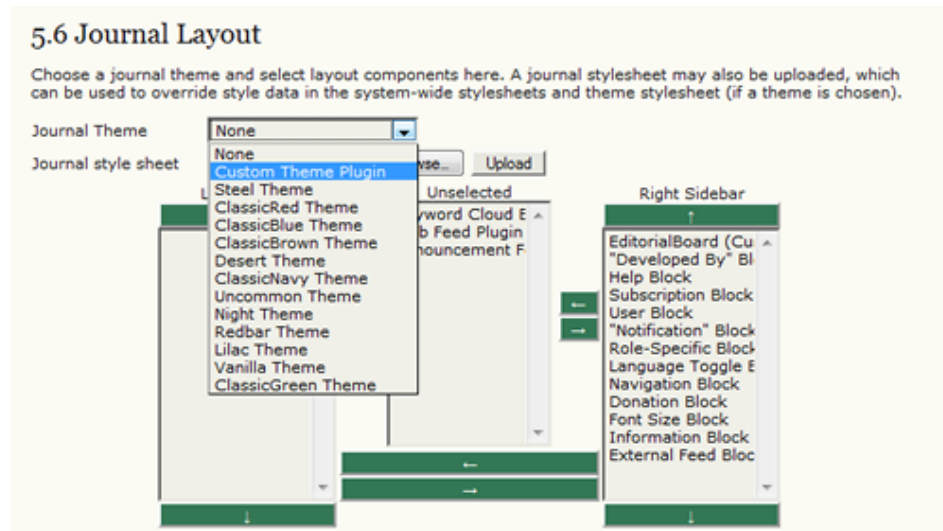
These plugins make different CSS themes available for your journal website (see [Journal Setup 5.6](#)). For simple changes including header colour, link colour, page background colour, foreground (i.e., text) colour, use the Custom Theme plugin.

Figure 4.193. Custom Theme Plugin



Once you have made the change, go to [Journal Setup Step 5.6](#) and activate the custom theme.

Figure 4.194. Enabling Custom Theme



Save your change and the new theme will appear immediately.

Figure 4.195. Custom Theme Example



If you change your mind, you can return to Step 5.6 and change the Journal Theme.

Install a New Plugin

Not a plugin itself, this utility allows you to easily upload a new plugin file (in .tar.gz format) to your journal. New plugin files can be found on the Support Forum's [Plugin Gallery](#).

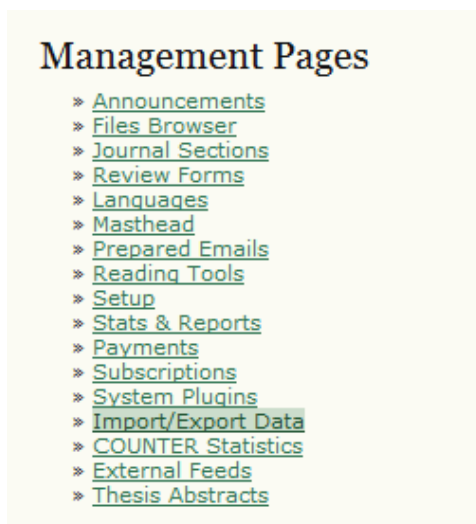
Import/Export Functions

Note

This section serves only as an overview of OJS' import/export functionality. Some import/export functions, notably the Users and Issues & Articles functions, are complex to use and to explain. For detailed usage instructions for all import/export functions, see the [documentation online](#).

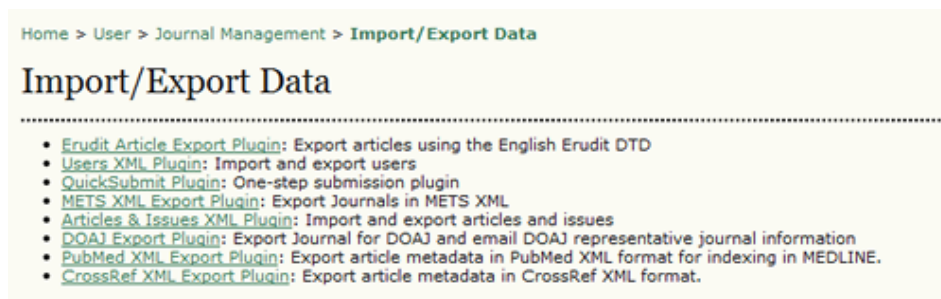
OJS allows Journal Managers to import and export different types of data. To do this, go to the Journal Management menu and select Import/Export Data.

Figure 4.196. Management Pages: Import/Export Data



On the resulting page, choose the appropriate export option.

Figure 4.197. Import/Export Data List



- **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.

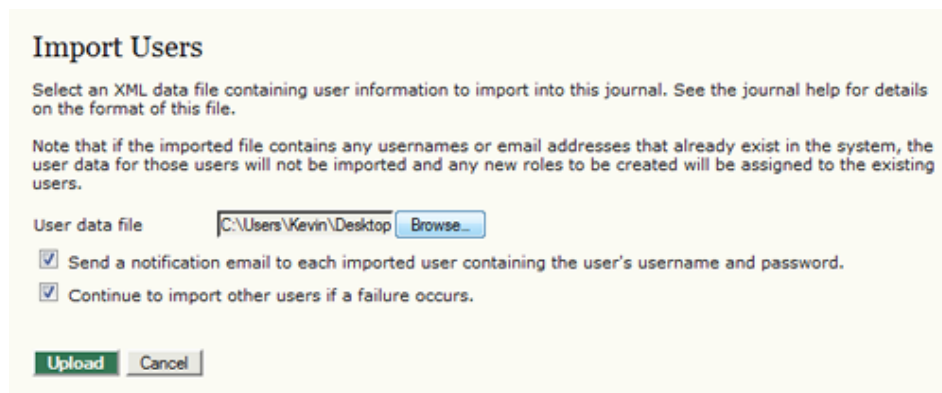
To export a list of users from your journal, select one or more roles and hit the Export Users button, or use the Export All link.

Figure 4.198. Export Users



To import a list of users, you can use the User Data File upload tool.

Figure 4.199. Import Users



You will receive a confirmation page before the users are loaded.

Figure 4.200. Users XML Plugin

Home > User > Journal Management > Users XML Plugin

Users XML Plugin

Confirm that these are the users you would like to import into the system:

	FIRST NAME	MIDDLE NAME	LAST NAME	USERNAME	EMAIL	ROLES
<input checked="" type="checkbox"/>	Peter	M.	Abadir	abadir	pmabad2@e	Journal Manage Editor Section Editor Layout Editor Reviewer
<input checked="" type="checkbox"/>	Mohamed		Abdelmutalit	abdelmutalit	mohamed.m	Journal Manage Editor Section Editor Layout Editor Reviewer
<input checked="" type="checkbox"/>	Eltayeb		Abdelwahid	abdelwahid	elabde@hotr	Journal Manage Editor Section Editor Layout Editor Reviewer
<input checked="" type="checkbox"/>	Mohamed		Abdgawad	abdgawad	mohamed.al	Journal Manage Editor

- QuickSubmit Plugin: Provides a one-step submission process for editors needing to bypass the traditional submission, review, and editing process.

Figure 4.201. QuickSubmit Plugin

Home > User > Journal Manager > Import/Export Data > QuickSubmit Plugin

QuickSubmit Plugin

This plugin allows you to quickly add complete submissions to the editing queue or directly into an issue.

Submission Destination

Select whether to add new submissions to an existing issue or to leave in the editing queue.

Leave unpublished
 Add to an existing issue: ----- Future Issues -----

Submission Data

Journal Section

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

Section* Articles

Submission File

Choose the file to be used as the final galley file for this submission.

Upload submission file C:\Users\Kevin\Desktop Browse... Upload

Authors

First name* William
 Middle name C.
 Last name* Jones
 Affiliation University of Texas

Once you have filled in the form, including the section, file to be uploaded (this would be a ready-to-publish PDF or HTML file), author information, title, abstract, keywords, etc., it will appear either in the selected issue or in the Editing section ready for scheduling to an issue (see Scheduling).

This is a useful tool for 5 - 10 articles, but if you have more than that, you may wish to use the Article XML Import feature, described below.

- METS XML Export Plugin: Exports Journals in [METS XML](#).
- Articles & Issues XML Plugin: This plugin supports import and export of articles and issues.

To export articles or issues, simply choose whether you want to Export Issues or Export Articles.

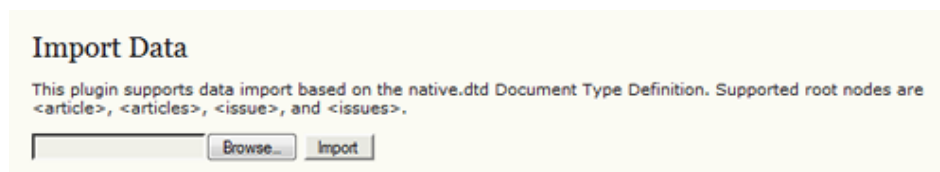
Figure 4.202. Export Data



This will generate an XML file with all of the data from your articles and issues.

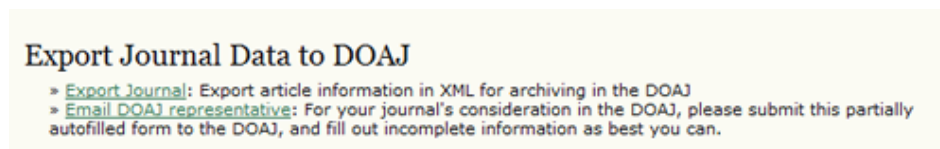
To import data, use the Import Data upload tool to import this data from an external XML file.

Figure 4.203. Import Data



- DOAJ Export Plugin: Exports Journal information that can be sent to the [Directory of Open Access Journals](#) (DOAJ). The plugin gives you two options: to export your journal content in a metadata format compatible with the DOAJ requirements, and to email the DOAJ requesting that they index your journal.

Figure 4.204. Export to DOAJ



- PubMed XML Export Plugin: Exports article metadata in [PubMed's NLM XML](#) format. This would be appropriate for health science journals that have been accepted for indexing in [MEDLINE](#).
- CrossRef XML Export Plugin: Exports article metadata in [CrossRef](#) XML format.

COUNTER Statistics

This option will appear on the Management Pages menu after you have enabled the COUNTER Statistics plugin (see previous). It allows for COUNTER-formatted reporting on site activity. It does NOT supply COUNTER statistics to institutions (e.g., libraries) that subscribe to your journal (e.g., the number of fulltext downloads from University of Toronto).

External Feeds

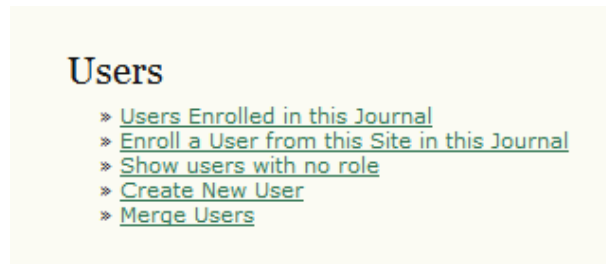
This option will appear on the Management Pages menu after you have enabled the External Feeds plugin (see previous).

Thesis Abstracts

This option will appear on the Management Pages menu after you have enabled the Thesis Abstracts plugin (see previous).

User Management

In addition to managing the journal web site, the Journal Manager is also responsible for all of the user accounts in the system. From the Journal Manager's User Home page, you'll find the Users menu, which includes all possible user management options.



To see a list of all of your journal's registered users, select Users Enrolled in this Journal.

Home > User > Journal Management > Enrollment

Enrollment

All Enrolled Users

All Enrolled Users | First name | contains | Search

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

- Journal Managers
- Editors
- Section Editors
- Reviewers
- Authors
- Readers
- Subscription Managers

USERNAME	NAME	EMAIL	ACTION
JBROWN	Joe Brown	jbrown@maili...	EDIT LOG IN AS REMOVE DISABLE
JJAZZ	Jimmy Jazz	jjazz@mailin...	EDIT LOG IN AS REMOVE DISABLE
SJONES	Sally Jones	sj@mailinato...	EDIT LOG IN AS REMOVE DISABLE
VOLDMAN	Vincent Oldman	vo@anywhere.ca	EDIT LOG IN AS REMOVE DISABLE
ADMIN	Jane Smith	stranack@gma...	EDIT

1 - 5 of 5 Items

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

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

From here you can edit any user account, log in as them to temporarily perform any of their tasks or troubleshoot a problem, remove them from the list, or disable their account. Clicking Remove next to any user's name will unenroll them from that particular role; it won't delete their account from the system. Clicking Disable will stop users from logging in with that profile, but again it won't remove them from the site proper. See the section on [Merging Users](#) for tips on deleting an 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. Remember, the Select All button only selects all on that page. If your user list covers several pages, you will need to select all for each page (or temporarily make your list all fit on one page using the Lists option in the Journal Setup).

Enrolling Existing Users

Users already enrolled in the journal can be given additional roles, and users registered to the site with other journals (if you are working in a multi-journal OJS installation) 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 Users, 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.

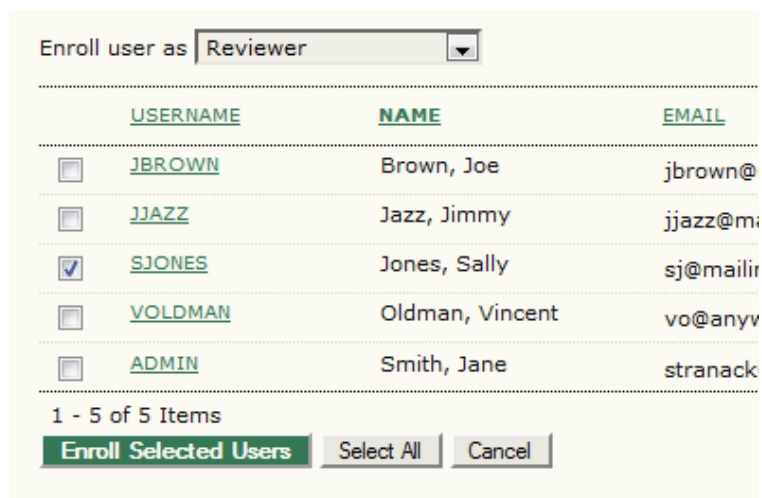
This feature allows you to enrol an existing user into an additional role. For example, if Sally is currently registered as an author, but volunteers to become a reviewer, this feature will allow you to add that role to her profile. From the list of users, select Enroll an Existing User.

Figure 4.205. Enroll Existing Users



On the resulting page, use the dropdown menu to select the role and place a check next to the user's name. Hit Enroll Selected User to enroll that user in the selected role.

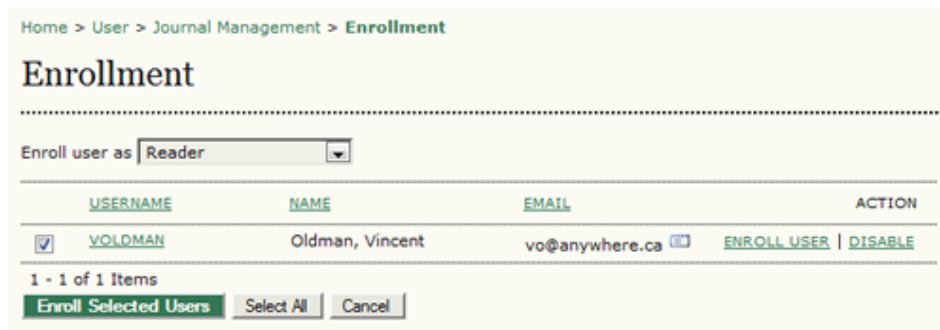
Figure 4.206. Selecting Users



Show Users with No Role

Occasionally, you may end up with a user without a role. They may have been accidentally unenrolled by the Journal Manager (by using the Remove option described earlier). When this user logs in, they have no options to choose from. To find any "lost" users, use the Show Users with No Role from the Users menu. From there you can re-enroll them with the journal.

Figure 4.207. Users with No Role



Creating Users

To create a new user for your journal, select Create New User. Fill in the form and press Save. You can optionally send the user a welcome email containing their username and password, which is a very useful feature.

Figure 4.208. People

Home > User > Journal Management > People

People

Create New User

Salutation

First name*

Middle name

Last name*

Gender

Initials Joan Alice Smith = JAS

Enroll user as

- Journal Manager
- Editor
- Section Editor
- Reviewer
- Author
- Reader
- Subscription Manager

Username*

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

Password*

Repeat password*

Generate a random password.

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

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

Affiliation

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

Merge Users

Occasionally, a user may have created two separate accounts (using two different email addresses), or you may find yourself in a situation where a user has to be removed entirely from the system. To accomplish either, task, you must use the Merge Users feature. Select Merge Users from the Journal Management User Home page. On the resulting page, select a user you wish to merge with another user. In this example, Vincent Oldman has two accounts (voldman and voldman1). He wishes to keep the voldman account and have voldman1 merged into it. Therefore, we will select Merge User next to the voldman1 account.

Figure 4.209. Selecting the Account to Merge

USERNAME	NAME	EMAIL	ACTION
JBROWN	Joe Brown	jbrown@maili...	MERGE USER
JJAZZ	Jimmy Jazz	jjazz@mailin...	MERGE USER
SJONES	Sally Jones	sj@mailinato...	MERGE USER
VOLDMAN	Vincent Oldman	vo@anywhere.ca	MERGE USER
VOLDMAN1	Vince Oldman	vo@mailinato...	MERGE USER
ADMIN	Jane Smith	stranack@gma...	MERGE USER
PWILLIAMS	Dr. Peter K. Williams	pw@mailinato...	MERGE USER

Next, we'll select the voldman account (which is the keeper).

Figure 4.210. Selecting the Account to Maintain

USERNAME	NAME	EMAIL	ACTION
JBROWN	Joe Brown	jbrown@maili...	MERGE USER
JJAZZ	Jimmy Jazz	jjazz@mailin...	MERGE USER
SJONES	Sally Jones	sj@mailinato...	MERGE USER
VOLDMAN	Vincent Oldman	vo@anywhere.ca	MERGE USER
VOLDMAN1	Vince Oldman	vo@mailinato...	MERGE USER
ADMIN	Jane Smith	stranack@gma...	MERGE USER
PWILLIAMS	Dr. Peter K. Williams	pw@mailinato...	MERGE USER

This action has effectively deleted the voldman1 account from the system.

Chapter 5. Authors

Overview

OJS exists to serve Authors as well as journals. Not only does OJS provide an easy-to-use submission process, it can collect and disseminate key information about Authors and their work across important research and citation databases, including [Google Scholar](#), [PubMed](#), the [Directory of Open Access Journals](#), and others.

As an Author, your tasks include submission; submitting revised copy; copyediting; and proofreading.

To make a submission, you must have a user account and be enrolled as an Author. User accounts can either be created by the [Journal Manager](#) or, if [journal policies allow](#), you can [register yourself](#).

Once you have an account, log in to the journal site and select the role of Author.

Figure 5.1. Selecting the Author's role



The Author User Home Page

After clicking on the Author link on your User Home page, you will be directed to your Author's User Home page, which includes information on [Active Submissions](#); a link to [start a new submission](#); and information on any [Refbacks](#) you may have.

Active Submissions

This page will list any of your submissions to the journal that are still in process (e.g., awaiting assignment to an editor, undergoing review, being edited) or incomplete (in which case you can return and finish the submission at any point).

Each completed submission will fall into one of the following categories:

- **Awaiting Assignment:** the submission has been completed by you; you cannot now delete the submission from the system yourself. The Editor can now see the submission, and must assign an Editor or Section Editor to it.
- **Queued for Review:** the submission has been vetted and is now in the review process. You should receive notice shortly on the review decision.

- **Queued for Editing:** the submission has completed the review process and has been accepted for publication; it will now make its way through the system's copyediting, layout editing and proofreading processes.

In the example below, the journal is charging a submission fee to authors, and you must pay this (using the Pay Submission Fee link) before the submission can be considered. If a journal does not charge submission fees, this link would not appear. Similarly, this example journal is also configured to require a publication fee. The author must use the Pay to Publish link to make the payment and allow for publication to proceed. Again, if a journal has not activated this fee option, authors will not have to go through this process.

Figure 5.2. Active Submissions

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

Active Submissions

ACTIVE ARCHIVE

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
4	—	ART	Chan	UNTITLED	Incomplete DELETE
1	12-28	ART	Chan	A STUDY OF ELECTRONIC PUBLISHING	Awaiting assignment PAY SUBMISSION FEE
2	12-28	ART	Chan	LEARNING TO PUBLISH	IN REVIEW PAY SUBMISSION FEE
3	12-28	ART	Chan	OPEN SOURCE SOFTWARE AND SCHOLARLY PUBLISHING	IN EDITING PAY TO PUBLISH

1 - 4 of 4 Items

Start a New Submission

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

Refbacks

ALL NEW PUBLISHED IGNORED

DATE ADDED	HITS	URL	TITLE	STATUS	ACTION
<i>There are currently no refbacks.</i>					

As the author, you can click on the hyperlinked title of any listed submission and review it. Clicking a submission title will bring you to your submission's Summary page. From here, you could revise the title or abstract (by clicking the Edit Metadata link). If the editor asks for revisions, you will upload the changes this way too (in the Review section of your submission).


Figure 5.3. Submission Summary

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

#1 Summary

[SUMMARY](#) [REVIEW](#) [EDITING](#)

Submission

Authors	Fred Chan
Title	A study of electronic publishing
Original file	1-1-1-SM.DOCX 2009-12-28
Supp. files	None ADD A SUPPLEMENTARY FILE
Submitter	Fred Chan 
Date submitted	December 28, 2009 - 07:21 AM
Section	Articles
Editor	None assigned
Author comments	test

Author Fees

Article Submission	100.00 CAD	PAY NOW
Fast-Track Review:	100.00 CAD	PAY NOW
Article Publication	100.00 CAD	PAY NOW

Status

Status	Awaiting assignment
Initiated	2009-12-28
Last modified	2009-12-28

Submission Metadata

[EDIT METADATA](#)

Authors

RefBacks

The RefBacks section displays any incoming links from external web sites such as blogs, news sites, or other articles that link directly to your articles. Each RefBack can be edited: it can be ignored, deleted, or published, in which case it appears publicly at the end of your published article on the web site.

Archive

Your Archive page will list all declined submissions, as well as any published submissions along with information on which issue they appear in.

Submitting an Article

To make a submission, select the Click Here link (under Start a New Submission) to proceed to the [first step](#) of the submission process.

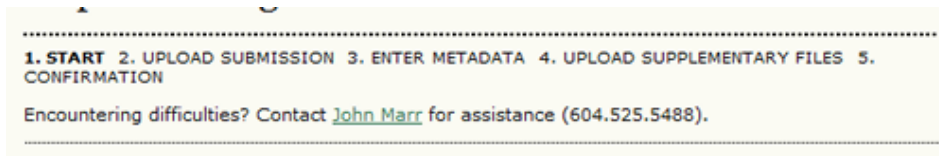
Figure 5.4. Starting a Submission



Submission Step One: Starting the Submission

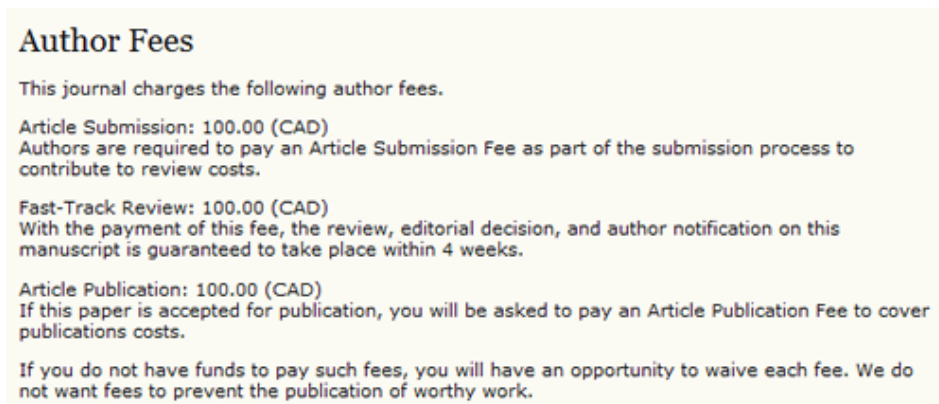
Step 1 ensures that the Author understands the journal's submission rules. The Author will have to pick the appropriate section to submit to, and will be provided with information on the journal's privacy statement, copyright notice, competing interest statement and/or author fees, if applicable. If you need any help the journal's technical support contact is provided at the top of this page.

Figure 5.5. Submission Steps Technical Support



First, if the journal charges [submission fees](#), these will be presented to the author. If the journal does not charge submission fees, this section will not appear.

Figure 5.6. Author Fees



Next, the author must check each of the items from the submission checklist. These items were established in [Journal Setup Step 3.1](#).

Figure 5.7. Submission Checklist

Submission Checklist

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

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

The journal's copyright policy will appear next, and, if configured as a requirement, the author will need to agree to this policy. If the journal has not [added a Copyright Notice](#), this section will not appear.

Figure 5.8. Copyright Notice

Copyright Notice

Submission of an original manuscript to the Journal will be taken to mean that it represents original work not previously published, that it is not being considered elsewhere for publication; that the author is willing to assign copyright to the journal as per a contract that will be sent to the author just prior to publication and, if accepted for publication, it will be published in print and online and it will not be published elsewhere in the same form, for commercial purposes, in any language, without the consent of the publisher.

The journal takes the stance that the publication of scholarly research is meant to disseminate knowledge and, in a not-for-profit regime, benefits neither publisher nor author financially. It sees itself as having an obligation to its authors and to society to make content available online now that the technology allows for such a possibility.

- The authors agree to the terms of this Copyright Notice, which will apply to this submission if and when it is published by this journal (comments to the editor can be added below).

Authors can then review the Privacy Statement. If the journal has not [added a Privacy Statement](#), this section will not appear.

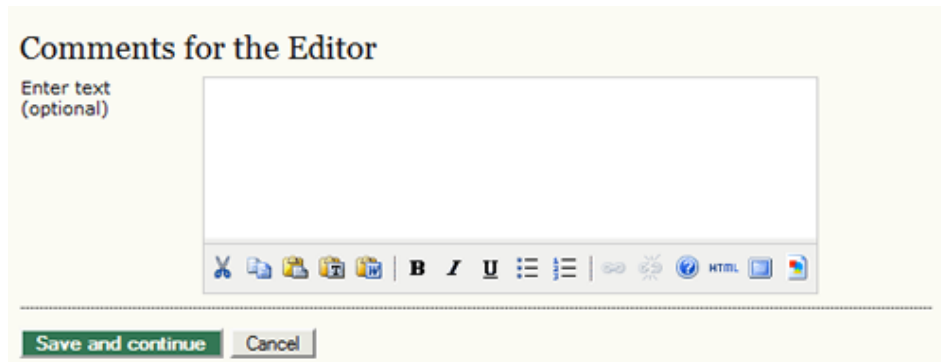
Figure 5.9. Journal's Privacy Statement

Journal's Privacy Statement

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

Finally, the author can add any comments, which will be visible to the editor. Move to the next step by hitting the Save and Continue button.

Figure 5.10. Comments for the Editor



Comments for the Editor

Enter text (optional)

Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, HTML, Color Picker.

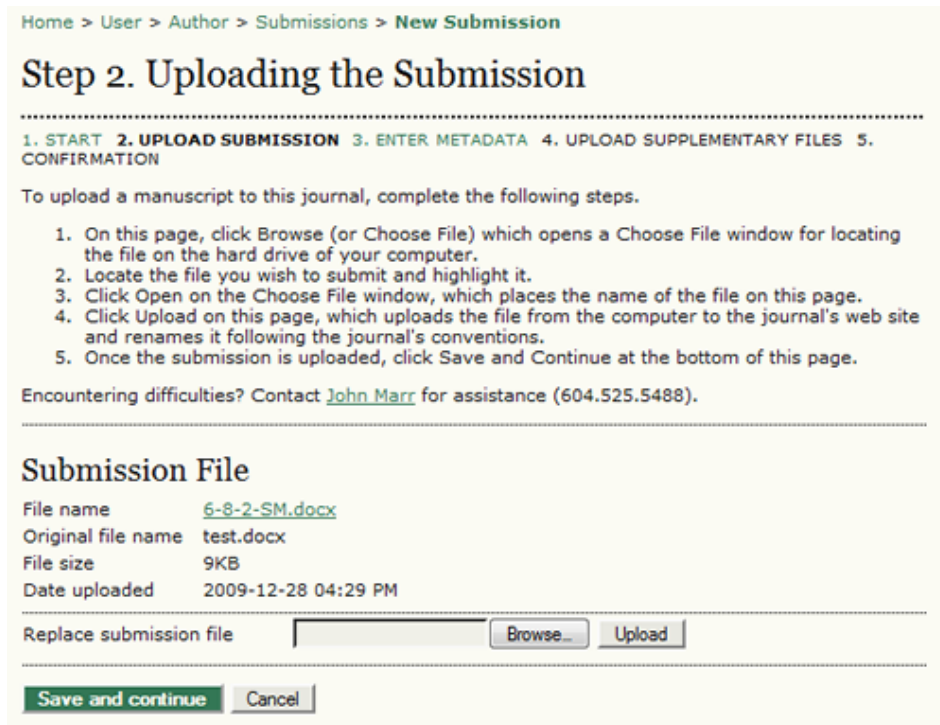
Buttons: Save and continue, Cancel

Submission Step Two: Uploading the Submission

Submission Step Two allows you to upload the submission file, typically a word-processing document.

- Click Browse to open a Choose File window for locating the file on the hard drive of your computer.
- Locate the file you wish to submit and highlight it.
- Click Open on the Choose File window, which places the name of the file on this page.
- 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.
- Once the submission is uploaded, click Save and continue.

Figure 5.11. Uploading the Submission



Submission Step Three: Entering the Submission's Metadata

The third step of the submission process serves to collect all relevant metadata from the author. The first section of metadata covers the authors. The submitting author will have their personal information automatically appear. Any additional information, such as Competing Interests should also be added at this time, if required.

Figure 5.12. Authors

The screenshot shows a web form titled "Authors" with the following fields and content:

- First name***: Fred
- Middle name**: (empty)
- Last name***: Chan
- Email***: fc@mailinator.com
- URL**: (empty)
- Affiliation**: (empty text area)
- Country**: (empty dropdown menu)
- Competing interests**: I have no competing interests. (with a link to [CI POLICY](#))
- Bio statement (E.g., department and rank)**: Department of Health Studies, University of Anywhere

At the bottom left of the form is an "Add Author" button. The form includes rich text editors for the competing interests and bio statement fields, with toolbars for text formatting and insertion.

If there are multiple authors for the submission, their information can be added using the Add Author button. You can also re-order the list of authors, make one of the authors the principal contact with the editor, and delete any authors added in error.

Figure 5.13. Biographical Statement

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

Department of Health Studies
University of Anywhere

✂ 📄 📁 📧 📧 | **B** *I* U ☰ ☰ | 🔗 🌐 🌐 HTML 🖨

⬆ ⬆ Reorder authors to appear in the order they will be listed on publication.

Principal contact for editorial correspondence.

First name*

Middle name

Last name*

Email*

URL

Affiliation

Next, enter the submission title and abstract.

Figure 5.14. Title and Abstract

Title and Abstract

Title*

Abstract*

You will then add indexing information. This will help others find your article. The suggested indexing options were determined by the Journal Manager in [Setup Step 3.4](#).

Figure 5.15. Indexing

The screenshot shows the 'Indexing' section of a submission form. It includes a title 'Indexing', a brief instruction, and four input fields with their respective labels and values:

- Academic discipline and sub-disciplines:** The input field contains 'Library Studies'. Below it, the text reads 'Publishing; Communications; Library Studies; Education'.
- Subject classification:** The input field contains 'Libraries - Public Services'. Below it, there is a link for 'Library of Congress Classification'.
- Keywords:** The input field contains 'libraries, publishing, research services'. Below it, the text reads 'Scholarly Communication; Libraries; Publishing; Open Source'.
- Language:** The input field contains 'en'. Below it, the text reads 'English=en; French=fr; Spanish=es. [Additional codes.](#)'.

The final section allows you to enter the name of any organization that may have supported your research.

Figure 5.16. Supporting Agencies

The screenshot shows the 'Supporting Agencies' section of a submission form. It includes a title 'Supporting Agencies', a brief instruction, and an input field for agencies:

- Supporting Agencies:** The input field is currently empty. Below it, the text reads 'Identify agencies that provided funding or support for the work presented in this submission.'

At the bottom of the form, there are two buttons: 'Save and continue' (highlighted in green) and 'Cancel'.

Hit the Save and Continue button to move on to Step 4.

Submission Step Four: Uploading Supplementary Files

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.

- Locate the file you wish to submit and highlight it.
- Click Open on the Choose File window, which places the name of the file on this page.
- 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.
- Once the submission is uploaded, click Save and Continue.

Figure 5.17. Uploading Supplementary Files

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

Step 4. Uploading Supplementary Files

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

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

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

Upload supplementary file

Submission Step Five: Confirming the Submission

This final step provides a summary of your submission.

Figure 5.18. Confirming the Submission

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

Step 5. Confirming the Submission

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

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

File Summary

ID	ORIGINAL FILE NAME	TYPE	FILE SIZE	DATE UPLOADED
8	TEST.DOCX	Submission File	9KB	12-28

If the journal charges submission, fast-track review, or publication fees, your required payment will also be detailed here. If you paid previously, use the checkbox to indicate that you have. If you require a fee waiver to be considered, check that box and provide an explanation (required).

Figure 5.19. Author Fees

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: 100.00 (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: 100.00 (CAD)
 If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publications costs.

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

Already Paid

Payment has already been sent

Select this box if you've already sent your payment to the journal in order to finish the submission process. The submission will not be reviewed until the payment arrives. Click PAY NOW above to see the payment instructions.

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](#)

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 review and editorial process by returning to the [Active Submissions](#) section of your Author page.

Authors and Submission Review and Editing Process

To track your submission's progress through the review and editorial process, you will need to log into the journal web site, and choose your role as Author. Click on the linked title to go to the submission record.

Figure 5.20. Active Submissions

Home > User > Author > Active Submissions

Active Submissions

ACTIVE ARCHIVE

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
1	12-28	ART	Chan	A STUDY OF ELECTRONIC PUBLISHING	Awaiting assignment PAY SUBMISSION FEE
2	12-28	ART	Chan	LEARNING TO PUBLISH	IN REVIEW PAY SUBMISSION FEE
6	12-28	ART	Chan, MacIntosh	LIBRARIES AND PUBLISHING: NEW OPTIONS FOR RESEARCH...	Awaiting assignment PAY SUBMISSION FEE
3	12-28	ART	Chan	OPEN SOURCE SOFTWARE AND SCHOLARLY PUBLISHING	IN EDITING PAY TO PUBLISH

1 - 4 of 4 Items

Summary

From the resulting 'Summary' page, you will see links to Summary, Review, and Editing pages. Each of these pages will provide details about your submission.

Figure 5.21. Selecting Submission Summary

Home > User > Author > Submissions > #6 > Summary

#6 Summary


SUMMARY REVIEW EDITING

Submission

Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services

The Summary section contains several sections, including Submission, which displays the author names, submission title, original submission file, any supplementary files, the ability to add a supplementary file, the name of the submitter, the date submitted, the section the article is assigned to, the editor responsible for the submission, and the comments to editor you made as part of your submission (see above).

Figure 5.22. Submission Summary

Submission	
Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services
Original file	6-8-2-SM.DOCX 2009-12-28
Supp. files	None ADD A SUPPLEMENTARY FILE
Submitter	Fred Chan 
Date submitted	December 28, 2009 - 05:59 PM
Section	Articles
Editor	None assigned
Author comments	please consider.

The next section outlines any required author fees. If the journal does not charge author fees, this section will not appear.

Figure 5.23. Author Fees

Author Fees	
Article Submission	100.00 CAD PAY NOW
Fast-Track Review:	100.00 CAD PAY NOW
Article Publication	100.00 CAD PAY NOW

The Status section lets you know where your submission is in the publishing process (see above for status possibilities). It also lets you know when you made your submission and the date of the most recent status change.

Figure 5.24. Status

Status	
Status	Awaiting assignment
Initiated	2009-12-28
Last modified	2009-12-28

The final section outlines the submission metadata, including author details, title, abstract, indexing, and supporting agency. You can modify any of this information by selecting Edit Metadata.

Figure 5.25. Submission Metadata

Submission Metadata

[EDIT METADATA](#)

Authors

Name Fred Chan

Affiliation —

Country —

Competing interests I have no competing interests.
[CI POLICY](#)

Bio statement Department of Health Studies
University of Anywhere

Principal contact for editorial correspondence.

Name Jillian MacIntosh

Affiliation —

Country —

Competing interests I have no competing interests.
[CI POLICY](#)

Bio statement —

Title and Abstract

Title Libraries and Publishing: New Options for Research Support Services

Abstract Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Indexing

Academic discipline and sub-disciplines Library Studies

Subject Libraries - Public Services

Review

If your submission is In Review, you can view its details in the Review section (linked from the top of your page).

Figure 5.26. Selecting Submission Review

Home > User > Author > Submissions > #6 > **Summary**

#6 Summary

SUMMARY **REVIEW** EDITING

Submission

Authors Fred Chan, Jillian MacIntosh

Title Libraries and Publishing: New Options for Research Support Services

First, you will see the basic submission information again.

Figure 5.27. Submission Information

Submission

Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services
Section	Articles
Editor	Jane Smith

Below that is the Peer Review section. You will see information about each round of review (there may be one or more) and any revised files (e.g., a version of your original submission file with changes marked in) uploaded by each reviewer (Reviewer A, Reviewer B, etc.).

Figure 5.28. Peer Review

Peer Review

Round 1

Review Version	6-9-1-RV.DOCX 2009-12-28
Initiated	2009-12-28
Last modified	2009-12-28
Uploaded file	Reviewer A 6-10-1-RV.DOCX 2009-12-28

Last on this page is the Editor Decision section. From this section you can notify the editor once you have submitted your revised submission file, view the reviewer comments (click on the cloud icon), and upload your revised submission file (if revisions were required).

Figure 5.29. Editor Decision

Editor Decision

Decision	Revisions Required 2009-12-28
Notify Editor	Editor/Author Email Record 2009-12-28
Editor Version	None
Author Version	None
Upload Author Version	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>

Possible decisions include:

- Accept: Your submission has been accepted as is.
- Revisions Required: Your submission requires minor changes and will be accepted once those have been completed.
- Resubmit for Review: Your submission needs significant re-working. A new file must be submitted and another round of review will take place.
- Reject: Your submission was not accepted for publication with this journal, either because it was not seen to be of high enough quality, or its subject did not match the journal.

Editing

Your submission is considered "In Editing" once it has been approved for publication. It will then need to go through copyediting to correct any grammatical or stylistic errors, layout editing to create the published galleys (e.g., HTML or PDF), and proofreading to take one final look at the article before it is made publicly available.

If your submission is In Editing, you can view its details in the Editing section (linked from the top of your page). The first section again includes basic submission information.

Figure 5.30. Selecting Submission Editing



Copyediting

In the next section, you can follow the copyediting process.

Figure 5.31. Copyediting



- Step 1: The journal's Copyeditor has made changes to the reviewed submission file. You can download a revised copy here (e.g., 6-11-1-ED.DOCX).
- Step 2: You will review the Copyeditor's changes, and make any final changes of your own. You then upload your revised submission file here. Be sure to use the email icon to notify the Copyeditor that you have submitted your file.
- Step 3: The Copyeditor takes a last look at your changes before passing the submission over to the Layout Editor. No action is required by the author.

Note

Copyedit comments can be added using the icon near the bottom of this section. There is also a link to "Copyedit Instructions".

Layout Editing

The next stage in the editorial process is layout editing. The Layout Editor takes the final copyedited version of the submission and converts it into a format suitable for publishing on the journal web site (e.g., typically HTML or PDF). These are known as the "galleys".

Figure 5.32. Layout

Layout			
Galley Format	FILE		
1. PDF VIEW PROOF	6-14-1-PB.PDF	2009-12-28	0
Supplementary Files	FILE		
	None		
Layout Comments No Comments			

Proofreading

The final editing stage is proofreading. It is also broken down into 3 steps.

Figure 5.33. Proofreading

Proofreading			
REVIEW METADATA			
	REQUEST	UNDERWAY	COMPLETE
1. Author	2009-12-28	2009-12-28	<input checked="" type="checkbox"/>
2. Proofreader	—	—	—
3. Layout Editor	—	—	—
Proofreading Corrections No Comments PROOFING INSTRUCTIONS			

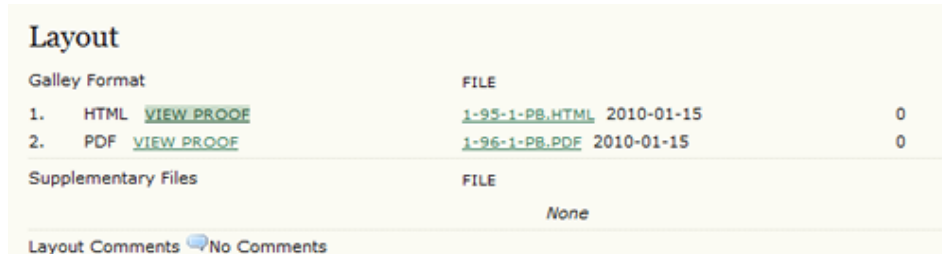
1. Once the galleys have been uploaded by the Layout Editor, you will receive an email from the editor asking that you review them and note any errors in the Proofreading Corrections comments. Proofing Instructions are also available. To view these, you will need to login to the journal and select the appropriate submission link:

Figure 5.34. Active Submissions

Active Submissions					
ACTIVE		ARCHIVE			
ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
1	12-28	ART	Chan	A STUDY OF ELECTRONIC PUBLISHING	IN EDITING: COPYEDIT REQUESTED Publication Fee Paid

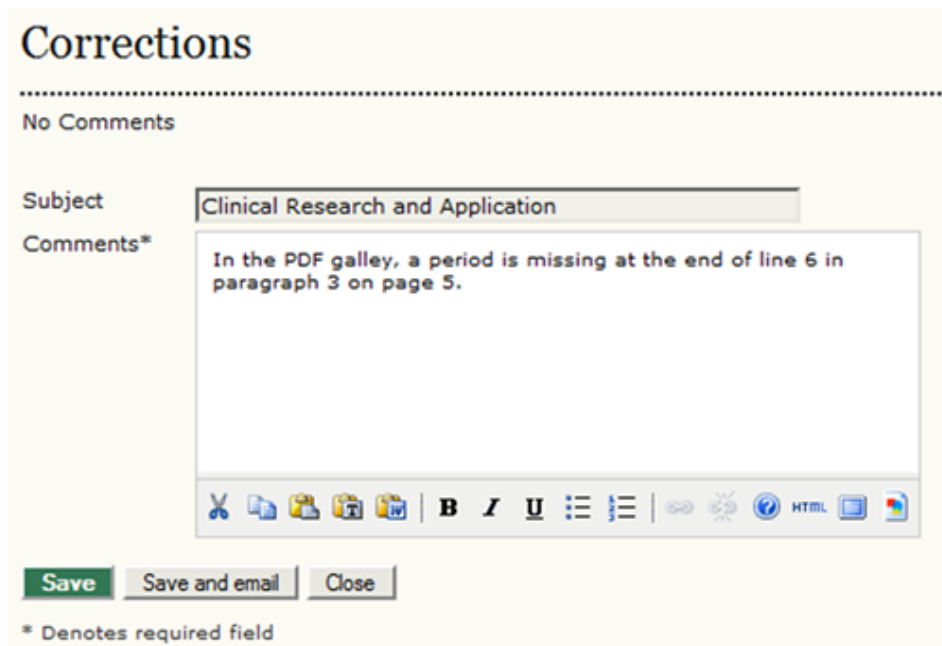
On the resulting screen, you can use the View Proof links to display the files. You can click the linked file names (e.g, 1-95-1-PB.HTML) to download a copy.

Figure 5.35. Layout



Review the files and make any comments using the Layout Comments icon.

Figure 5.36. Corrections



Once you have completed your review and noted any necessary changes, hit the Complete button.

Figure 5.37. Proofreading



This will generate an email informing the Proofreader and Section Editor that you are satisfied with the galleys.

Figure 5.38. Sending Email

Send Email

To: Jimmy Jazz <jjazz@mailinator.com>

CC: Sally Jones <sj@mailinator.com>

BCC:

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

Attachments:

From: "Fred Chan" <fc@mailinator.com>

Subject: [JOJS] Proofreading Completed (Author)

Body:

Jimmy Jazz:

I have completed proofreading the galleys for my manuscript, "Clinical Research and Application," for Journal of Open Journal Systems. The galleys are now ready to have any final corrections made by the Proofreader and Layout Editor.

Fred Chan

2. The journal's own Proofreader will also check for errors and make their own notes and inform the Layout Editor when all proofreading is complete. No action is required by the Author.
3. The Layout Editor takes all of the notes and incorporates all of the changes into revised galleys. These are then ready to publish. No action is required by the Author.

You have now completed all of the steps involved in submitting to the journal and participating in the review and editing of your submission.

Chapter 6. Editors

Overview

The Editor oversees entire editorial and publishing process. The Editor, working with the [Journal Manager](#) (or playing both roles), typically establishes the policies and procedures for the journal, which are used in configuring the journal in [Journal Setup](#).

Via the Editorial Process, the Editor assigns submissions to the [Section Editors](#) to see through the submission's [Review](#) and [Editing](#) processes, 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.

Note

The Editor and Section Editor share many capabilities. While the [Review](#) and [Editing](#) processes alike can be handled by both roles, they are only discussed in the [Section Editor](#) section. Pages unique to the Editor follow.

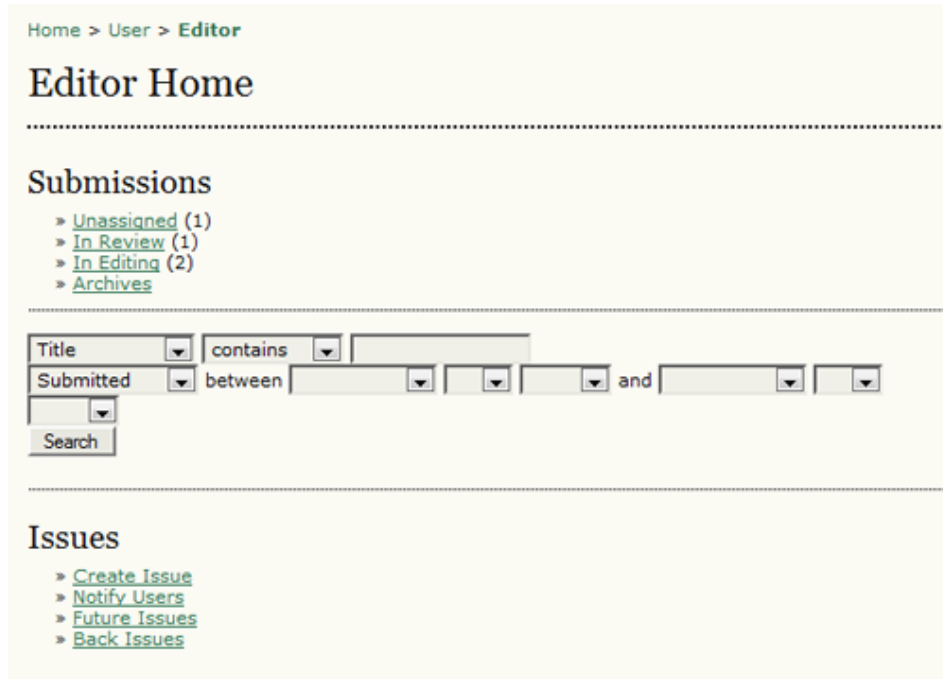
Editor Pages

You can reach the Editor Home page by logging in and clicking the Editor link from your User Home page. Note the addition of quick links that can take you directly to various tasks ([Create Issue](#), [Notify Users](#), etc.).



The Editor Home page is chunked into three distinct sections: the [Submissions](#) section, with Unassigned, In Review and In Editing queues as well as a link to the submission Archives; a [submission search](#) section; and the [Issues](#) section, where you can schedule and publish new issues and edit previously published content.

Figure 6.1. Editor Home Page



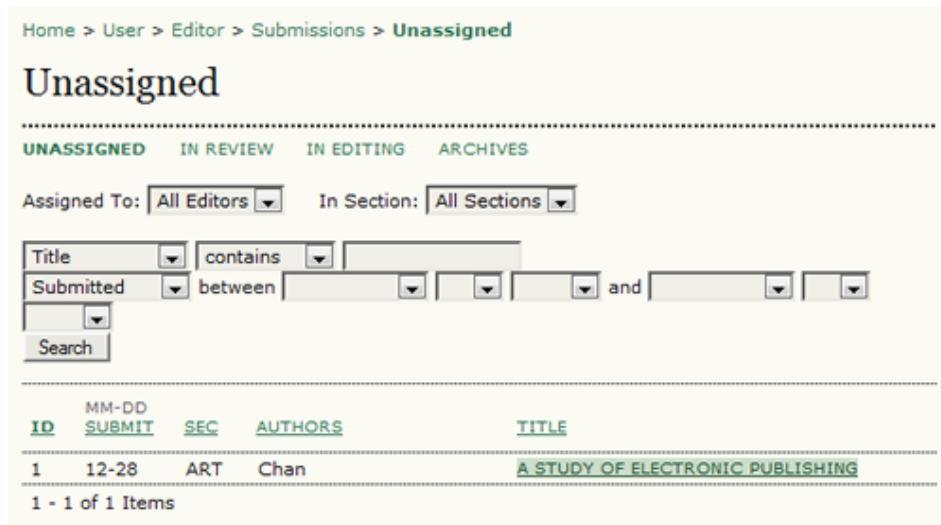
Submissions

Unassigned Submissions

When an author completes a submission it automatically arrives in the Editor's Unassigned queue, available from the Editor's User Home page. If the submission was made to a journal section with an assigned Section Editor, however, the submission will go directly to the In Review queue for that Section Editor (see the configuration option for [Journal Sections](#) for details). Click the Unassigned link to go to the Unassigned queue.

The Unassigned page contains links to the other queues (In Review, In Editing, Archives), a search function, and the list of submissions awaiting assignment to an Editor or Section Editor. Although the example below has only one unassigned submission, your journal may have hundreds, and the search feature will help you find the one you are looking for. To assign a submission, you must click the submission title. This will take you to the submission record.

Figure 6.2. Unassigned Submissions



Submission Summary

The submission record is divided into four pages: Summary, Review, Editing, and History. Complete details on the Review and Editing pages are covered in the [Section Editor](#) section of this manual.

Submission Summary Information

The Summary section includes basic submission details.

Figure 6.3. Submission Summary

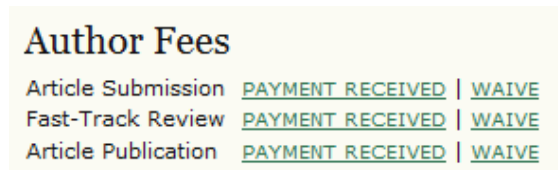


In addition to details about the submission (author, title, original files, etc.), you have the option to upload any additional supplementary files using the Add A Supplementary File link. You can also see the section selected by the Author, and change it if necessary using the dropdown "Change To" menu and the Record button. You can also see any comments the author has made for you when the submission was originally made.

Submission Author Fees

The Summary page also lists Author Fees. If your journal does not charge fees, this section will not appear. From here you can note if the fees have been paid, or you can choose to waive fees.

Figure 6.4. Author Fees



Submission Assignment

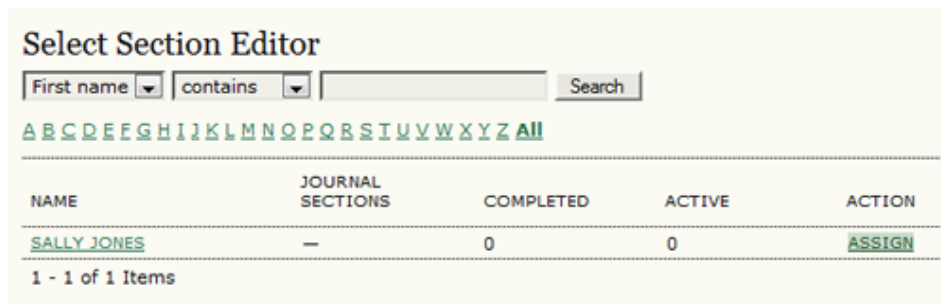
Next, from the Editors section you can assign either a Section Editor, another Editor, or yourself to guide this submission through the review and editing process. Clicking the Add Section Editor (or Add Editor) link will bring up a selection page. (Clicking the Add Self link will assign yourself to the submission and bring you to the submission's [Review](#) page.)

Figure 6.5. Editors



From here, use the Assign link to assign this user to the submission.

Figure 6.6. Assigning Editors



An email box will appear, addressed the assignee, from you, with text pulled from the appropriate email template.

At this point, you can add email addresses to the TO, CC or BCC fields, upload an attachment, and change the Subject or Body text.

Once the message is ready to go, use the Send button to deliver it. The Cancel button does not send the message and cancels the assignment. The Skip Email button does not send the message but does complete the assignment.

Figure 6.7. Sending Email to Editor

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

Send Email

To:

CC:

BCC:

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

Attachments:

From: "Jane Smith" <stranack@gmail.com>

Subject:

Body:

Once the message is sent, cancelled, or skipped, you will be returned to the Summary page. If you have completed the assignment, the assigned user's name will appear. By default, she will be given the responsibility to guide the submission through both the review and editing process, but this can be limited by unchecking either of the Review or Editing boxes. Be sure to use the Record button after making a change.

From here, you can also use the Delete link to reverse the assignment and also assign another Section Editor, Editor, or yourself.

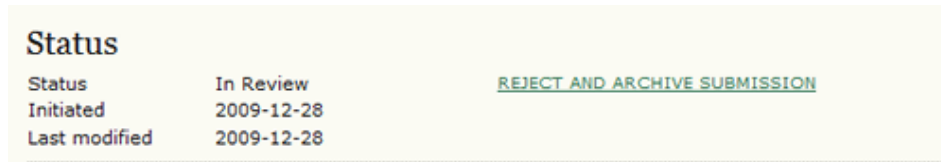
Figure 6.8. Active Editors

Editors		REVIEW	EDITING	REQUEST	ACTION
Section Editor	Sally Jones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2009-12-29	DELETE
<input type="button" value="Record"/> <input type="button" value="ADD SECTION EDITOR"/> <input type="button" value="ADD EDITOR"/> <input type="button" value="ADD SELF"/>					

Submission Status

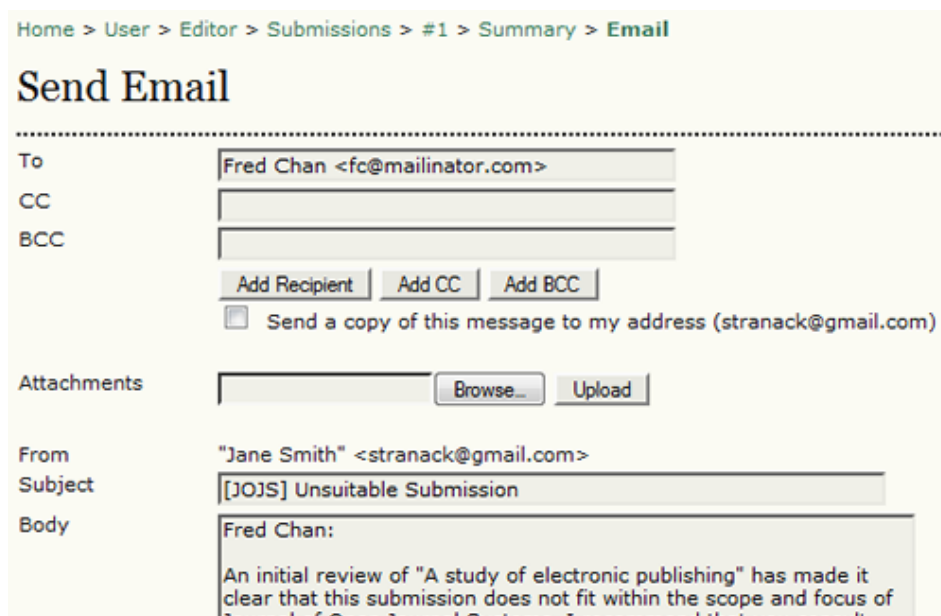
Next, you can see the Status of the submission. If a Section Editor has been assigned, the submission will be listed as "In Review". If the submission is clearly unsuitable and should not be sent through peer review, you can use the Reject and Archive Submission link to send it immediately to the Archives (where it will be listed as Rejected).

Figure 6.9. Submission Status



This will generate an email (based on an existing email template) to the author.

Figure 6.10. Sending Rejection Email



Submission Metadata

The final section of the Summary page contains the submissions' Metadata. From here, you can review the metadata and make any changes using the Edit Metadata link.

Figure 6.11. Submission Metadata

The screenshot displays the 'Submission Metadata' page. At the top, there is a link for 'EDIT METADATA'. Below this, the 'Authors' section lists the author's name as 'Fred Chan' with an email icon, and other fields like 'Affiliation', 'Country', 'Competing interests', and 'Bio statement' are marked with dashes. A link for 'CI POLICY' is also present. The 'Title and Abstract' section shows the title 'A study of electronic publishing'.

Submission Metadata	
EDIT METADATA	
Authors	
Name	Fred Chan
Affiliation	—
Country	—
Competing interests	—
CI POLICY	
Bio statement	—
Principal contact for editorial correspondence.	
Title and Abstract	
Title	A study of electronic publishing

Using the Edit Metadata link allows you to make any necessary changes to the information supplied by the Author, including author information. You can add any additional authors using the Add Author button.

Figure 6.12. Authors

The screenshot shows a web form titled "Authors" with the following fields and content:

- First name***: Fred
- Middle name**: (empty)
- Last name***: Chan
- Email***: fc@mailinator.com
- URL**: (empty)
- Affiliation**: (empty text area)
- Country**: (empty dropdown menu)
- Competing interests**: [CI POLICY](#)
- Bio statement (E.g., department and rank)**: (empty text area with a rich text editor toolbar below it)

At the bottom left of the form is a button labeled "Add Author".

You can also modify the title and abstract.

Figure 6.13. Title and Abstract

Title and Abstract

Title*

Abstract*

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, Source, HTML, Print.

The next section allows you to upload a small cover image for the submission. This would appear with the article in the Table of Contents (and in the abstract view page) upon publication. This is an optional feature, but can serve to add some visual interest to your journal design.

Figure 6.14. Article Cover

Cover

Create a cover for this article with the following elements.

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

Alternate text
 Please provide alternate text for this image to ensure accessibility for users with text-only browsers or assistive devices.

Display Do not display cover image thumbnail in table of contents.
 Do not display cover image in article abstract view.

You can also modify the indexing information supplied by the author.

Figure 6.15. Indexing

Indexing

Provide terms for indexing the submission; separate terms with a semi-colon (term1; term2; term3).

Academic discipline and sub-disciplines

[Library of Congress Classification](#)

Subject classification

Keywords

Language

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

Next, you can modify the supporting agencies included by the author.

Figure 6.16. Supporting Agencies

Supporting Agencies

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

Agencies

Finally, you can determine whether or not the author names should display in the Table of Contents. This is typically controlled by the [Journal Section](#) policy, but it can be overridden here. For example, you may have set your Editorial section to not display author names, but one issue will have a special editor and you do want her name to appear. Use this feature to allow for this.

Figure 6.17. Display Options

Display

Table of Contents Omit author names from issue table of contents:

Remember to hit the Save Metadata button. For further information on working with submissions, see Section Editor.

Searching Submissions

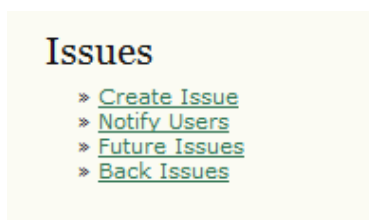
As an Editor you can search through all submissions from your Editor Home page. Between your Submissions queues and your Issues options is a comprehensive search field: you can use it to search against a submission title, or against any user associated with the submission; you can also use it to search for submissions that were submitted, copyedited, layout edited, or proofread between any given date range.

Figure 6.18. Searching Submissions

Issues

As an Editor you have four issue-specific pages available: [Create Issue](#), [Notify Users](#), [Future Issues](#), and [Back Issues](#).

Figure 6.19. Issues



Only Editors can create issues and publish issues. Section Editors can add (schedule) submissions to an existing issue, but they cannot create an issue.

It is the Editor's responsibility to check that all edited material has been proofread by the Author and (optionally) by a Proofreader.

The Editor can arrange journal section and article order for each issue; can modify issue data like volume and number information, issue details and cover images, and so on.

The Editor is also the only one who may remove published material from a Table of Contents.

Finally, the Editor is the only person who can send out a notification email to all registered Readers, notifying them of a new issue.

Note

Journal content can be published in bundled issues in traditional volume/number/year format, or can be published as soon as they are ready by adding finished submissions to the 'current' issue. See [Publication Scheduling](#) for more information on configuration options.

Create Issue

To create an issue, you must select the Create Issue link. The resulting page has three sections: Identification, Access, and Cover.

Identification

The issue needs to be identified with the appropriate numbers and/or title, depending on the option chosen in [Publication Setup](#) (e.g., Vol 2, No 5, 2008). While the system will prompt the Editor with the next issue each time an issue is created, the Editor can override these settings and enter a new set of numbers or a different year. You also have the opportunity to add a special title and description for the new issue.

Figure 6.20. Issue Identification

Identification

Volume

Number

Year

Issue identification

- Volume
- Number
- Year
- Title

Public issue identifier

Title

Description

(Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted list, Numbered list, Link, Unlink, HTML, Print)

Cover

You can also upload a cover illustration for the journal, in the form of a .jpg, .png or .gif file. This file will be posted on the Table of Contents as a cover page. It will appear on the journal's homepage while the journal issue is Current, and can be clicked on to reach the Table of Contents for that issue. Once the issue is archived, the cover will remain available with the issue through the Table of Contents.

Figure 6.21. Issue Cover

Cover

Create a cover for this issue with the following elements.

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

Stylesheet Use Save to upload file.

Uploaded: —

Cover caption

(Rich text editor toolbar: Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Bulleted list, Numbered list, Link, Unlink, HTML, Print)

Display

- Do not display cover image thumbnail in issue listing.
- Do not display cover image prior to table of contents.

Access

If your journal has enabled [subscriptions](#), you will next see an Access section, where you can set the status of the issue (open, subscription) and an open access date (if applicable).

Figure 6.22. Issue Access

The screenshot shows a form titled "Access". It contains two rows of input fields. The first row is "Access status" with a dropdown menu currently showing "Subscription". The second row is "Open access date" with three separate dropdown menus for the month ("December"), day ("29"), and year ("2010").

Notify Users

You can send an email notification to all users associated with your journal by clicking the Notify Users link. Before sending the email, you can choose to have the email sent only to those who have indicated they wish to receive notifications regarding newly-published material (this option is available in a user's Profile), or to all users associated with your journal -- Journal Managers, Editors, Authors, Readers, and so on. You can also opt to include the table of contents of an issue. Finally, you have one more chance to edit the prepared email template before it is sent.

Figure 6.23. Notify Users Email

The screenshot shows a "Send Email" interface. At the top, there is a breadcrumb trail: "Home > User > Editor > Issues > Email". Below this is the title "Send Email". A horizontal dotted line separates the title from the "Recipients" section. Under "Recipients", there are two radio button options:

- Send this message to the users associated with this journal who have indicated that they wish to receive updates (12 users)
- Send this message to all users associated with this journal (32 users)

 Below the recipients is the "Issue" section, which includes a checked checkbox and a dropdown menu:

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

 At the bottom, there is a preview of the email content:

From: "Kevin Stranack" <stranack@gmail.com>
 Subject: [sj] New Issue Published
 Body: Readers:
 Sofia Journal has just published its latest issue at <http://journals.stranack.ca/index.php/sj>. 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,
 Kevin Stranack
 stranack@gmail.com

Future Issues

The Future Issues are where the Editor schedules submissions that are to be published next and into the future. The Editor may wish to ensure that there are always two or three unpublished issues, which enables submissions to be

scheduled over a couple of issues (for reasons of balance, for example). Once an issue is created, it appears in the Future Issues list. A planned special issue is another example of a future issue.

Every entry in the Future Issues list displays the issue title and as it was created by the Editor and as it will appear online; the number of items (edited submissions that have been scheduled with that particular issue; and a Delete option. clicking Delete will remove the issue from the Future Issues list, and all scheduled submissions will revert to their original unscheduled status (they will not be archived or deleted, nor will they be resubmitted for review: they will remain in Editing, but will have to be rescheduled).

Figure 6.24. Future Issues

ISSUE	ITEMS	ACTION
VOL 1, NO 2 (2010)	2	DELETE
VOL 1, NO 3 (2010)	0	DELETE

1 - 2 of 2 Items

Table of Contents

Clicking on an issue title in the Future Issues list will take you the issue's Table of Contents, Issue Data and Preview Issue pages.

Clicking the Table of Contents link will display all submissions that have been scheduled against that issue, enveloped within their respective journal sections (e.g., Articles, Commentary, etc.). By default, journal sections are ordered as they have been ordered by the Journal Manager in the [Journal Sections](#) configuration pages; articles are ordered by the date they have been scheduled. You can reorganize the order of both the journal sections and the articles by clicking the up and down arrows next to each item or by single-clicking and dragging an element with your mouse.

Rearranging journal sections in one issue will not affect the order of already-published issues, and future issues will still default to the Journal Manager's prescribed order. After making changes, make sure to click the Save button at the bottom of the page.

Figure 6.25. Table of Contents

CREATE ISSUE FUTURE ISSUES BACK ISSUES

Issue: Vol 1, No 2 (2010)

TABLE OF CONTENTS ISSUE DATA PREVIEW ISSUE

Table of Contents

Articles ↑ ↓

ORDER	AUTHORS	TITLE	ACCESS	PUBLIC ID	REMOVE	PROOFED
1.	↑ ↓ Pinet	THE CONTESTATION OF CITIZENSHIP	Default		<input type="checkbox"/>	<input type="checkbox"/>

Commentary ↑ ↓

ORDER	AUTHORS	TITLE	ACCESS	PUBLIC ID	REMOVE	PROOFED
1.	↑ ↓ Szabo	I MEANT TO SAY THAT: HOW ADULT LANGUAGE LEARNERS...	Default		<input type="checkbox"/>	<input type="checkbox"/>

Save Publish Issue

Every submission entry in the Table of Contents displays the submission title as a link: clicking the link will take you to the submission's Summary, Review, Editing and History pages. There is also a checkbox you can check to remove the submission from that particular issue. Removing a submission from an issue will not delete or archive the submission: it will only 'deschedule' it, and you will have to reschedule it from its Editing page, or archive it from its Summary page.

The 'Proofed' column shows which submissions have had the Author sign off on the final galley copy via the Proofreading process. Your journal may not rely on proofreading online, but this is a handy check to see whether Authors have had a final say on how their work has been represented.

Finally, you have the Publish Issue button at the bottom of the unpublished Table of Contents. Clicking this will publish the issue, moving it from the Future Issues list to the [Back Issues](#) page and promoting it to Current status on the website. The issue will also be listed in the journal's Archives page.

Issue Data

The Issue Data page allows you to edit any of the information you entered when [creating an issue](#).

Figure 6.26. Issue Identification

TABLE OF CONTENTS ISSUE DATA PREVIEW ISSUE

Identification

Form Language: English

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

Volume: 1

Number: 2

Year: 2010

Issue identification: Volume, Number, Year

Preview Issue

You can preview an issue layout and associated information by clicking the Preview Issue link. You should do this to double-check that the article and section orders look ok, and that the issue data looks as it should.

Figure 6.27. Issue Preview

Home > Archives > Vol 1, No 2 (2010)

Vol 1, No 2 (2010) (Preview)

Table of Contents

Articles

[The Contestation of Citizenship](#) [PDF](#)
Robert Pinet 1 - 20

Commentary

[I Meant to Say That: How Adult Language Learners Construct Positive Identities Through Nonstandard Language Use](#) [PDF](#)
Michelle Szabo 21 - 39

Back Issues

The Back Issues page lists issues that have already been published, including the Current issue. There are three differences between this page and the [Future Issues](#) page listing: this page shows the issues' publication dates; you can re-order back issues up and down (which will affect the order in which they are displayed in the Archives); and you can assign any of the published issues to be the Current issue by choosing from the dropdown menu near the bottom and pressing Record.

Figure 6.28. Back Issues

CREATE ISSUE FUTURE ISSUES **BACK ISSUES**

This journal uses custom issue ordering. [RESET TO DEFAULTS](#)

ISSUE	PUBLISHED	ITEMS	ORDER	ACTION
VOL 1, NO 1 (2008)	2008-08-11	6	↑ ↓	DELETE

1 - 21 of 21 Items

Current Issue

Clicking on any issue title in the Back Issues listing will bring you to that title's Table of Contents page, which is exactly the same as the [Table of Contents](#) available for Future Issues. Similarly, you also have access to the issue's [Issue Data](#) page. As the issue has already been published, you do not need -- or have -- a [Preview Issue](#) option.

Chapter 7. Section Editors

Overview

Section Editors usually manage the review of submissions and the editing of those that are accepted. Depending on the journal's policies, however, a Section Editor initially assigned to a submission by an Editor may be asked only to see it through the Review stage, after which, if the submission is accepted, the Editor or another Section Editor takes over the Editing Process; or vice-versa.

Editors can self-assign and accomplish the following functions described below.

Section Editor Pages

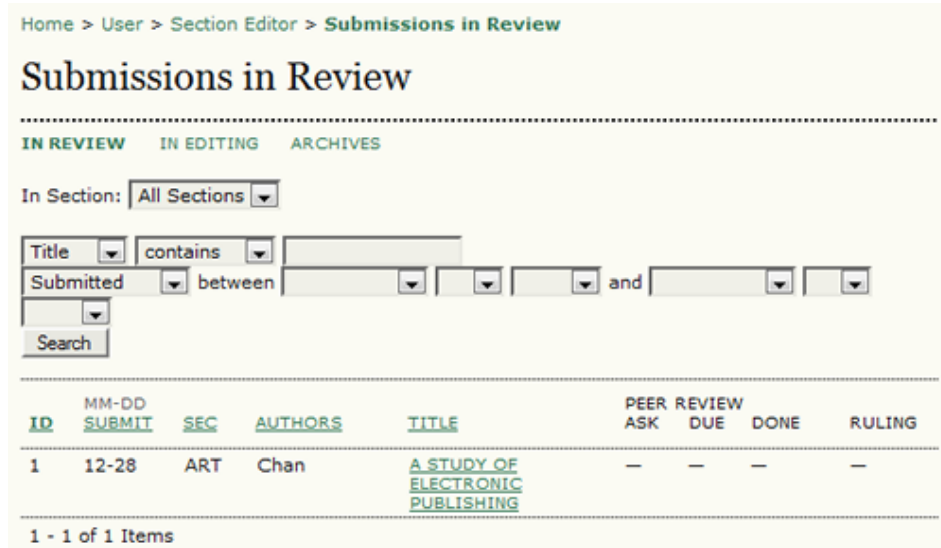
Submissions to the journal that are assigned to a Section Editor appear in that Section Editor's Submissions In Review or In Editing queue. Section Editors will have received an email from the Editor requesting that you take on this submission.

Section Editors have access to only those submissions to which they have been assigned. Depending on the journal's policies, Section Editors may be responsible for just the Review of the submission or for both the Review and the Editing of the Submission.

Click on the 1 In Review link to see the submissions assigned to you that are currently going through the review process.



On the resulting page, you will see a list of all submissions in your Review queue. Select a hyperlinked title to proceed to the submission's Summary page.



Submission Summary

The Section Editor's Submission Summary page is almost identical to the Editor's [Submission Summary Page](#), with the exception that the Section Editor does not have access to the Editor Assignment section. Otherwise, the Section Editor can add supplementary files; change the article section; archive the article; and/or modify the article's metadata just as the Editor can. For further information, please refer to the Editor's pages in this manual.

Submissions In Review

To begin the review process, select Review from the top of the submission record.

Review Summary

The first part consists of basic submission information, and a review version of the submission (automatically generated from the original submission file).

Figure 7.1. Submission Review



Managing Review Rounds

You can manage one or more rounds of review. Click on the Select Reviewer link to assign one or more reviewers to this submission. The View Regrets, Cancels, Previous Rounds link will show you a list of past, inactive reviews.

Figure 7.2. Peer Review



From the resulting screen, you can choose from your list of enrolled Reviewers. If there are many to choose from, you can use the search tool to narrow your choices (e.g., search for matching review interests). If you know of an existing user in the journal that is not currently enrolled as a Reviewer, this can be quickly done using the Enroll An Existing User As Reviewer link. You can also use the Create New Reviewer to enroll someone who is not currently an existing user. In this example, the Journal Manager has also added a link to PubMed, a free, online health database, where you can search for potential reviewers (see Journal Setup).

To assign a Reviewer, select Assign.

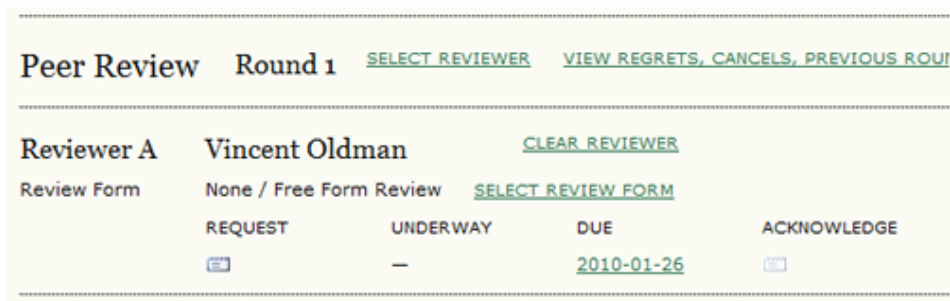
Figure 7.3. Select Reviewer



Once you've made the selection, you will be returned to the Review page. You can select another Reviewer.

Notice the addition of Reviewer A (your first selection). You can remove this Reviewer using the Clear Reviewer link.

Figure 7.4. Request Reviewer



Use the Request icon to send an email to the Reviewer (using an email template), asking him to take on the task.

Figure 7.5. Request Email

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

Send Email

To: Vincent Oldman <vo@anywhere.ca>

CC:

BCC:

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

Attachments:

From: "Sally Jones" <sj@mailinator.com>

Subject: [JOJS] Article Review Request

Body:

Vincent Oldman:

I believe that you would serve as an excellent reviewer of the manuscript, "A study of electronic publishing," which has been submitted to Journal of Open Journal Systems. The submission's abstract is inserted below, and I hope that you will consider undertaking this important task for us.

Please log into the journal web site by 2010-01-05 to indicate whether you will undertake the review or not, as well as to access the submission and to record your review and recommendation. The web site is <http://journals3.stranack.ca/index.php/jojs>

The review itself is due 2010-01-26.

By default, Reviewers will be provided with an extended text box to type in their comments. However, the Journal Manager can setup Review Forms [<link>](#) allowing for more focused questions. Use the Select Review Form link to provide a review form to this Reviewer.

Figure 7.6. Assign Review Form

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

Review Forms

Select Review Form

TITLE	ACTION
Articles Form	ASSIGN PREVIEW

1 - 1 of 1 Items

If there are several Review Forms to choose from, use the Preview link to take a quick look at each.

Figure 7.7. Review Form

Home > User > Section Editor > Submissions > **Preview Form**

Preview Form

Articles Form

This review form is to be used for all submissions to the Articles section.

Rate the clarity of the writing style.*

Very Good
 Good
 Average
 Below Average
 Poor

Close

* Denotes required field

The Reviewer will send you an email both when he agrees to do the review and when the review is completed. Returning to the Review section, you can see the Reviewer's decision (e.g., Revisions Required). Any competing interests are also displayed.

You can also view the Reviewer comments by clicking on the Review Form Response icon. If the Reviewer uploaded a revised version of the submission (e.g., a Word document with changes included), this would also be available here.

If the journal has set up reviewer ratings (see Journal Setup), use the dropdown menu to grade the Reviewer. This is invisible to the Reviewers, but will display for Editors and Section Editors assigning new Reviewers.

Be sure to use the Acknowledge icon to email your thanks to the Reviewer.

Figure 7.8. Review Information

Reviewer A	Vincent Oldman			
Review Form	Articles Form			
	REQUEST	UNDERWAY	DUE	ACKNOWLEDGE
	2009-12-29	2009-12-29	<u>2010-01-26</u>	
Recommendation	Revisions Required 2009-12-29			
Competing Interests	—			
Review Form Response				
Uploaded files	None			
Reviewer rating	5 High Record			

At this point, you can enroll more Reviewers (see above) or make a decision.

Editor Decision

Figure 7.9. Editor Decision

Editor Decision

Select decision: Revisions Required Record Decision

Decision: None

Notify Author: Editor/Author Email Record No Comments

Review Version: [1-2-1-RV.DOCX](#) 2009-12-28

Author Version: None

Editor Version: None

Browse... Upload

Decision choices include:

- Accept Submission: The submission will be accepted without revisions.
- Revisions Required: The submission will be accepted after minor changes have been made.
- Resubmit for Review: The submission needs to be re-worked, but with significant changes, may be accepted. It will require a second round of review, however.
- Decline Submission: The submission will not be published with the journal.

Once you've selected a decision from the dropdown menu, hit the Record Decision button.

Important Note: You must use the Notify Author icon to generate an email to the Author, informing him or her of your decision. Until this is done, no further work can be done with the submission. Use the Import Peer Reviews button to pull the anonymous reviewer comments (or form results) into the body of the email. Hitting the Send button delivers the message.

Figure 7.10. Notify Author

Home > User > Section Editor > Submissions > Email

Send Email

To:

CC:

BCC:

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

Attachments:

From: "Sally Jones" <sj@mailinator.com>

Subject:

Body:

Accept Submission

If the decision is to Accept, select the appropriate version (i.e., Review Version, Author Version, or Editor Version) and hit the Send button to move the submission from the "In Review" queue to the "In Editing" queue (see below).

Figure 7.11. Accept Submission

Editor Decision

Select decision:

Decision: Accept Submission 2009-12-29

Notify Author: Editor/Author Email Record 2009-12-29

Select file for Copyediting:

Review Version: [1-2-2-RV.DOCX](#) 2009-12-29

Author Version: None

Editor Version: [1-17-1-ED.DOCX](#) 2009-12-29 [DELETE](#)

Revisions Required

If the decision is Revisions Required, the Author will need to make the required changes and upload them for you to view. Once this is done, you will receive an email and will be able to access the revised file by clicking on the Author Version link.

Figure 7.12. Revisions Required

The screenshot shows the 'Editor Decision' interface. At the top, there is a dropdown menu set to 'Revisions Required' and a 'Record Decision' button. Below this, the current decision is listed as 'Revisions Required' with a date of '2009-12-29'. There is a 'Notify Author' link with an envelope icon and a date of '2009-12-29'. Under 'Review Version', there is a link for '1-2-1-RV.DOCX' dated '2009-12-28'. Under 'Author Version', there is a link for '1-15-1-ED.DOCX' dated '2009-12-29'. The 'Editor Version' is listed as 'None'. At the bottom, there is a file input field with 'Browse...' and 'Upload' buttons.

If the revisions are not complete, use the Notify Author link to send another email with further instructions.

If the revisions are complete, you can change the decision from Revisions Required to Accept Submission and re-notify the Author.

Resubmit for Review

If the decision is Resubmit for Review, the Author will need to upload a significantly revised version of the submission. You will receive an email when this is ready.

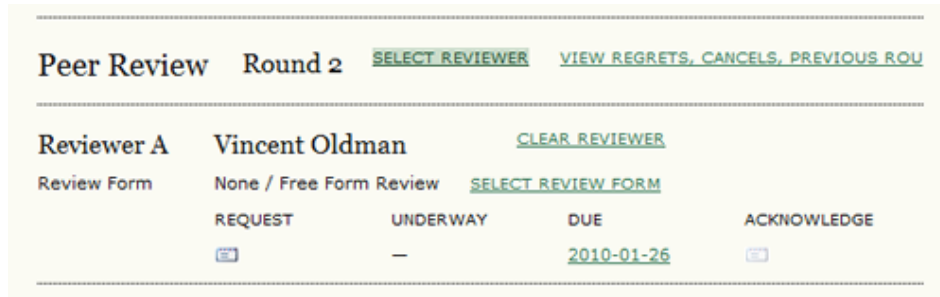
You can access the revised author submission file using the Author Version link. To send it for another round of review, select it using the radio button, and hit the Resubmit button.

Figure 7.13. Resubmit for Review

The screenshot shows the 'Editor Decision' interface. The dropdown menu is now set to 'Resubmit for Review'. The decision history shows 'Revisions Required' (2009-12-29) followed by 'Resubmit for Review' (2009-12-29). The 'Notify Author' link is still present. Under 'Review Version', there is a radio button next to '1-2-1-RV.DOCX' (2009-12-28). Under 'Author Version', there is a radio button next to '1-15-1-ED.DOCX' (2009-12-29). A 'Resubmit selected file for peer review' button is now visible. The 'Editor Version' is 'None'. At the bottom, there is a file input field with 'Browse...' and 'Upload' buttons.

This will allow you to select Reviewers for a second round of review.

Figure 7.14. Selecting Second Round Reviewer



From here, follow the instructions above <link>.

Decline Submission

If the decision is to Decline, the submission automatically moves from the "In Review" queue to the "Archive" queue (see below) upon notifying the Author.

Submissions In Editing

Upon acceptance, the submission moves from "In Review" to "In Editing" <link>. You can go to "In Editing" by selecting the Editing link at the top of the submission record.

The first section provides basic submission information (authors, title, section, editor). Below that is the Copyediting section.

Figure 7.15. Submission Editing



Copyediting

The "Section Editor as Copyeditor" Process

Copyediting consists of checking the submission for grammatical or stylistic errors. The journal has two options for the copyediting process. The Journal Manager can choose to have the Editor or Section Editor act as the Copyeditor or allow the Editor or Section Editor to select a separate Copyeditor.

If you as the Section Editor are doing the copyediting, follow the 3 copyediting steps:

- Step 1: You can simply select the Initiate link to indicate that copyediting has begun. The latest version of the submission file is linked here. Once you are finished copyediting, you can upload the revised file at the bottom of this section, under "Upload file to - Step 1". Once this is done, hit the Complete link in the Step 1 line.

Note the link to Copyedit Instructions and the ability to make Copyedit Comments, shared by the Copyeditor, Section Editor, and Author.

Figure 7.16. Copyediting Step 1



- Step 2: Having completed Step 1, you must now select the Request Email icon.

Figure 7.17. Copyediting Step 2



This will send an email to the Author, asking him to review your copyediting changes (note the instructions provided in the prepared email template).

Figure 7.18. Sending Email

Home > User > Section Editor > Submissions > #1 > Editing > Email

Send Email

To: Fred Chan <fc@mailinator.com>

CC:

BCC:

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

Attachments:

From: "Sally Jones" <sj@mailinator.com>

Subject: [JOJS] Copyediting Review Request

Body:

Fred Chan:

Your submission "A study of electronic publishing" for Journal of Open Journal Systems has been through the first step of copyediting, and is available for you to review by following these steps.

1. Click on the Submission URL below.
2. Log into the journal and click on the File that appears in Step 1.
3. Open the downloaded submission.
4. Review the text, including copyediting proposals and Author Queries.
5. Make any copyediting changes that would further improve the text.
6. When completed, upload the file in Step 2.

Once the email has been sent, the Author will be able to upload any further changes to the submission.

Once the Author has uploaded any revisions, be sure to use the Acknowledge icon to thank him.

Figure 7.19. Copyediting Acknowledgement

REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit File: 1-15-2-CE.DOCX	2009-12-29 2009-12-29	N/A	2009-12-29	N/A
2. Author Copyedit File: 1-18-1-CE.DOCX	2009-12-29 2009-12-29	2009-12-29	2009-12-29	

- Step 3: Next, review the Author's latest file (available in Step 2 above). Make any final changes and upload the submission file (by selecting Step 3 and using the file upload tool). Hit the Complete link when this is done. The submission is now ready to move to Scheduling.

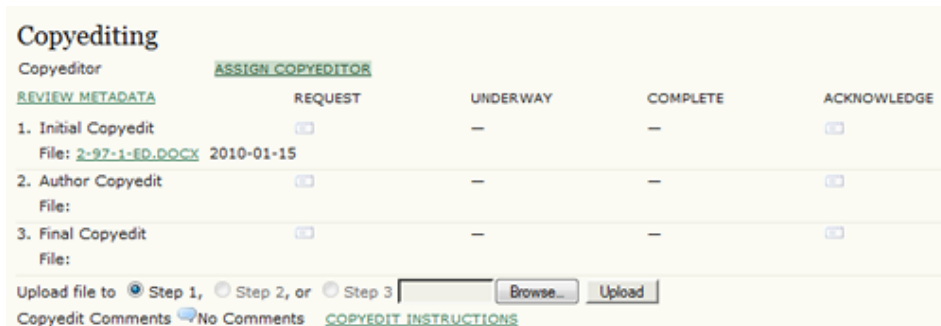
Figure 7.20. Copyediting Step 3



The Separate Copyeditor Process

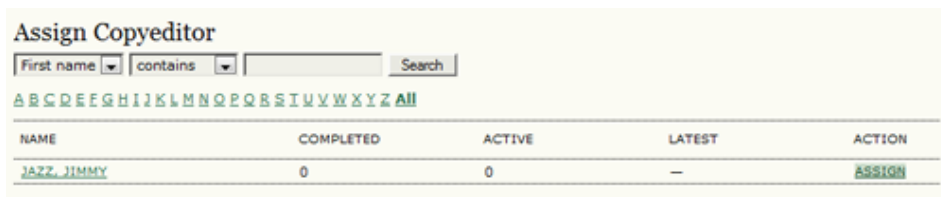
If your journal is configured to use separate Copyeditors, you must first select one for the submission using the Assign Copyeditor link.

Figure 7.21. Assigning Copyeditor



On the resulting screen, select an available Copyeditor (if there isn't one, ask your Journal Manager to [enroll one](#)).

Figure 7.22. Selecting the Copyeditor



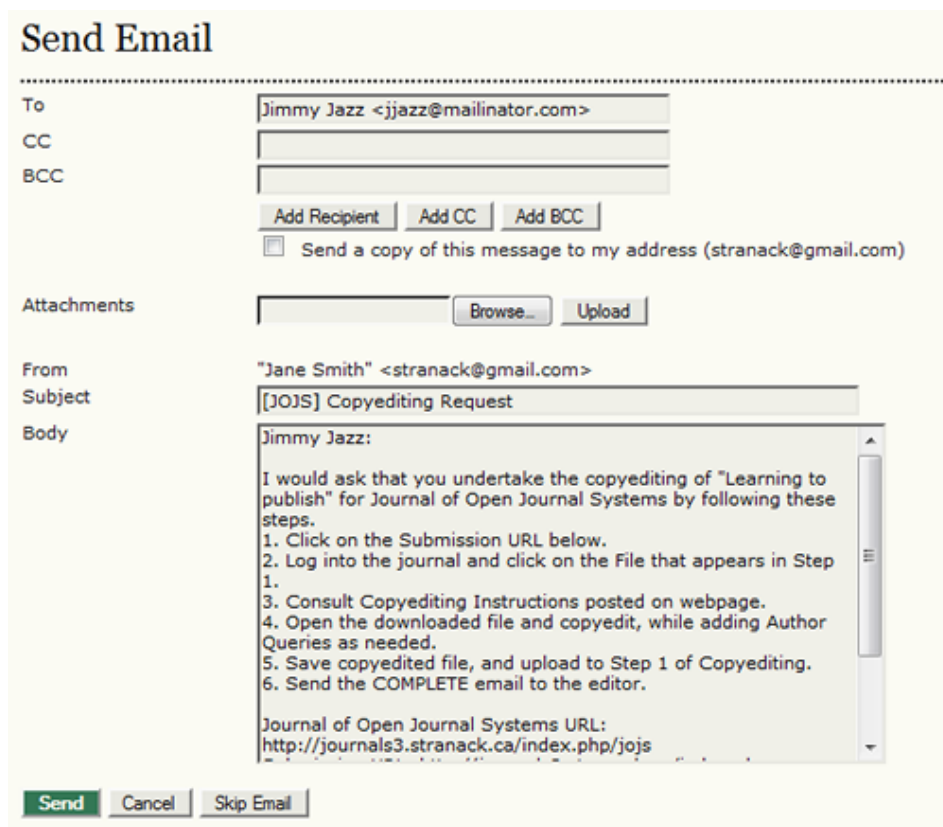
Use the Request icon to ask the Copyeditor to undertake the assignment.

Figure 7.23. Requesting Copyediting



This will generate with prepared email template text automatically provided.

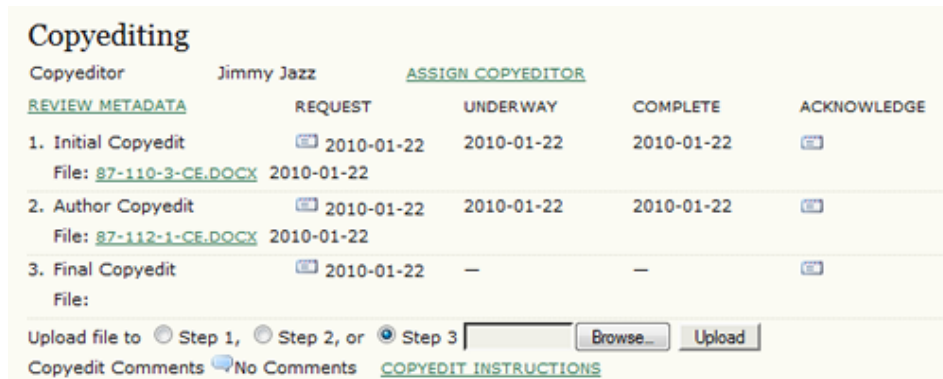
Figure 7.24. Send Email



For details on the Copyeditor's tasks see the detailed section on the [Copyeditor role](#).

Once the Copyeditor has completed the first stage of copyediting, both you and the Author will receive an email notification. The Author will review the changes and make any final changes of his own. You will be able to access both revisions from the copyediting section of the submission record. Remember to use the Acknowledge icon to let the Author and Copyeditor know that you have received their revisions.

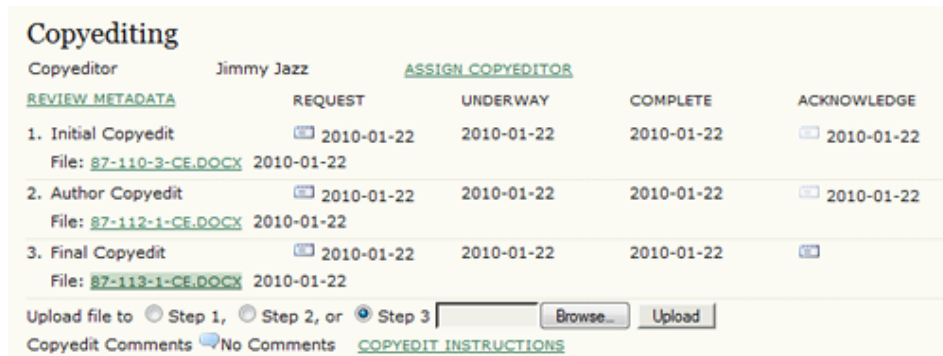
Figure 7.25. Acknowledge Copyeditor and Author



Use the Request icon in Step 3 to ask the Copyeditor to make the final revisions, incorporating changes from the Author (and from you, if you choose to upload your own revised version). Remember to review any Copyedit Comments located just under the upload tool.

Once the Copyeditor is finished with the final revisions, you will receive an email notification. Returning to the submission record, you will see the final copy (e.g.,) and be able to use the Acknowledge icon to thank him for his work. This file will now automatically become the first layout file.

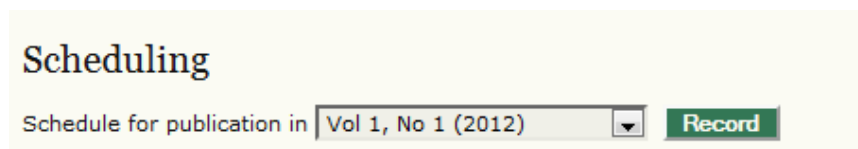
Figure 7.26. Acknowledging Final Copyedits



Scheduling

Use the scheduling dropdown menu to select the issue for this submission. You can change it later if you change your mind. If you have not yet created the required issue, see the [Create New Issue](#) instructions and do so.

Figure 7.27. Scheduling a Submission



Layout Editing

The "Section Editor as Layout Editor" Process

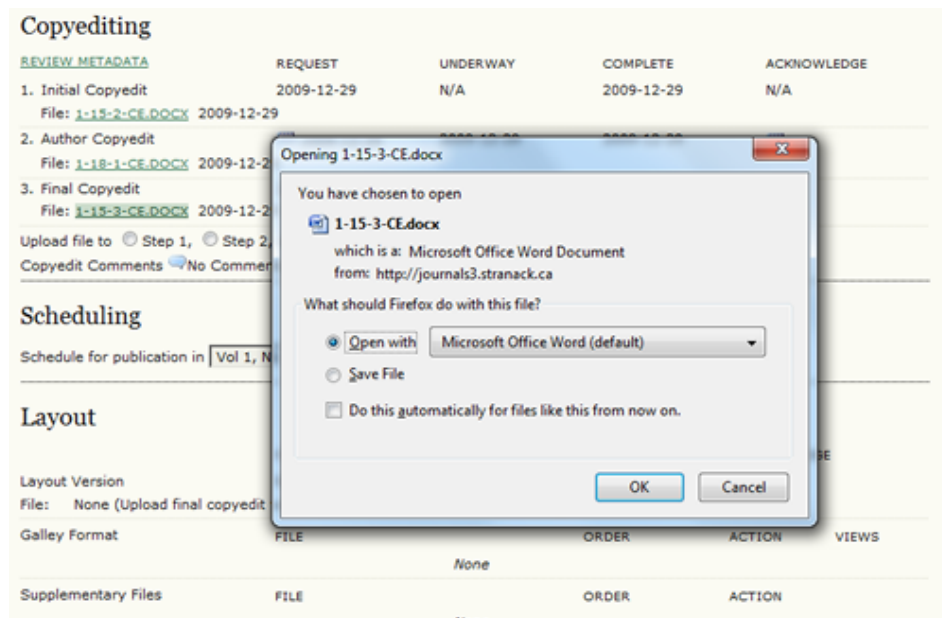
Layout editing consists of taking the final copyedited submission file from OJS and using external software (e.g., Adobe Acrobat or Dreamweaver) to create the HTML or PDF files, known as galleys, which will be published on the web site. This is a critical step, as it uploads the files that will be viewed by the journal's readers.

The journal has two options for the layout editing process. The Journal Manager can choose to have the Editor or Section Editor perform the layout editing or allow the Editor or Section Editor to select a separate Layout Editor.

If you as the Section Editor doing the layout editing, follow these steps:

- First, download the final copyedited version of the submission by clicking on the Final Copyedit file (e.g., 1-15-3-CE-DOCX) from Step 3 of Copyediting:

Figure 7.28. Downloading a File



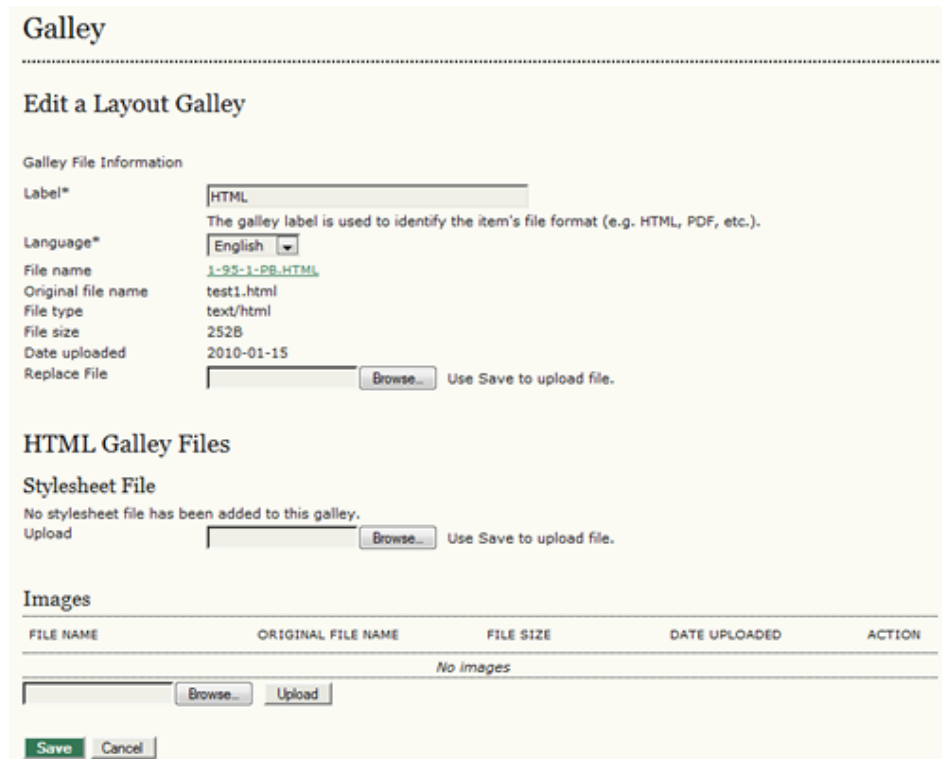
- Next, using the downloaded submission file as your source document, convert it into an HTML or PDF version suitable for online viewing.
- For HTML files, you might want to use software such as Adobe Dreamweaver or the open source Nvu. Exercise caution if using Microsoft Word to generate the HTML, as it will introduce non-standard tags which may disrupt the display of the submission when published on your web site (Note: Dreamweaver has a "Clean Up Word HTML" option that can help with this).
- For PDF files, Adobe Acrobat can easily convert Word documents, as can Microsoft Word 2007. The open source Open Office suite can also open Word documents and easily convert them into PDF files. Many journals on a limited budget have opted to only display PDFs, as it takes significantly less time to create PDF files, and requires less technical knowledge.
- Returning to OJS, you will next need to upload your HTML or PDF file as a "galley":

Figure 7.29. Upload File to Galley



- If it is an HTML file, the following screen will appear:

Figure 7.30. Edit HTML Galley



OJS will automatically include a "label" (eg. "HTML"), which will become the link text on the Table of Contents.

If you upload an HTML file, you can also optionally upload a separate stylesheet for the file and images or other media associated with the article.

- If it is a PDF file, this screen will appear:

Figure 7.31. Edit PDF Galley

Galley

Edit a Layout Galley

Galley File Information

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

Language*

File name [1-96-1-PB.PDF](#)

Original file name test.pdf

File type application/pdf

File size 45KB

Date uploaded 2010-01-15

Replace File Use File to upload file.

OJS will automatically include a "label" (PDF), which will be the link text on the Table of Contents.

- Returning to the Layout section, you will now see your galley:

Figure 7.32. Galley Files

Layout

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE	
Layout Version	N/A	N/A	N/A	N/A	
File: None (Upload final copyedit version as Layout Version prior to sending request)					
Galley Format	FILE		ORDER	ACTION	VIEWS
1. HTML VIEW PROOF	1-95-1-PB.HTML 2010-01-15		↑ ↓	EDIT DELETE	0
2. PDF VIEW PROOF	1-96-1-PB.PDF 2010-01-15		↑ ↓	EDIT DELETE	0
Supplementary Files	FILE		ORDER	ACTION	
None					

Upload file to Layout Version, Galley, Supp. files

Layout Comments [LAYOUT INSTRUCTIONS](#) [REFERENCE LINKING](#)

- View Proof will display the galley in your browser.
- The linked file name will allow you to download a copy of the file.
- The Order arrows will allow you to change the order of the galley links on the Table of Contents. In this example, the HTML link would appear before the PDF link. These Order arrows would allow you to adjust that.
- The Edit link will take you back to the "Edit a Layout Galley" screen, allowing you to replace the galley file (without modifying that galley's view count) or, in the case of an HTML galley, add a new stylesheet or images. Using the Delete link will remove the file (and all viewing statistics -- see the Views column).

- The Views number (0 in this example as it has not yet been published) shows how many times a reader has accessed the file. If you delete the file, these views will be reset to zero. If you edit the file, these numbers will be maintained.
- Finally, you may wish to upload additional supplementary files for the article, such as Powerpoint slides or an Excel spreadsheet of data. You can do this by changing the "Upload File to" button from Galley to Supp. Files and using the upload tool. These files will be visible in the Reading Tools for the article.

The Separate Layout Editor Process

Once the Copyeditor completes the "clean" copy in Step 3 of Copyediting, that version of the submission automatically moves to the Layout stage.

As the Section Editor, on receiving notification of the completion of the copyediting, return to the submission record and select a Layout Editor.

Figure 7.33. Selecting a Layout Editor



Request that the Layout Editor begin work, by using the email icon under Request Layout, which will generate an email message.

Figure 7.34. Assign Layout Editor Email

Send Email

To: Jimmy Jazz <jjazz@mailinator.com>

CC:

BCC:

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

Attachments:

From: "Sally Jones" <sj@mailinator.com>

Subject: [JOJS] Request Galleys

Body:

Jimmy Jazz:

The submission "Clinical Research and Application" to Journal of Open Journal Systems now needs galleys laid out by following these steps.

1. Click on the Submission URL below.
2. Log into the journal and use the Layout Version file to create the galleys according to the journal's standards.
3. Send the COMPLETE email to the editor.

Journal of Open Journal Systems URL:
<http://journals3.stranack.ca/index.php/jojs>
 Submission URL: <http://journals3.stranack.ca/index.php/jojs/layoutEditor/submission/87>
 Username: jjazz

The Layout Editor will prepare galleys for the submission in each of the journal's publishing formats (e.g., HTML, PDF, PS, etc.). The Supplementary Files, which remain in the original file format in which they were submitted, will be reviewed by the Layout Editor and Proofreader to ensure that basic formatting is in place, and that the files conform as well as possible to journal standards. You will receive an email when the Layout Editor has completed the initial production of the galleys.

Upon receiving the email notification, log back into the system and return to the submission record. You will see the galleys in place. Use the Acknowledge email icon to thank the Layout Editor for his work.

Figure 7.35. Galley Files

Layout

Layout Editor: Jimmy Jazz [ASSIGN LAYOUT EDITOR](#)

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
Layout Version	<input checked="" type="checkbox"/> 2010-01-22	<input type="checkbox"/> 2010-01-22	<input type="checkbox"/> 2010-01-22	<input type="checkbox"/>
File:	87-114-1-1E.DOCX 2010-01-22			

Galley Format	FILE	ORDER	ACTION	VIEWS
1. PDF	87-115-1-PB.PDF 2010-01-22	↑ ↓	EDIT DELETE	0
2. HTML	87-116-1-PB.HTML 2010-01-22	↑ ↓	EDIT DELETE	0

Supplementary Files: None

Upload file to: Layout Version, Galley, Supp. files

Layout Comments: [LAYOUT INSTRUCTIONS](#) [REFERENCE LINKING](#)

You can select the View Proof links to quickly view the galley files.

You can click on the linked file names to download a copy of the galley file.

You can use the Order arrows to determine which galley appears first on the Table of Contents.

You can use the Edit link to revise the galley files.

You can use the Delete link to remove the galley files.

Note the Views column. This is a very important statistic that records the number of times readers have downloaded a copy of the galley file.

Proofreading

The Section Editor as Proofreader Process

Now that the galleys have been created and uploaded into OJS, the next step will be to proofread those files, to ensure that no errors exist before publication.

The journal has two options for the proofreading process. The Journal Manager can choose to have the Editor or Section Editor act as the Proofreader or allow the Editor or Section Editor to select a separate [Proofreader](#).

If you as the Section Editor are acting as Proofreader, follow these steps:

- First, request that the Author undertake the proofreading of the galley using the Request icon:

Figure 7.36. Proofreading

Proofreading

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	<input checked="" type="checkbox"/>	—	—	<input type="checkbox"/>
2. Proofreader	INITIATE	N/A	—	N/A
3. Layout Editor	INITIATE	N/A	—	N/A

Proofreading Corrections: [PROOFING INSTRUCTIONS](#)

- This will generate an email message for the author. Hit the Send button to deliver this email:

Figure 7.37. Send Email

Send Email

To: Fred Chan <fc@mailinator.com>
 CC: Sally Jones <sj@mailinator.com>
 BCC:

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

Attachments:

From: "Jane Smith" <stranack@gmail.com>
 Subject: [JOJS] Proofreading Request (Author)
 Body: Fred Chan:
 Your submission "A study of electronic publishing" to Journal of Open Journal Systems now needs to be proofread by following these steps.
 1. Click on the Submission URL below.
 2. Log into the journal and view PROOFING INSTRUCTIONS
 3. Click on VIEW PROOF in Layout and proof the galley in the one or more formats used.
 4. Enter corrections (typographical and format) in Proofreading Corrections.
 5. Save and email corrections to Layout Editor and Proofreader.
 6. Send the COMPLETE email to the editor.
 Submission URL: <http://journals3.stranack.ca/index.php/jojs/author/submission/1>

- Once the Author has completed her review, use the Acknowledge icon to thank her for her work. Use the Proofreading Corrections icon to view any comments made by the Author. You can optionally use the Initiate link to indicate that you have begun your proofreading responsibilities for this submission. Alternatively, you could simply revise the galleys and upload them in the Layout section using the Edit link for each galley.

Figure 7.38. Initiating Proofreading

Proofreading

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	<input type="checkbox"/> 2010-01-15	2010-01-15	2010-01-15	<input type="checkbox"/>
2. Proofreader	<input type="button" value="INITIATE"/>	N/A	—	N/A
3. Layout Editor	<input type="button" value="INITIATE"/>	N/A	—	N/A

Proofreading Corrections [PROOFING INSTRUCTIONS](#)

- Make any required changes to the galleys, and upload them as Layout Versions in the Layout section. Hit the Complete link when finished.

Figure 7.39. Completing Proofreading

Proofreading				
	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2010-01-15	2010-01-15	2010-01-15	2010-01-15
2. Proofreader	2010-01-15	N/A	COMPLETE	N/A
3. Layout Editor	INITIATE	N/A	—	N/A

Proofreading Corrections No Comments [PROOFING INSTRUCTIONS](#)

- As the final step, select the Initiate link to indicate that you have started the Layout Editor proofing (again, this is optional and may not be required for your journal's workflow).

Figure 7.40. Initiating Proofreading as Layout Editor

Proofreading				
	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2010-01-15	2010-01-15	2010-01-15	2010-01-15
2. Proofreader	2010-01-15	N/A	COMPLETE	N/A
3. Layout Editor	INITIATE	N/A	—	N/A

Proofreading Corrections No Comments [PROOFING INSTRUCTIONS](#)

- Download the corrected Layout Versions, make any final changes, upload as revised galleys, and hit the Complete link to indicate that you have finished your proofreading.

Figure 7.41. Completing Proofreading as Layout Editor

Proofreading				
	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2010-01-15	2010-01-15	2010-01-15	2010-01-15
2. Proofreader	2010-01-15	N/A	2010-01-15	N/A
3. Layout Editor	2010-01-15	N/A	COMPLETE	N/A

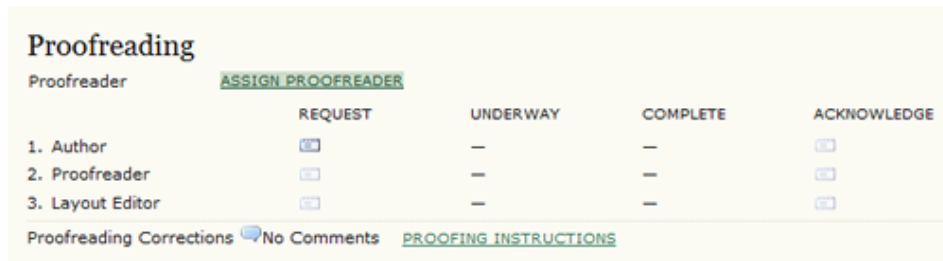
Proofreading Corrections No Comments [PROOFING INSTRUCTIONS](#)

- Repeat these editorial steps for each submission. Once you have scheduled all of the submissions to the issue, you can [Publish](#) the issue and make it available on your journal web site.

The Separate Proofreader Process

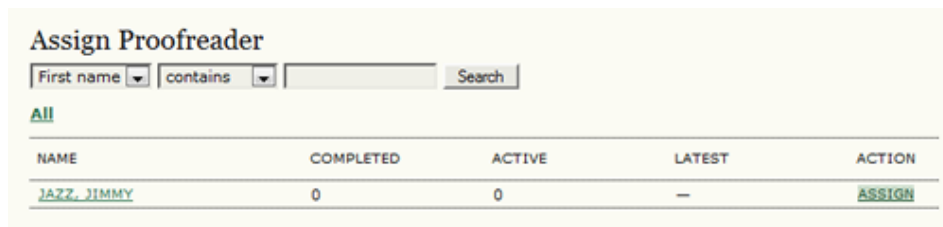
As the Section Editor, once you have been notified by the Layout Editor of the completion of the galleys, select a Proofreader.

Figure 7.42. Assigning a Proofreader



Select a Proofreader from the resulting list using the Assign link. If no Proofreaders are listed, contact the Journal Manager to [enroll someone](#) in this role.

Figure 7.43. Selecting from the Proofreader List



The Section Editor then sends the Request email to the Author to begin the Proofreading process using the Request icon.

Figure 7.44. Contacting the Author



This will generate an email message, which includes detailed instructions for the Author.

Figure 7.45. Email to Author for Proofreading

You and the Proofreader will receive an email from the Author when he has completed his proofreading. You can use the Acknowledge icon to thank him for his work.

Figure 7.46. Acknowledging the Author

Proofreader	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2010-01-22	2010-01-22	2010-01-22	
2. Proofreader	2010-01-22	—	—	
3. Layout Editor		—	—	

The Author, upon completing his review of the galley and Supplementary Files, if any, sends a completion email to the Proofreader, with a CC to the Section Editor. Any typos or formatting errors are noted in the Corrections text-box in Proofreading (because the Authors and Proofreaders cannot mark up the galley).

The Proofreader, on completing the review of the galley and Supplementary Files, if any, notifies the Layout Editor, with a CC to the Section Editor, and the Layout Editor proceeds to correct the galley and Supplementary Files, if any.

Finally, The Layout Editor will notify you that the submission is ready to be scheduled for publication. Use the Acknowledge icons to thank them for their work.

Figure 7.47. Final Proofreading Acknowledgment

Proofreading				
Proofreader	Jimmy Jazz ASSIGN PROOFREADER			
	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Author	2010-01-22	2010-01-22	2010-01-22	2010-01-22
2. Proofreader	2010-01-22	2010-01-22	2010-01-22	2010-01-22
3. Layout Editor	2010-01-22	2010-01-22	2010-01-22	
Proofreading Corrections	2010-01-22	PROOFING INSTRUCTIONS		

At this point, you may again wish to review the files, and if satisfied, schedule the submission for publication by choosing an issue under Scheduling, and pressing Record. The submission's galley files will then be available for readers when the issue is published.

Submission Archives

Submissions in this queue have been through the editorial process, whether they have been declined, scheduled to be published, or are published. This queue provides Editors and the assigned Section Editor complete access to the submission's editorial history (Summary, Submission, Review, Editing, and History).

Figure 7.48. Submission Archives

Home > User > Editor > Submissions > Archives

Archives

UNASSIGNED IN REVIEW IN EDITING **ARCHIVES**

Assigned To: In Section:

Title contains

Submitted between and

ID	SUBMITTED	SEC	AUTHORS	TITLE	STATUS
1052	2009-12-28	REV	Buhmeid	CLINICAL RESEARCH AND APPLICATION	Vol 1, No 2 (2006)
1053	2009-12-28	OART	Smith, Jones	HAEMATOLOGICAL DISORDERS AND STEM CELL TRANSPLANT	Archived DELETE

Submissions rejected from the submission [Summary](#) page can be deleted by clicking the Delete link next to their names; published material have their issue listed instead of a delete button.

To Restore an Archived Item to the Active List: the Editor should go to the Archives on the Editor Home page and find the submission. Clicking on the submission's title will lead to the Summary, Review, Editing and History pages for the submission. On the Summary page you will find a Restore to Active List link; clicking this will move the submission back into the In Review or In Editing list, depending on what stage the submission was at when it was archived.

Figure 7.49. Submission Status

Status

Status	Archived	RESTORE TO ACTIVE LIST
Initiated	2009-12-29	
Last modified	2009-12-29	
Reader Comments	Default	Change to <input type="text" value="Default"/> <input type="button" value="Record"/>

Chapter 8. Reviewers

Overview

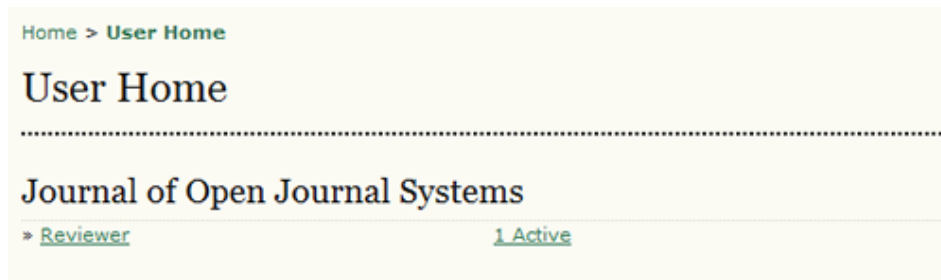
The Reviewer is invited by email to review a submission, which includes its title and abstract, as well as the journal's URL and a username and password for the Reviewer to use to enter the journal. The journal has the option of using a reviewer option that sends the submission as an email attachment to the Reviewer along with an invitation to review. In this case, the Reviewer then responds by email <link>. What is described here is the principal method for reviewing (and ensuring complete records of the process), which involves the Reviewer conducting the Review on the journal's web site.

Review Home Page

Submissions

On logging in to the journal, you will arrive at the User Home page.

Figure 8.1. Reviewer Home



To see the submissions you need to review, click the Reviewer link, or click the "x" Active link. Both will take you to your active Submissions page. This page lists the submissions which you have been invited to review or are currently in the process of reviewing. The Submissions queue also notes what round the review is, as some reviews may have entered a second round of reviewing, following the Section Editor's decision that the submission must be "resubmitted for review." This page also provides access to past reviews which the Reviewer has completed for the journal.

Clicking on the linked title will take you to the review process.

Figure 8.2. Active Submissions



Review

You will first see a summary of the submission details.

Figure 8.3. Review Assignment

Home > User > Reviewer > #1 > Review	
#1 Review	
.....	
Submission To Be Reviewed	
Title	A study of electronic publishing
Journal Section	Articles
Abstract	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Submission Editor	Sally Jones
Submission Metadata	VIEW METADATA

Next, you will see the review schedule, and the associated deadline.

Figure 8.4. Review Schedule

Review Schedule	
Editor's Request	2009-12-29
Your Response	—
Review Submitted	—
Review Due	2010-01-26

Next, the Review process is divided into six or seven steps (depending upon the Journal Setup).

Figure 8.5. Review Steps

Review Steps

1. Notify the submission's editor as to whether you will undertake the review.
Response **Accepted**
2. If you are going to do the review, consult Reviewer Guidelines below.
3. Click on file names to download and review (on screen or by printing) the files associated with this submission.
Submission Manuscript [1-2-1-RV.DOCX](#) 2009-12-28
Supplementary File(s) None
4. Declare whether or not you have competing interests with regard to this research (see [CI POLICY](#)).

No competing interests.

✂ 📄 📁 🖨 📖 | **B** *I* U | ☰ ☰ | 🔗 ⚙️ 🌐 HTML 🖨

Save
5. Click on icon to fill in the review form.
Review Form 💬
6. In addition, you can upload files for the editor and/or author to consult.
Uploaded files **None**
7. 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

1. You have first to indicate to the Section Editor whether they will undertake the review. The decision should be made after reviewing the submission's Abstract and perhaps looking at the submission, by clicking on the file name in Step 3 (depending on the journal's policies, the file may not be available before agreeing to review it).

If you are unable to do the review, click on Unable to do the review which leads to a standard email to the Section Editor.

If able to do the review, click on Will do the review, which leads to a standard email to the Section Editor, and which will indicate to Section Editor and Author that the review is underway.

2. Consult the Reviewer Guidelines, found at the bottom of the Review page. The Reviewer Guidelines have been prepared by the Editors of the journal to ensure that your review is as helpful as possible to them and the author.

Figure 8.6. Review Guidelines

Reviewer Guidelines

In reviewing an article for the Journal of Open Journal Systems, we are interested in your overall opinion of the article and any comments you might wish to pass on to the author to assist him or her in making the article publishable. The editor would appreciate at least one paragraph indicating why this paper makes a contribution to our knowledge of communication. If it does not, your frank and candid opinion of why not would be welcome.

In your review we request that you consider:

- a) the potential interest of this topic to our readers: would you read this piece?

3. The Author has uploaded the submission as a file, which you can download from the journal's web site to your computer by clicking on the file name. The Supplementary Files refer to materials the Author may have uploaded in addition to the submission, such as data sets, research instruments, or source texts.
4. (Optional): In some cases, the journal may require you to declare whether or not you have competing interests with the article being reviewed. If this is the case, this step becomes a form requesting a declaration of Competing Interests, and all following steps change their step number accordingly.
5. Click on the Review icon and is presented with two Review text-boxes where the Review can be either entered by hand or pasted: one for the Editor and Author, and one visible to the Editor only. The Reviewer may enter or paste partial reviews into these boxes and click the Save button at the bottom of the form to return and make changes later. The Reviewer may return to make such changes until a recommendation on the main Review pages is chosen, at which time the Review process is complete.

Please note: the Journal manager, in conjunction with the journal's Editor(s), may have created an extended custom review form to be filled out here. More information on the custom form should be found in the Reviewer's Guidelines. The form can be returned to and edited until a recommendation has been chosen.

Figure 8.7. Review Form Response

Home > User > Reviewer > #1 > Review Form Response

Review Form Response

Articles Form

This review form is to be used for all submissions to the Articles section.

Rate the clarity of the writing style. *

Very Good
 Good
 Average
 Below Average
 Poor

* Denotes required field

6. You also have the option, in addition to entering a review, of uploading files for the Section Editor and/or the Author to see. These files may be an annotated version of the submission or some relevant data or other materials that will assist Editor and/or Author. It will be at the Editor's discretion whether these files are shown to the Author, but you can certainly comment on this in the Review (Step 5).
7. You must select a Recommendation for the submission from among the following options: Accept, Revisions Required, Resubmit for Review, Resubmit Elsewhere, Decline Submission, See Comments. When you click Submit Review to the Editor, it leads to a prepared email to the Section Editor, and makes your recommendation, saved Review (which is now locked) and any uploaded files available to the Editor.

Chapter 9. Copyeditors

Overview

The Copyeditor receives an email request from the Section Editor to copyedit a submission, which will then appear in the Copyeditor's Submissions queue. A Copyeditor who is unable to do the copyediting simply responds by email to the Section Editor.

Copyeditor Pages

Copyeditor Home Page

After logging in, clicking on the Copyeditor link in the User Home page (or on the linked number of items) will lead to the Submissions queue.

Figure 9.1. Copyeditor User Home Page

» Section Editor	1 In Review 0 In Editing
» Layout Editor	0 In Editing
» Copyeditor	1 In Editing
» Proofreader	0 In Editing

This queue lists the submissions to be copyedited. To access the Copyediting page for a particular submission, click on the linked title.

Figure 9.2. Copyeditor List

Active Submissions						
ACTIVE		ARCHIVE				
ID	MM-DD ASSIGN	SEC	AUTHORS	TITLE	STATUS	
85	01-22	ART	Chan	CLINICAL RESEARCH AND APPLICATION	Step 1	

1 - 1 of 1 Items

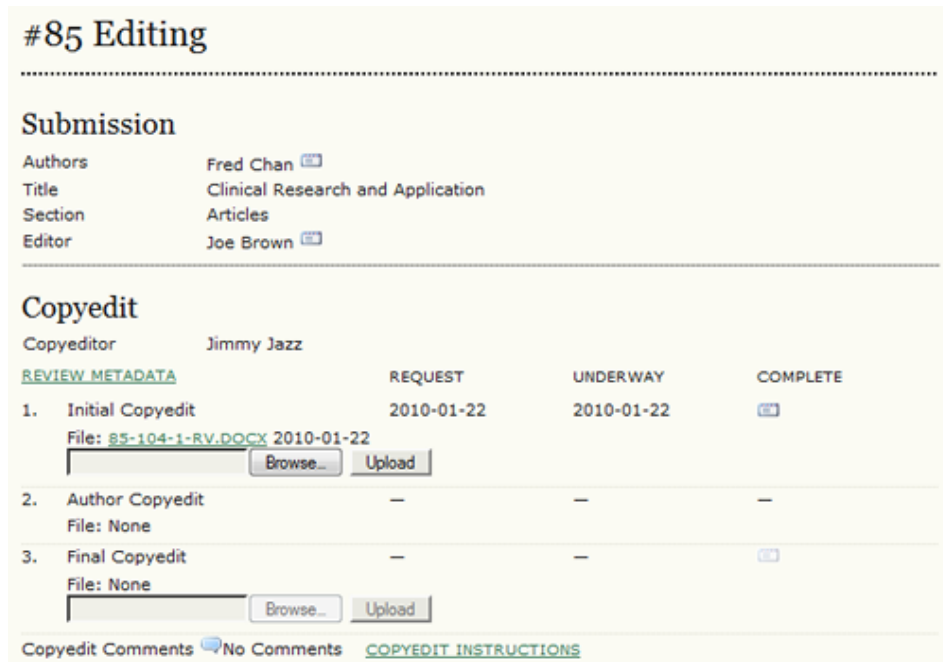
On the resulting submission record screen, you can see some of the details (Authors, Title, Section, Editor). Below that is the Copyedit section, where you can begin working with the submission.

Use the Review Metadata link to see more information about the submission (abstract, keywords, etc.).

To access the file, click on the linked file name in step 1 (e.g., 85-104-1-RV.DOCX). Open the document in your word processor, make the required changes, and upload your revised version using the Upload tool.

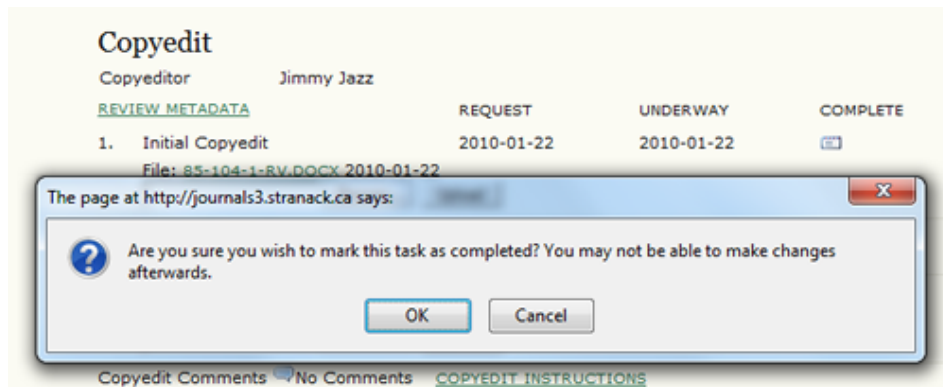
Use the Complete icon to notify the Section Editor that you have completed your work.

Figure 9.3. Copyeditor View of Submission Record



A popup window will appear asking you to confirm that you wish to mark Step 1 as completed.

Figure 9.4. Confirm Copyediting Completion



An email message will be generated, informing both the Author and the Section Editor that the first step of copyediting is complete.

Figure 9.5. Sending Completion Email

Send Email

To: Fred Chan <fc@mailinator.com>

CC: Joe Brown <jbrown@mailinator.com>

BCC:

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

Attachments:

From: "Jimmy Jazz" <jjazz@mailinator.com>

Subject: [] Copyediting Completed

Body:

Fred Chan:

We have now copyedited your submission "Clinical Research and Application" for Demo Journal. To review the proposed changes and respond to Author Queries, please follow these steps:

1. Log into the journal using URL below with your username and password (use Forgot link if needed).
2. Click on the file at 1. Initial Copyedit File to download and open copyedited version.
3. Review the copyediting, making changes using Track Changes in Word, and answer queries.
4. Save file to desktop and upload it in 2. Author Copyedit.
5. Click the email icon under COMPLETE and send email to the editor.

You must now wait for the Author to complete his copyedits. Once it is ready, you will receive an email notification, and be able to download the revised submission (e.g., 87-112-1-CE.DOCX), located in Step 2: Author Copyedit. Be sure to check the Copyedit Comments, located just under the file upload tool for any additional information the Author or the Section Editor may have noted.

Figure 9.6. Download Author Copyedits

Copyedit

Copyeditor: Jimmy Jazz

	REQUEST	UNDERWAY	COMPLETE
1. Initial Copyedit	2010-01-22	2010-01-22	<input type="checkbox"/> 2010-01-22
File: 87-110-3-CE.DOCX 2010-01-22			
2. Author Copyedit	2010-01-22	2010-01-22	2010-01-22
File: 87-112-1-CE.DOCX 2010-01-22			
3. Final Copyedit	2010-01-22	2010-01-22	<input checked="" type="checkbox"/>
File: None			

Copyedit Comments [COPYEDIT INSTRUCTIONS](#)

The next step will be to open the Author's revised file in your word processor, make any required changes, and upload these in Step 3 using the file upload tool.

Figure 9.7. Final CopyeditUpload



The screenshot shows a web interface for a submission. At the top, it displays '3. Final Copyedit' with two dates, '2010-01-22', and a 'Complete' icon. Below this, it says 'File: None' and shows a text input field containing 'C:\Users\Kevin\Desktop'. To the right of the input field are 'Browse...' and 'Upload' buttons. At the bottom of the interface, there is a 'Copyedit Comments' section with a speech bubble icon, the text 'No Comments', and a link for 'COPYEDIT INSTRUCTIONS'.

Use the Complete icon to notify the Section Editor that you have completed the copyediting of the submission. This will send a notification email and be the end of your responsibilities for this submission.

Chapter 10. Layout Editors

Overview

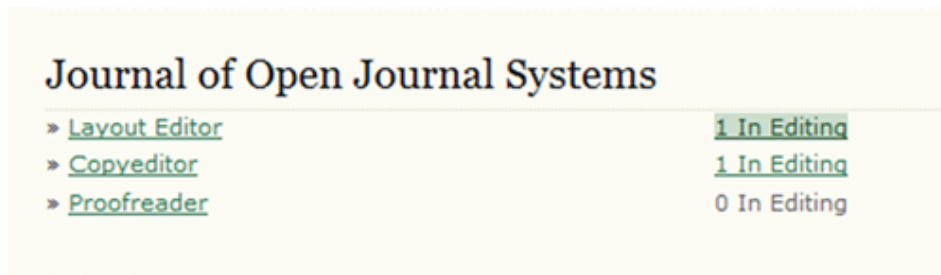
The Layout Editor receives an email request from the Copyeditor or the Section Editor requesting the layout of a submission that has completed the copyedit stage. A Layout Editor who is unable to do the Layout simply responds by email to the Section Editor.

Layout Editor Pages

Layout Editor Home Page

Upon logging in, you will have access to your User Home Page. This page includes a link to your Active Submissions page, as well an Archives link to view previously completed submissions. Clicking on the Active link from the User Home page will take the Layout Editor to the Active Submissions page.

Figure 10.1. Layout Editor Home Page



Select the submission from the resulting list by clicking on its linked title.

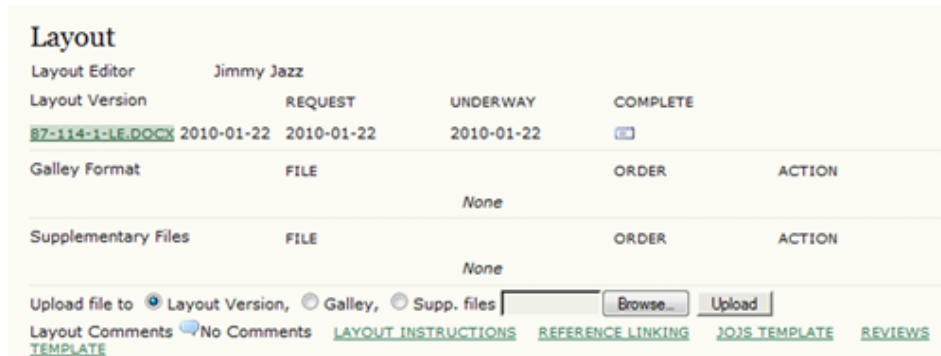
Figure 10.2. Layout Editor's Active Submissions



Layout

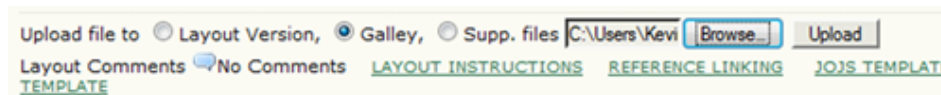
On the resulting page, you will see the Layout Version of the submission, which has been prepared by the Copyeditor to the journal's standards. Click on the linked file name (e.g., 87-114-1-LE.DOCX) to download a copy of the file. You will need to use third party-software to prepare the galley files (e.g., HTML using Dreamweaver or PDF using Adobe Acrobat, Microsoft Word or Open Office). The Journal Manager had made a set of Layout and Reference Linking instructions and Templates available to assist you in properly formatting the files for publication.

Figure 10.3. Layout Editing



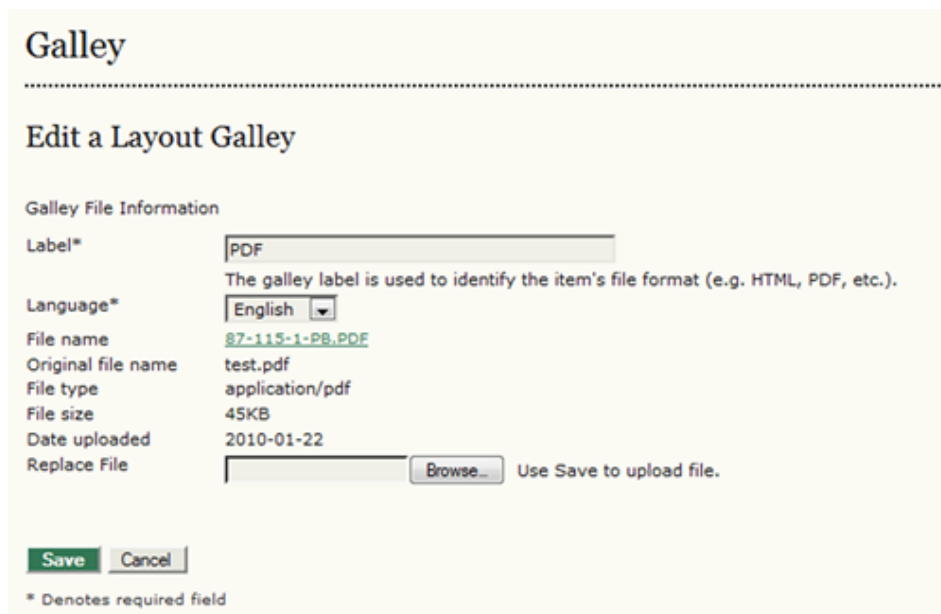
Once you have created the HTML or PDF files, upload them as galleys using the file upload tool.

Figure 10.4. Uploading Galley Files



OJS will identify the file type based on its suffix (e.g., PDF, HTML), as well as provide information on the file size, language (if your journal is multilingual), original file name, etc. The label is added automatically, and will appear as such on the journal's Table of Contents in association with the item published. You also have the option of manually labelling the file.

Figure 10.5. PDF Galley Details



When uploading an HTML galley, the Edit screen provides additional information, including the option to upload a stylesheet (unique to the submission) or images.

Figure 10.6. HTML Galley Details

Galley

Edit a Layout Galley

Galley File Information

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

Language*

File name [87-116-1-PB.HTML](#)

Original file name test.html

File type text/html

File size 384B

Date uploaded 2010-01-22

Replace File Use Save to upload file.

HTML Galley Files

Stylesheet File

No stylesheet file has been added to this galley.

Upload Use Save to upload file.

Images

FILE NAME	ORIGINAL FILE NAME	FILE SIZE	DATE UPLOADED	ACTION
No images				

* Denotes required field

You can upload more than one Galley Format file, delete files that have been uploaded, and edit information such as the file name.

Figure 10.7. Multiple Galley Files

Layout

Layout Editor Jimmy Jazz

Layout Version	REQUEST	UNDERWAY	COMPLETE
87-114-1-LE.DOCX	2010-01-22	2010-01-22	2010-01-22 <input type="button" value="X"/>

Galley Format	FILE	ORDER	ACTION
1. PDF VIEW PROOF	87-115-1-PB.PDF 2010-01-22	↑ ↓	EDIT DELETE
2. HTML VIEW PROOF	87-116-1-PB.HTML 2010-01-22	↑ ↓	EDIT DELETE

Supplementary Files

FILE	ORDER	ACTION
None		

Upload file to Layout Version, Galley, Supp. files

[Layout Comments](#) [LAYOUT INSTRUCTIONS](#) [REFERENCE LINKING](#) [JOJS TEMPLATE](#) [REVIEWS](#)

If the Author has uploaded any Supplementary Files, they will already be in place. They will be published in the journal in their original file format by default, unless the journal has a special policy with regard to their preparation (as with Figures or illustrations). Even if the policy is to publish them in their original format, you may still wish

to consult the files to ensure that they are legible and to see whether they can be readily made to further conform to journal style and standards.

When you have completed uploading the galley files, use the Complete icon to generate an email message to the Section Editor.

Figure 10.8. Send Email

Send Email

To: Sally Jones <sj@mailinator.com>

CC:

BCC:

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

Attachments:

From: "Jimmy Jazz" <jjazz@mailinator.com>

Subject: [JOJS] Galleys Complete

Body:

Sally Jones:

Galleys have now been prepared for the manuscript, "Clinical Research and Application," for Journal of Open Journal Systems and are ready for proofreading.

If you have any questions, please contact me.

Jimmy Jazz

You have now completed the first phase of layout editing and must now wait for the Author and Proofreader to make any necessary changes.

Proofreading

The Author and Proofreader will proof the galley files in their various formats for typographical and formatting errors. They will record the corrections needed in the Corrections text-box, following the Proofreading Instructions. Once the Proofreader emails you that the proofing is complete, you will need to log back into the system and return to the submission record. Use the Proofreading Corrections icon to see the comments made by the Author and Proofreader.

Figure 10.9. Proofreading

Proofreading		REQUEST	UNDERWAY	COMPLETE
Proofreader Jimmy Jazz				
REVIEW METADATA				
1.	Author Comments	2010-01-22	2010-01-22	2010-01-22
2.	Proofreader Comments	2010-01-22	2010-01-22	<input type="checkbox"/>
3.	Layout Editor Final	—	—	—
Proofreading Corrections 2010-01-22		PROOFING INSTRUCTIONS		

This will produce a window with the required corrections.

Figure 10.10. Corrections

Corrections

Author
2010-01-22 02:34 PM

Subject: Clinical Research and Application

In the PDF galley, a period is missing at the end of line 6 in paragraph 3 on page 5.

Proofreader
2010-01-22 02:41 PM

Subject: Clinical Research and Application [EDIT](#) [DELETE](#)

In the HTML galley, a semi-colon is missing in sentence 4 in paragraph 8 on page 12.

Subject
Clinical Research and Application

Comments*

Apply these changes to the galley files, upload them again to the Layout section. On completing this task, you may wish to add comments to the Corrections text-box (e.g. explaining a change), before clicking on the email icon under Complete which will generate an email notifying the Section Editor that the submission is ready to be scheduled for publication.

Figure 10.11. Send Email

The screenshot shows a 'Send Email' form with the following fields and content:

- To:** Sally Jones <sj@mailinator.com>
- CC:** (empty)
- BCC:** (empty)
- Buttons:** Add Recipient, Add CC, Add BCC
- Checkbox:** Send a copy of this message to my address (jjazz@mailinator.com)
- Attachments:** (empty) with Browse... and Upload buttons
- From:** "Jimmy Jazz" <jjazz@mailinator.com>
- Subject:** [JOJS] Proofreading Completed (Layout Editor)
- Body:**

Sally Jones:

The galleys have now been corrected, following their proofreading, for the manuscript, "Clinical Research and Application," for Journal of Open Journal Systems. This piece is now ready to publish.

Jimmy Jazz
- Buttons:** Send, Cancel, Skip Email

You have now completed your layout editing responsibilities.

Chapter 11. Proofreaders

Overview

The Proofreader will receive an email from the Section Editor requesting that the Proofreader complete a round, or rounds, of proofreading. It is then the Proofreader's duty to accept or deny the responsibility; if accepted, the Proofreader can then log in and begin the proofreading process from their User Home.

Proofreader Pages

Proofreader User Home

Upon logging in, clicking on the Proofreader link on your User Home page leads to your Active Submissions page, listing submissions requiring proofreading. You can also access past submissions under the Active link. To access the submission's proofreading page, click on the article title.

Figure 11.1. Active Submissions

Active Submissions						
ACTIVE		ARCHIVE				
ID	MM-DD ASSIGN	SEC	AUTHORS	TITLE		STATUS
87	01-22	ART	Chan	CLINICAL RESEARCH AND APPLICATION		Post-Author

1 - 1 of 1 Items

Proofreading

From here, you can review the submission metadata (using the Review Metadata link) and the galley files (under Layout), and also see the Proofreading Corrections identified by the Author by clicking the Proofreading Corrections icon.

Figure 11.2. Proofreading

Layout

Layout Editor Jimmy Jazz

Galley Format FILE

1.	PDF	VIEW PROOF	87-115-1-PB.PDF	2010-01-22
2.	HTML	VIEW PROOF	87-116-1-PB.HTML	2010-01-22

Supplementary Files FILE

None

Layout Comments No Comments

Proofreading

Proofreader Jimmy Jazz

[REVIEW METADATA](#)

		REQUEST	UNDERWAY	COMPLETE
1.	Author Comments	2010-01-22	2010-01-22	2010-01-22
2.	Proofreader Comments	2010-01-22	2010-01-22	
3.	Layout Editor Final	—	—	—

Proofreading Corrections 2010-01-22 [PROOFING INSTRUCTIONS](#)

Clicking this link will open a comment box, where you can see the Author's comments and add your own. These comments will be available to the Section Editor and the Layout Editor, allowing them to make any final corrections before publication.

Figure 11.3. Corrections

Corrections

Author
2010-01-22 02:34 PM

Subject: Clinical Research and Application

In the PDF galley, a period is missing at the end of line 6 in paragraph 3 on page 5.

Proofreader
2010-01-22 02:41 PM

Subject: Clinical Research and Application [EDIT](#) [DELETE](#)

In the HTML galley, a semi-colon is missing in sentence 4 in paragraph 8 on page 12.

Subject

Comments*

[Save](#) [Save and email](#) [Close](#)

Using the Save button will save your comments and return you to the submission page. Use the Complete icon to inform the Layout Editor and Section Editor that you have completed your work. You are now finished with the submission.

Chapter 12. Readers

Overview

Readers include subscribers for journals for which access is subscription-based, and readers who choose 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 which includes the Table of Contents from the journal.

Reader Pages

Accessing Content

For open access journals using OJS, accessing content is as simple as selecting the Current link to see the latest issue, or the Archives link to see the previous issues.

Figure 12.1. Current Issue



Subscribing

If access to content requires a subscription, you will need to first register for a Reader account with the OJS journal. See the section on [payments](#) and [subscriptions](#) for more subscription information.

Signing up for notification

If you would like to receive an automatic email message alerting you to new content from an OJS journal, you can often register for a Reader account, and check the box for notification:

Figure 12.2. Reader Notification



Reading Tools

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

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

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

Figure 12.3. 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 create a much more interactive reading environment. The Tools are also designed to take the first two keywords from the submission

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 Management section](#) regarding Reading Tools for details.)

Part III. System Administration

The following instructions will demonstrate how to install OJS; how to make backups and restore from them; and how to upgrade to a new version of OJS. These instructions apply to typical Linux/Unix environments but will be substantially similar for Windows. The system requirements [listed below](#) must be met before beginning the installation process.

If you have any issues with these processes, you should take a look at the detailed install instructions found in `docs/INSTALL` in the OJS installation package. You may also want to take a look at the [online FAQ](#), and then follow up on the [support forum](#).

Instructions and how-to's involving different environments may be found on the [support forum](#) or on the [development wiki](#).

Chapter 13. Installation

Minimum and Preferred Requirements

Minimum System Requirements

- [PHP](#) >= 4.2.x (including PHP 5.x); Microsoft IIS requires PHP 5.x
- [MySQL](#) >= 3.23.23 (including MySQL 4.x and 5.x) or [PostgreSQL](#) >= 7.1 (including PostgreSQL 8.x)
- [Apache](#) >= 1.3.2x or >= 2.0.4x or [Microsoft IIS](#) 6
- Operating system: Any OS that supports the above software, including Linux, BSD, Solaris, Mac OS X, Windows

Recommended Server Configuration

- PHP 5.x with [iconv](#), [mbstring](#), [libgd](#), and [libfreetype](#) support
- MySQL 5.x with data storage and connection using [UTF8](#)
- *NIX-like OS (Linux, BSD, Mac OS X)
- Apache web server configured with PHP via [FastCGI](#)

We also recommend that you have [SSH](#) access to your server, as you will find SSH access mandatory for some advanced tasks, and helpful overall.

Components of an Installation

- Installation path containing OJS (typically 10-20MB)
- Files path, as configured in `config.inc.php` using the `files_dir` directive; size varies depending on the documents being managed (e.g. file format, design complexity, number of rounds of review, etc.)
- MySQL database, as configured in `config.inc.php` in the `[database]` section; size varies from tens of megabytes for small journals to hundreds for large journals or large collections
- OJS contains several third-party open source libraries, including:
 - [ADODB](#)
 - [Smarty](#)
 - [TinyMCE](#)

The Install Process

There are a number of components to a successful OJS install: downloading and unpacking the OJS application files in a web accessible directory on your server; creating a separate `files/` directory that is not web accessible; and most likely, manually creating a database user and database.

Note

All servers are different, and the installation process in your case may be different than what follows. If any of this confuses you or for some reason does not work, be sure to check the documentation that comes with OJS in the `docs/` folder, as well as the [support forum](#) and [FAQ](#). But also be sure to read your service provider and server documentation as well.

Download and unpack the OJS installation from the PKP website

All OJS downloads can be found at http://pkp.sfu.ca/ojs_download. Depending on your circumstances you will want to download either the most recent stable version (best for production systems) or the most recent development version (less stable but with more features). The install process is the same for both versions. In this example, we will use the development version, `ojs-2.3.1-2.tar.gz`.

Unpack the [tar file](#), and move the unpacked contents to a web-accessible directory on your web server from which you want OJS to run. A common web-accessible directory is `/var/www/html`, which we will use for this example.

Note

Regarding web accessible directories: each server is different. If you do not know where your web-accessible directory is (that is, the directory where you put everything that you want people to see on your website; sometimes called a web root directory), you should contact your service provider.

If you did not download the tar file directly to your web server, you can untar the tar file on your desktop and transfer its contents by FTP, or you can transfer the tar file by FTP to your web server directly and run the following command:

```
tar xzf ./ojs-2.3.1-2.tar.gz
```

This will extract the OJS files into the directory `/var/www/html/ojs-2.3.1-2`. You may want to change the name of the directory to something more user friendly, such as "ojs". At this point, you should be able to go to that directory on your server, (ie. point your browser to <http://example.com/ojs/>) and see the install screen.

Figure 13.1. OJS Install Screen

OJS Installation

OJS Version 2.3.1.2

Thank you for downloading the Public Knowledge Project's **Open Journal Systems**. Before proceeding, please read the [README](#) file included with this software. For more information about the Public Knowledge Project and its software projects, please visit the [PKP web site](#). If you have bug reports or technical support inquiries about Open Journal Systems, see the [support forum](#) or visit PKP's online [bug reporting system](#). Although the support forum is the preferred method of contact, you can also email the team at pkp.contact@gmail.com.

Upgrade

If you are upgrading an existing installation of OJS 2.x, [click here](#) to proceed.

Recommended system requirements

- [PHP](#) >= 4.2.0 (including PHP 5.x); you are currently using PHP 5.3.1
- [MySQL](#) >= 3.23.23 (including MySQL 4.x) or [PostgreSQL](#) >= 7.1 (including PostgreSQL 8.x)
- [Apache](#) >= 1.3.2x or >= 2.0.4x or Microsoft IIS 6
- Operating system: Any OS that supports the above software, including [Linux](#), [BSD](#), [Solaris](#), [Mac OS X](#), [Windows](#)

As PKP does not have the resources to test every possible combination of software versions and platforms, no guarantee of correct operation or support is implied.

Changes to these settings can be made after installation by editing the file `config.inc.php` in the base OJS directory, or using the site administration web interface.

Supported database systems

OJS has currently only been tested on MySQL and PostgreSQL, although other database management systems supported by [ADODB](#) may work (in full or partially). Compatibility reports and/or code patches for alternative DBMSs can be sent to the OJS team.

Prepare Your Environment for the Install

You will need to create a directory for OJS to store its submission files in. This should not be in a web-accessible directory, as then it would be possible for private files to be accessed online (eg. by savvy users attempting to point directly to the file in question by typing `http://www.example.com/files/journals/1/articles/1/submission/review/1-3-1-RV.doc` into their browser). If, for example, you have placed the OJS application files in `/var/www/html/ojs/`, you will have to create this directory outside of `/var/www/`.

You will then need to grant file permissions so that the web server can administer and write to the `public/` and `cache/` subdirectories of the OJS installation path, the `files/` directory you just created, and the `config.inc.php` configuration file. The specifics of setting permissions will depend on your web server configuration, i.e. whether PHP scripts run SetUID. The install page will warn you if you don't have the appropriate permissions.

Figure 13.2. OJS Install: Insufficient Permissions

Pre-Installation Steps

1. The following files and directories (and their contents) must be made writable:

- `config.inc.php` is writable (optional): **NO**
- `public/` is writable: Yes
- `cache/` is writable: Yes
- `cache/t_cache/` is writable: **NO**
- `cache/t_compile/` is writable: Yes
- `cache/_db` is writable: Yes

In the above example, `config.inc.php` isn't writable by the server (which is not strictly necessary for normal functioning, although it is for automatic installation), and neither is the `cache/t_cache/` directory. Remember, all directories within `cache/` must be writable by the server.

Configure Your Database Information

You will need to create a database for the system to use, and also ensure that you have a database user that has sufficient permissions to operate the database. OJS can conceivably run on many different types of [RDBMS](#), although only PostgreSQL and MySQL are actively tested.

For MySQL, you can create the database and user via phpMyAdmin or the MySQL command line interface. A CLI example follows:

```
$ mysql -u root -p
Enter password:

Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 95
Server version: 5.1.38 MySQL Community Server (GPL)

Type 'help;' or '\h' for help. Type '\c' to clear the current input statement.

mysql> CREATE DATABASE ojs DEFAULT CHARACTER SET utf8;
Query OK, 1 row affected (0.13 sec)

mysql> GRANT ALL ON ojs.* TO pkpuser@localhost IDENTIFIED BY 'password';
Query OK, 0 rows affected (0.15 sec)

mysql> exit;
Bye
```

In this example, the database is called `ojs`; the database user is called `pkpuser`; and the password is `password` (certainly not secure!). You will need those three pieces of information later.

Complete the Install from the Web

Point your web browser to your OJS installation directory. You will see an OJS Installation installation page: fill in all of the form fields (including the database connection information you established previously; and under File Settings, the location of the `files` path you previously created) and click the Install button at the bottom of the page.

You must configure your site's locale settings: not only the locales available for your users, but also character set options. If possible, change the last two from the default (shown) to "Unicode (UTF-8)". Unless your database server

is particularly old, you should not run into any problems setting these options to Unicode. This will ensure better multilingual support.

Figure 13.3. OJS Install: Locale Settings

Client character set	<input type="text" value="Unicode (UTF-8)"/> <p>The encoding to use for data sent to and received from browsers.</p>
Connection character set	<input type="text" value="Unicode (UTF-8)"/> <p>The encoding to use for data sent to and received from the database. This should be the same as the client character set. Note that this capability is only supported with MySQL >= 4.1.1 or PostgreSQL >= 7.1. Select "Not applicable" if your database server does not meet these requirements.</p>
Database character set	<input type="text" value="Unicode (UTF-8)"/> <p>The encoding to use for data stored in the database. Note that this capability is only supported with MySQL >= 4.1.1 or PostgreSQL >= 7.1. Select "Not applicable" if your database server does not meet these requirements.</p>

You must then specify the location of the `files/` directory you previously created.

Figure 13.4. OJS Install: File Settings

File Settings

Directory for uploads

Enter full pathname to an existing directory where uploaded files are to be kept. This directory should not be directly web-accessible. **Please ensure that this directory exists and is writable prior to installation.** Windows path names should use forward slashes, e.g. "C:/myjournal/files".

Do not create required subdirectories (only useful for a manual installation)

Next, choose your security settings. This configuration option specifies how system passwords are stored. SHA1 is more secure than MD5, so if your PHP version is 4.3.0 or above, choose the SHA1 option.

Figure 13.5. OJS Install: Security Settings

Security Settings

Password encryption algorithm

SHA1 is recommended if your system supports it (requires PHP >= 4.3.0).

You must then specify a username, password and email for the Administrator Account. After a successful install, you will use this account to log in and configure new journals; but typically, this account will not be used for the day-to-day running of a journal.

Figure 13.6. OJS Install: Administrator Account

Administrator Account

This user account will become the site administrator and have complete access to the system. Additional user accounts can be created after installation.

Username	<input type="text" value="admin"/>
Password	<input type="password" value="....."/>
Repeat password	<input type="password" value="....."/>
Email	<input type="text" value="admin@example.com"/>

Next is the Database Settings section. You must fill in the proper database connection settings: choose the correct database driver for your system; specify the correct host (normally `localhost`, but this could be different depending on your setup); the username and password of the database user; and the database name that they will be connecting to. If you have not yet created the database, then ensure that the "Create new database" checkbox remains checked; however, this option will not work if your database user does not have sufficient permissions to create databases, in which case you should create the database beforehand.

Figure 13.7. OJS Install: Database Settings

Database Settings

OJS requires access to a SQL database to store its data. See the system requirements above for a list of supported databases. In the fields below, provide the settings to be used to connect to the database.

Database driver	<input type="text" value="MySQL"/>
<p>Database drivers listed in brackets do not appear to have the required PHP extension loaded and installation will likely fail if selected.</p> <p>Any unsupported database drivers listed above are listed solely for academic purposes and are unlikely to work.</p>	
Host	<input type="text" value="localhost"/>
<p>Leave the hostname blank to connect using domain sockets instead of over TCP/IP. This is not necessary with MySQL, which will automatically use sockets if "localhost" is entered, but is required with some other database servers such as PostgreSQL.</p>	
Username	<input type="text" value="pkpuser"/>
Password	<input type="password" value="password"/>
Database name	<input type="text" value="ojs"/>
<input checked="" type="checkbox"/> Create new database	
<p>To use this option your database system must support remote database creation and your user account must have the appropriate permissions to create new databases. If installation fails with this option selected, manually create the database on your server and run the installer again with this option disabled.</p>	

Then choose an appropriate OAI repository identifier (the default may be sufficient), and choose the Install Open Journal Systems option if your database user can write directly to the database; or Manual Install if you need to populate the database manually.

Figure 13.8. OJS Install: Finalizing Installation

Miscellaneous Settings

OAI repository identifier

A unique identifier used to identify metadata records indexed from this site using the [Open Archives Initiative](#) Protocol for Metadata Harvesting.

[Install Open Journal Systems](#) [Manual Install](#)

If all goes well, you will then see a success screen.

Figure 13.9. OJS Install: Success

OJS Installation

Installation of OJS has completed successfully.

To begin using the system, [login](#) with the username and password entered on the previous page.

If you wish to receive news and updates, you can:

1. [Register](#) your journal, conference, or harvester and receive updates on software upgrades, security patches, and more.
2. Join our [discussion list](#) for OJS, OCS, the Harvester, Lemon8-XML, OMP, or all of the above.
3. Subscribe to the [PKP blog RSS feed](#).

If you have questions or comments, please visit the [support forum](#).

If your `config.inc.php` file wasn't writable by the server, you will be prompted to copy the contents of a text field and paste it to the default `config.inc.php` file on the server.

Figure 13.11. OJS Install: Manual Installation

Manual installation

The SQL statements to create the OJS database schema and initial data are displayed below. Note that the system will be unusable until these statements have been executed manually. You will also have to manually configure the `config.inc.php` configuration file.

SQL statements for installation:

```
CREATE DATABASE ojs| DEFAULT CHARACTER SET utf8;

CREATE TABLE versions (
  major          INTEGER NOT NULL DEFAULT 0,
  minor          INTEGER NOT NULL DEFAULT 0,
  revision       INTEGER NOT NULL DEFAULT 0,
  build          INTEGER NOT NULL DEFAULT 0,
  date_installed DATETIME NOT NULL,
  current        TINYINT NOT NULL DEFAULT 0,
  product_type   VARCHAR(30),
  product        VARCHAR(30),
  product_class_name VARCHAR(80),
  lazy_load      TINYINT NOT NULL DEFAULT 0
);

CREATE TABLE site (
  redirect          BIGINT NOT NULL DEFAULT 0,
  primary_locale    VARCHAR(5) NOT NULL,
  min_password_length TINYINT NOT NULL DEFAULT 6,
```

Chapter 14. Backing up and Restoring

Making Backups of Your System

A full back up of an OJS or OCS installation should include three components: the OJS system files; the `files/` directory you created on installation; and the database. There are many ways to make backups of these three components. Depending on the tools at your disposal you may be able to make backups entirely over the web via an administrative interface such as CPanel; or you may have to make backups via the command line. The following section demonstrates one way to back up files via the command line.

Note

All servers are different, and the backup process in your case may be different than what follows. If any of this confuses you or for some reason does not work, be sure to check the documentation that comes with OJS in the `docs/` folder, as well as the [support forum](#) and [FAQ](#). But also be sure to read your service provider and server documentation as well.

Backing up the OJS System Files

To find your system files, look for the `config.inc.php` configuration file; this will be in the directory where you originally installed OJS. Back up all files in this directory and all subdirectories. Assuming OJS is installed in `/var/www/html/ojs` and the backup should be placed in `/root`, the following example will compress the OJS system files to a file in `/root/` called `ojs-install.tar.gz`:

```
$ cd /var/www/html/ojs
$ tar czf /root/ojs-install.tar.gz *
```

Backing up the Database

You will need to know the database name, username, and password; these can be found in the database section of your `config.inc.php` configuration file:

```
[database]

driver = mysql
host = localhost
username = pkpuser
password = password
name = ojs
```

Back up the database using the `mysqldump` tool, e.g. if the backup should be placed in `/root/`:

```
$ mysqldump -u pkpuser -p password | gzip -9 > /root/ojs-database.sql.gz
```

Of course, phpMyAdmin or other tools could be used to back up the database.

Backing up the `files/` Directory

To find where the `files/` directory is, look at the `files_dir` parameter in the `config.inc.php` configuration file:

```
[files]
; Complete path to directory to store uploaded files
; (This directory should not be directly web-accessible)
; Windows users should use forward slashes
files_dir = /usr/local/ojs-files
```

Back up this directory and all of its contents, e.g. if the backup should be placed in `/root/`:

```
$ cd /usr/local/ojs-files/
$ tar czf /root/ojs-files.tar.gz
```

When these steps have been completed, you will have created three backup files, which can be found in `/root`. All three of these are required to restore a copy of OJS from backup.

Restoring Your System From Backup

This section gives a brief overview of how a system could be restored from the backups made in the previous section. This is only one way to restore a system: there are plenty of other ways, depending on the tools you have at your disposal, and just as important, on the way you backed the system up.

Note

All servers are different, and the restore process in your case may be different than what follows. If any of this confuses you or for some reason does not work, be sure to check the documentation that comes with OJS in the `docs/` folder, as well as the [support forum](#) and [FAQ](#). But also be sure to read your service provider and server documentation as well.

Restoring Files

To restore from backup, unpack the files and installation backups into their appropriate places:

```
$ cd /var/www/html
$ mkdir ojs
$ cd ojs
$ tar xzf /root/ojs-install.tar.gz
$ cd /usr/local
$ mkdir ojs-files
$ cd ojs-files
$ tar xzf /root/ojs-files.tar.gz
```

Restoring the Database

Re-create the MySQL database (dropping it first if necessary):

```
$ mysql -u root -p
Enter password:

Welcome to the MySQL monitor.  Commands end with ; or \g.
Your MySQL connection id is 103
Server version: 5.1.38 MySQL Community Server (GPL)

Type 'help;' or '\h' for help. Type '\c' to clear the current input statement.

mysql> DROP DATABASE ojs;
Query OK, 0 rows affected (0.23 sec)
```

```
mysql> CREATE DATABASE ojs DEFAULT CHARACTER SET utf8;
Query OK, 1 row affected (0.00 sec)

mysql> GRANT ALL ON ojs.* TO pkpuser@localhost IDENTIFIED BY 'password';
Query OK, 0 rows affected (0.01 sec)

mysql>
```

Load the database dump into the newly created database:

```
$ zcat /root/ojs-database.sql.gz | mysql -u pkpuser -p ojs23
```


Chapter 15. Upgrading and Migrating

Comprehensive upgrade instructions can be found in `docs/UPGRADE`. As with any major administration task, it is strongly suggested that you back up your complete installation before beginning. Upgrading is a two-step process:

1. The code must first be upgraded. This will involve downloading a new copy of OJS, or downloading and installing a patch file. Both the full OJS package and the relevant patch file are available from http://pkp.sfu.ca/ojs_download.
2. The database must be upgraded. This can be done using the `tools/upgrade.php` script.

See `docs/UPGRADE` for complete instructions.

If the installation has been customized in any way, it will be necessary to ensure that the customizations are properly migrated to the new version:

- Use the standard `diff` and `patch` tools. To generate a patch file describing the modifications you have made to an installation, generate a diff file against a stock version of that installation. For example, if you are upgrading from OJS 2.1.1 to OJS 2.3:

```
$ diff -u /path/stock-ojs-2.1.1 /path/modified-ojs-2.3-install > mods.diff
```

This will generate a file called `mods.diff`. Review this file; these changes may need to be transferred into the upgraded installation.

- Ensure that any schema changes you make are properly reflected in the XML database schema descriptor(s) in `dbscripts/xml` (e.g. `dbscripts/xml/ojs_schema.xml`). During upgrades, these schema files are applied and any added or modified columns may be reverted.

Chapter 16. Support; Development; Troubleshooting; Reporting Problems

PKP uses a number of Open Source applications as part of the development process. [Git](#) and [Bugzilla](#) are used to track PKP source code and bugs, respectively; [Mediawiki](#) is used to track and discuss general development issues and roadmaps; and [phpBB](#) is used to run our support forums, which community troubleshooting and bug reporting generally happens.

The following sections describe specifically how these different applications are used by the PKP team, and how they can be used effectively by the community. In general, however, the forum is used as our interface to the larger PKP community, where most questions and problems are dealt with; the wiki is used as a "living" document pool; and the Git repository and Bugzilla are used by PKP and partner developers to coordinate development and testing. In practice, roles overlap somewhat. We encourage you to browse and use these tools as you continue to use OJS.

Finding Solutions: PKP Support Forum

The [PKP Support Forum](#) is generally the first -- and last -- place community members look to for help. The forum holds a wealth of information, available via a [Google Custom Search](#).

The PKP team monitors most subforums in the support forum, and tries to reply to questions within a few days. Other community members may answer more quickly in the meantime.

Language-specific subforums (for example, the [Spanish support forum](#)) are moderated by volunteer community members, and not directly by PKP team members. We are always happy to consider hosting other language-specific subforums, or pointing to other PKP-specific support resources.

Please keep the following points in mind as you use the forum:

- Check the [FAQ](#) to see if your question has already been answered. If you aren't exactly sure what kind of problem you are encountering, the FAQ includes many troubleshooting tips.
- [Search](#) before you post. Many questions have been answered already, and we appreciate the time you spend in finding answers. Try searching for error messages, or even parts of messages; for words that have anything to do with the problem at hand; or even for broad categories.
- Take some time, if you can, to contribute your own wisdom! The forums are a community endeavour, and we appreciate any feedback, solutions, and other information you may want to provide, either to us or to other community members directly.

Getting Source Code: Access via Git

PKP uses Git, an online distributed version control system, to manage the project's application source code. Git allows the developers to quickly and easily share code online, and create special project branches for new function and feature development, without disturbing core application development.

You can access all source code for our entire suite of web applications online at <http://github.com/pkp>. For example, by visiting <http://github.com/pkp/ojs>, you will see a navigable snapshot of the entire OJS codebase. You can see the age and last commit message for any directory or file within the system, and who made the commit. You can also view file information by navigating through the file structure online and clicking the filename (eg. <http://github.com/>

[pkp/ojs/blob/master/templates/issue/view.tpl](http://pkp.ojs/blob/master/templates/issue/view.tpl)). For each file, you have the option of seeing the raw file, or viewing that particular file's view history, which can be particularly helpful in understanding and tracking down previous bug fixes. Bug reports are normally embedded within the commit message.

The PKP development wiki has comprehensive, up-to-date [information](#) on how to check out PKP applications from Git, and how to generally work with Git and the PKP.

Reporting Bugs: Using Bugzilla

Bugs can be reported in our online Bugzilla bug tracker at <http://pkp.sfu.ca/bugzilla>. We welcome bug reports of any kind, including feature requests, but ask that you include as much information as possible on the problem as well as your server environment, including PHP, database and server information. We encourage you to search [the Support Forum](#) and the [bug database](#) as thoroughly as possible before posting a report, in case the issue has already been raised, but we greatly prefer getting two reports on one problem than none at all!

Future Plans and Current Procedures: The PKP Development Wiki

The [PKP Development Wiki](#) is used to track [milestones](#) and specific application [roadmaps](#). It also houses the PKP [FAQ](#), and community-written and editable [documentation](#). The wiki is also increasingly being used to house frequently-updated [developer documentation and how-tos](#), and to list [community pages](#).

For the most part, pages on the wiki are open to anonymous editing, although there are some pages that are protected for various reasons. (For example, all application roadmap pages are protected, so that only PKP team members can edit them, since we are the ones who drive the roadmaps in the first place.) Modifications and additions to community and developer documentation are more than welcome on the wiki.

Chapter 17. Other Administration Components

System Administrators are often tasked with other configuration tasks when administering OJS, such as configuring scheduled tasks; email; and plugin installation and management. The following sections detail some of the more common Site Administration tasks. Further information can be found on the [forum](#), in the [wiki](#), or in other [documentation](#).

General Configuration Options

While OJS strives to be an easily-installed, low-maintenance system requiring minimal external configuration, a handful of options need direct system access to be configured. These options are largely set in `config.inc.php`. The following is not a comprehensive breakdown of that file - rather, it you will find here instructions on administering the most commonly changed components.

Note

When you enable an option in `config.inc.php` you must ensure that it is not commented out in order for them to take effect. Lines in this file are commented out using a semi-colon. Therefore, to enable Scheduled Tasks,

```
; scheduled_tasks = Off
```

should be changed to

```
scheduled_tasks = On
```

in order to function properly.

Scheduled Tasks

OJS includes a scheduled tasks script that will periodically execute certain tasks (such as send out periodic Review Reminder emails). To enable this script, you will have to enable the option in `config.inc.php`, and also set up the appropriate cron job on your server.

Open `config.inc.php` and under the `general` section find

```
; scheduled_tasks = Off
```

Change that line to

```
scheduled_tasks = On
```

keeping in mind to remove the semi-colon at the beginning of the line.

You will then need to instruct your server to periodically execute (as the same user your webserver is running under) the PHP script found at `tools/runScheduledTasks.php` in your OJS directory. On *nix operating systems, this is typically done by adding a simple cron task, whereas on Windows systems you can use the Windows Task Scheduler. Detailed instructions for each can be found in `docs/README`.

If using the scheduled tasks script, it is recommended that the script be set up to execute at least once per day.

On *nix operating systems, this can be done by adding a simple cron task:

```
# crontab -e www
0 * * * * php /path/to/ojs2/tools/runScheduledTasks.php
```

In this example the script would be executed every hour.

On Windows XP systems, this can be done by using the Windows Task Scheduler:

1. From the Control Panel, double-click on Scheduled Tasks.
2. Right-click within the Scheduled Tasks window and choose: New > Scheduled Task
3. Under the Task tab, in the Run field, enter: php c:\path\to\ojs2\tools\runScheduledTasks.php
4. You will also be asked to specify the folder to start this task in (which will usually be the folder that PHP was installed into) and the user under which the task will be executed as.
5. Under Schedule tab and the Settings tab, you can more specifically configure the task. For example, you can choose start and end dates for this scheduled task and also how often to execute this task.

Email Settings

By default, OJS uses PHP's `mail()` function to send email. You can configure OJS to use SMTP to send mail instead. To do so, you will need to uncomment and configure the relevant lines in `config.inc.php`, under the Email Settings subheading. Your final configuration might look something like the following:

```
; Use SMTP for sending mail instead of mail()
smtp = On

; SMTP server settings
smtp_server = mail.example.com
smtp_port = 25

; Enable SMTP authentication
; Supported mechanisms: PLAIN, LOGIN, CRAM-MD5, and DIGEST-MD5
smtp_auth = PLAIN
smtp_username = username
smtp_password = password
```

You will have to find the appropriate SMTP information (server, port, authentication type, username and password) from your ISP.

To allow for notification of bounced emails (sent to the email address specified in [Journal Setup 1.4](#)) you will have to uncomment and enable the `envelope_sender` configuration option in `config.inc.php`; you may also want to provide a default email address.

```
; Allow envelope sender to be specified
; (may not be possible with some server configurations)
allow_envelope_sender = On

; Default envelope sender to use if none is specified elsewhere
default_envelope_sender = my_address@my_host.com
```

There are a number of other email options in `config.inc.php` but they are sufficiently explained in the configuration file, and are rarely, if ever, changed from the default.

CAPTCHA Settings

You can configure OJS to use [CAPTCHA](#) challenges to prevent user registration and comment abuse. Find the CAPTCHA Settings section in `config.inc.php` and uncomment and change to the following:

```
[captcha]

; Whether or not to enable Captcha features
captcha = On

; Whether or not to use Captcha on user registration
captcha_on_register = On

; Whether or not to use Captcha on user comments
captcha_on_comments = On

; Font location for font to use in Captcha images
font_location = /usr/share/fonts/truetype/freefont/FreeSerif.ttf
```

Please note that your server needs to support the IMLIB library for this to work, and that you need to point your `font_location` variable to a font that exists on your system, which may be different than the default provided.

Debugging Options

If things start to go strange with your OJS installation, you have several debugging options available to you.

- If you encounter a blank page, chances are there's a PHP error of some sort happening in the background. PHP errors are normally sent to your web server or system log file. To send any PHP errors to the browser, put the following line near the top of the root `index.php` file:

```
ini_set('display_errors', E_ALL);
```

When you rerun the task or reload the page you were having problems with, any PHP error messages that were being sent to the log files should now be displayed on the web page.

Note

Of course, you can always check your server's error log for errors as well.

There are also a number of debugging variables in `config.inc.php`.

- You can set the system to display database output in the page header. Under the [Database Settings](#) section of `config.inc.php`, set the `debug` variable to On:

```
; Enable database debug output (very verbose!)
debug = On
```

Turning database debugging on will display every database query for that particular page, regardless of any errors (or the lack thereof) in the page header. You may also see a few warnings about headers in the debug info too: those are harmless and can be ignored.

With debug turned on, certain parts of the system may not function (for example, trying to log in). The debug option should only be used to try and diagnose a problem and may expose private information. Additionally, as the warning in the config file suggests, it is very verbose - it prints out every database query regardless of whether the system has encountered an error, and so should not be turned on by default.

- Turning on `show_stats` (Under `Debug Settings` at the end of `config.inc.php`) will display execution stats provided by the included [PHP Quick Profiler](#).

```
; Display execution stats in the footer  
show_stats = On
```

The Profiler will give you information and metrics on load times, database queries, files included, and more, and is useful for pinpointing bottlenecks and other points of failure.

- The `stack_trace` option (found just after the `show_stats` option) will cause OJS to display a full dump of the current call stack if an error occurs. This makes it easier to find out where in the process of execution an error occurred, by displaying the full list of functions that are running at the time. It may expose a variety of private information, depending on where the error occurs, and should be left disabled on a production machine.

Finding and Installing Plugins

OJS comes with a number of useful plugins by default, and more can be easily installed. You can view extra plugins at our Plugin Gallery online at <http://pkp.sfu.ca/support/forum/viewforum.php?f=28>.

Most plugins should come with a readme file of some sort, and should also list which versions of OJS they are compatible with. To install a plugin, you should simply need to copy the files to the correct `plugins` subdirectory in your OJS installation. For example, if the plugin you want to install is considered a 'generic' plugin, copy the plugin folder to `plugins/generic/`; if it is classed as an import plugin, it should go into `plugins/importexport/`; and so on.

Most plugins operate at the Journal Manager level, and require no additional system configuration - that is, Journal Managers can enable and configure them once they are installed - but some plugins require additional configuration at the system level, or are only operable by Site Administrators. For more information, you should consult the plugin's documentation.