PKP
PUBLIC
KNOWLEDGE
PROJECT

SFU SIMON FRASER UNIVERSITY
LIBRARY

OJS in an Hour

An Introduction to Open Journal Systems

Version 2.2.1.0

Last Updated: July 15, 2008

PKP
PUBLIC
KNOWLEDGE
PROJECT

SFU SIMON FRASER UNIVERSITY
LIBRARY

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

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

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

SOME RIGHTS RESERVED

PKP PUBLIC KNOWLEDGE PROJECT

SFU SIMON FRASER UNIVERSITY LIBRARY

Table of Contents

Overview

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

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

OJS Features

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

The OJS Journal

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

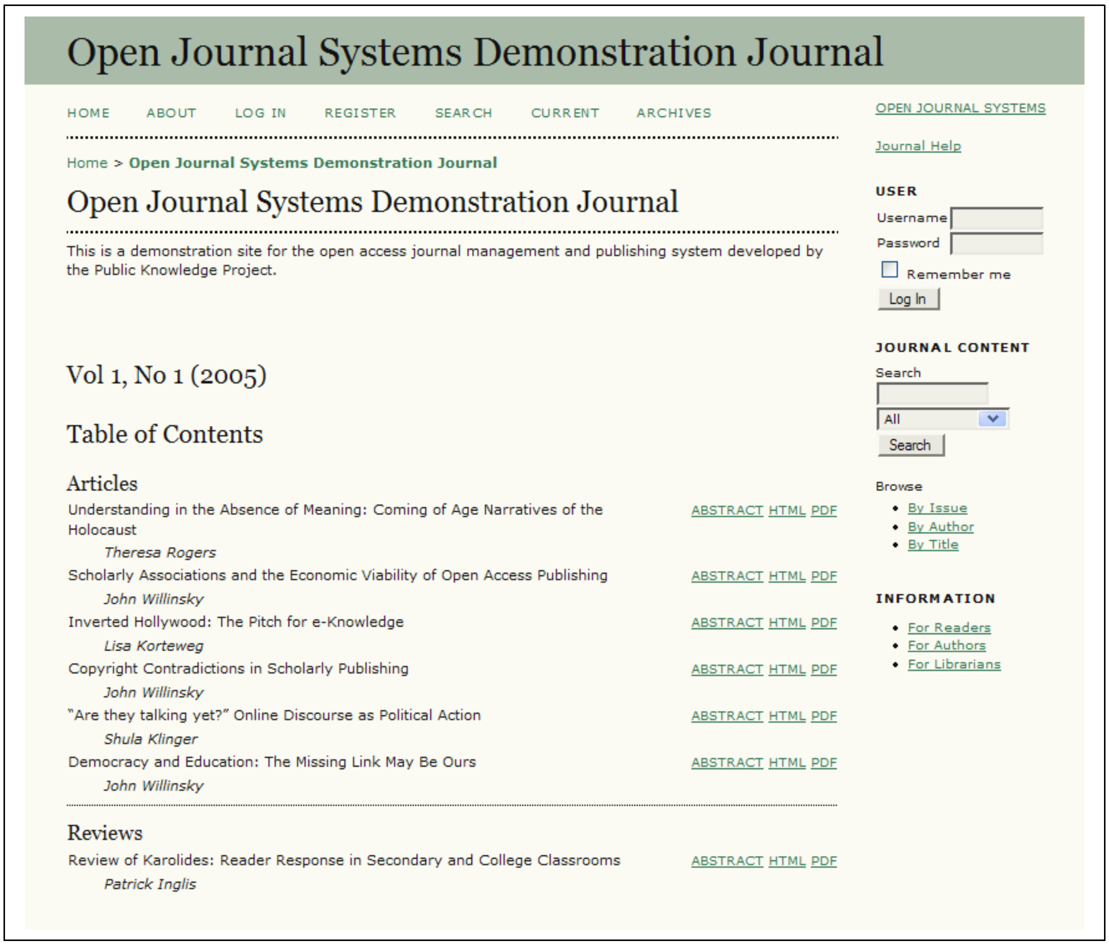


Figure 1: OJS Table of Contents

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

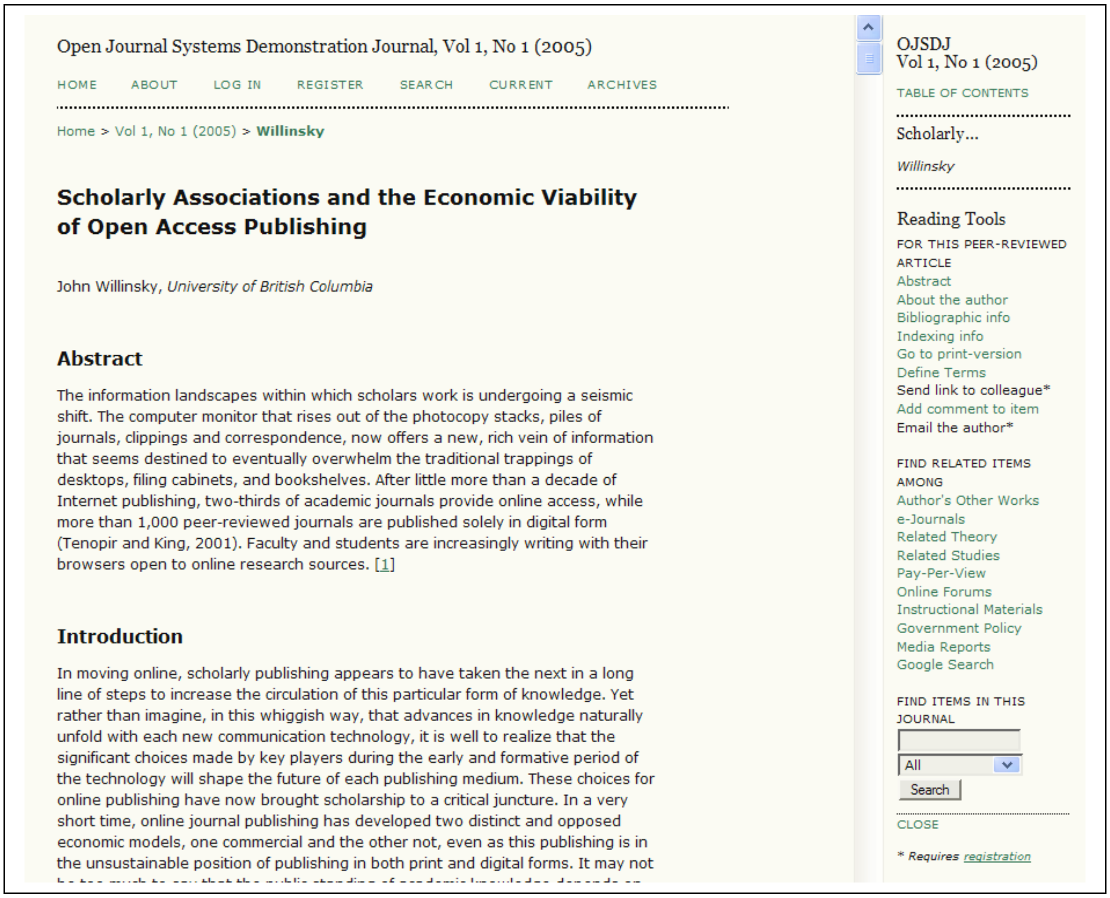


Figure 2: OJS HTML Article

Editorial Process

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

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

Editorial Roles

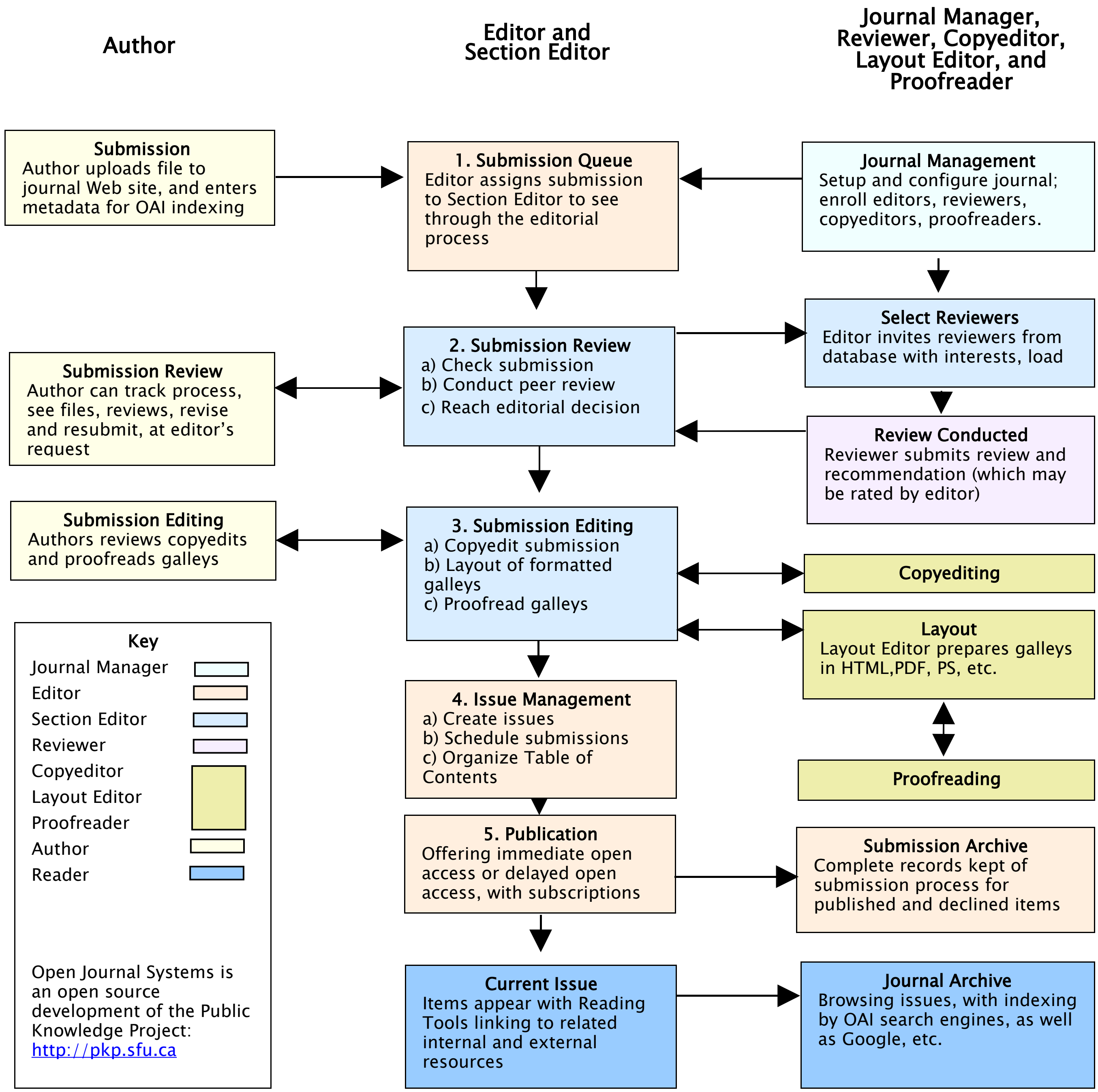
- Journal Manager: Sets up journal and staffs editorial roles (can also serve as an Editor and other roles as well).
- Editor: Oversees editorial process; can assign submissions to Section Editors to see through Submission Review and Submission Editing; undertakes scheduling of content and publishing of journal.
- Section Editor: Oversees Submission Review and possibly Submission Editing for assigned submissions.
- Copyeditor: Works with submissions to improve grammar and clarity, poses questions to author on possible errors, and ensure strict adherence to journal's bibliographic and textual style.

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

PKP
PUBLIC KNOWLEDGE PROJECT

SFU SIMON FRASER UNIVERSITY LIBRARY

OJS Workflow Chart



System Requirements

A server environment meeting the following requirements is recommended:

- PHP support (4.2.x or later)
- MySQL (3.23 or later) or PostgreSQL (7.1 or later)
- Apache (1.3.2x or later) or Apache 2 (2.0.4x or later) or Microsoft IIS 6 (PHP 5.x required)
- Linux, BSD, Solaris, Mac OS X, Windows operating systems

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

Help Documentation

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

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

Community Contributions

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

Test-Drive OJS 2.2.1.0

A demonstration journal utilizing OJS 2.2.1.0 has been set up online at http://pkp.sfu.ca/ojs/demo/present/

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

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

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

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

Site Administration

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

Getting Started

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

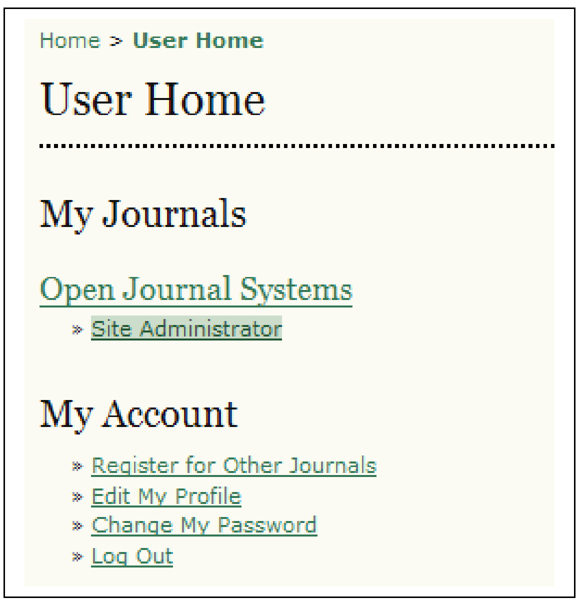


Figure 3: Selecting your role as Site Administrator

Site Settings

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

Figure 4: Site Administration Menu

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

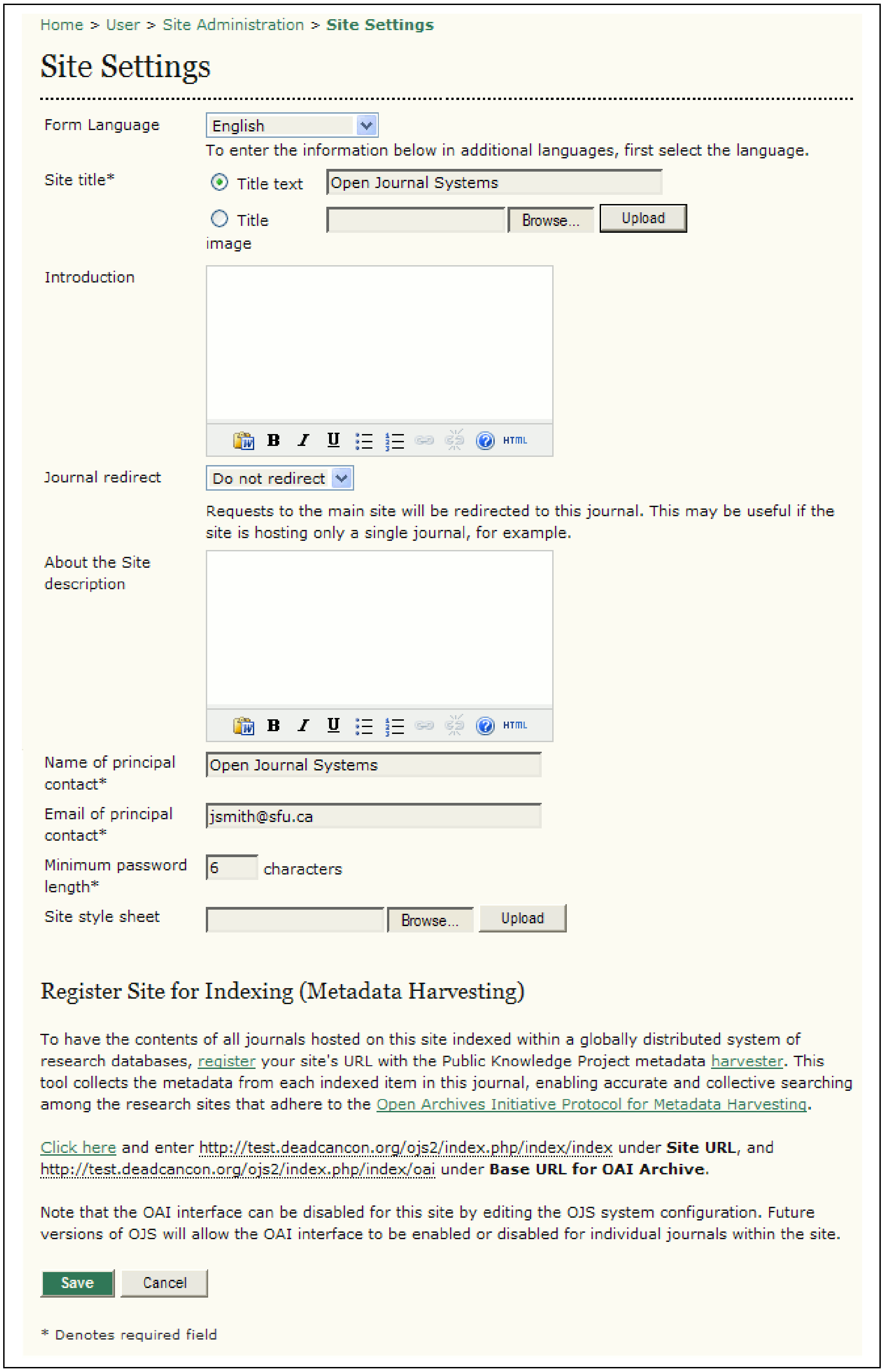


Figure 5: Site Settings

Creating a New Journal

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

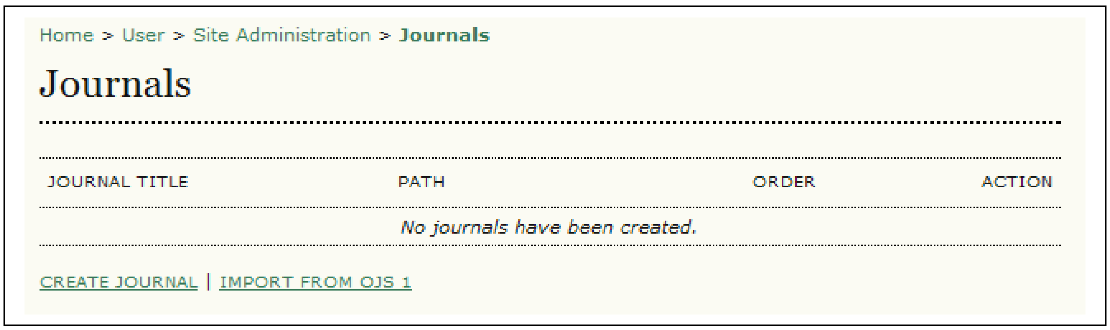


Figure 6: Creating a new journal

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

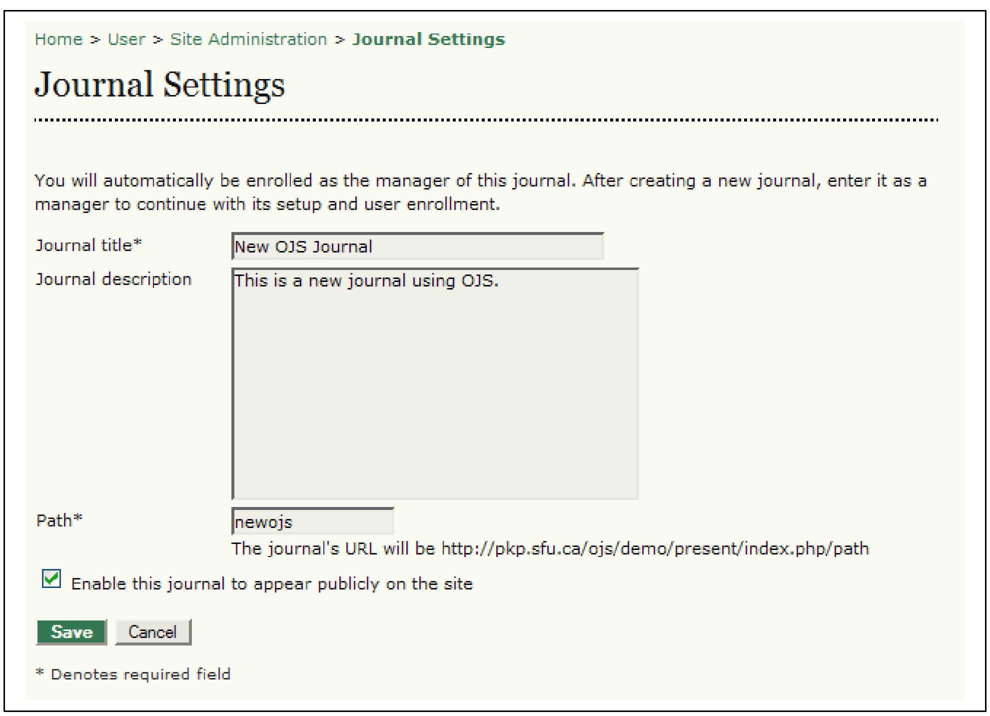


Figure 7: Journal settings

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

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

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

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

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

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

Migrating from OJS 1.x

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

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

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

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

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

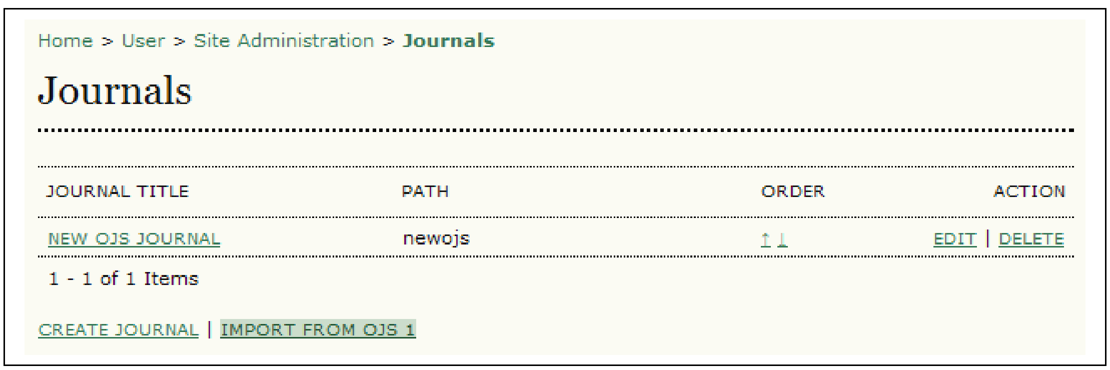


Figure 8: Import from OJS 1.x

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

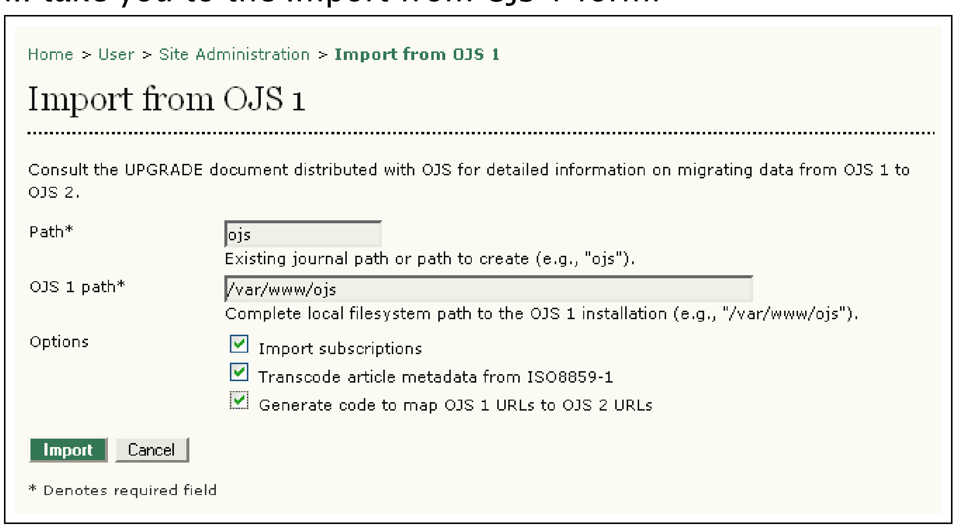


Figure 9: Import from OJS 1

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

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

Finally, you can choose to import subscriptions from the OJS 1 installation, transcode the article metadata from ISO8859-1, and generate code to map OJS 1 URLs to OJS 2 URLs, by selecting the checkboxes.

Select **Import** to begin the migration.

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

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

Some additional notes regarding migration:

- After using the migration tool, edit and save the hosted journal settings under Site Administration, and proceed through and complete all Journal Setup steps under Journal Management -- there are a number of new and modified settings in OJS 2.x compared to OJS 1
- Any number of OJS 1.x journals can be imported into a single OJS 2.x instance (OJS 2.x is designed as a multiple journal system)

- OJS 2.x requires both user usernames and email addresses to be unique (OJS 1 did not enforce the latter restriction):
    - If a user already exists with the same username as an imported user, all imported data will be associated with the existing user
    - If a user already exists with the same email address as an imported user, the email address of the imported user will be prefixed with "ojs-<username>+" to ensure uniqueness -- such users can then be updated manually post-migration
- Modified email templates and RST versions are not migrated due to the numerous revisions and enhancements to these components in OJS 2.x
- Migrated subscription types are given a 12-month duration and public visibility by default -- these settings can be modified post-migration

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

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

Languages

OJS is designed to be a multilingual system, allowing journals supporting a wide variety of languages to be hosted under a single site. The Site Administrator can specify the default language of the site and install additional locales as they become available to make other languages available for use by journals.

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

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

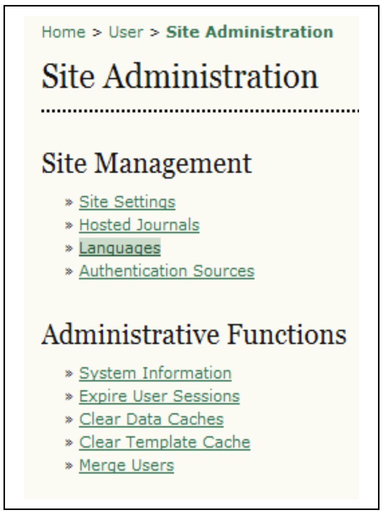


Figure 10: Site Administration Menu

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

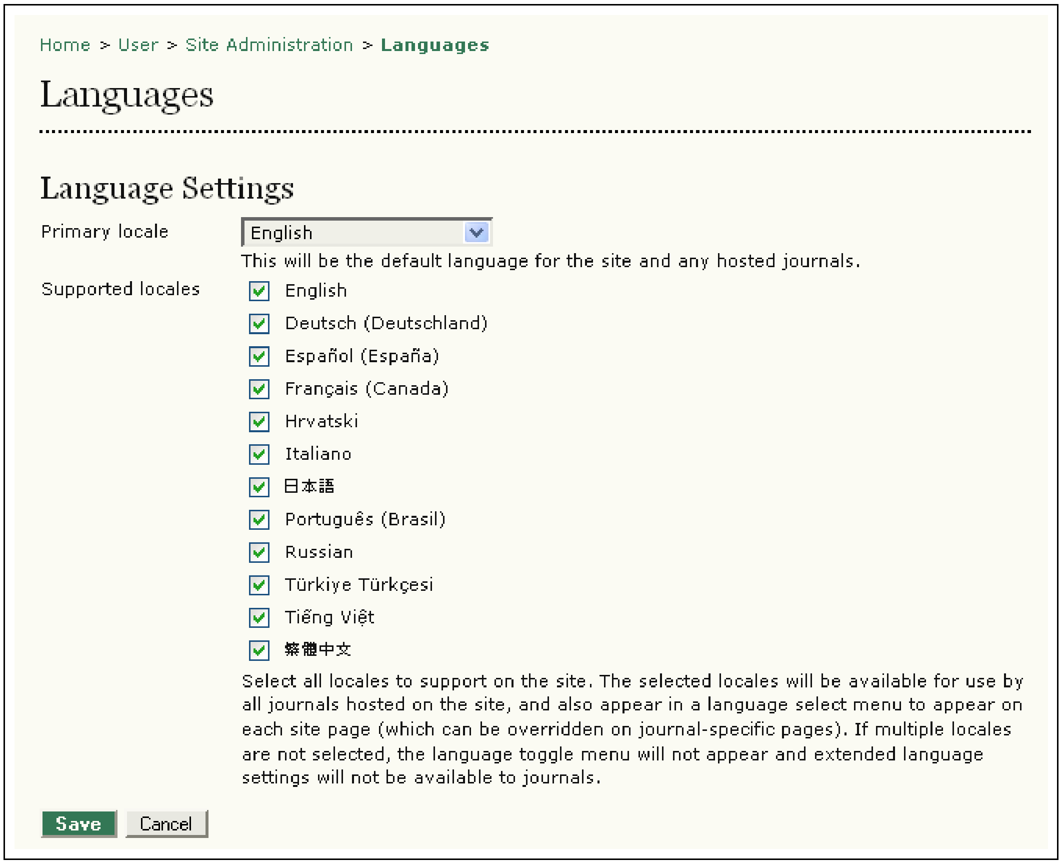


Figure 11: Languages

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

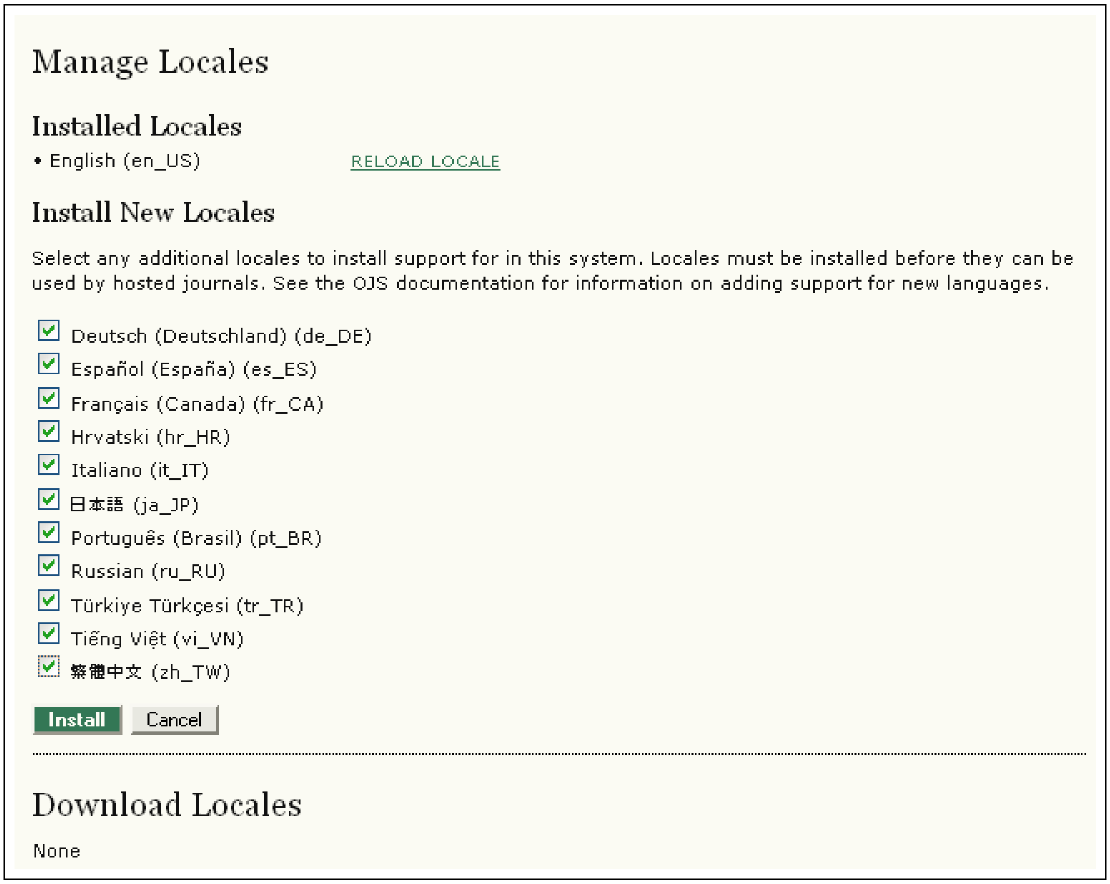


Figure 12: Installing additional languages

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

Authentication Sources

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

Figure 13: Authentication Sources

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

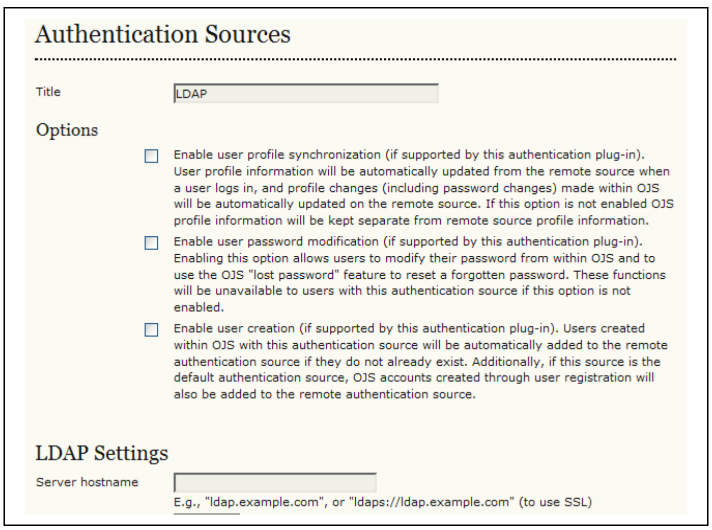


Figure 14: LDAP options and settings

Version Checking

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

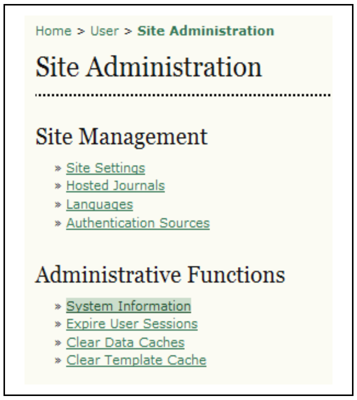


Figure 15: System Information

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

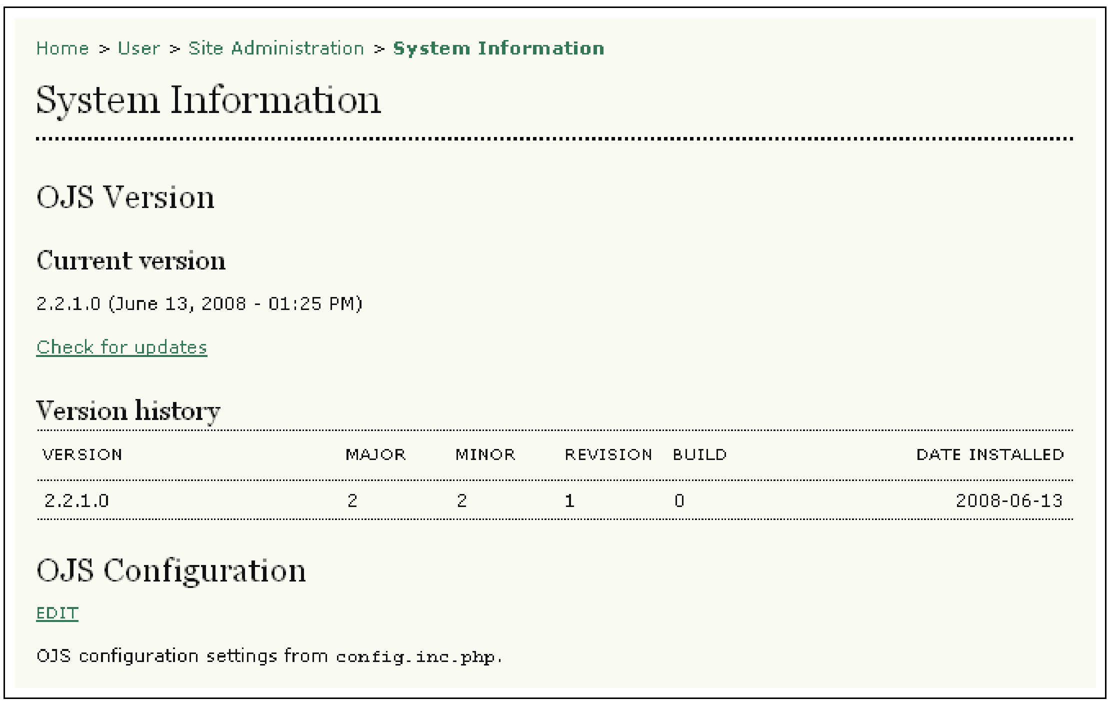


Figure 16: Checking for updates

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

Expire User Sessions

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

Clear Data Caches

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

Clear Template Cache

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

Merge Users

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

COUNTER Statistics

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

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

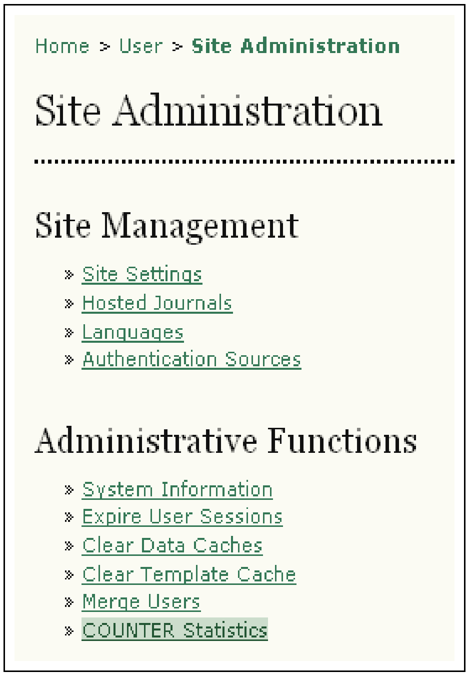


Figure 17: COUNTER Statistics

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

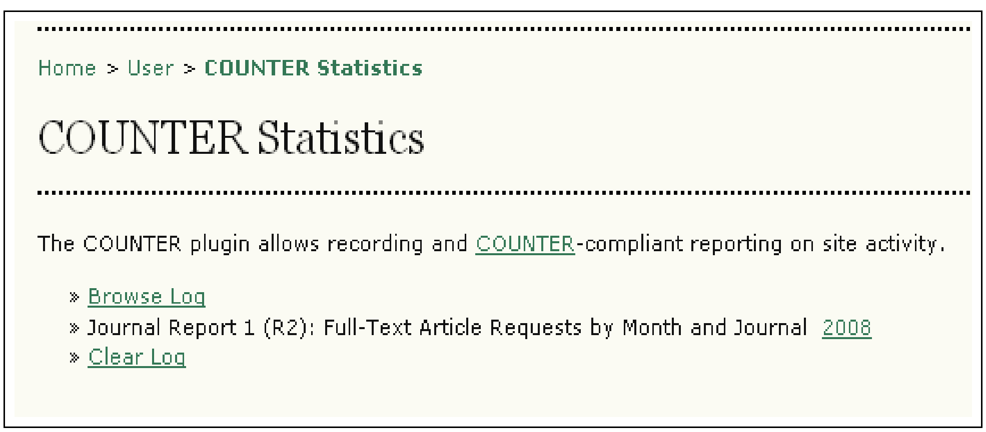


Figure 18: COUNTER Statistics

Journal Managers

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

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

Getting Started

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

Figure 19: Selecting your role

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

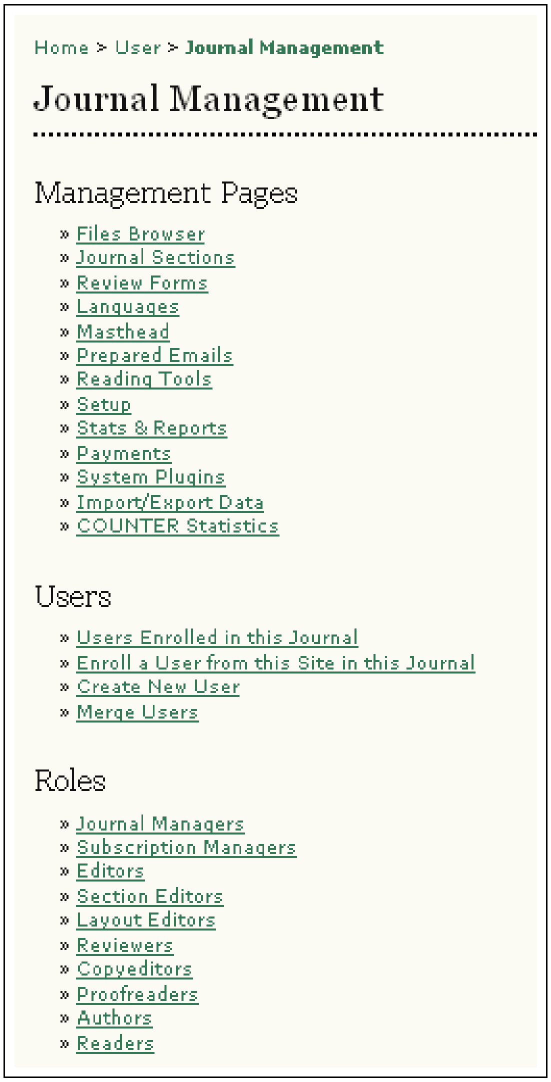


Figure 20: Journal Management options

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

Setting up a New Journal

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

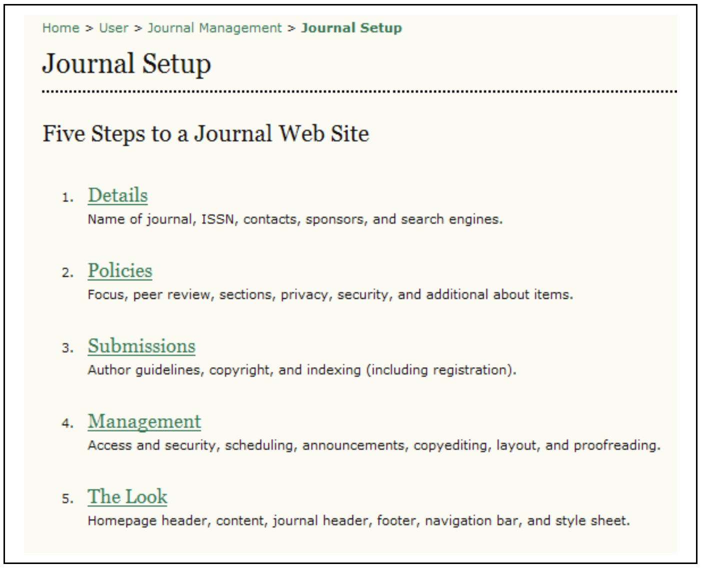


Figure 21: Five steps to setting up a journal web site

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

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

Step 1: Details

1.1 General Information

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

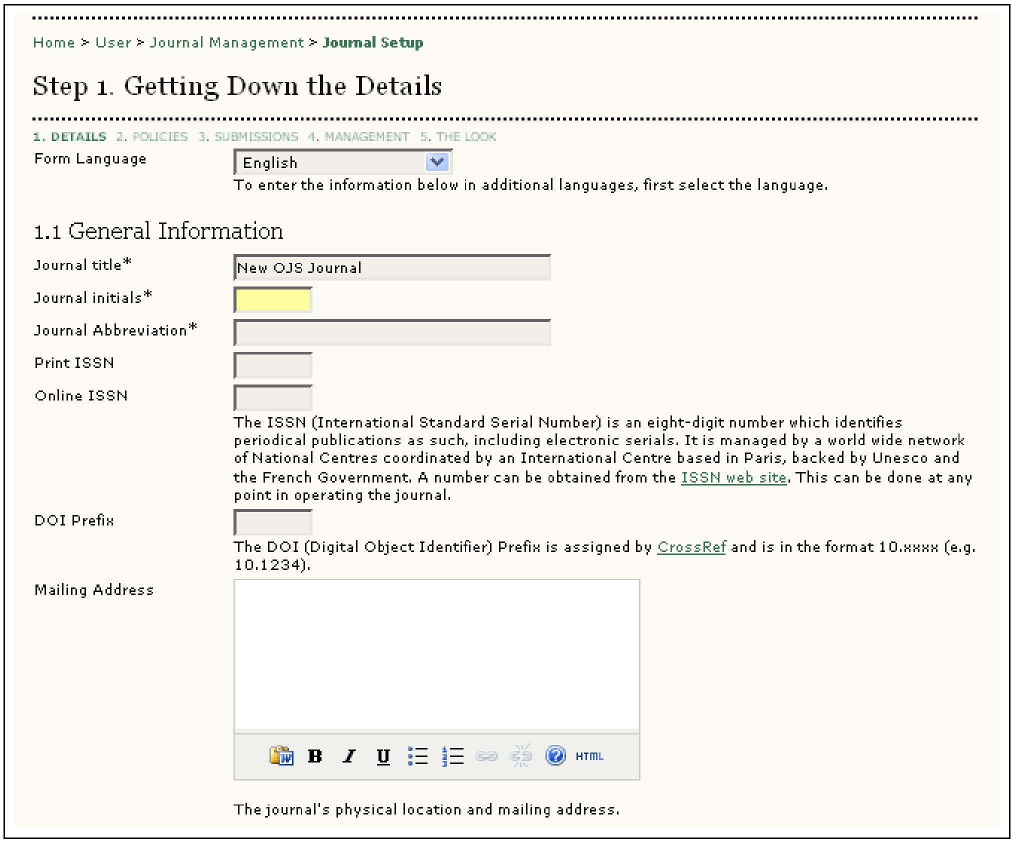
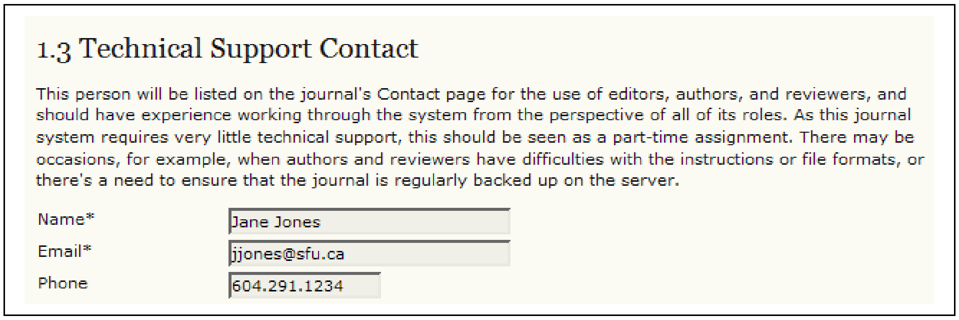


Figure 22: General Information

1.2 Principal Contact

Figure 23: Principal Contact

1.3 Technical Support Contact


1.3 Technical Support Contact

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

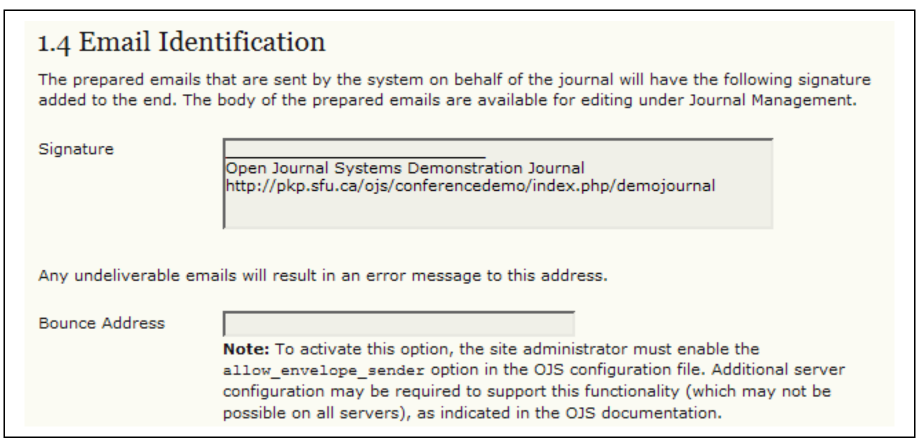
Name* Jane Jones
Email* jjones@sfu.ca
Phone 604.291.1234

Figure 24: Technical Support Contact Information

1.4 Email Identification

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

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


1.4 Email Identification

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

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

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

Bounce Address

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

Figure 25: Email signature

1.5 Publisher

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

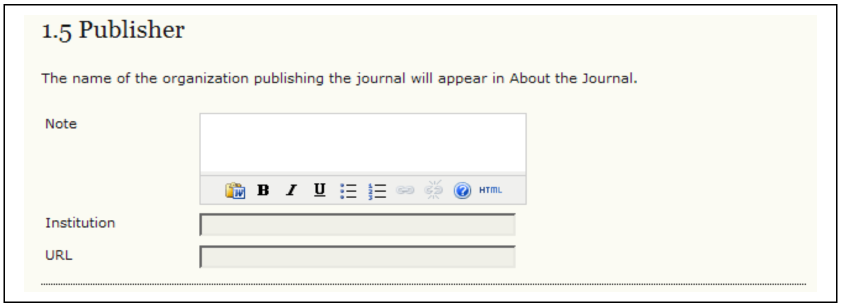


Figure 26: Publisher information

1.6 Sponsoring Organizations

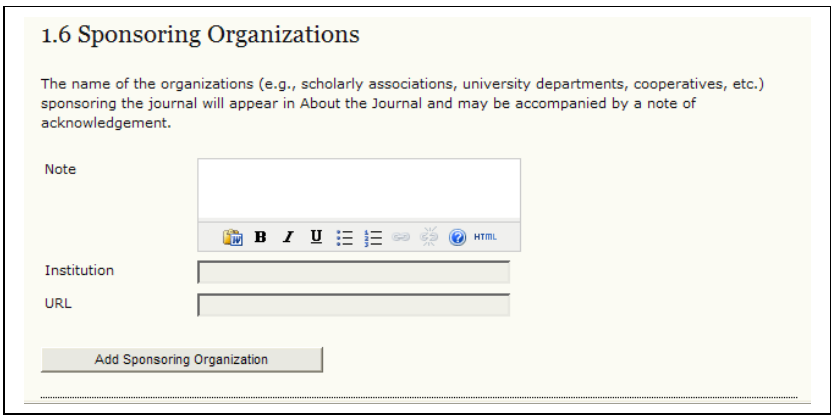


Figure 27: Sponsoring organization information

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

1.7 Sources of Support

Figure 28: Sources of support information

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

1.8 Search Engine Indexing

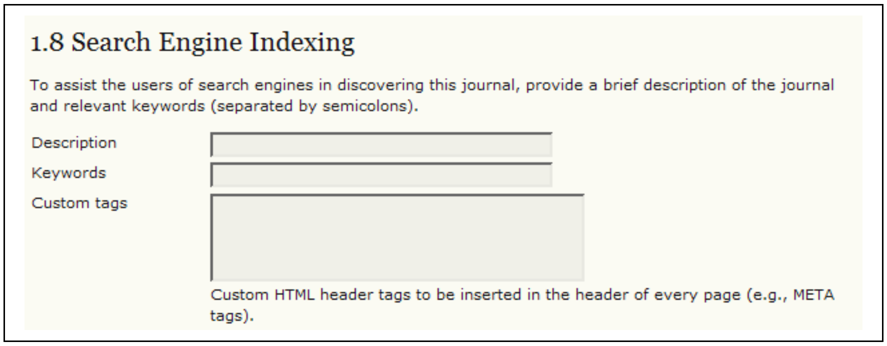


Figure 29: Search engine indexing information

Step 2: Policies

2.1 Focus and Scope of Journal

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

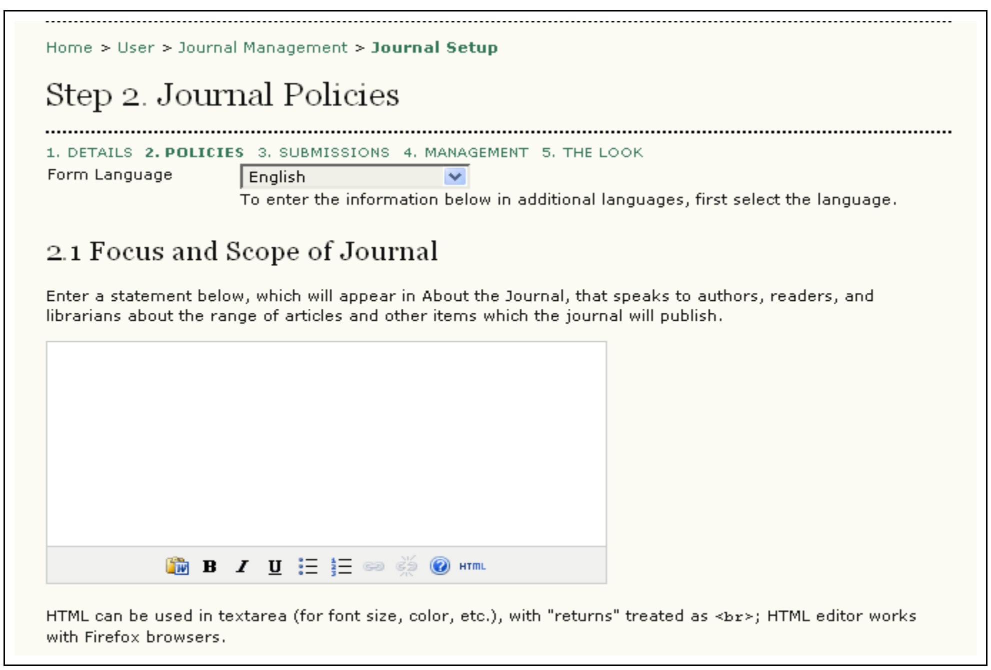


Figure 30: Focus and scope of the journal

2.2 Peer Review

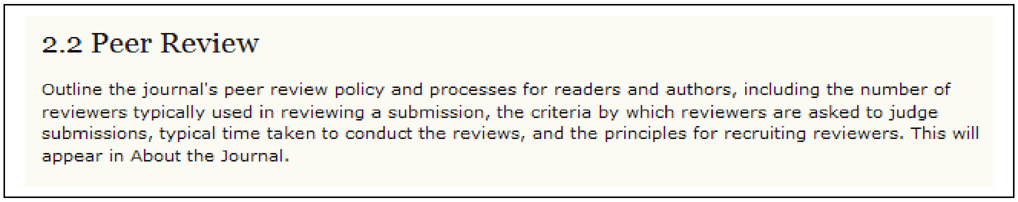


Figure 31: Peer review

Review Policy

This will be visible on the About the Journal section.

Review Guidelines

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

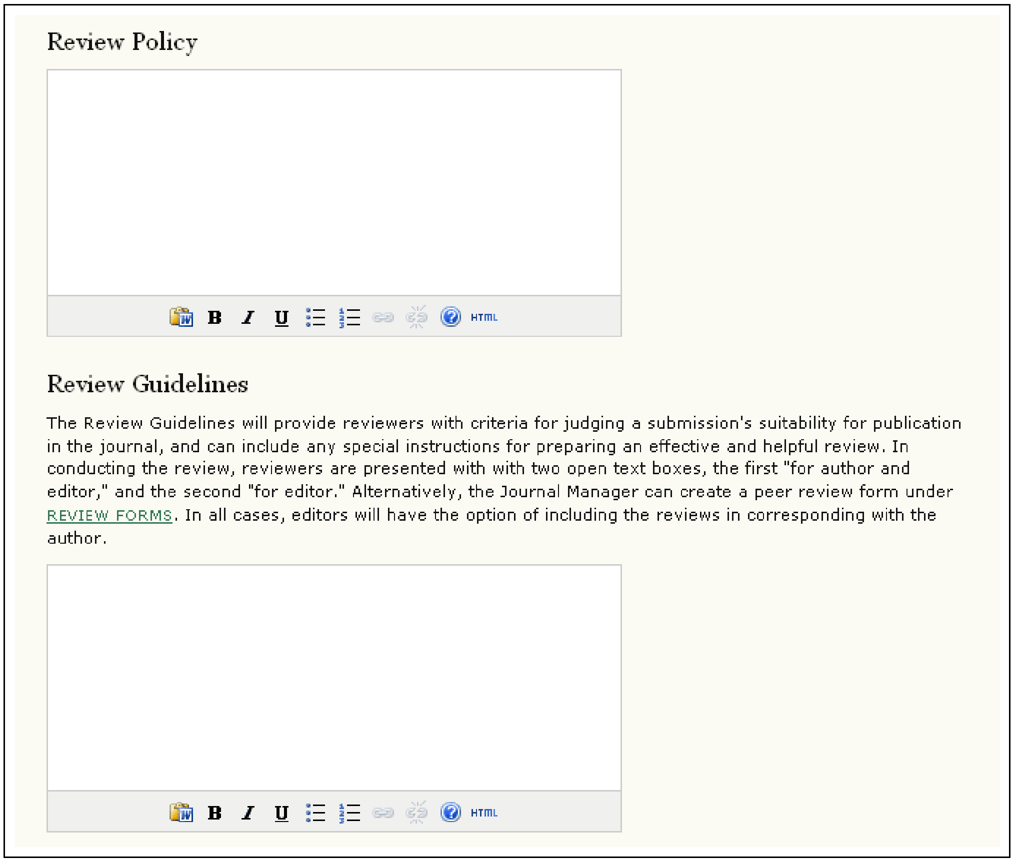


Figure 32: Review policy and guidelines

Review Process

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

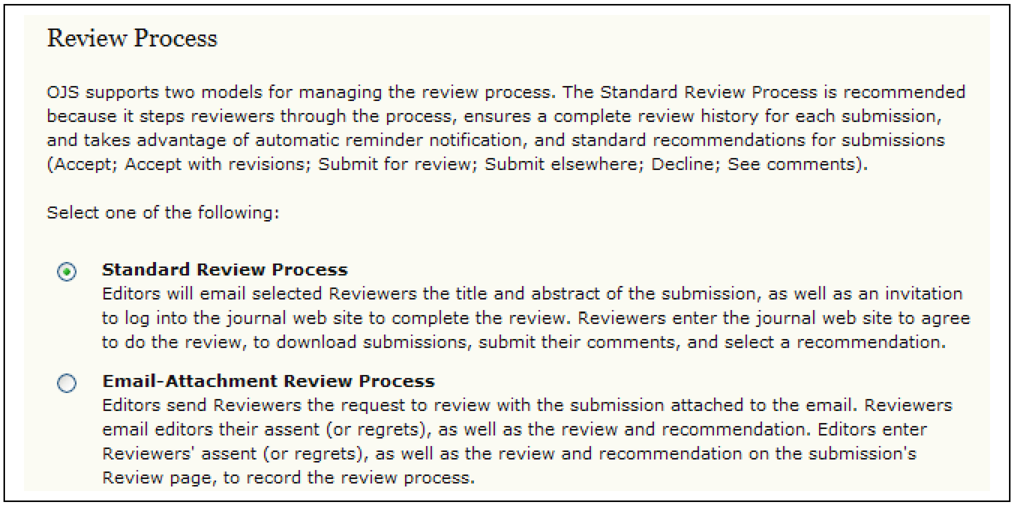


Figure 33: Review process

Review Options

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

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

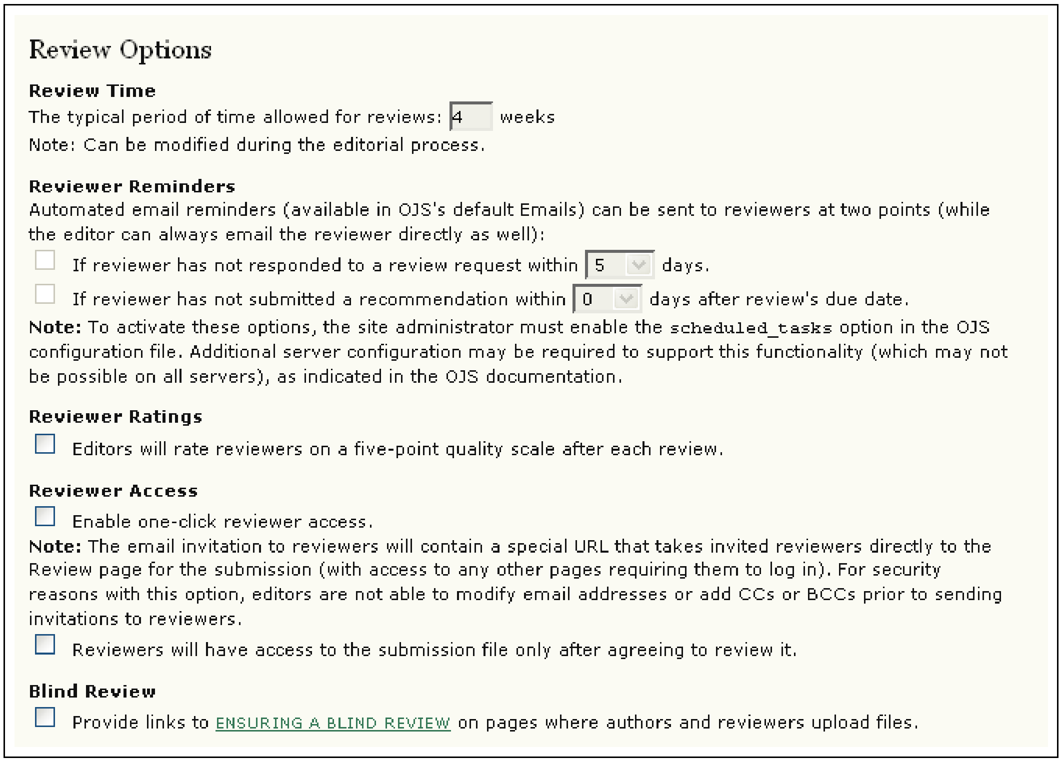


Figure 34: Review options

2.3 Privacy Statement

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

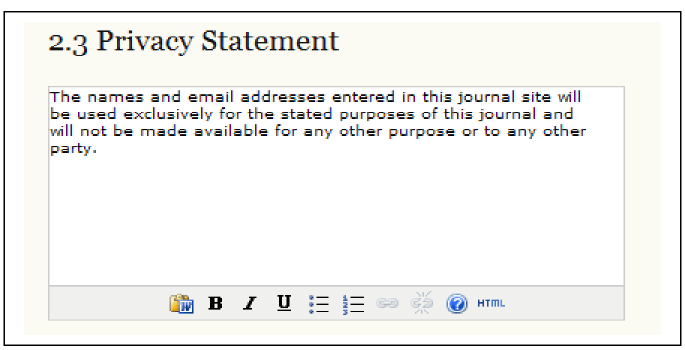


Figure 35: Privacy statement

2.4 Editor Decision

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

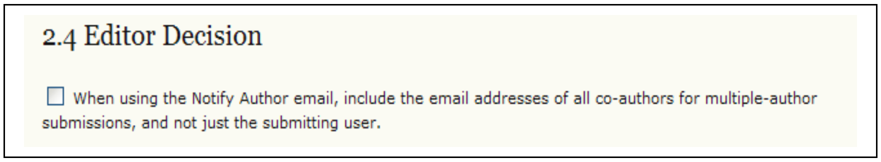


Figure 36: Editor decision

2.5 Add Item to Appear in "About the Journal"

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

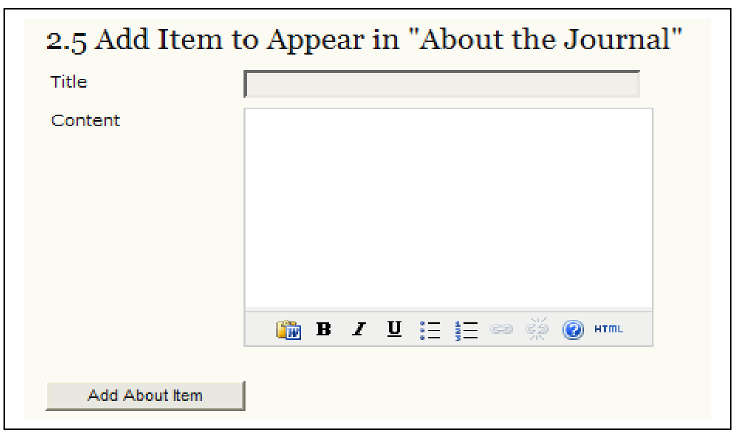


Figure 37: Add Item to Appear in “About the Journal”

2.6 Journal Archiving

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

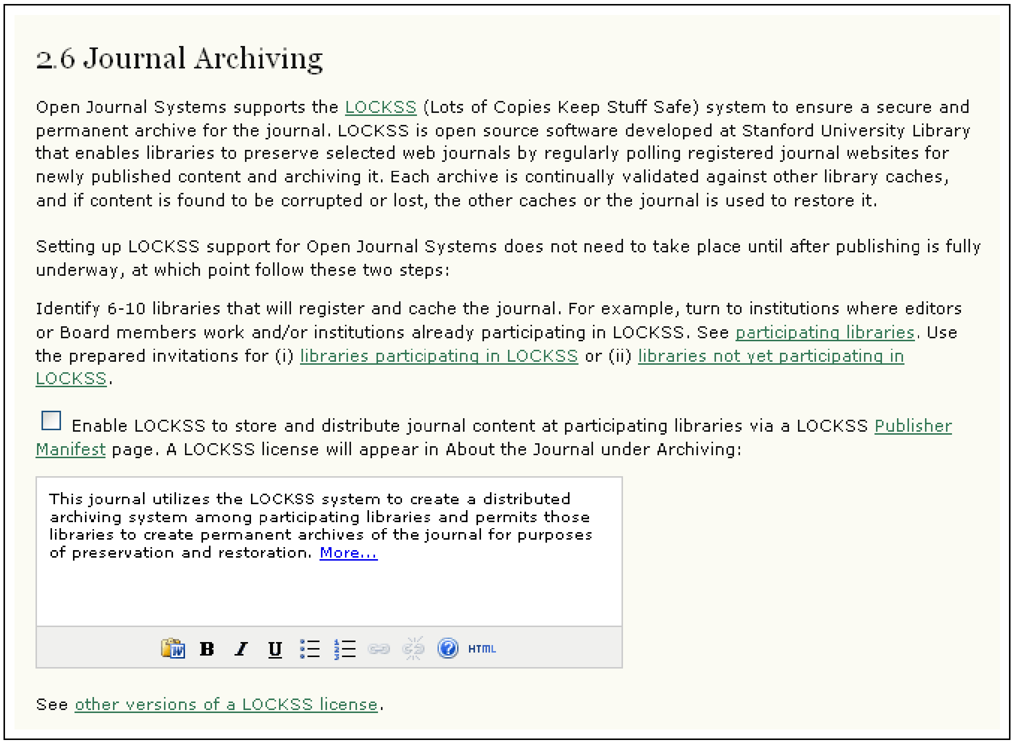


Figure 38: Journal Archiving

2.7 Potential Reviewer Database

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

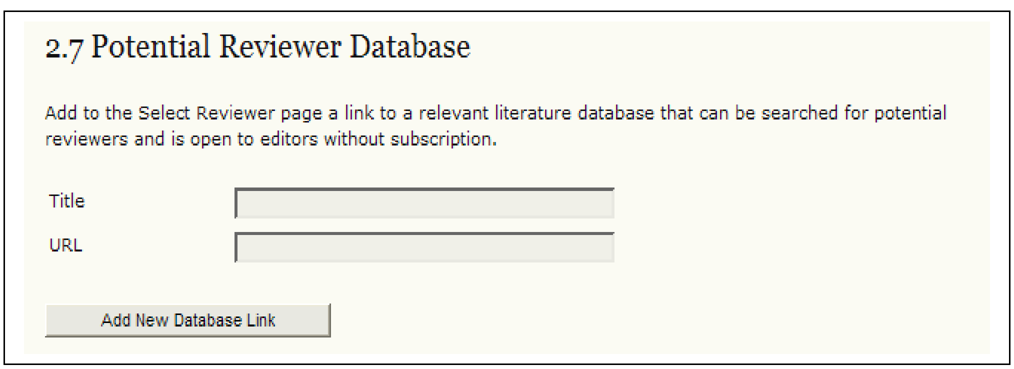


Figure 39: Potential reviewer database

Step 3: Submissions

3.1 Author Guidelines

These guidelines will appear on the About the Journal page.

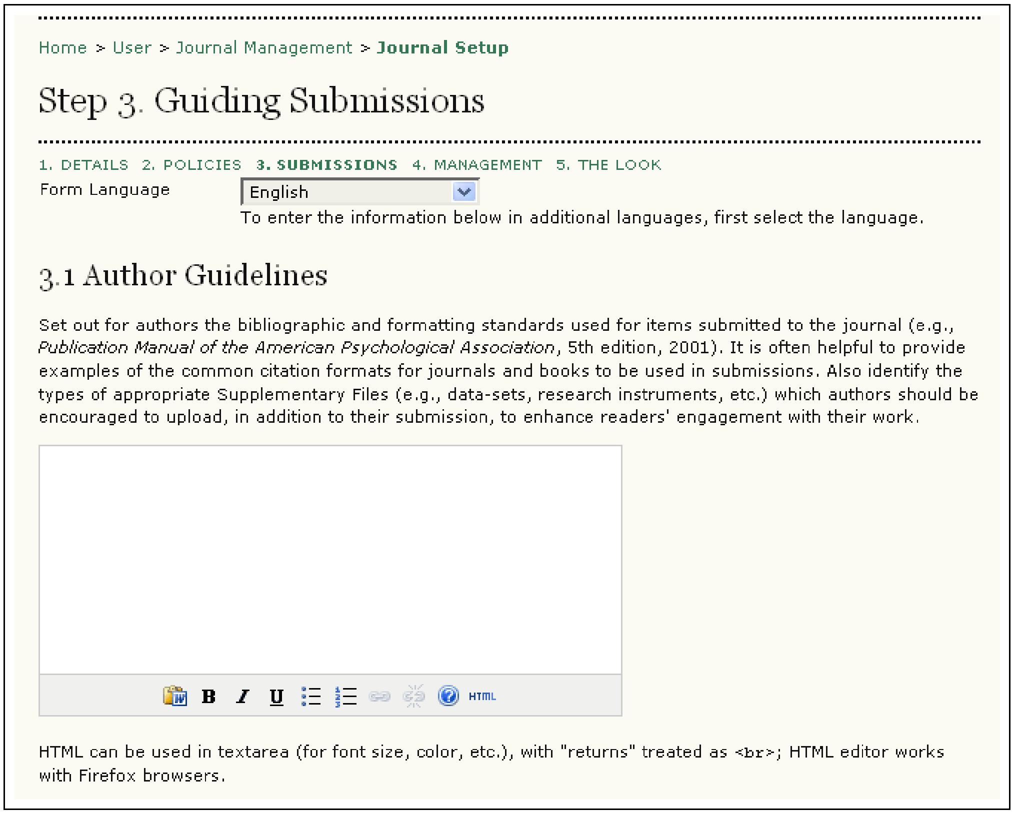


Figure 40: Author guidelines

Submission Preparation Checklist

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

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

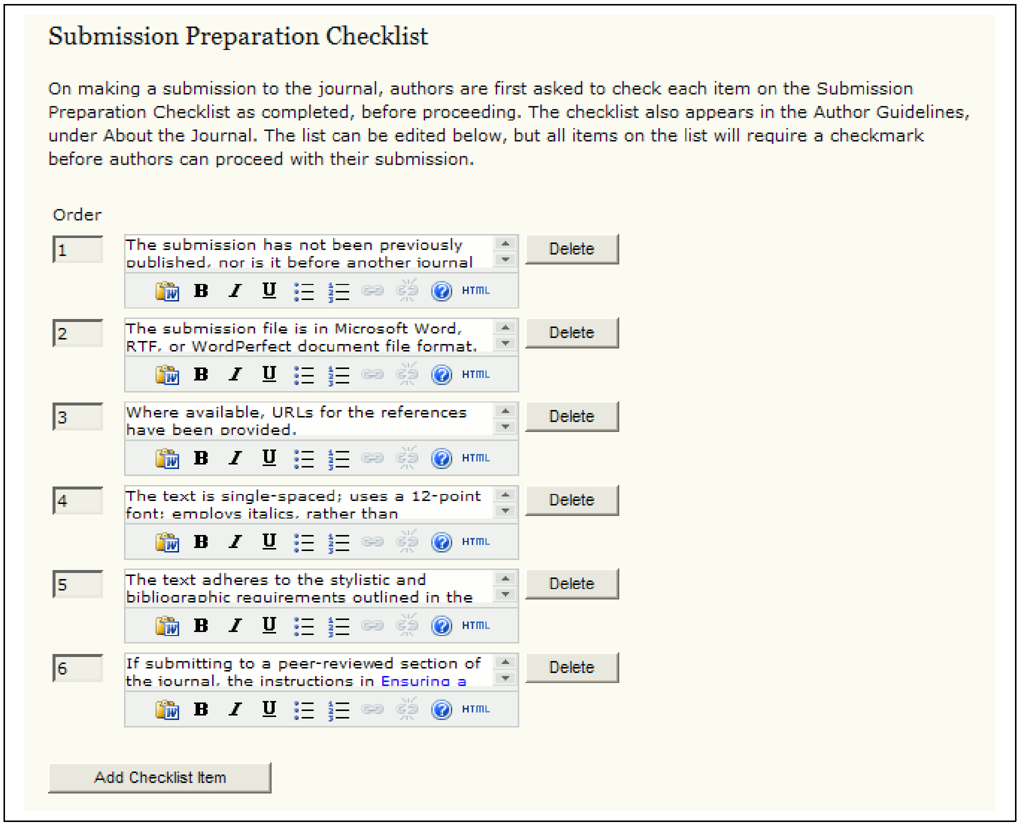


Figure 41: Submission preparation checklist

3.2 Copyright Notice

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

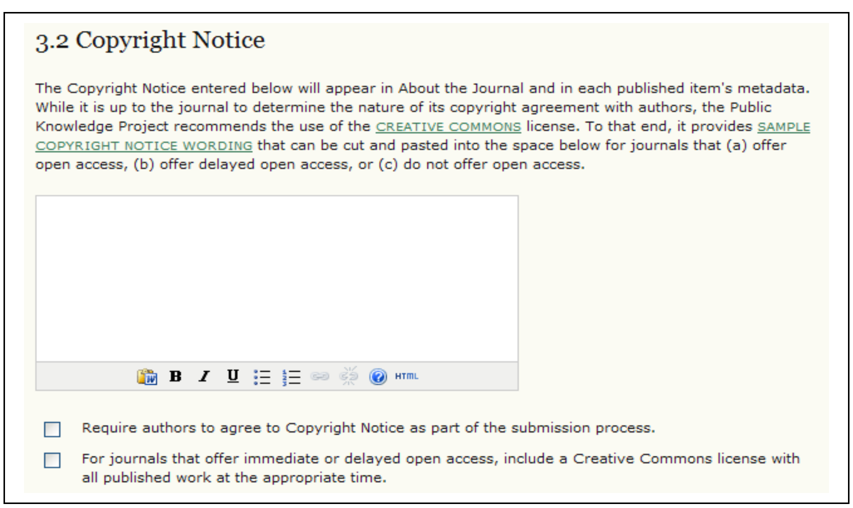


Figure 42: Copyright notice

3.3 Competing Interests

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

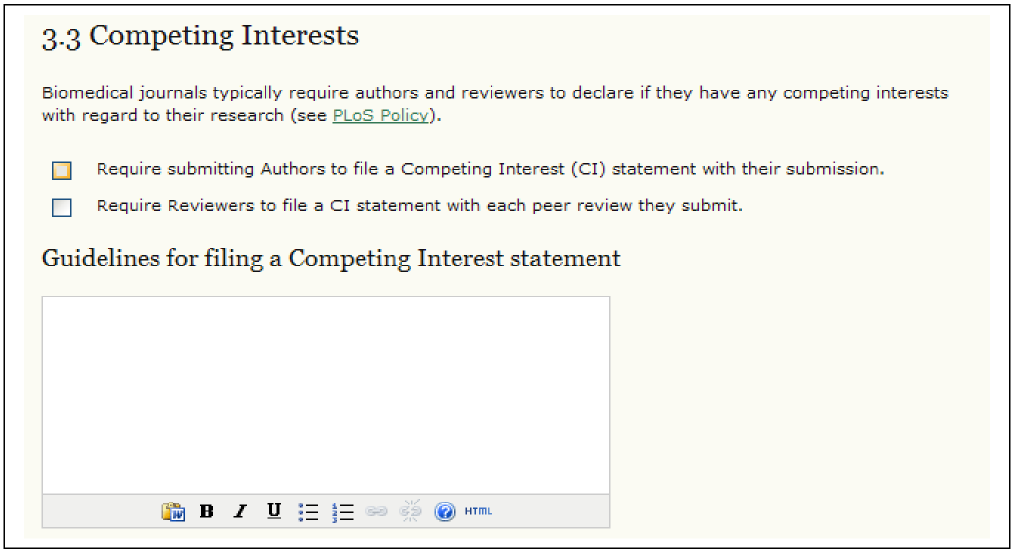
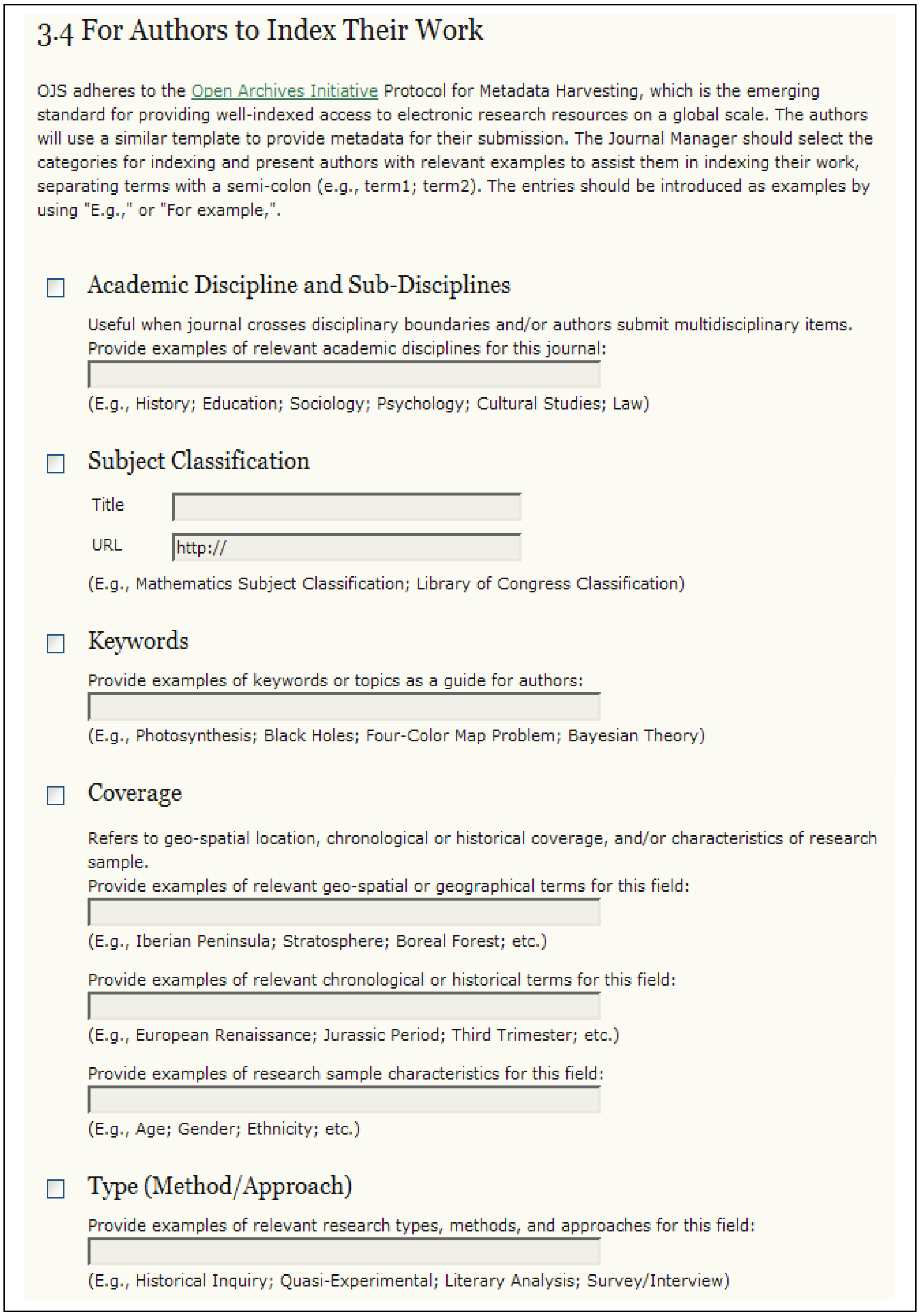


Figure 43: Competing interests

3.4 For Authors to Index Their Work

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



3.4 For Authors to Index Their Work

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

☐ **Academic Discipline and Sub-Disciplines**

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

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

☐ **Subject Classification**

Title

URL http://

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

☐ **Keywords**

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

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

☐ **Coverage**

Refers to geo-spatial location, chronological or historical coverage, and/or characteristics of research sample.
Provide examples of relevant geo-spatial or geographical terms for this field:

(E.g., Iberian Peninsula; Stratosphere; Boreal Forest; etc.)

Provide examples of relevant chronological or historical terms for this field:

(E.g., European Renaissance; Jurassic Period; Third Trimester; etc.)

Provide examples of research sample characteristics for this field:

(E.g., Age; Gender; Ethnicity; etc.)

☐ **Type (Method/Approach)**

Provide examples of relevant research types, methods, and approaches for this field:

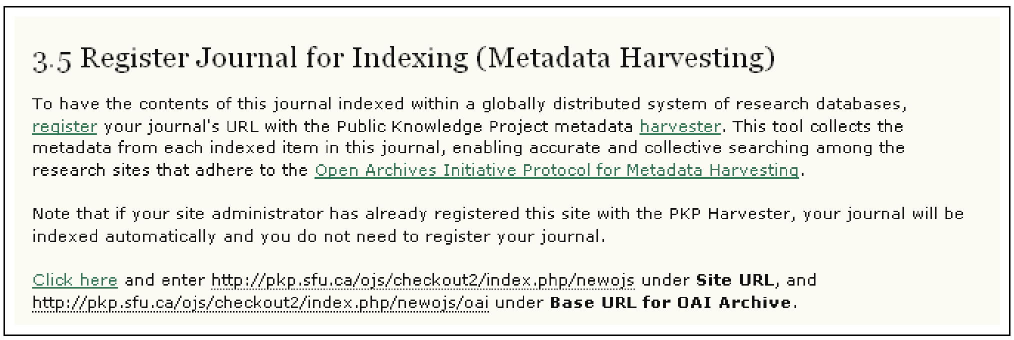
(E.g., Historical Inquiry; Quasi-Experimental; Literary Analysis; Survey/Interview)

Figure 44: For authors to index their work

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

3.5 Register Journal for Indexing

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


3.5 Register Journal for Indexing (Metadata Harvesting)

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

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

Click here and enter http://pkp.sfu.ca/ojs/checkout2/index.php/newojs under **Site URL**, and http://pkp.sfu.ca/ojs/checkout2/index.php/newojs/oai under **Base URL for OAI Archive**.

Figure 45: Register journal for indexing

3.6 Notification of Author Submission

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


3.6 Notification of Author Submission

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

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

☐ Send a copy to this email address:

Figure 46: Notification of author submission

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

Step 4: Management

4.1 Access and Security Settings

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

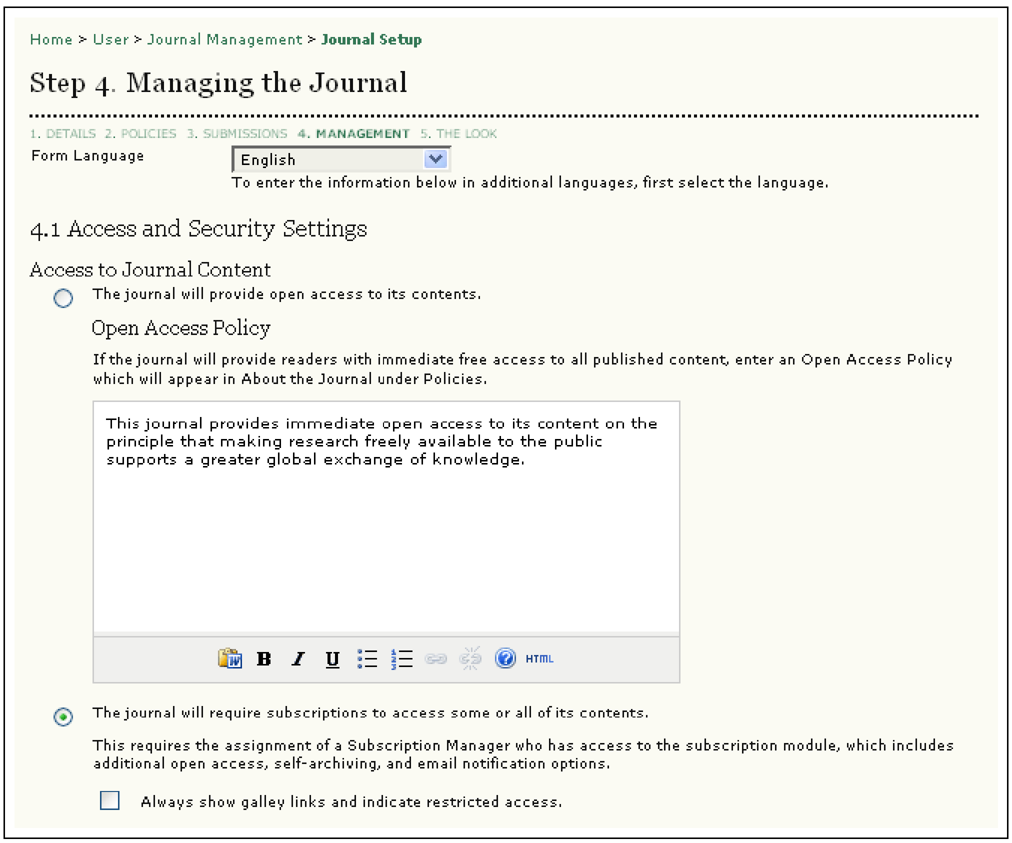


Figure 47: Setting the Open Access policy

You can then further restrict site- and article-level access through the use of user registration, and decide how users are allowed to register themselves. Finally, you can enable logging of submission actions and user emails sent by the system.

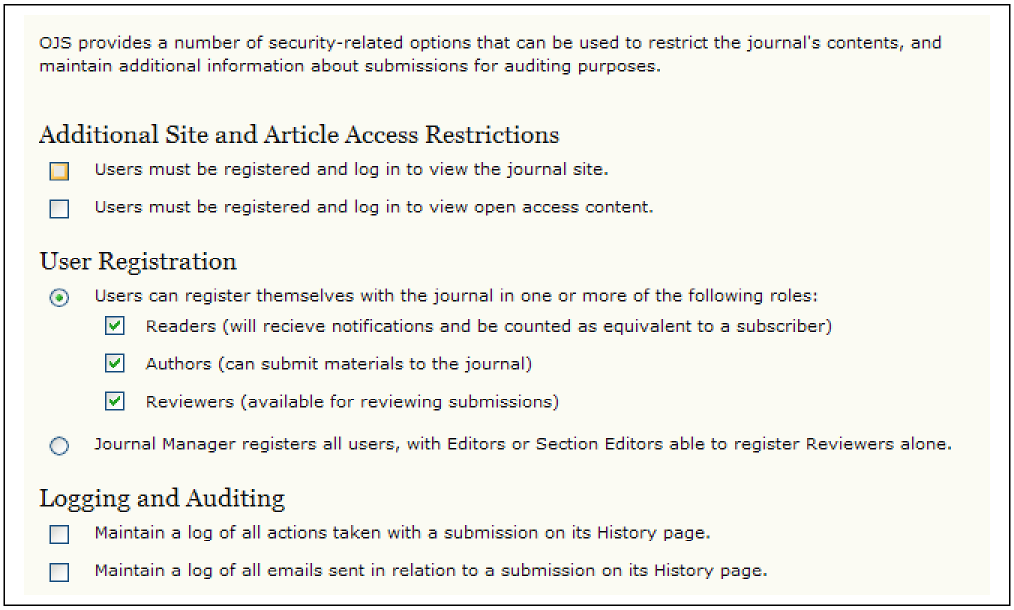
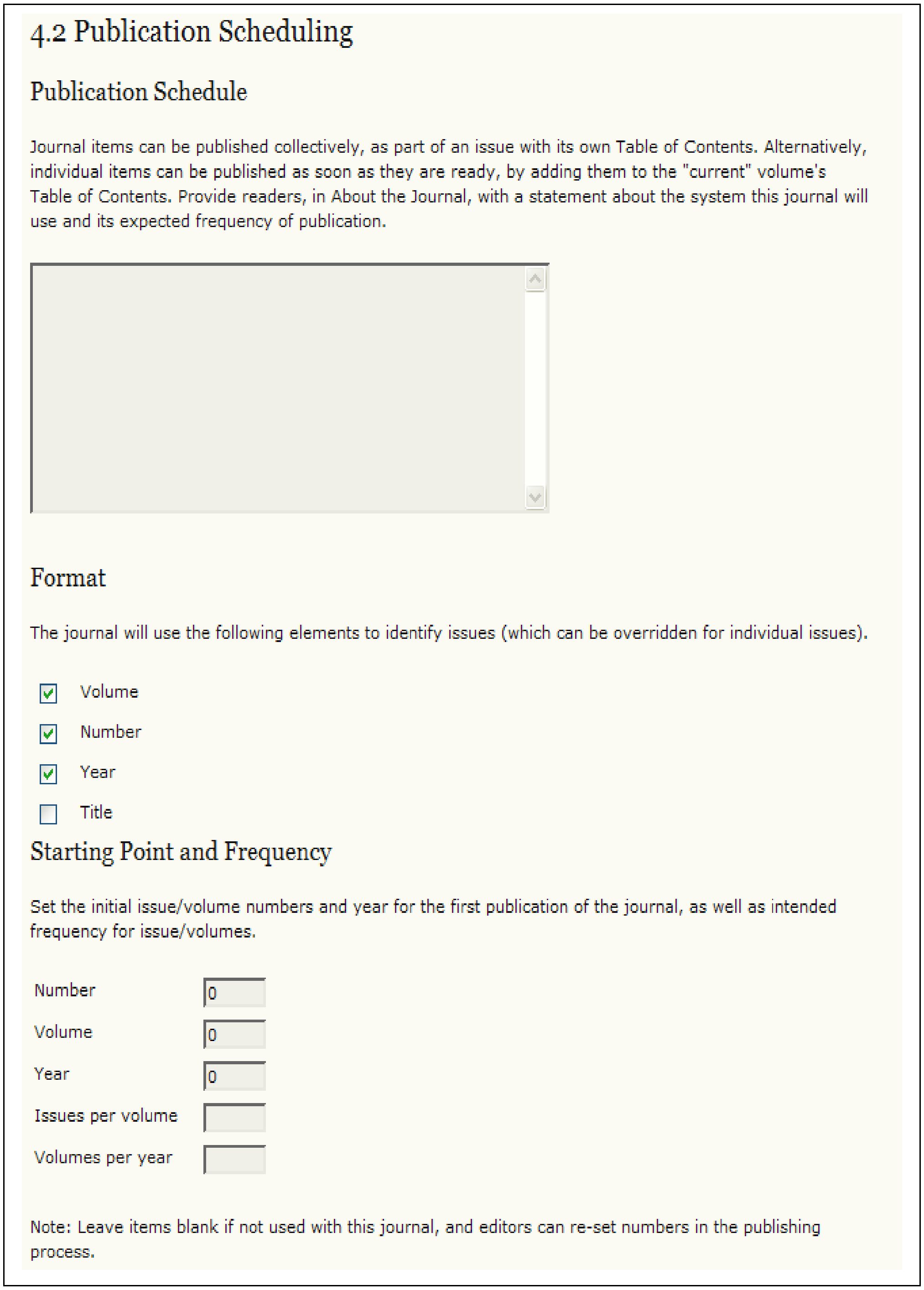


Figure 48: Additional site and article restrictions; logging and auditing

4.2 Publication Scheduling

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



4.2 Publication Scheduling

Publication Schedule

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

Format

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

- [x] Volume
- [x] Number
- [x] Year
- [ ] Title

Starting Point and Frequency

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

Number	0
Volume	0
Year	0
Issues per volume	
Volumes per year	

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

Figure 49: Publication scheduling

4.3 Identification of Journal Content

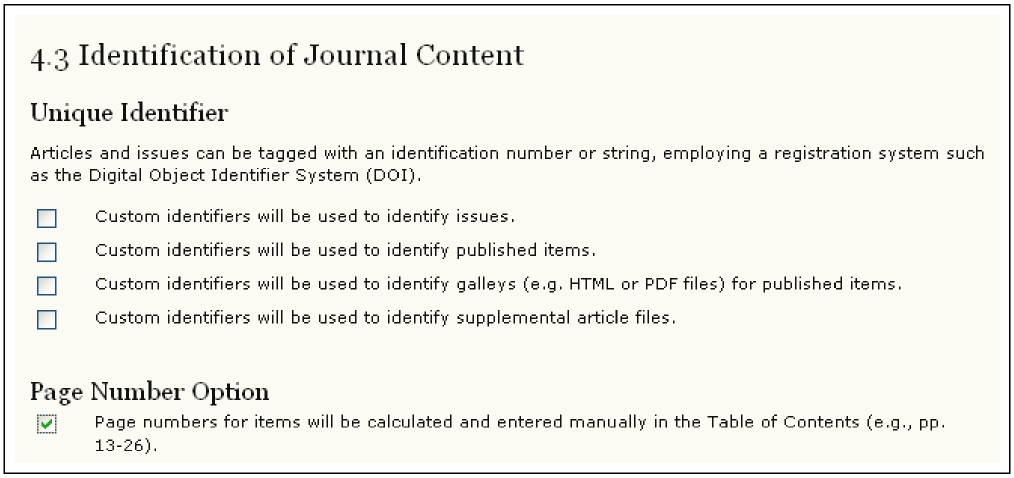


Figure 50: Identification of journal content

Visit http://doi.org/ to learn more about registering for a Digital Object Identifier for your journal. A page number option is also available for journals.

4.4 Announcements

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

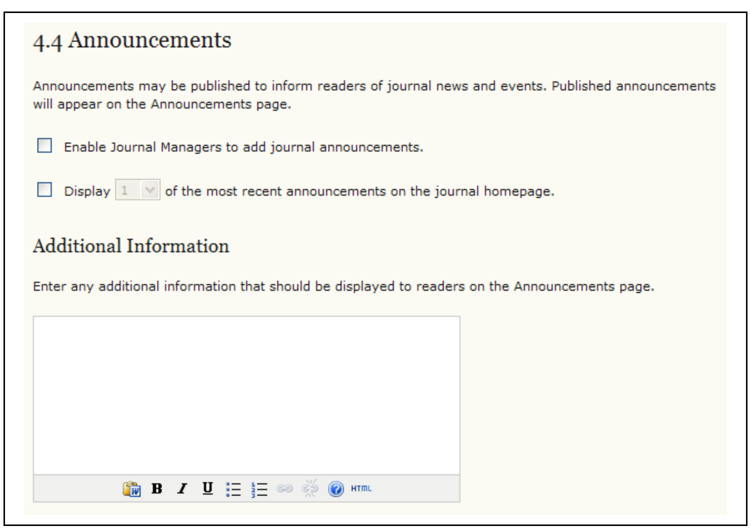


Figure 51: Announcements

4.5 Copyeditors

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

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

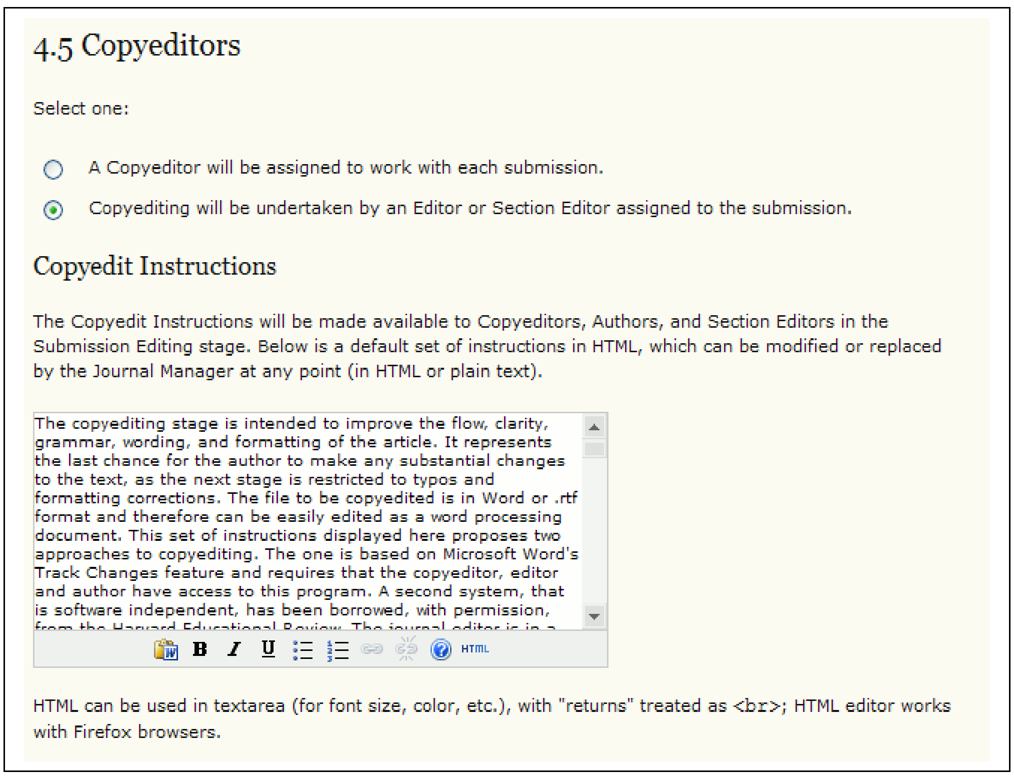


Figure 52: Copyeditors

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

4.6 Layout Editors

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

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

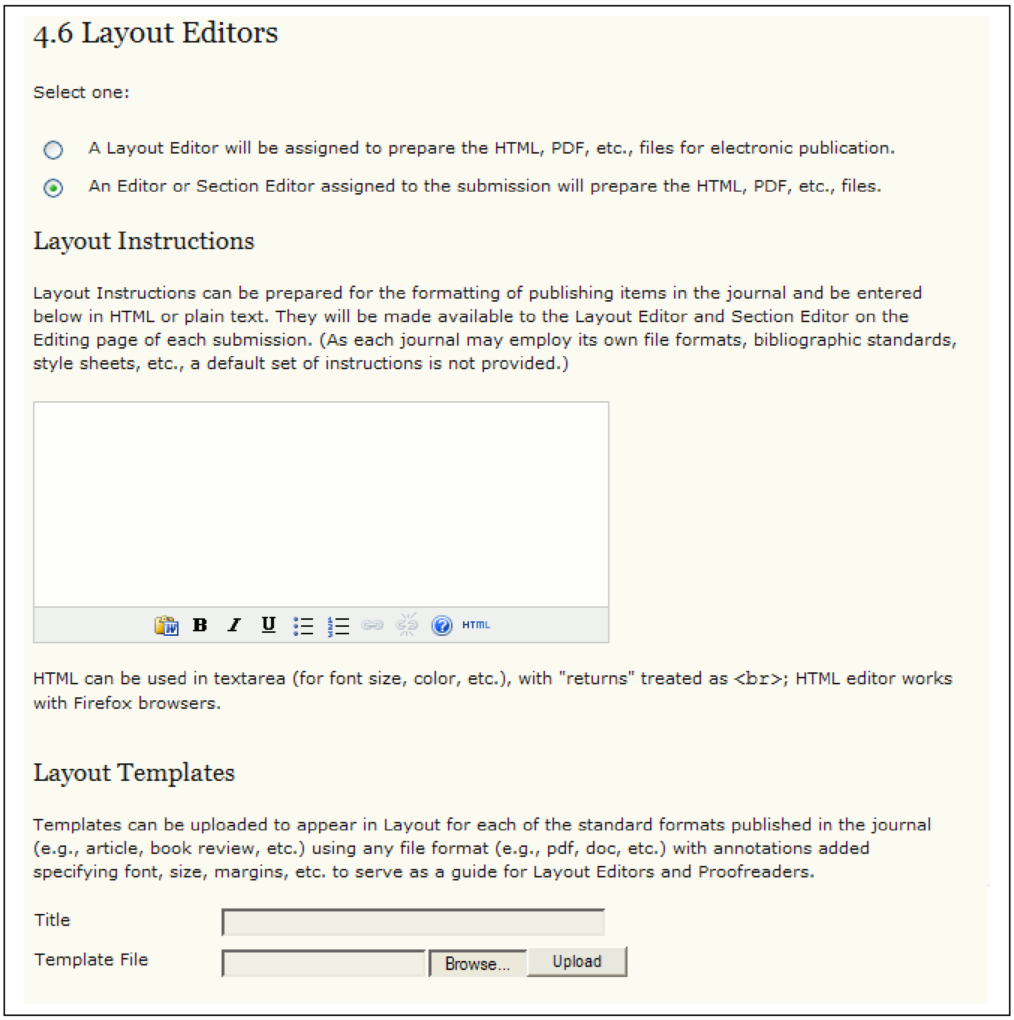


Figure 53: Layout Editors

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

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

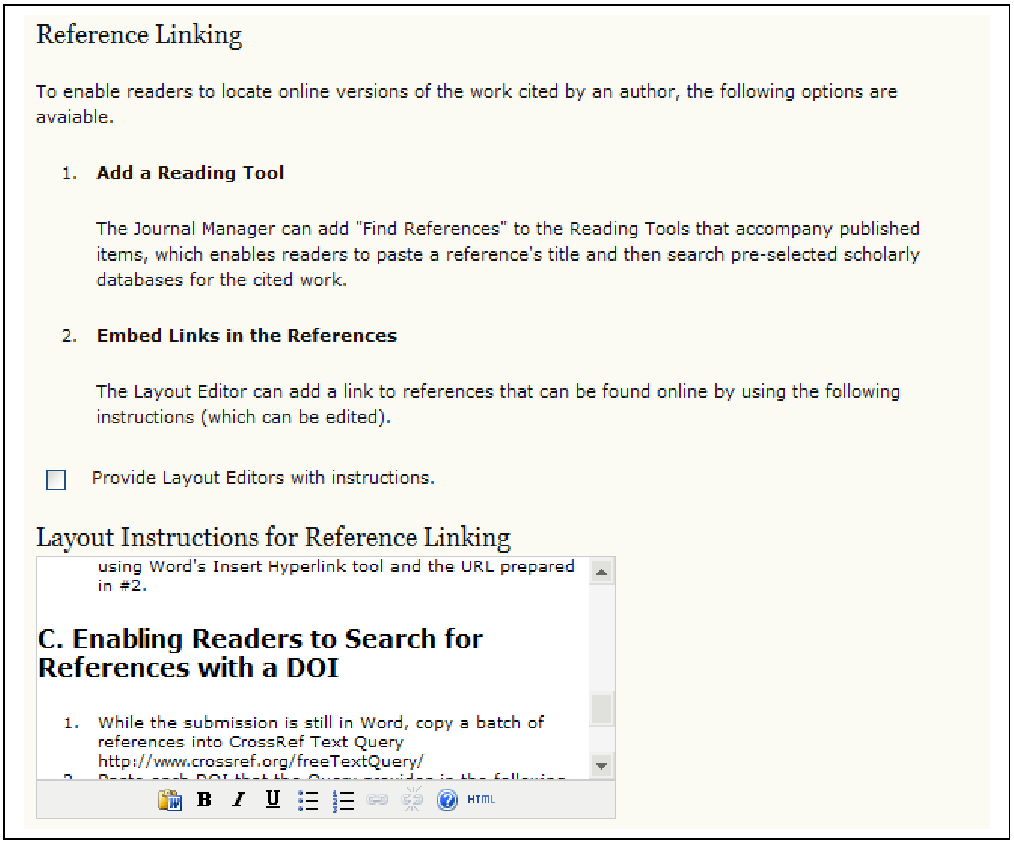


Figure 54: Reference linking

4.7 Proofreaders

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

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

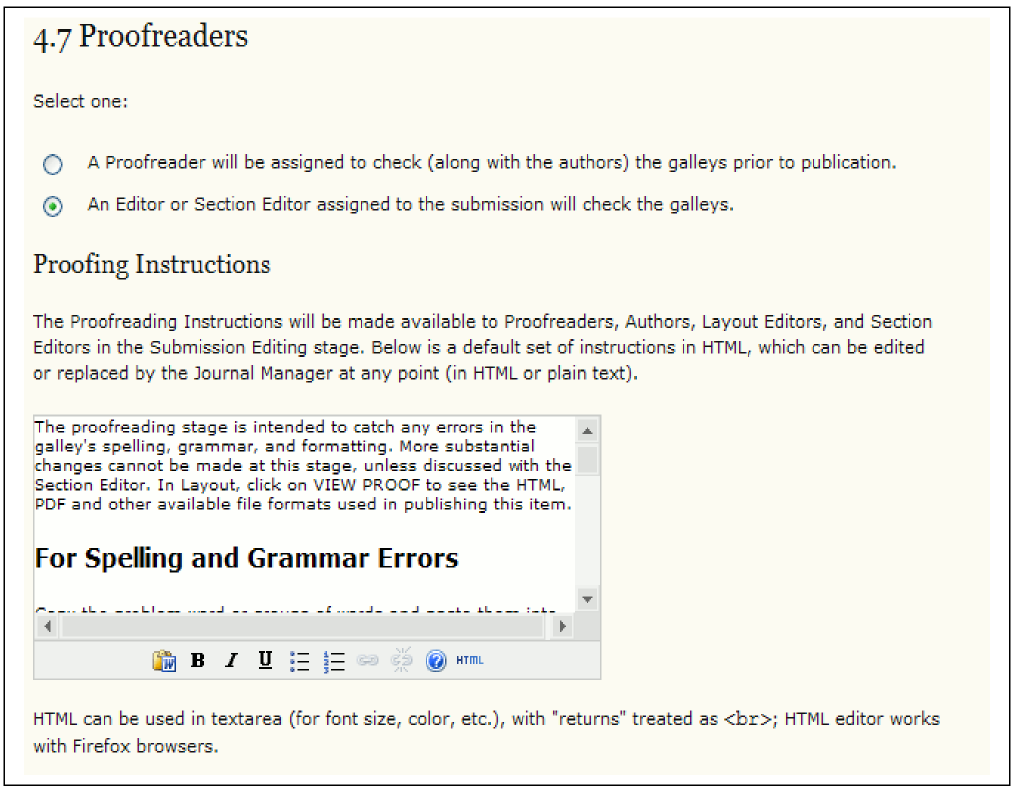


Figure 55: Proofreaders

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

Step 5: The Look

5.1 Journal Homepage Header

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

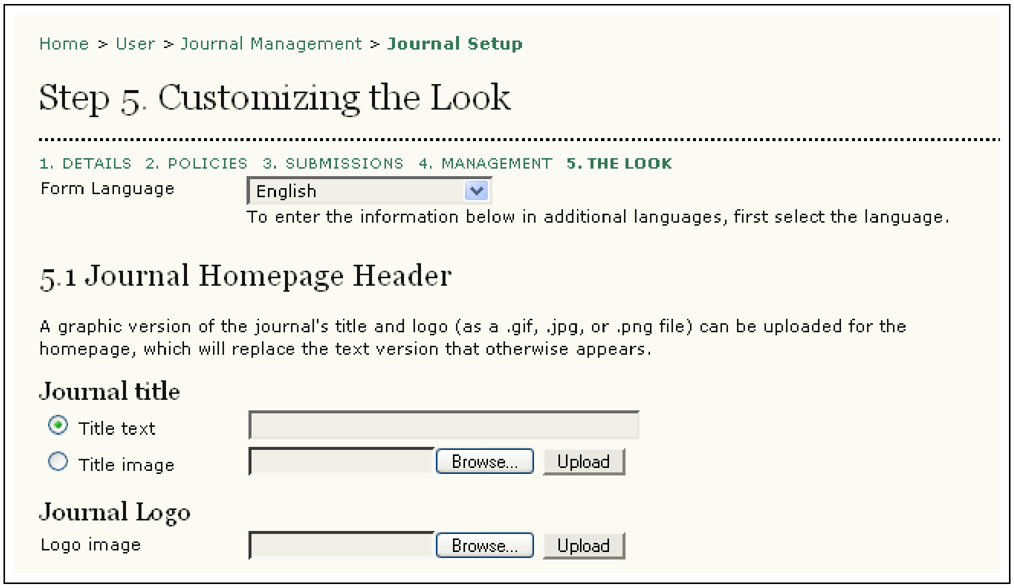


Figure 56: Journal Homepage Header

5.2 Journal Homepage Content

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

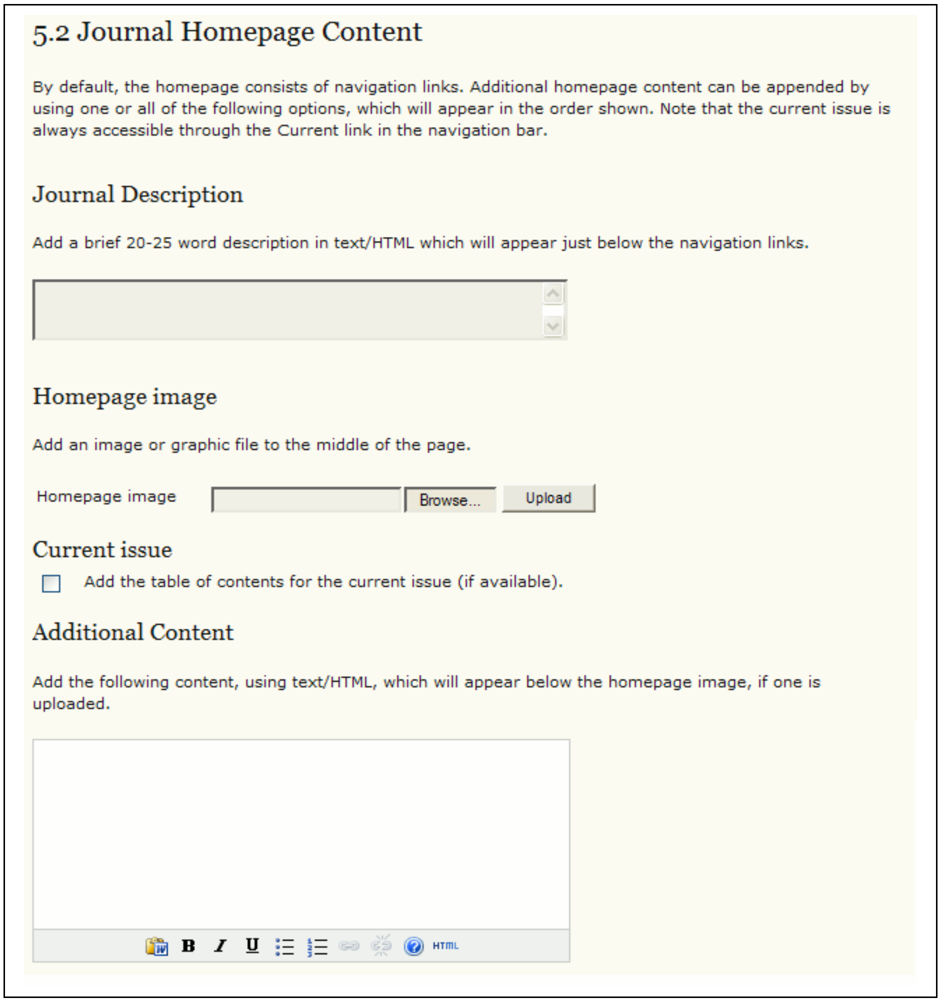


Figure 57: Journal Homepage Content

5.3 Journal Page Header

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

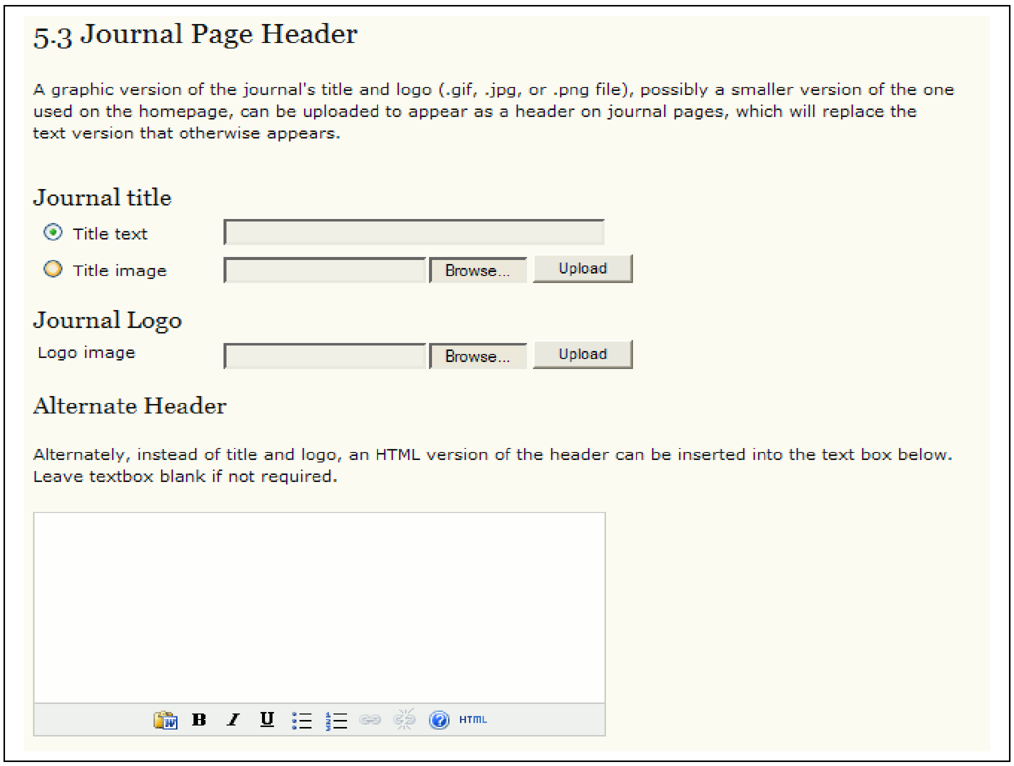


Figure 58: Journal Page Header

5.4 Journal Page Footer

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

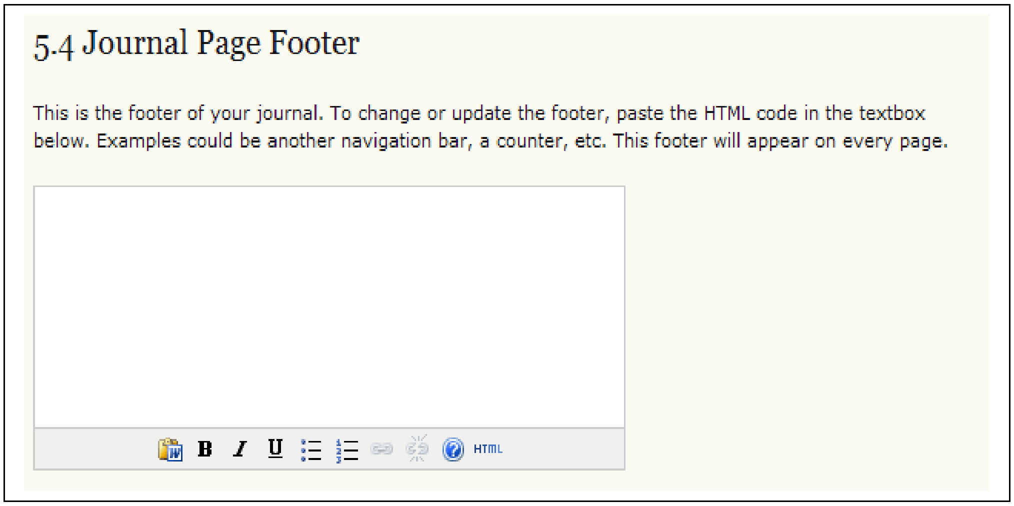


Figure 59: Journal page footer

5.5 Navigation Bar

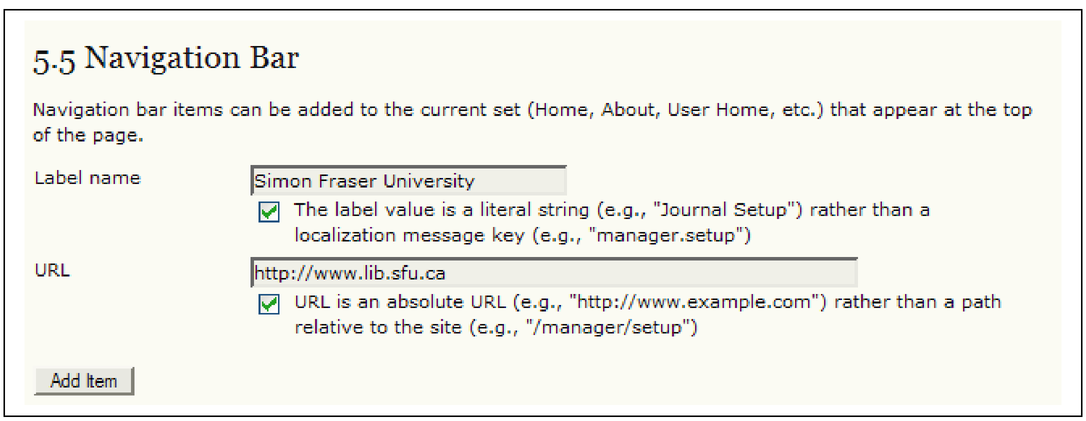


Figure 60: Navigation bar

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

5.6 Journal Layout

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

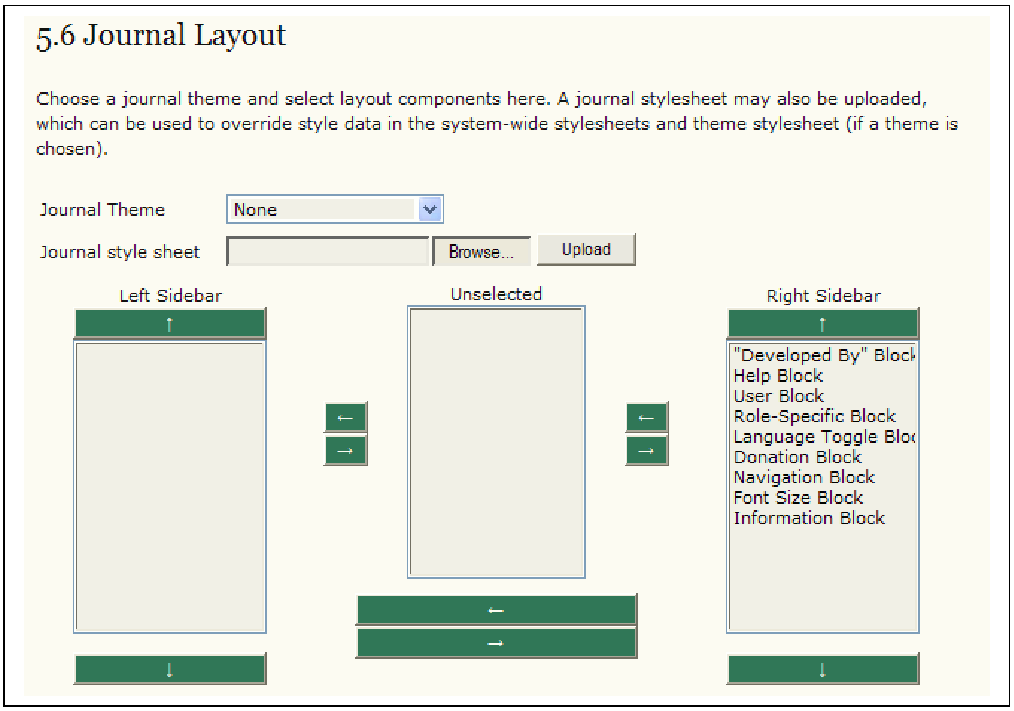


Figure 61: Journal Layout

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

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

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

to this

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

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

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

5.7 Information

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

Figure 62: Information

5.8 Lists

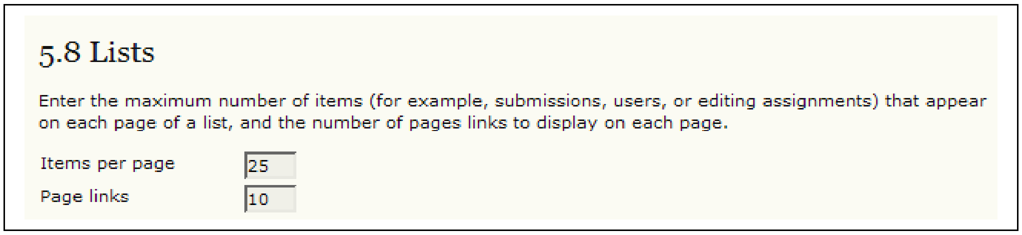


Figure 63: Lists

Announcements

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

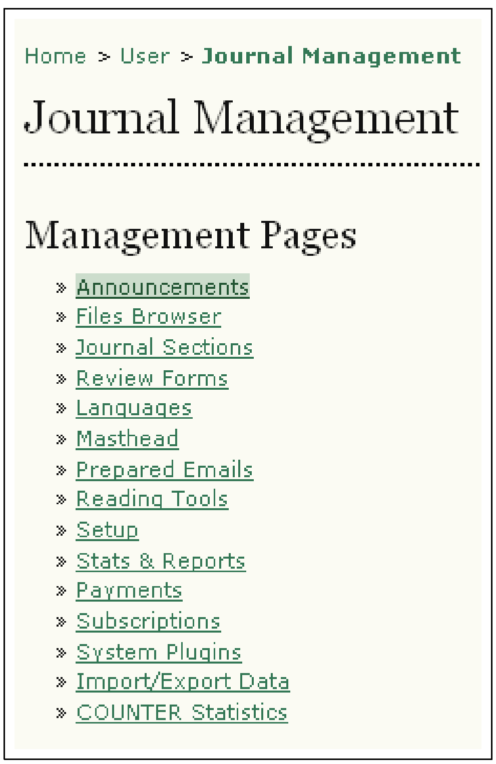


Figure 64: Announcements

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

Figure 65: Announcement Types

Figure 66: Announcement Types

Fill in the name for a new announcement type.

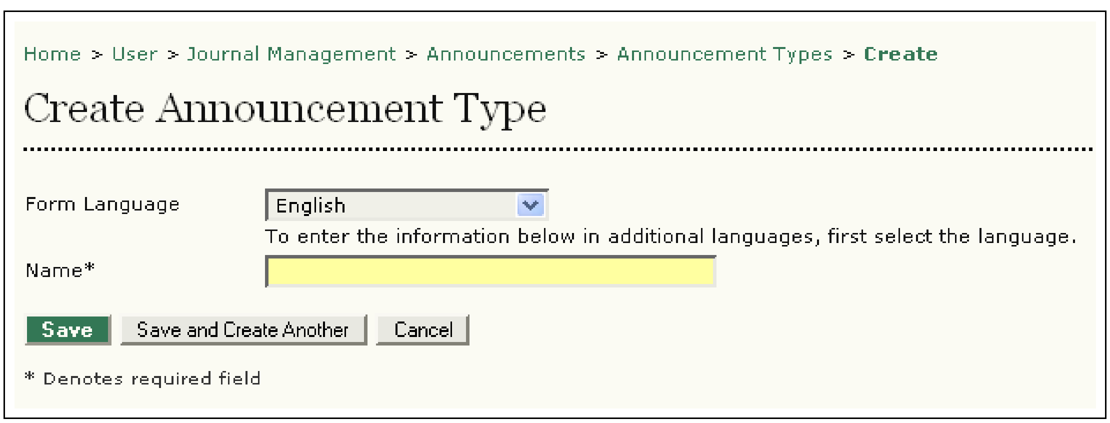


Figure 67: Create Announcement Type

Next, you can create and post an announcement using “Create New Announcement” link. Select announcement type from the dropdown menu, fill in the announcement title, provide the short and detailed descriptions for the announcement, and specify the expiry date for the announcement to display.

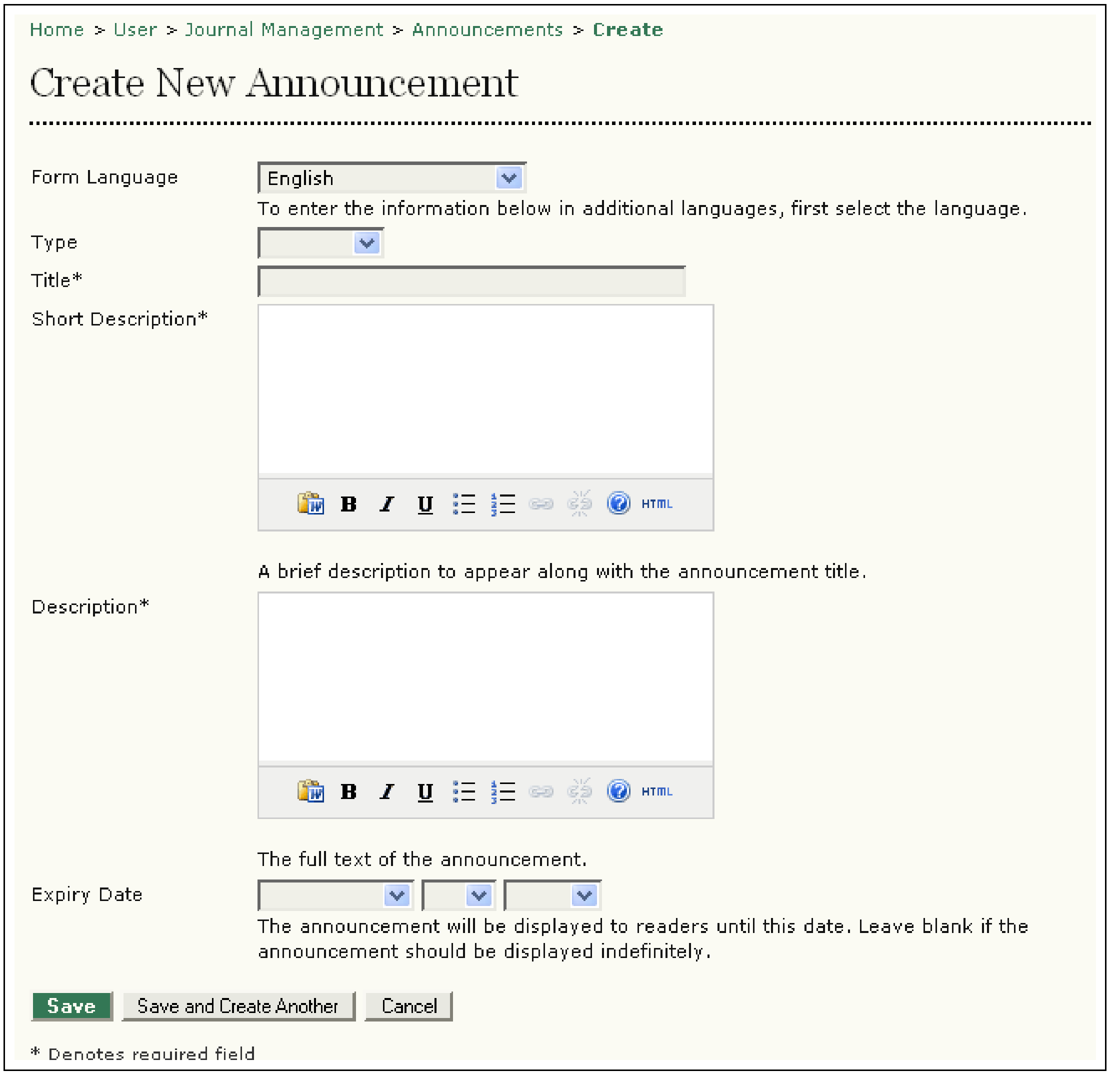


Figure 68: Create New Announcement

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

Files Browser

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

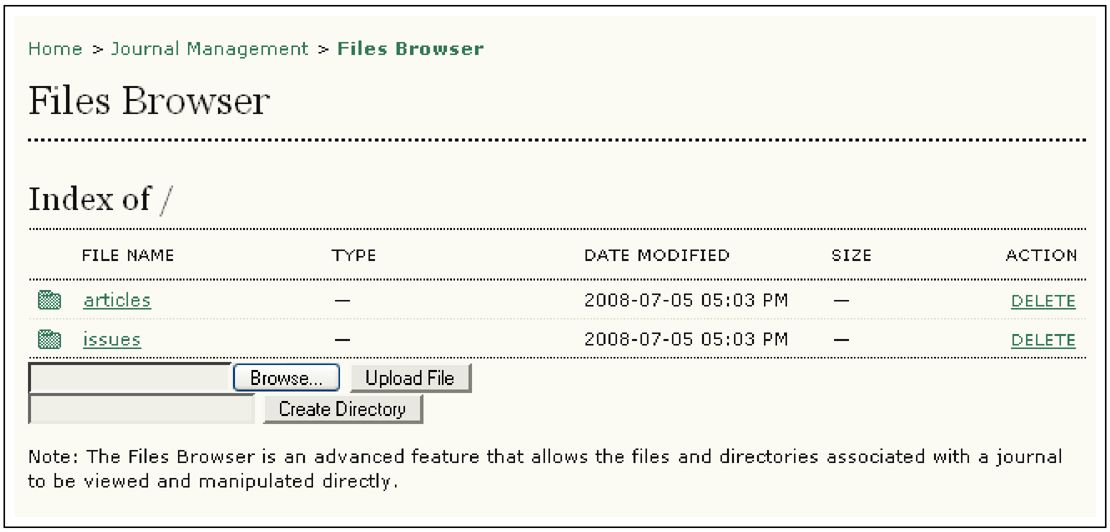


Figure 69: File Browsing

Journal Sections

OJS journals may contain several sections (e.g., Articles, Reviews, Research, etc.). You will need to create at least one section for your journal (all journals start with a default “Articles” section that can be edited). If you do not wish for the section title to be visible to your readers, you can choose to omit it from the Table of Contents (this may be handy for things like introductions and editorials, for example).

To create a new section:

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

Figure 70: Sections

- Select ‘Create Section’:

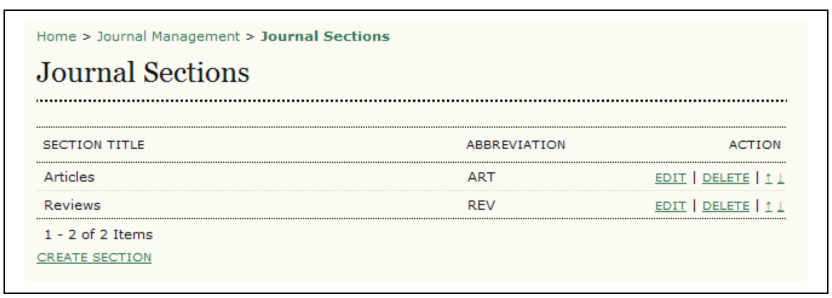


Figure 71: Create Section

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

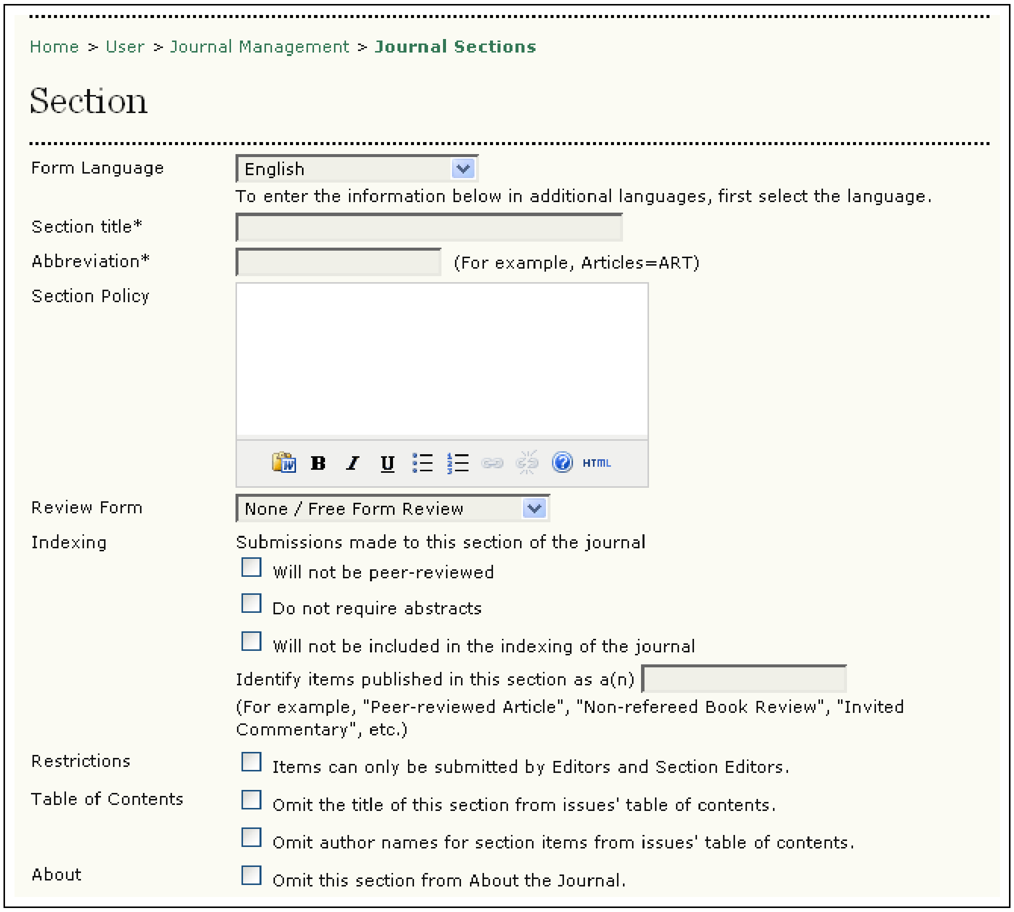


Figure 72: Section information

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

Section Editors

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

Available Section Editors

USERNAME	NAME	ACTION
	None	

This Section's Editors

USERNAME	NAME	REVIEW	EDITING	ACTION
		None		

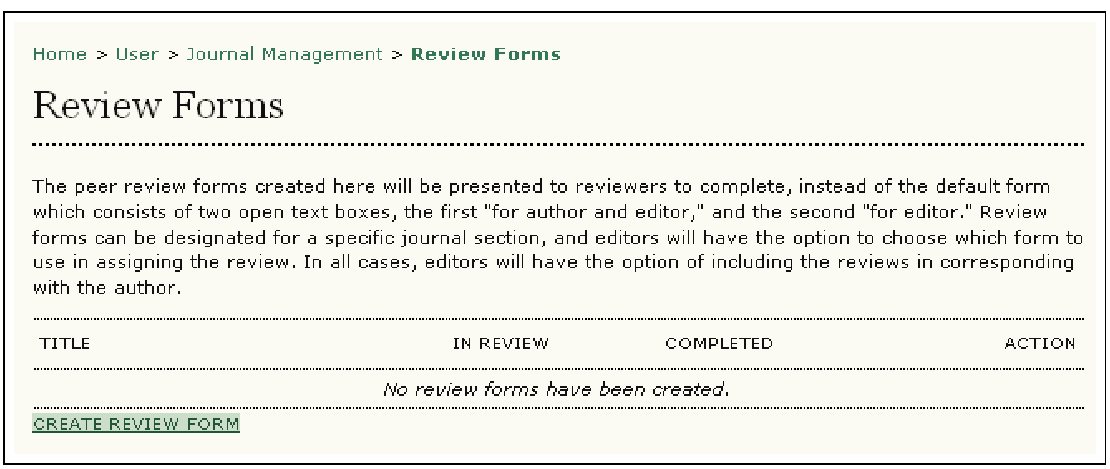
Save Cancel

* Denotes required field

Figure 73: Assigning Section Editors

Review Forms

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



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

Review Forms

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

TITLE	IN REVIEW	COMPLETED	ACTION
	No review forms have been created.		

CREATE REVIEW FORM

Figure 74: Review Forms

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

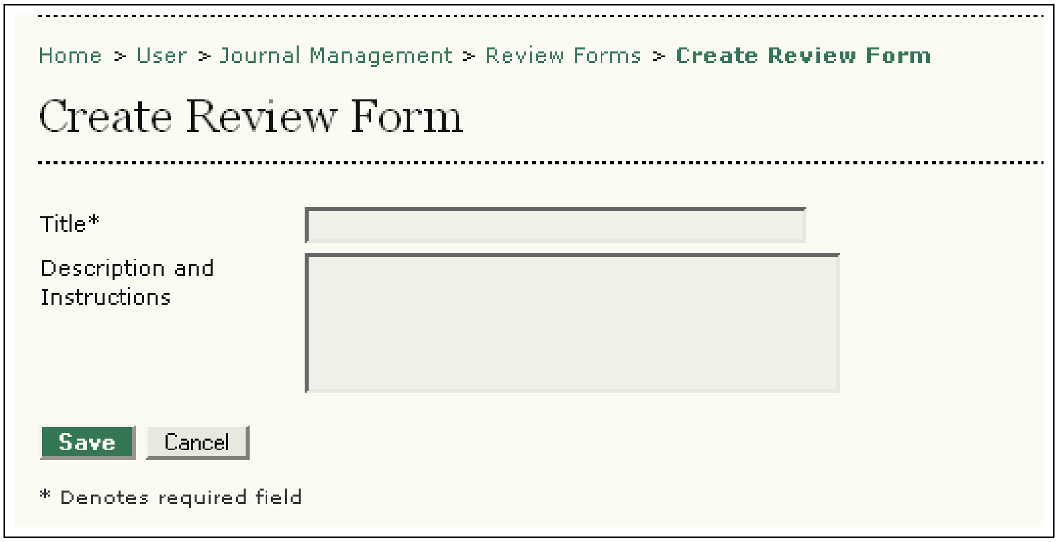


Figure 75: Create Review Form

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

Figure 76: Created Review Form

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

Figure 77: Form Items

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

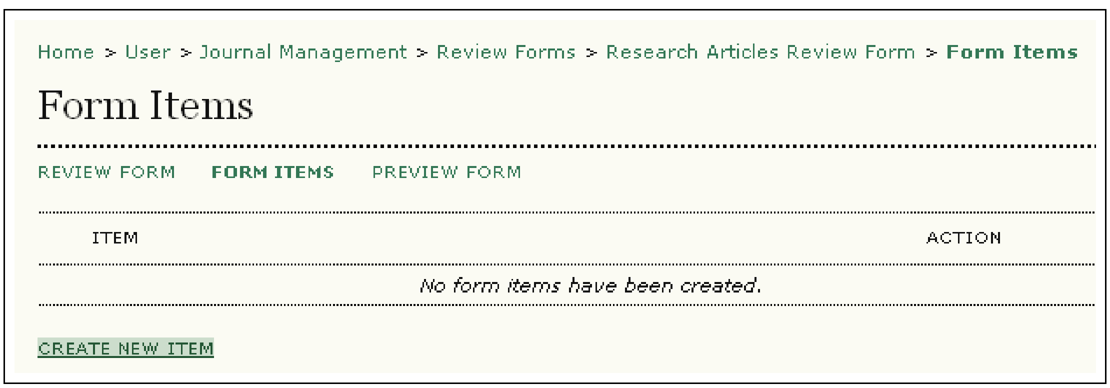


Figure 78: Create New Item

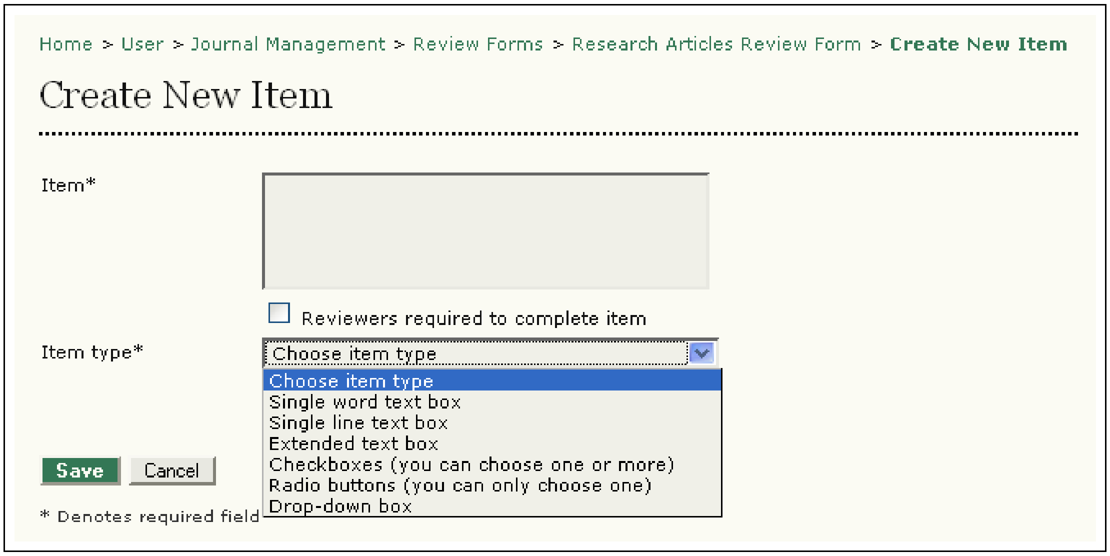


Figure 79: Create New Item

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

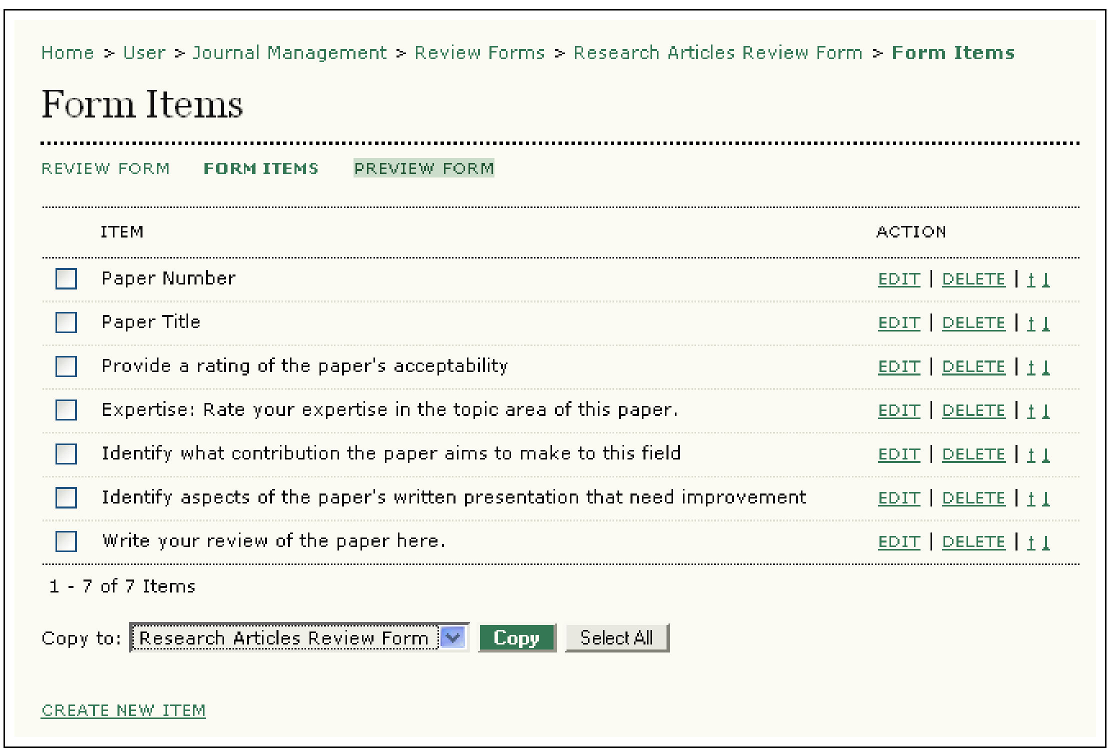
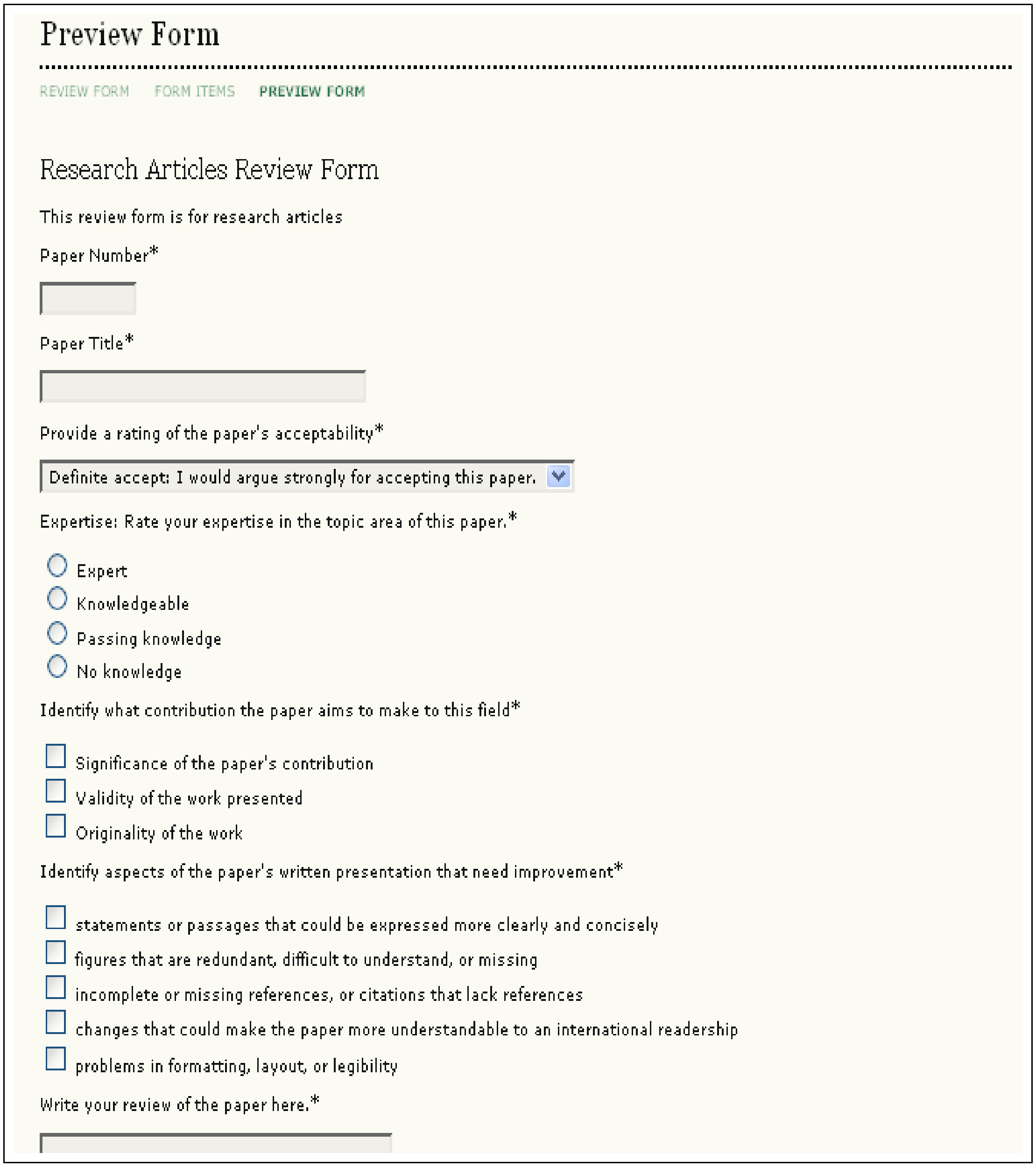


Figure 80: Created Items



Preview Form

REVIEW FORM FORM ITEMS PREVIEW FORM

Research Articles Review Form

This review form is for research articles

Paper Number*

Paper Title*

Provide a rating of the paper's acceptability*

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

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

- Expert
- Knowledgeable
- Passing knowledge
- No knowledge

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

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

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

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

Write your review of the paper here.*

Figure 81: Preview Form

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

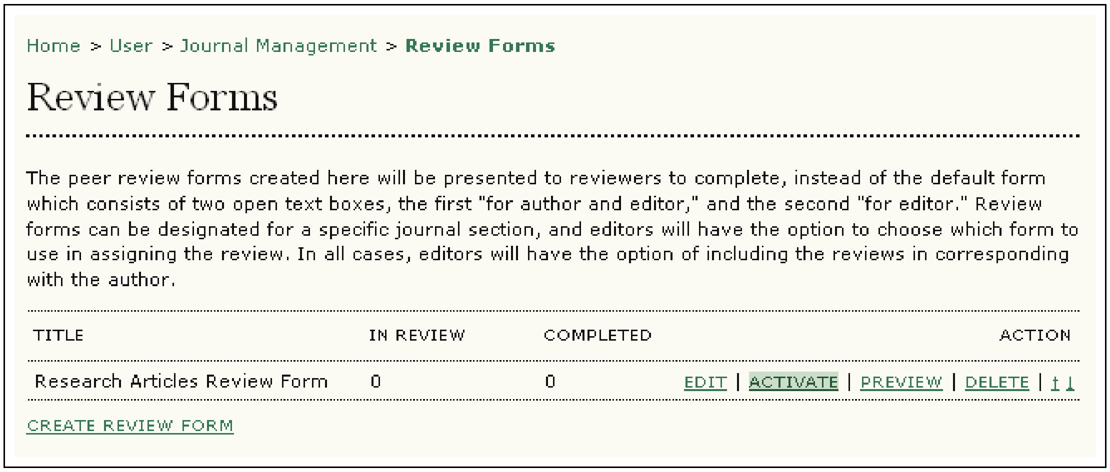


Figure 82: Activate Review Form

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

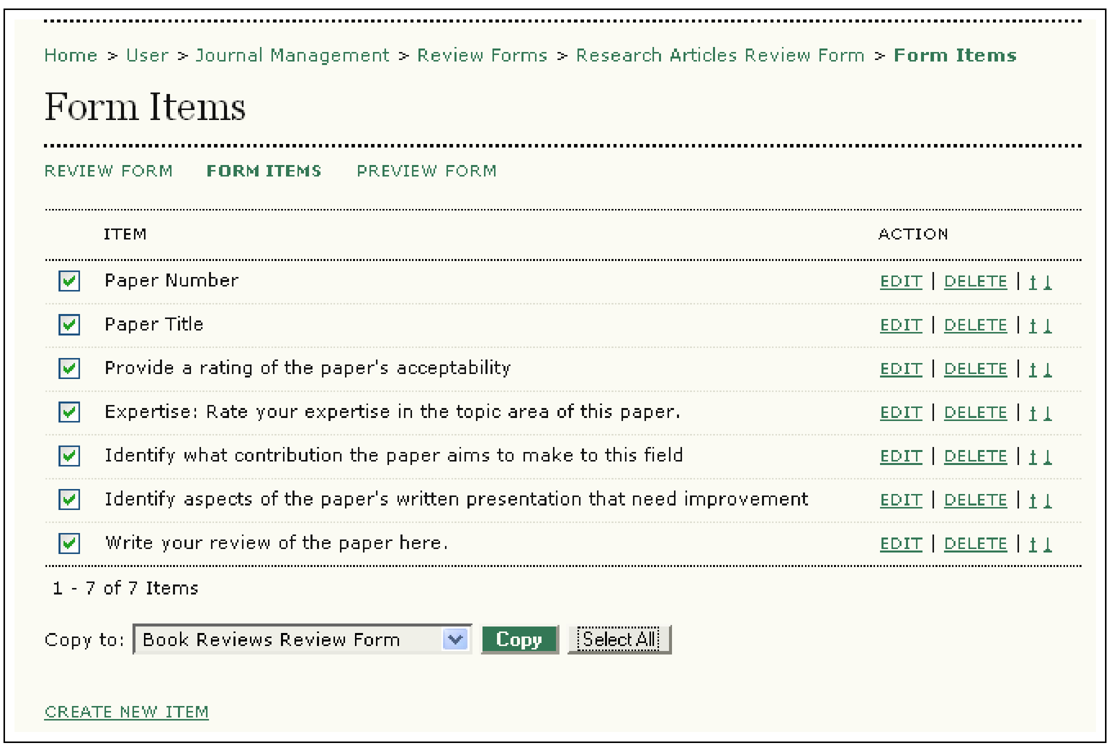


Figure 83: Copy Form Items

Languages

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

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

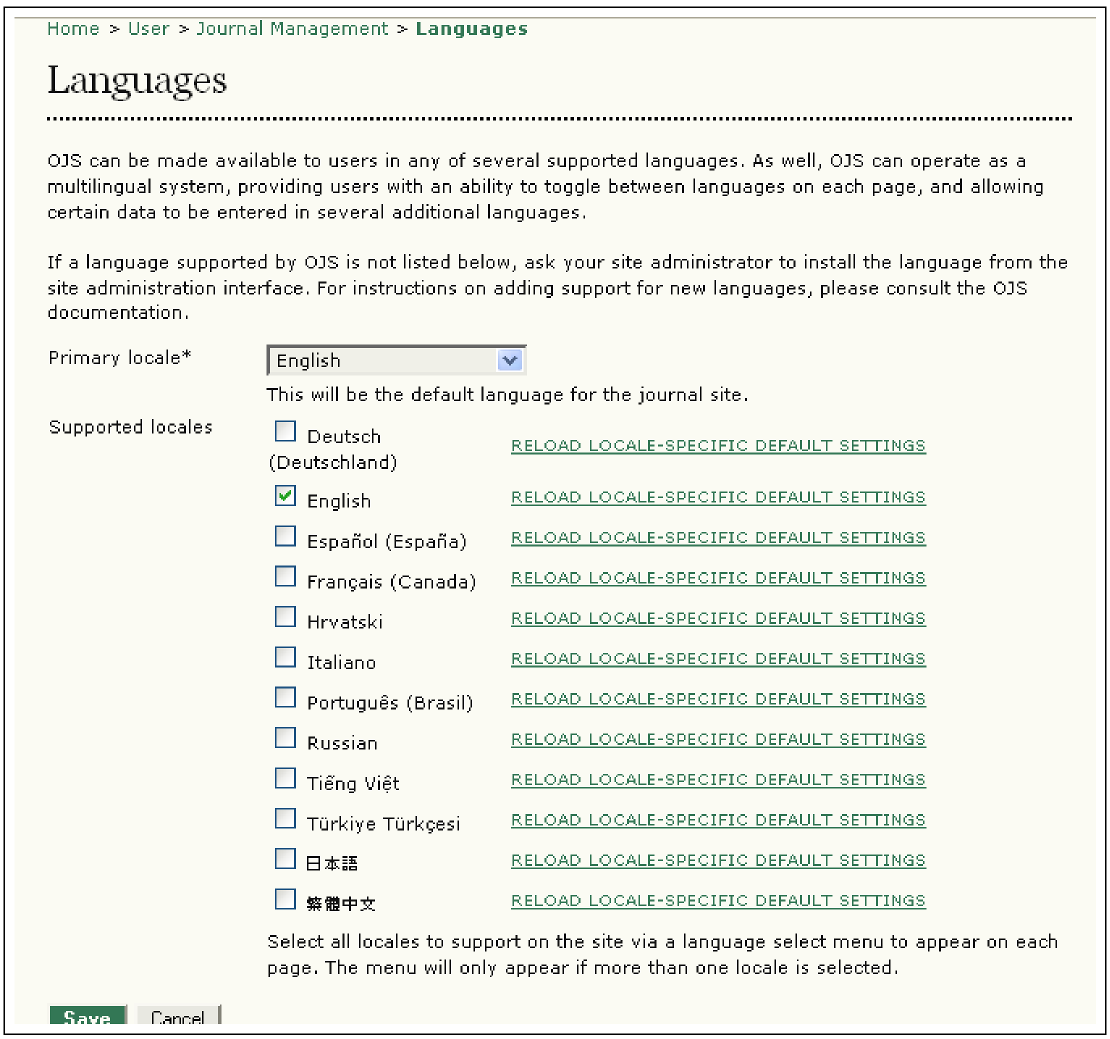


Figure 84: Languages

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

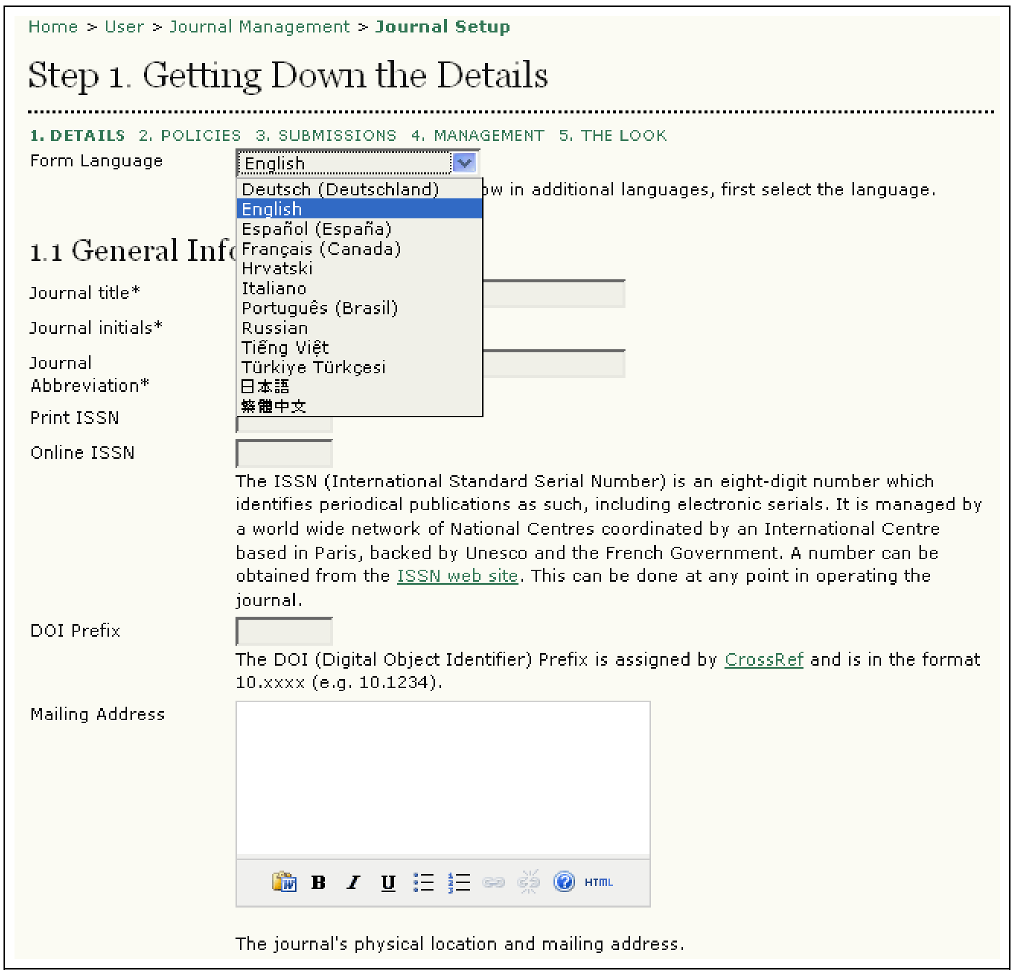


Figure 85: Form Language

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

Figure 86: Language Toggle

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

Masthead

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

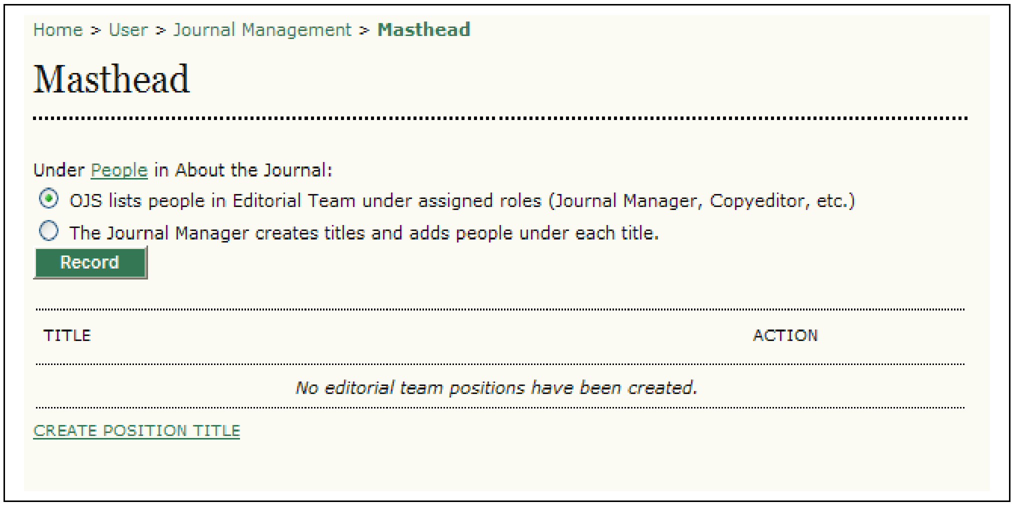


Figure 87: Editorial Team

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

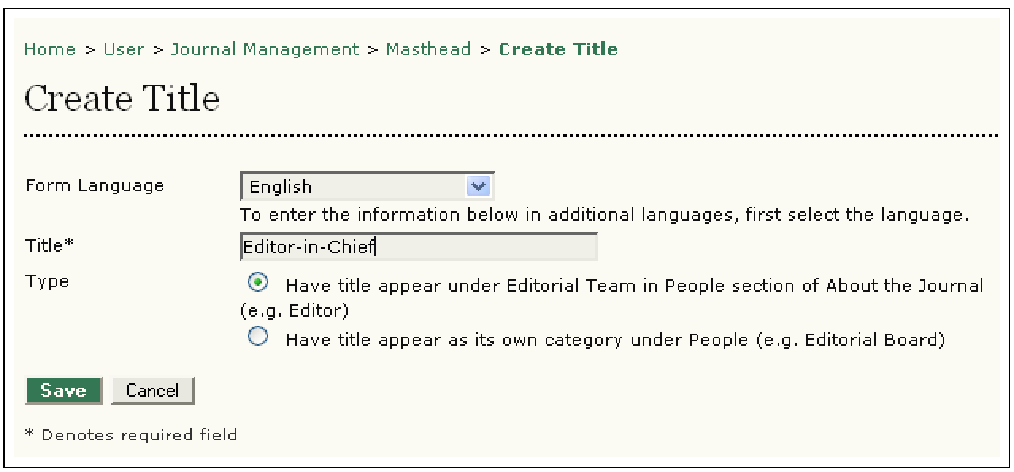


Figure 88: Creating a Position Title

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

Figure 89: Masthead Options

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

Prepared Email

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

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

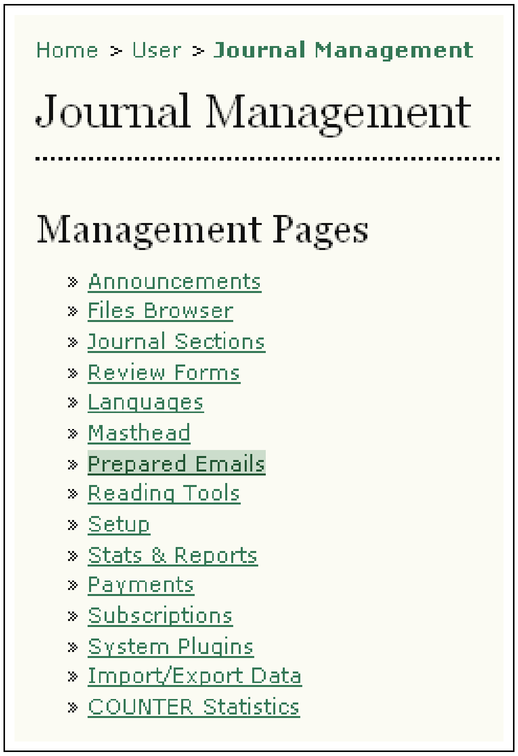


Figure 90: Emails

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

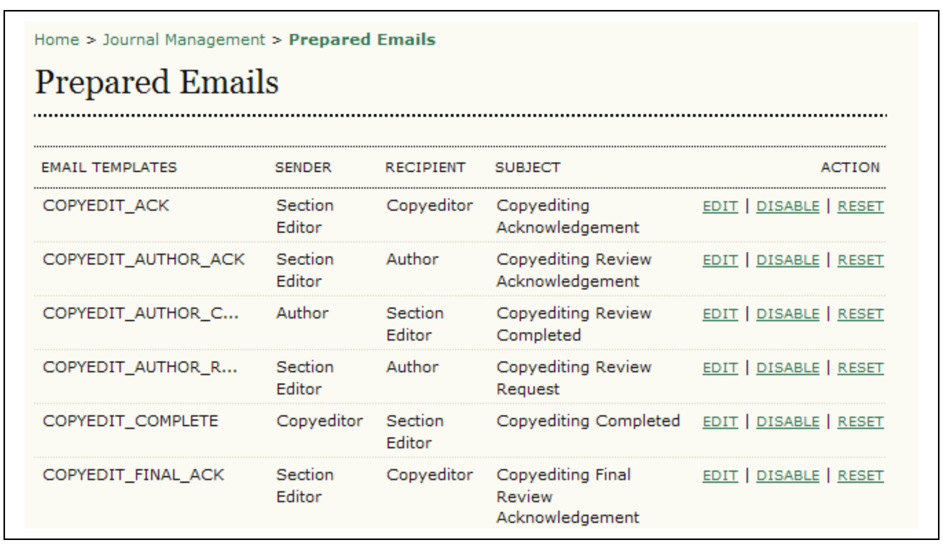


Figure 91: Email templates

- Make your changes to the selected template. Avoid changing any of the embedded programming (anything that looks like {$this}) however, as these will dynamically generate the appropriate information:

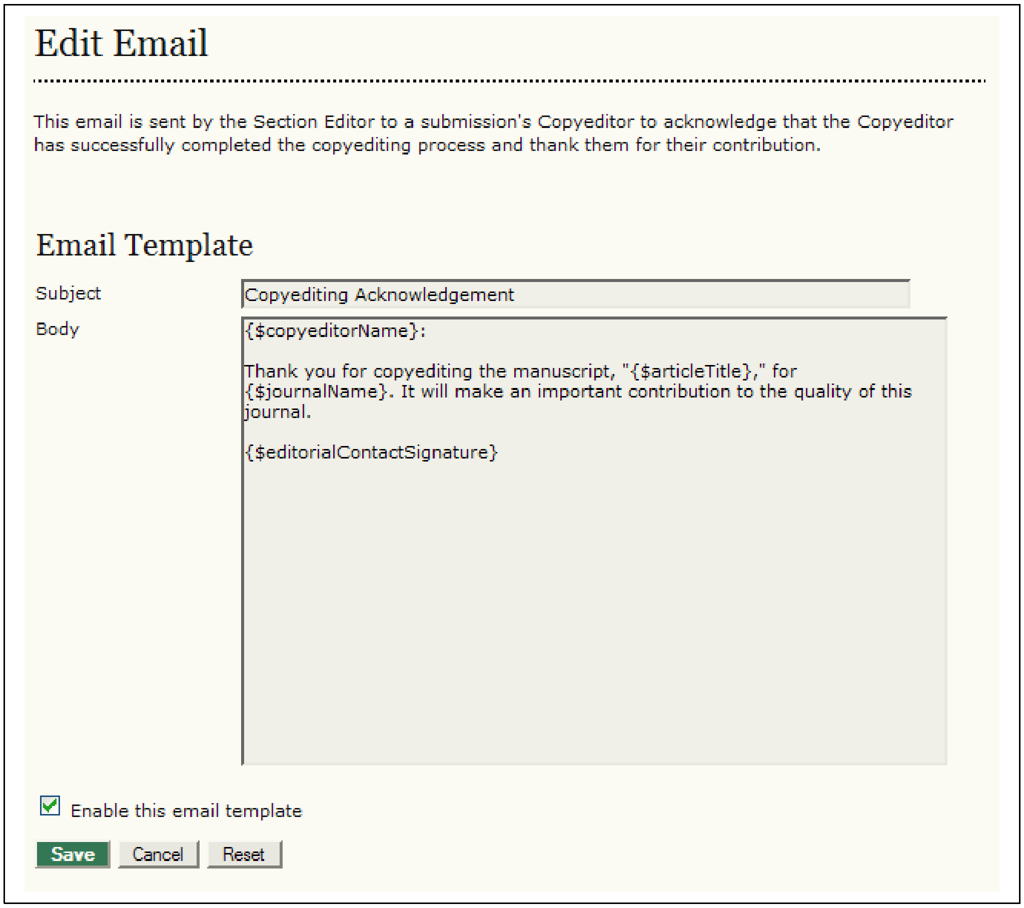


Figure 92: Editing email templates

Reading Tools

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

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

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

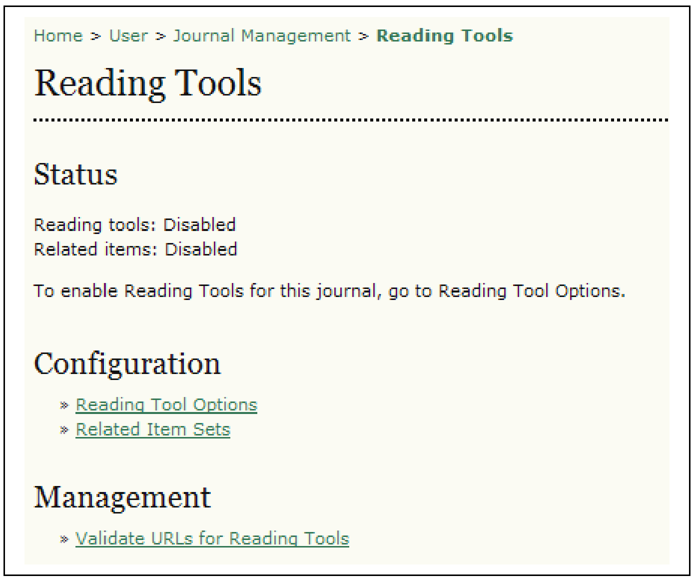


Figure 93: Activating Reading Tools

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

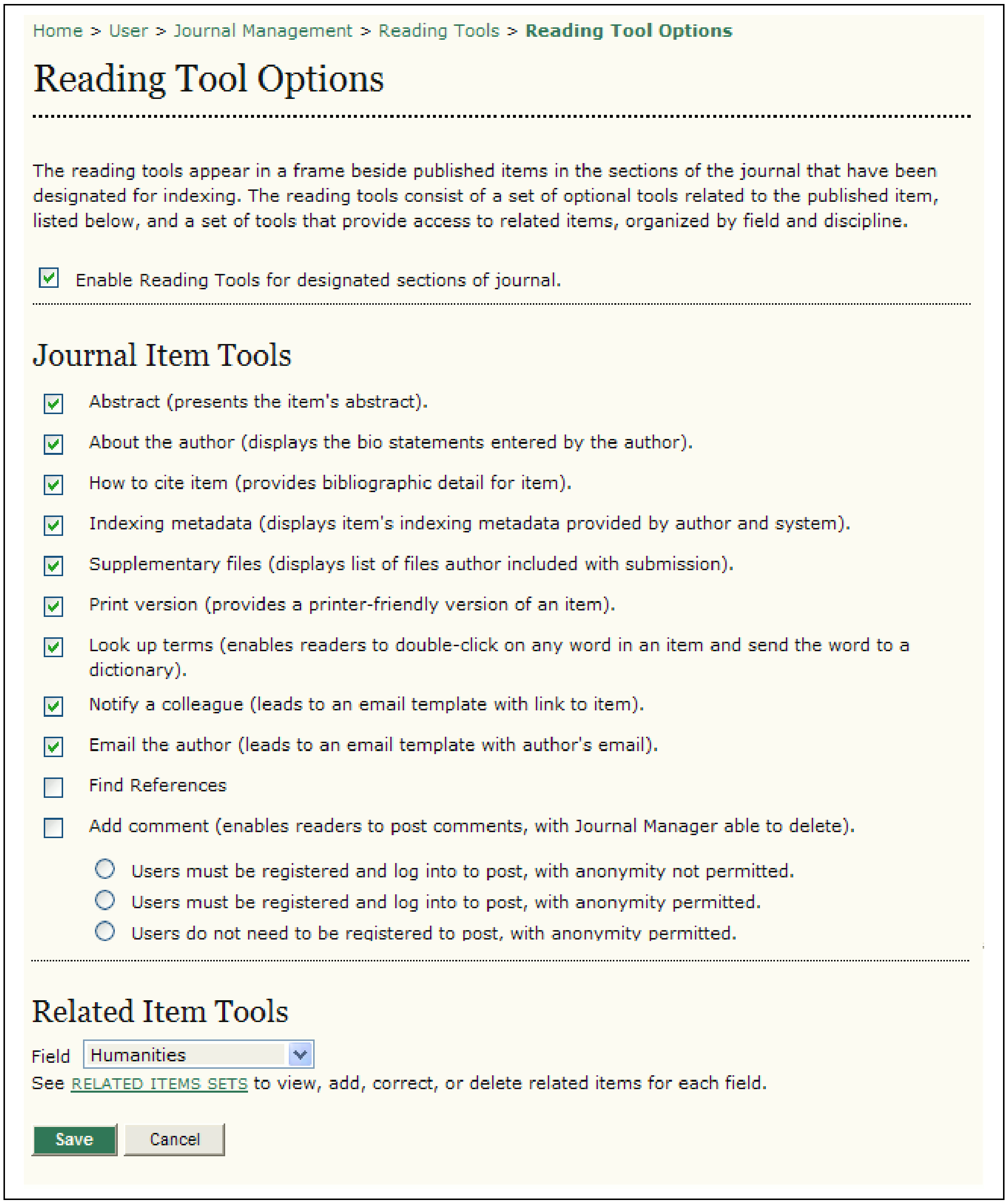


Figure 94: Reading Tool Options

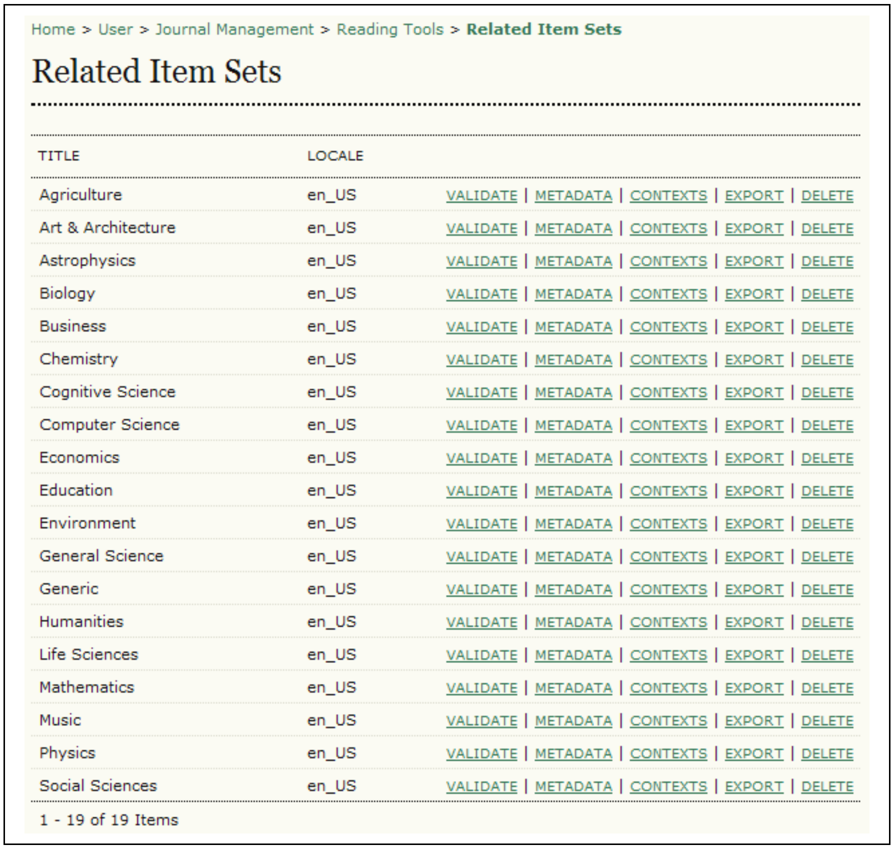
At this point, you can also configure which tools will be available to your readers. You may wish to experiment with these yourself to see if some or all of them will be useful to your audience.

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

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

Figure 95: Related Item Sets

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


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

Related Item Sets

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

1 - 19 of 19 Items

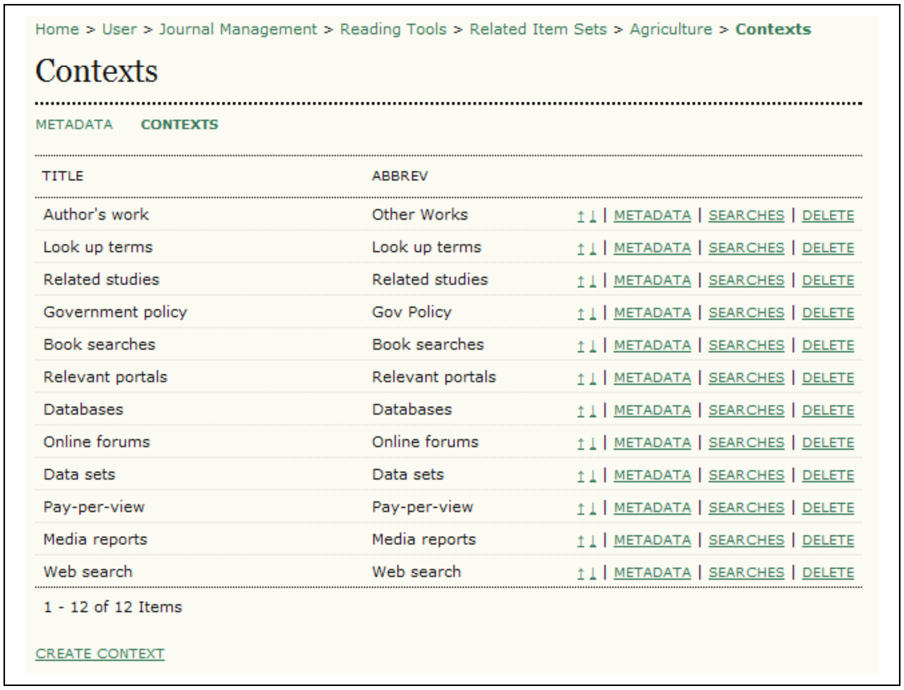
Figure 96: Related Item Sets

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

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

Metadata describes the subject item.

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


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

Contexts

METADATA CONTEXTS

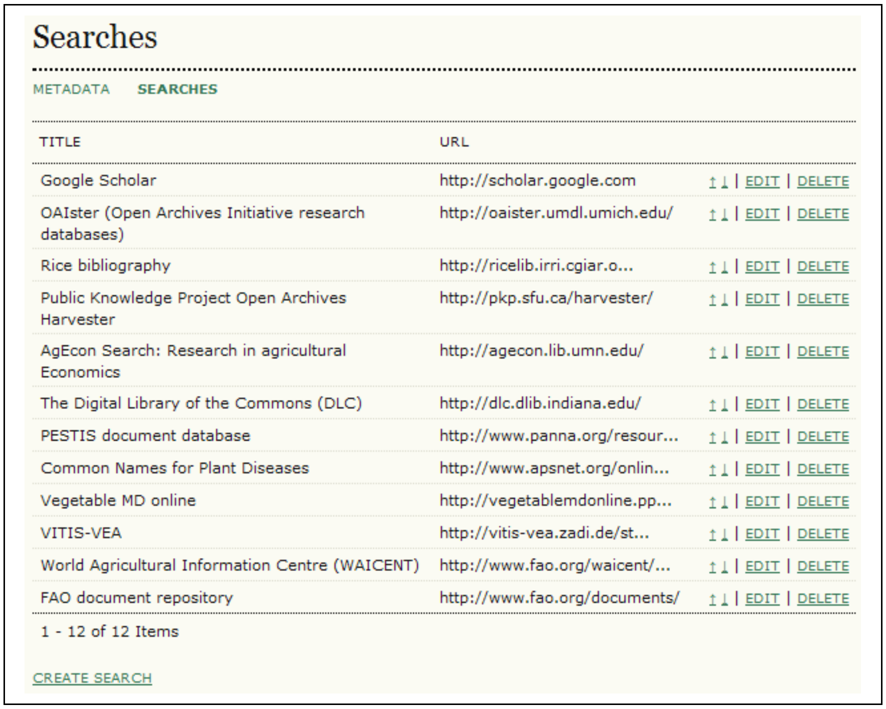
TITLE	ABBREV	
Author's work	Other Works	↑ ↓ | METADATA | SEARCHES | DELETE
Look up terms	Look up terms	↑ ↓ | METADATA | SEARCHES | DELETE
Related studies	Related studies	↑ ↓ | METADATA | SEARCHES | DELETE
Government policy	Gov Policy	↑ ↓ | METADATA | SEARCHES | DELETE
Book searches	Book searches	↑ ↓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

1 - 12 of 12 Items

CREATE CONTEXT

Figure 97: Contexts

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



Searches

METADATA SEARCHES

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

1 - 12 of 12 Items

CREATE SEARCH

Figure 98: Searches

Export creates an XML file of the items.

Delete removes the item.

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

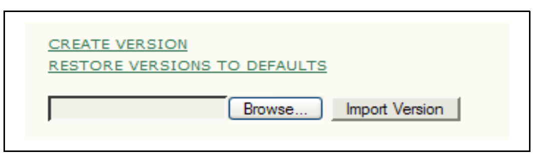


Figure 99: Creating Item Sets

Statistics and Reports

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

Figure 100: Journal Management menu

Statistics

OJS provides a summary of your journal's usage.

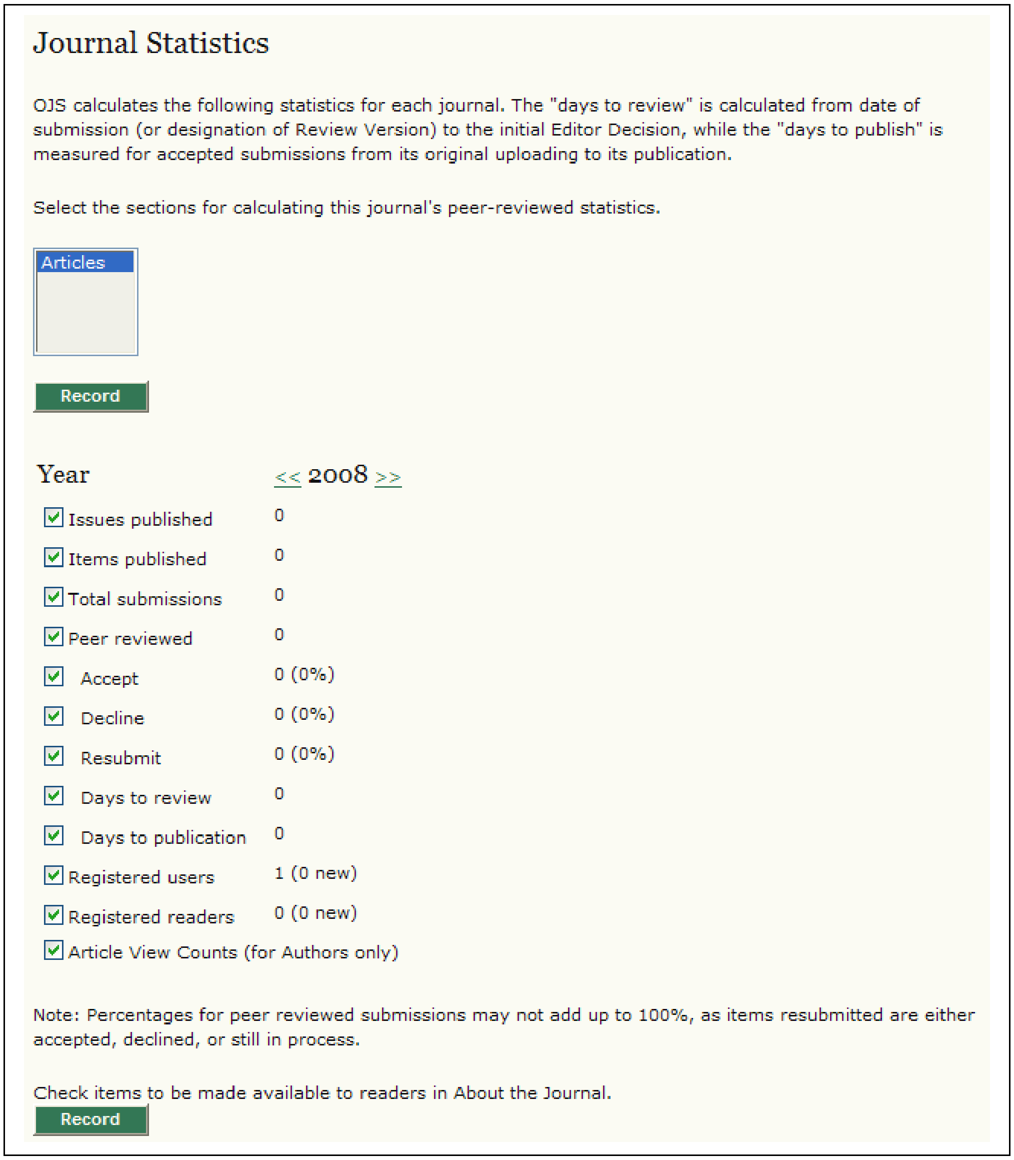


Figure 101: Statistics

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

Reports

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

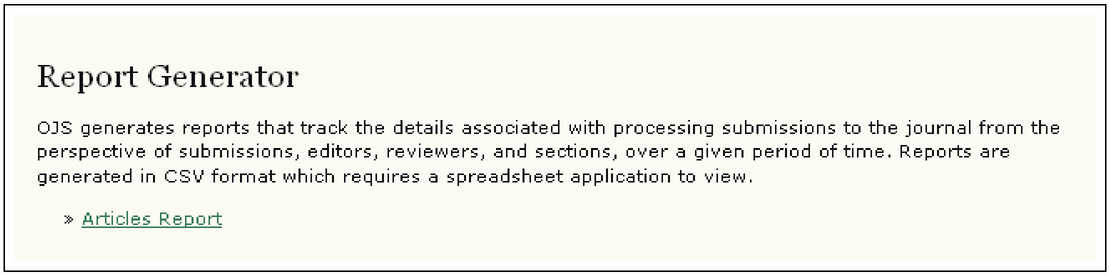


Figure 102: Reports

Payments

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

Payment Options

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

Figure 103: Journal Management Menu

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

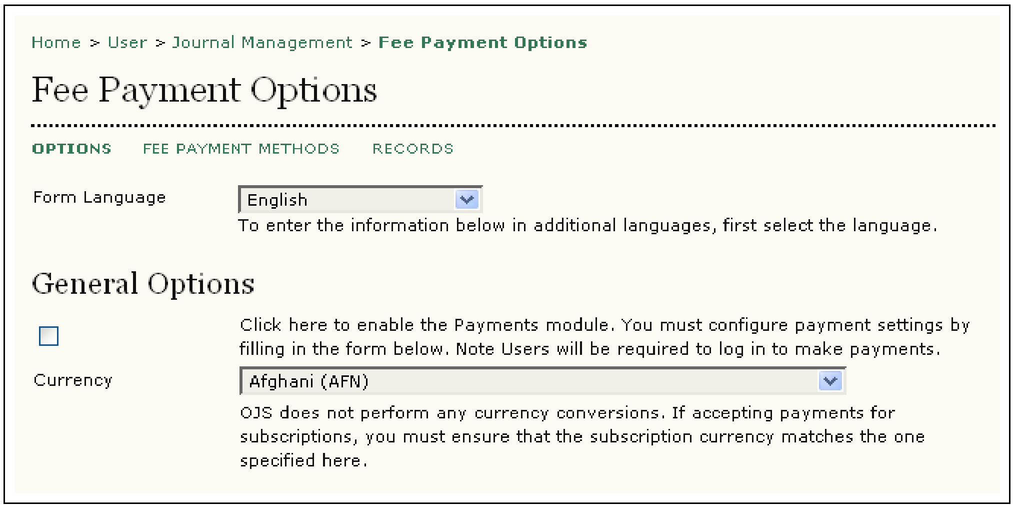


Figure 104: Payment General Options

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

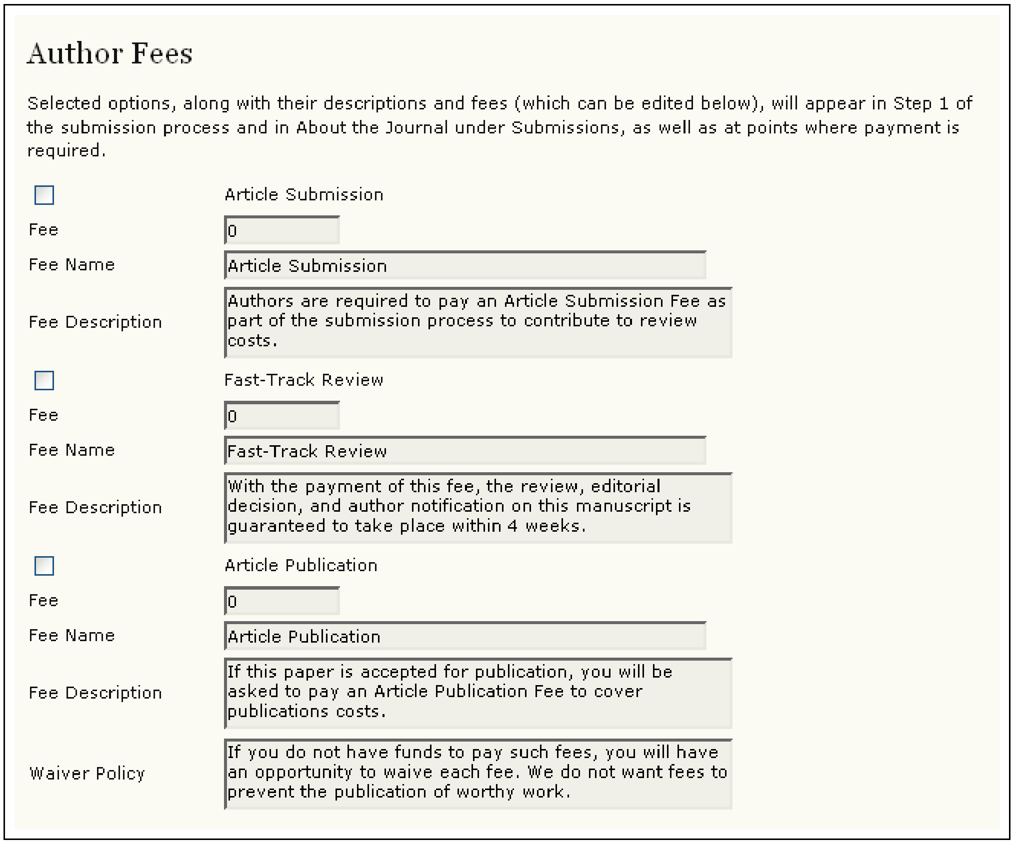


Figure 105: Enabling Author Fees

Reader fees can also be enabled:

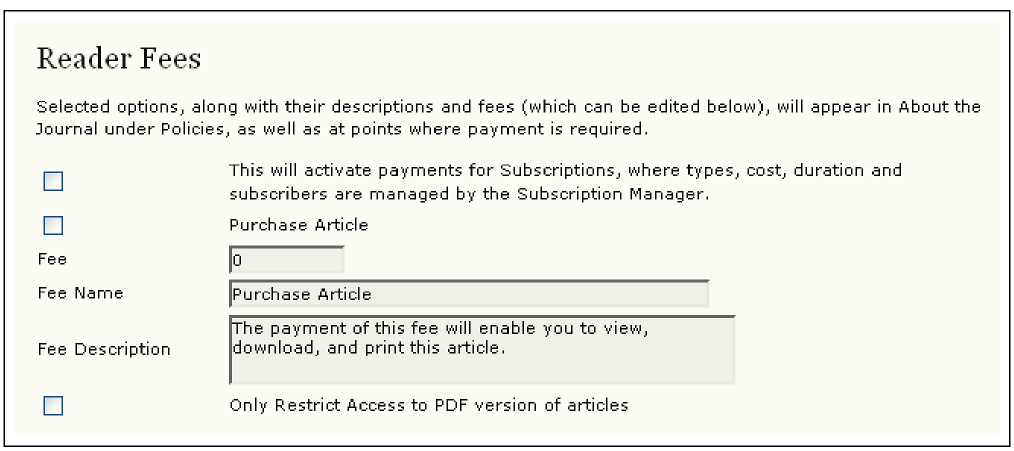


Figure 106: Enabling Reader Fees

As can general fees for donations and association membership:

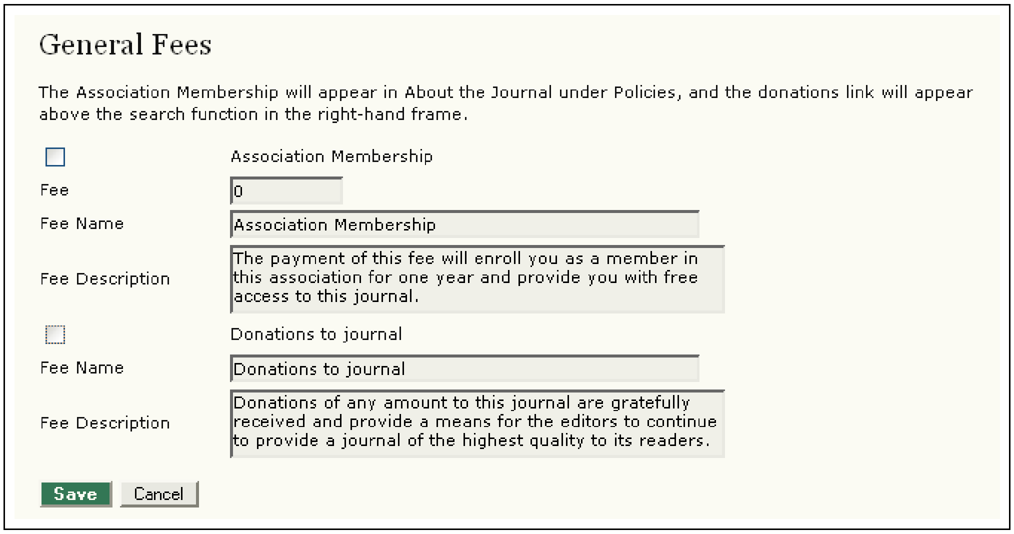


Figure 107: Enabling General Fees

Fee Payment Methods

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

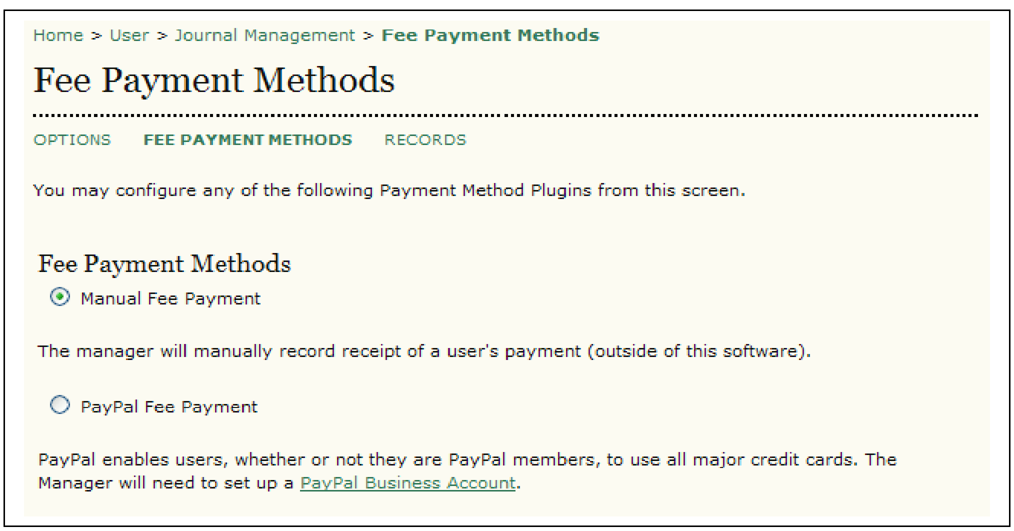


Figure 108: Fee Payment Methods

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

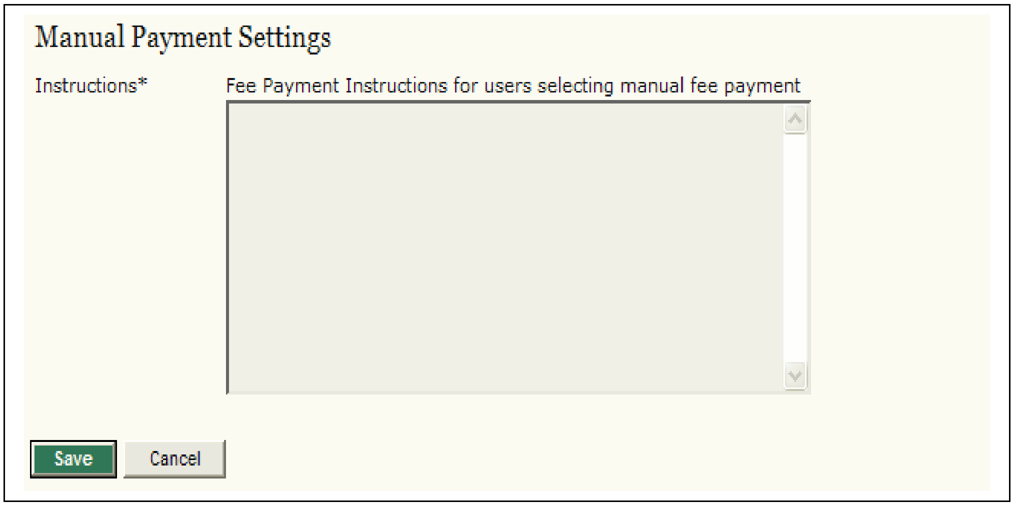


Figure 109: Manual Payment Settings

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

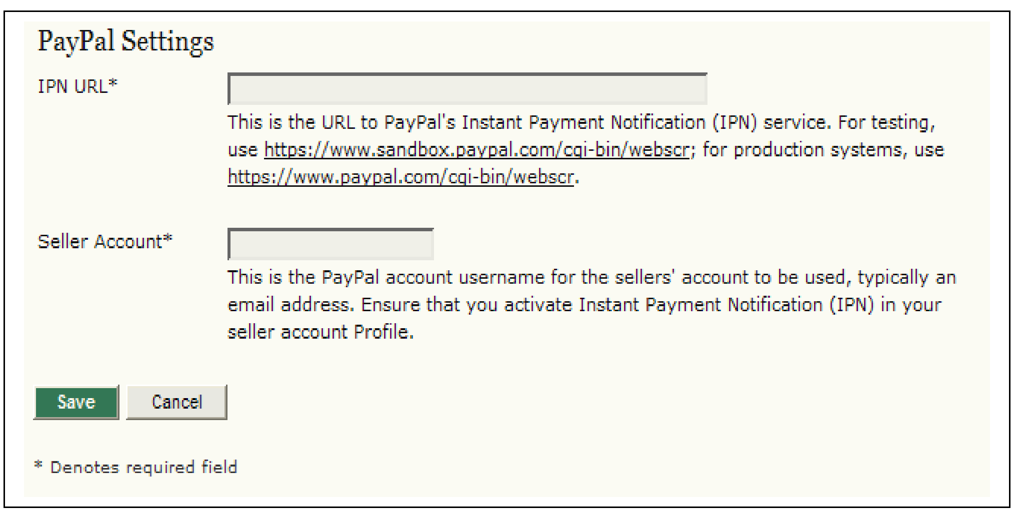


Figure 110: PayPal Settings

Fee Payment Records

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

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

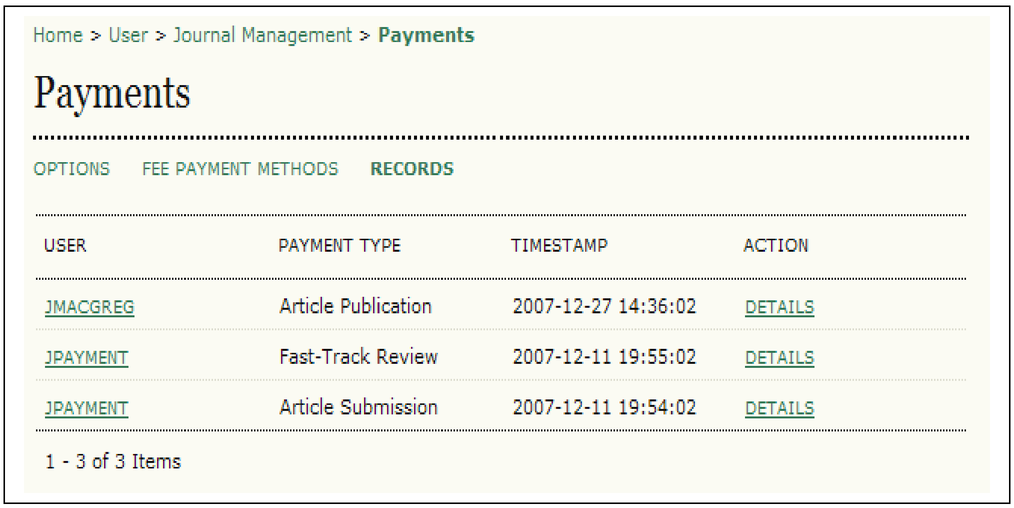


Figure 111: Payment Details

Subscriptions

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

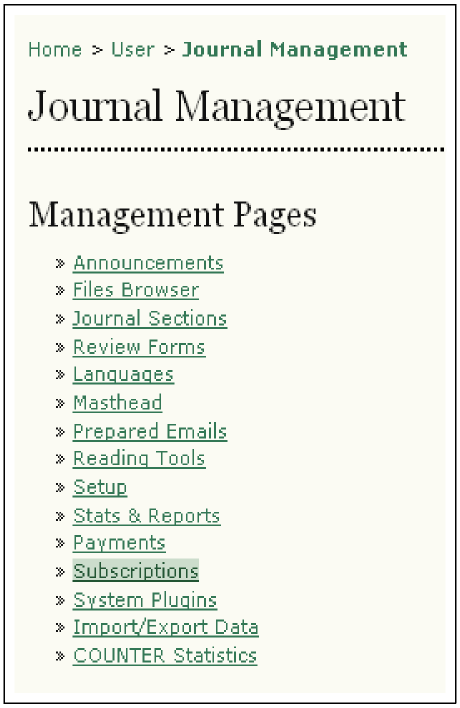


Figure 112: Managing subscriptions

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

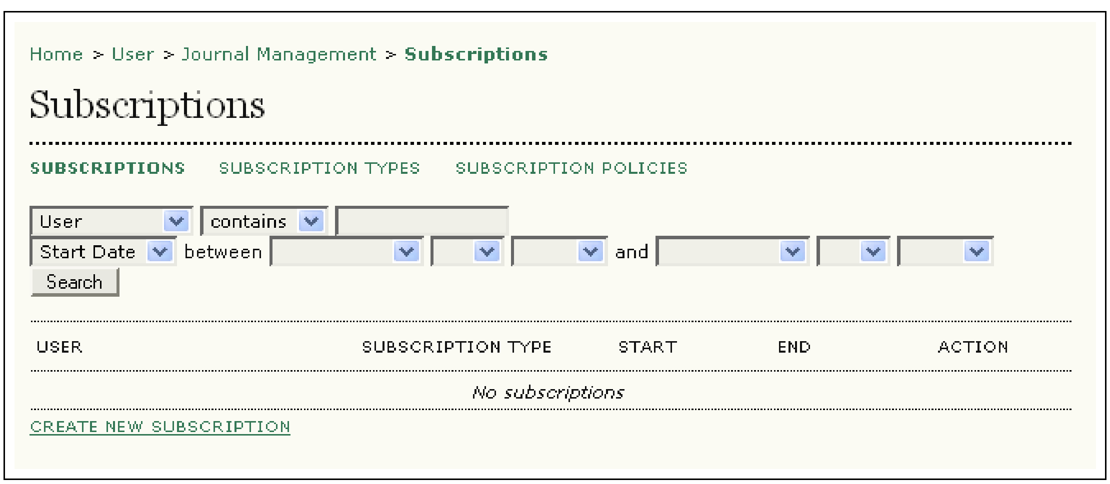


Figure 113: Subscription choices

Create Subscription Types

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

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

Figure 114: Creating a new subscription type

Next, fill in the details:

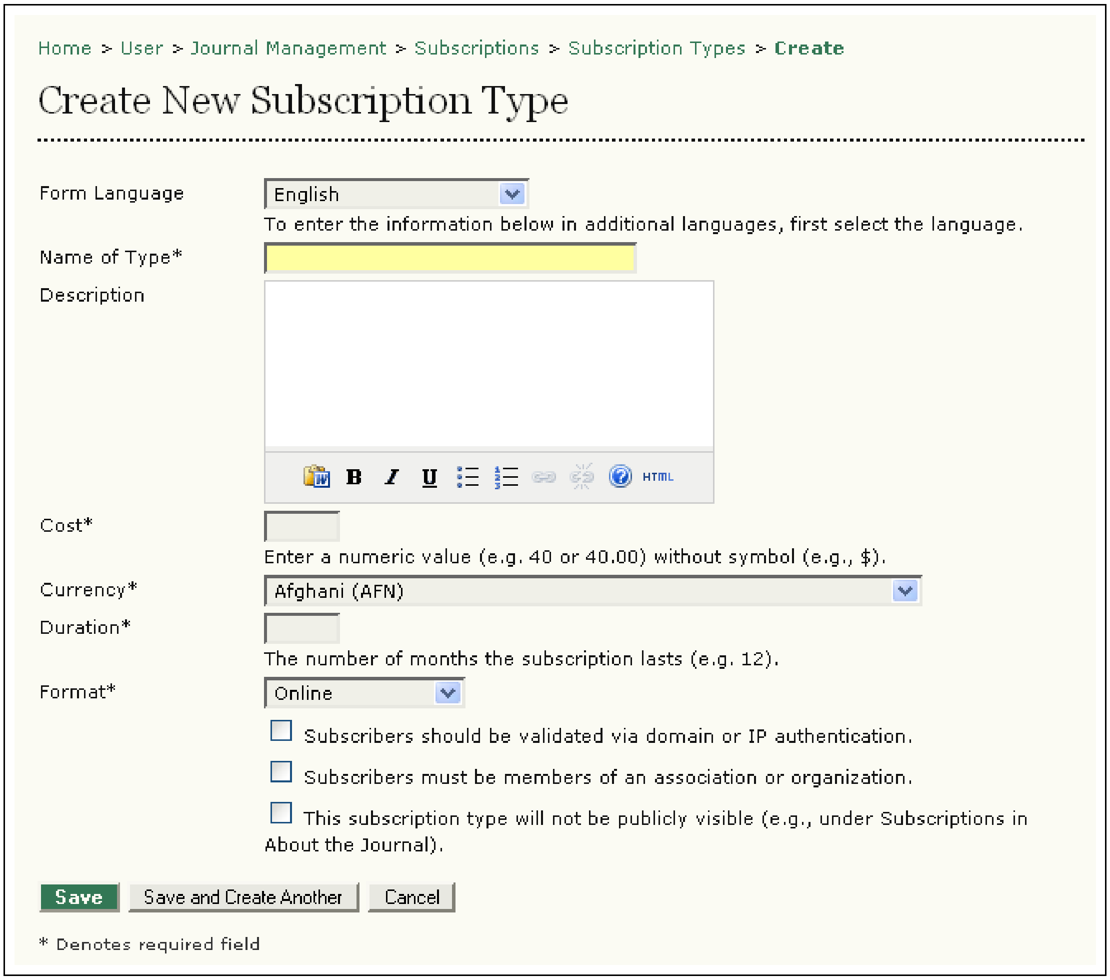


Figure 115: Subscription type information

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

Subscription Policies

You will next need to determine your journal's subscription policies. Under the Subscription Policies heading you will have to enter Subscription Manager and Subscription information. You can also enable subscription expiry reminders if you wish.

Subscription Manager Information

This information will be publicly available under About the Journal:

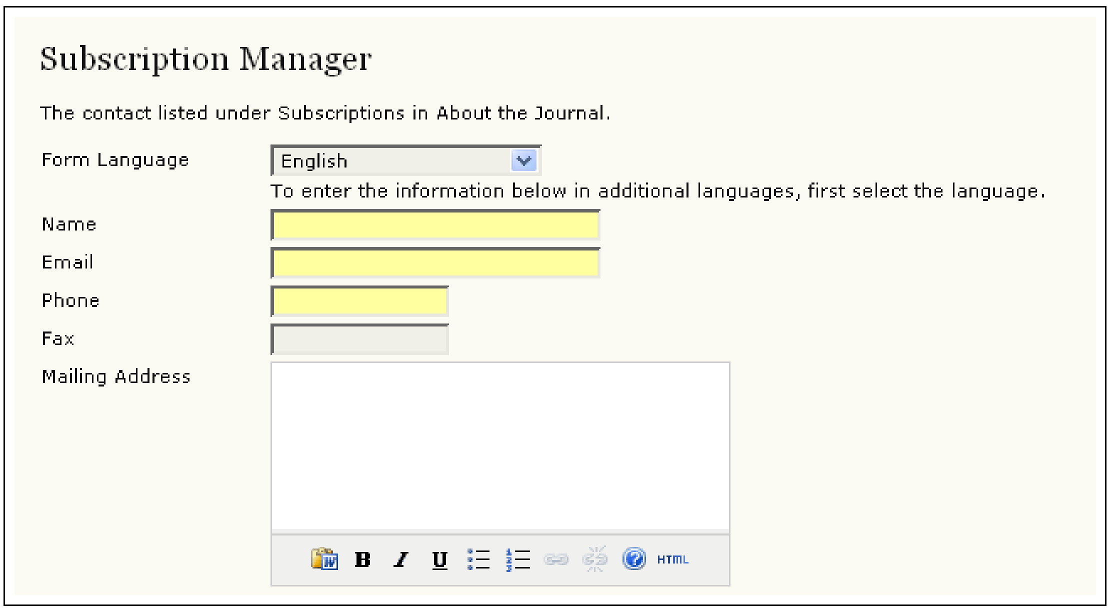


Figure 116: Subscription Manager Information

Subscription Information

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

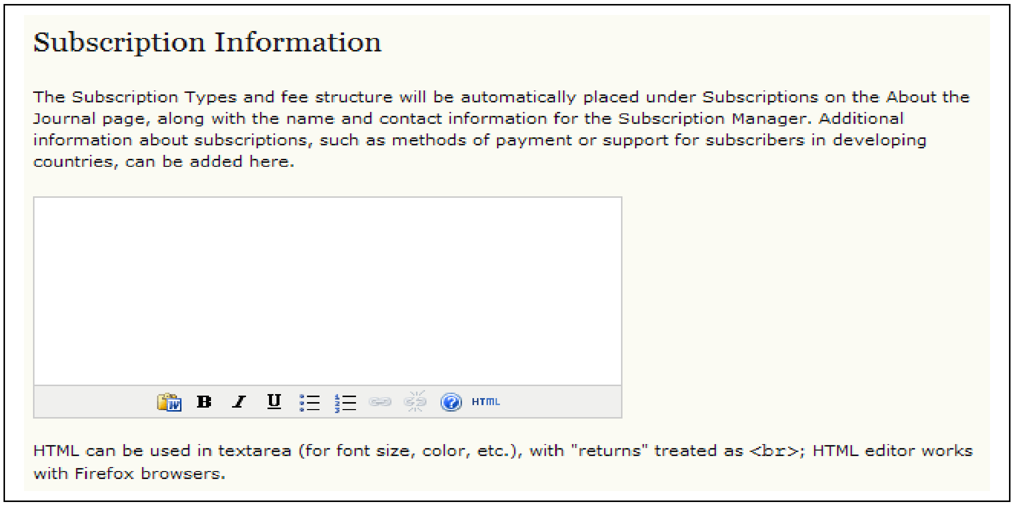


Figure 117: Subscription Information

Subscription Expiry

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

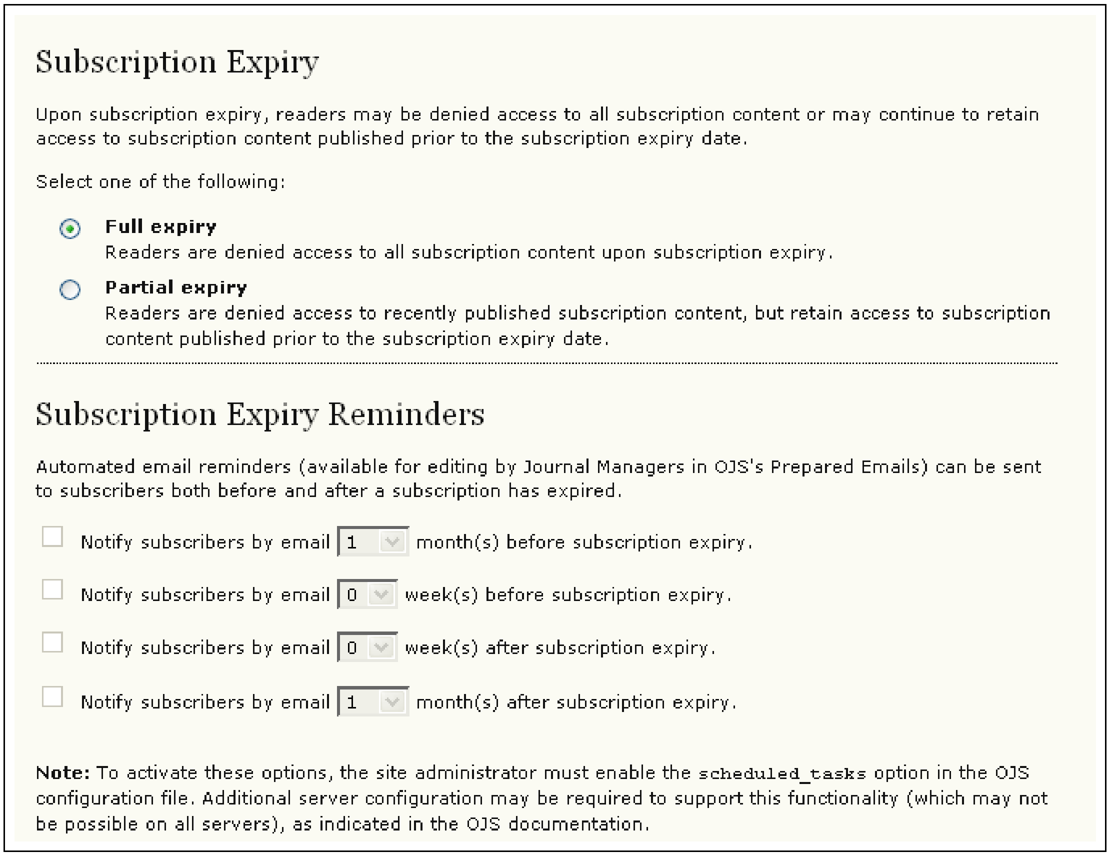


Figure 118: Expiry Reminders

Open Access Options for Subscription Journals

Delayed Open Access

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

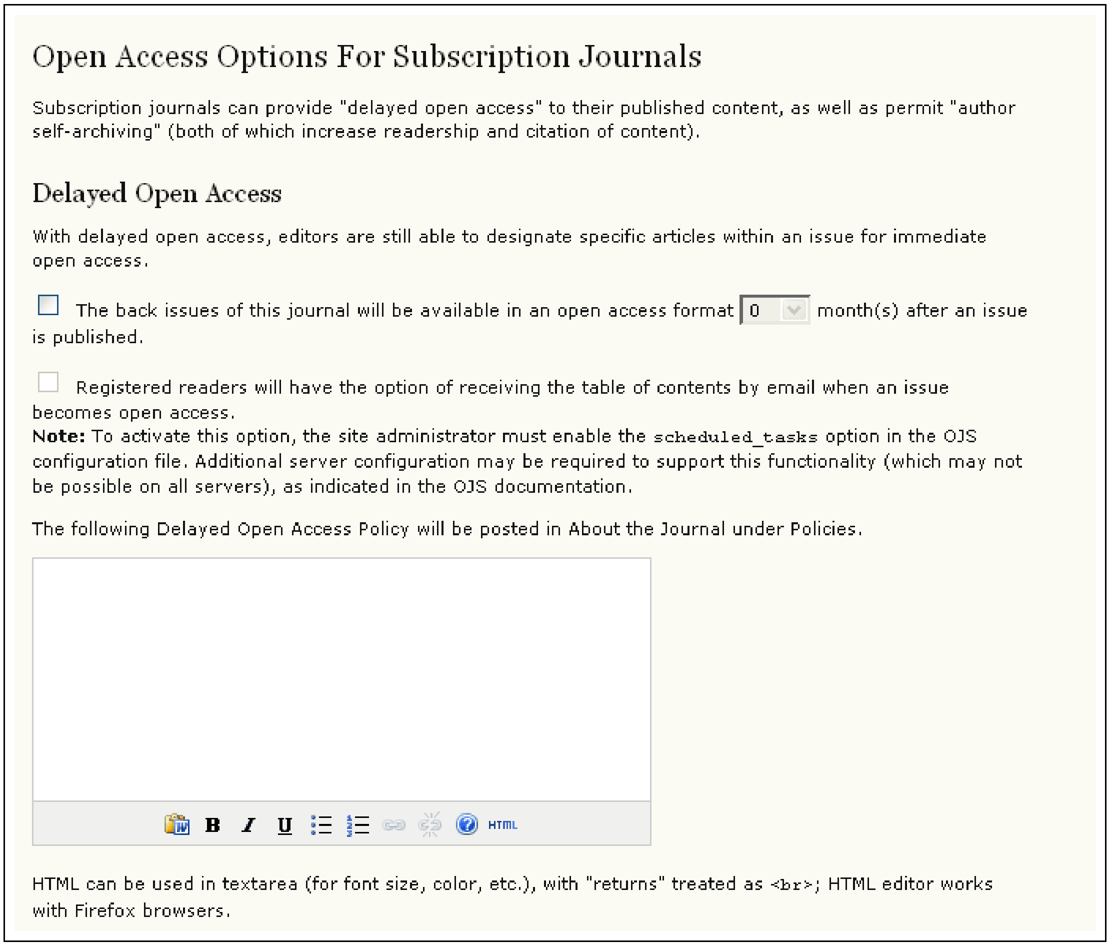


Figure 119: Delayed Open Access

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

Author Self-Archiving Policy

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

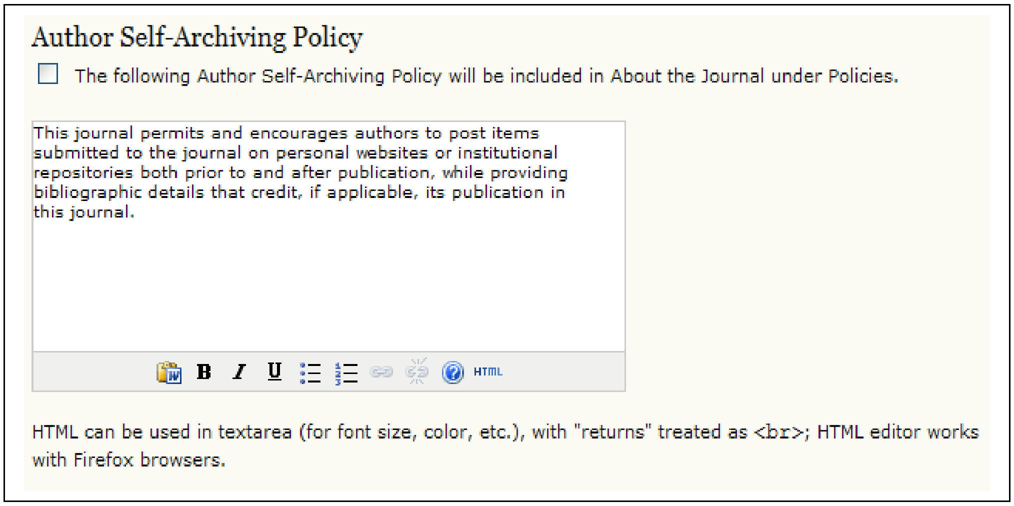


Figure 120: Author self-archiving policy

Create New Subscriptions

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

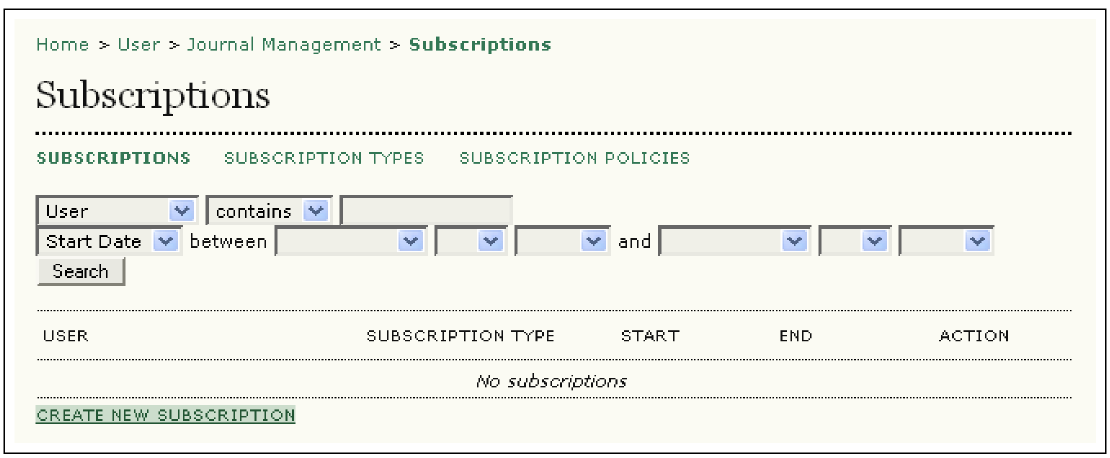


Figure 121: New subscriptions

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

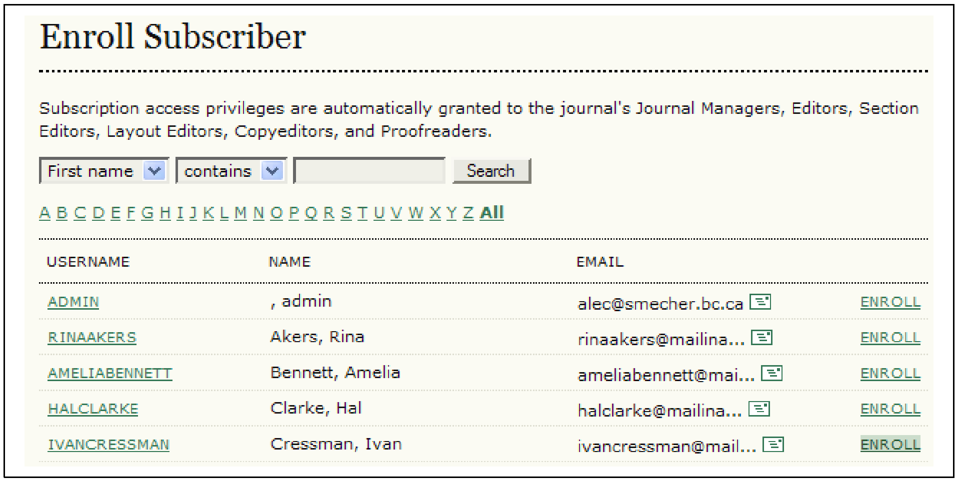


Figure 122: Enroll Subscribers

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

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

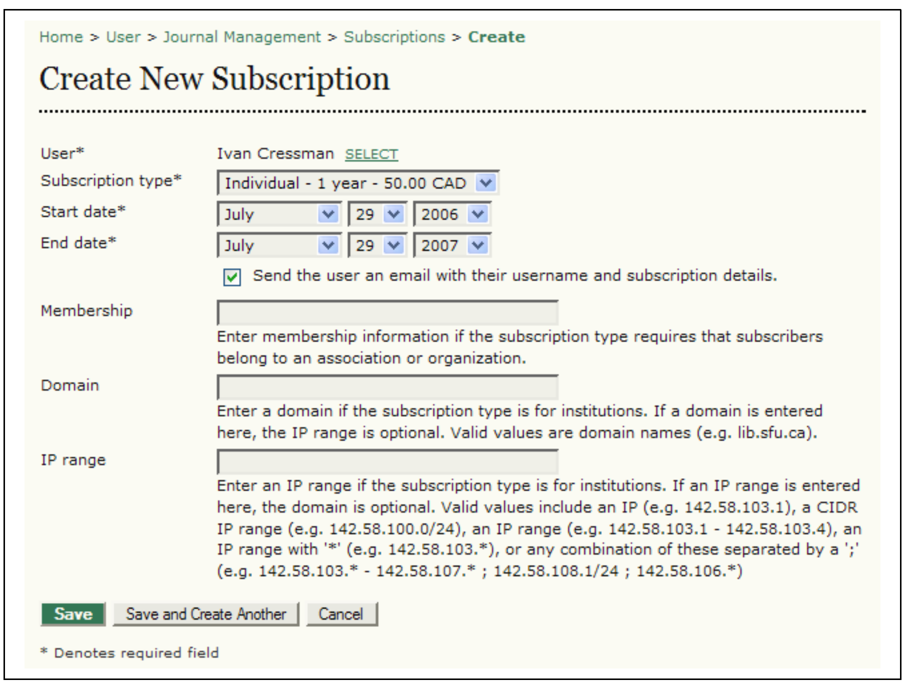


Figure 123: New subscription details

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

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

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

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

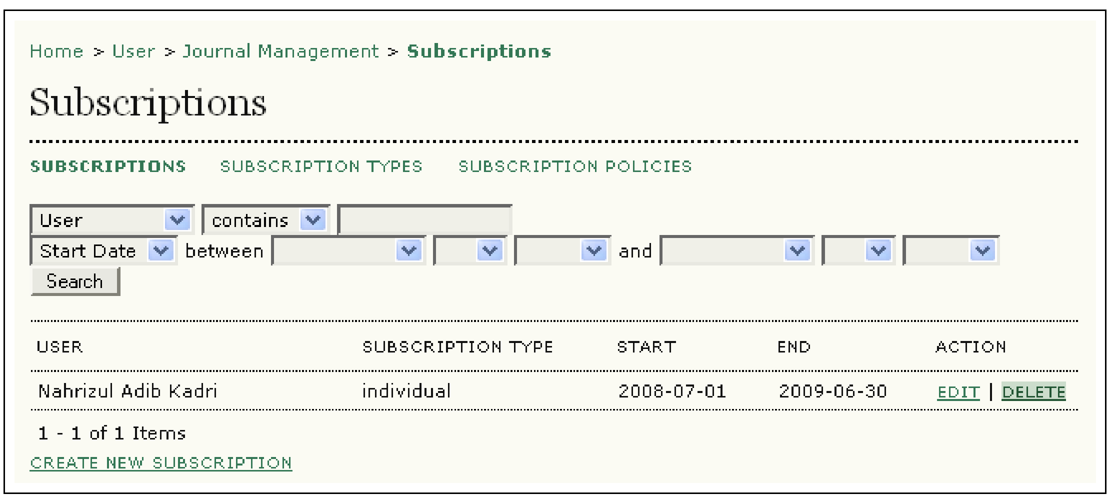


Figure 124: Deleting subscriptions

System Plugins

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

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

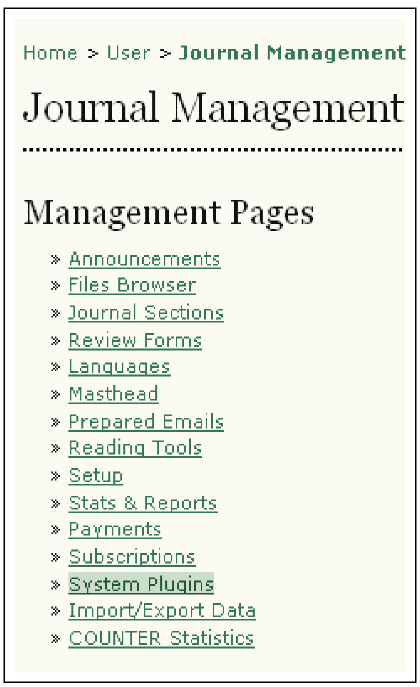


Figure 125: Journal Management menu

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

Import/Export Data

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

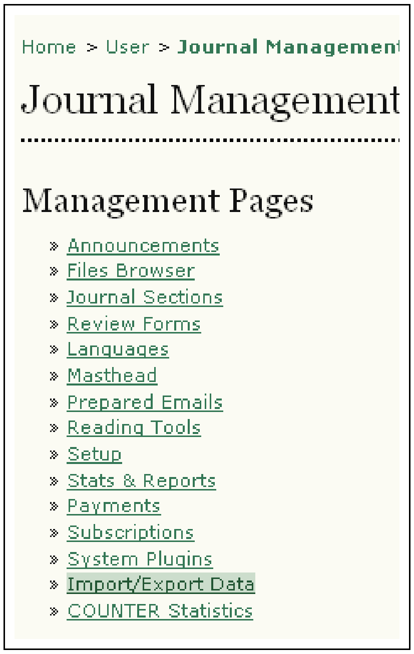


Figure 126: Journal Management menu

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

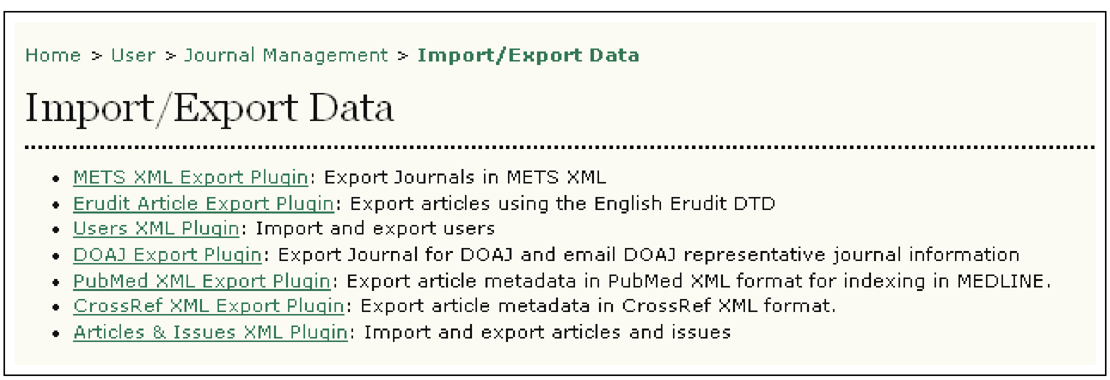


Figure 127: Import/Export Data page

METS XML Export Plugin

Exports Journals in METS XML.

Erudit Article Export Plugin

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

Users XML Plugin

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

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

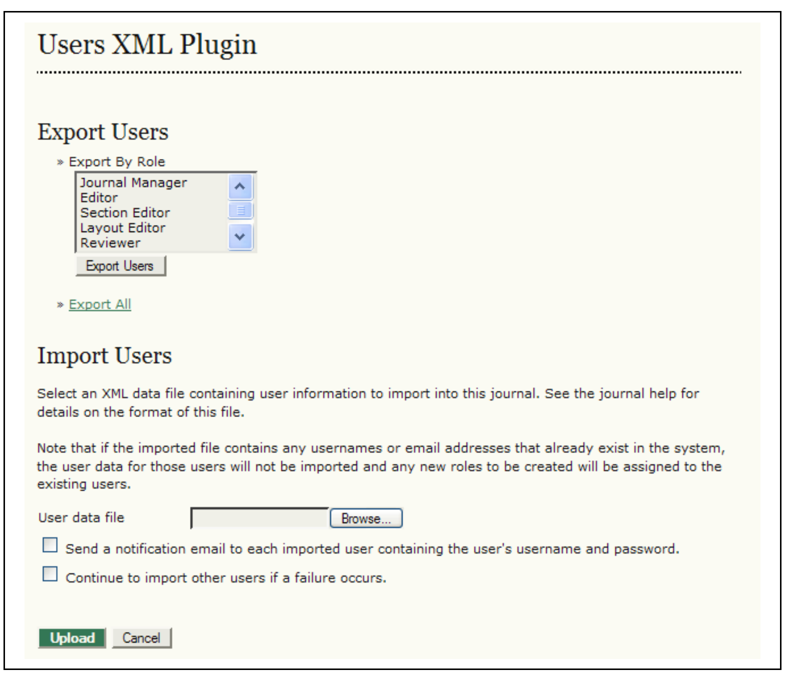


Figure 128: User data page

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

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

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

DOAJ Export Plugin

Exports Journal for DOAJ and email DOAJ representative journal information.

PubMed XML Export Plugin

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

CrossRef XML Export Plugin

Exports article metadata in CrossRef XML format.

Articles & Issues XML Plugin

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

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

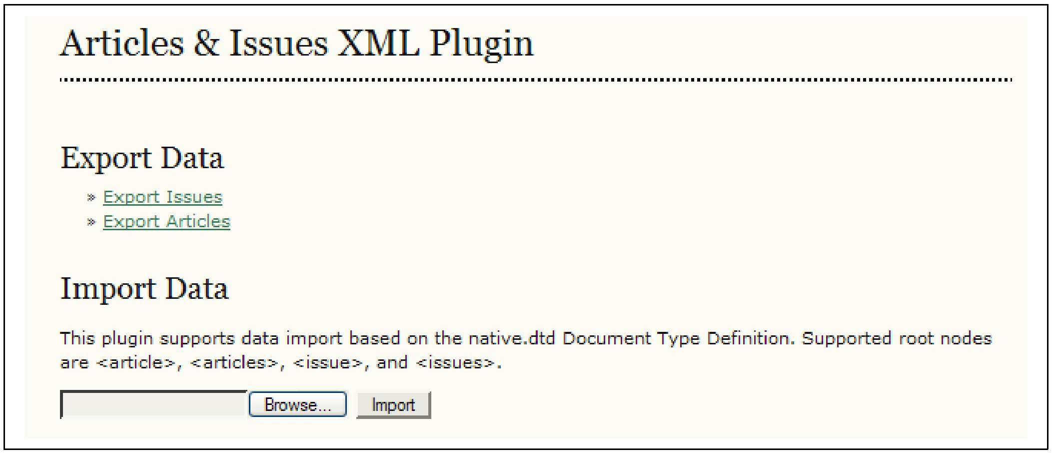


Figure 129: Importing or exporting articles and issues

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

User Management

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

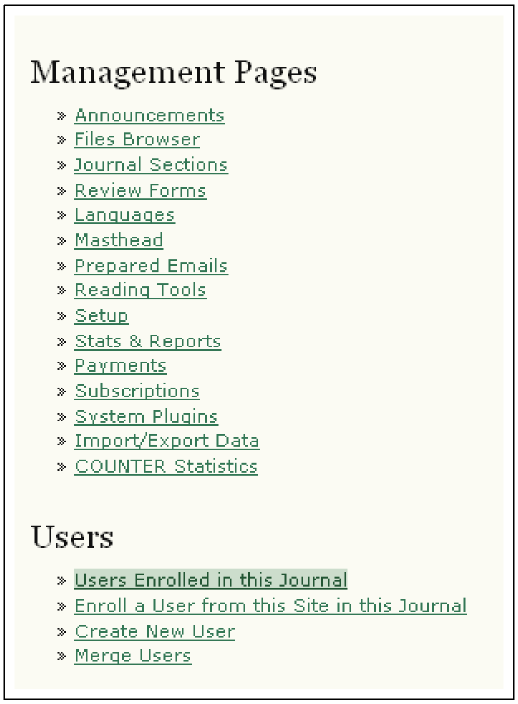


Figure 130: Users Menu

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

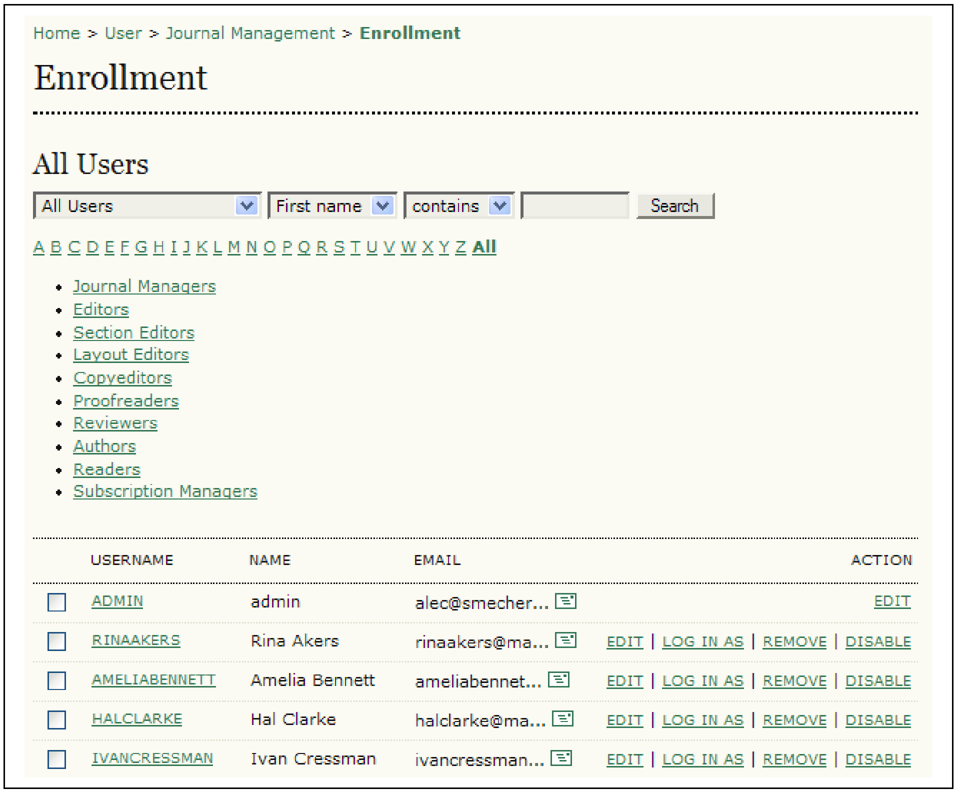


Figure 131: All users

Emailing Users

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

Enrolling Existing Users

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

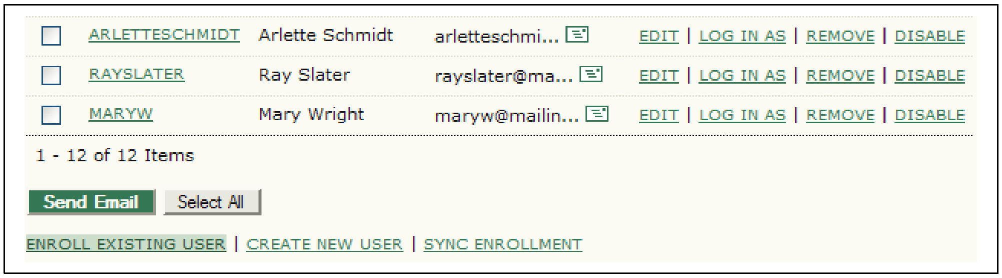


Figure 132: Enroll Existing User

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

Creating Users

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

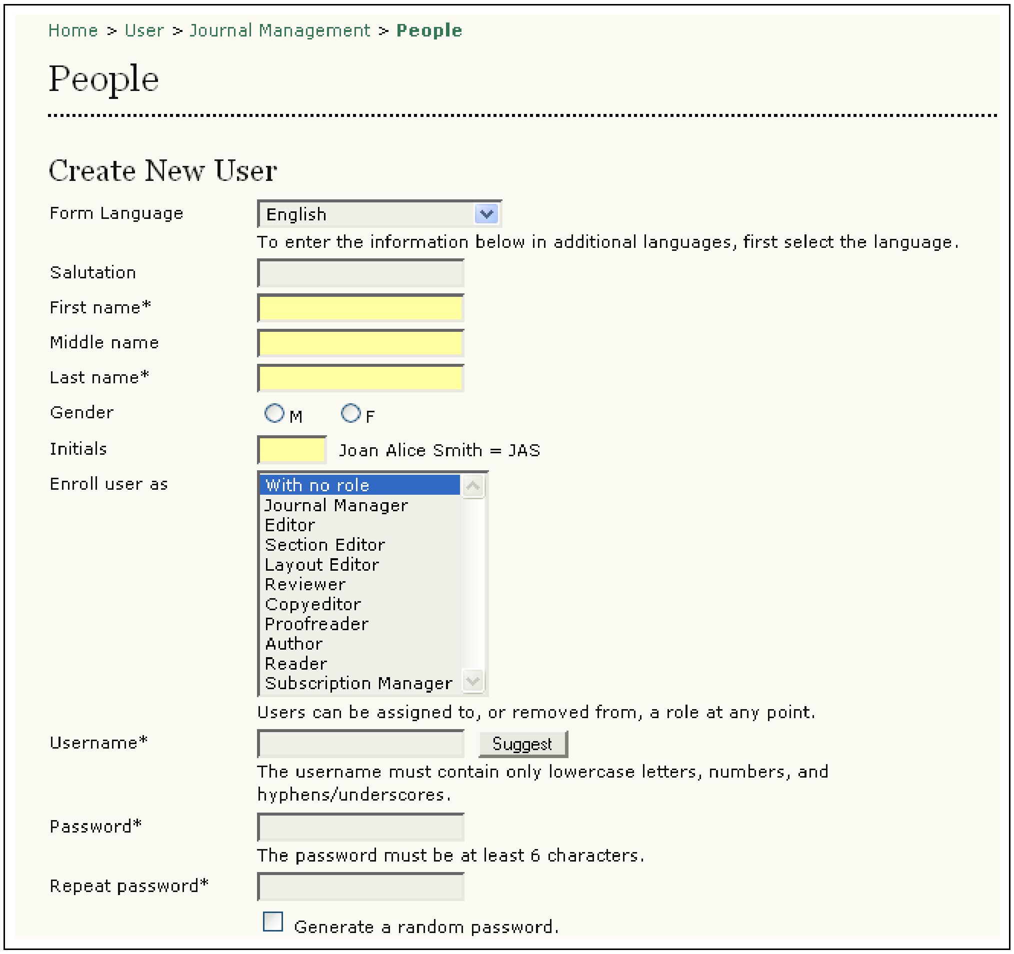


Figure 133: Part of the Create New User interface

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

Merge Users

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

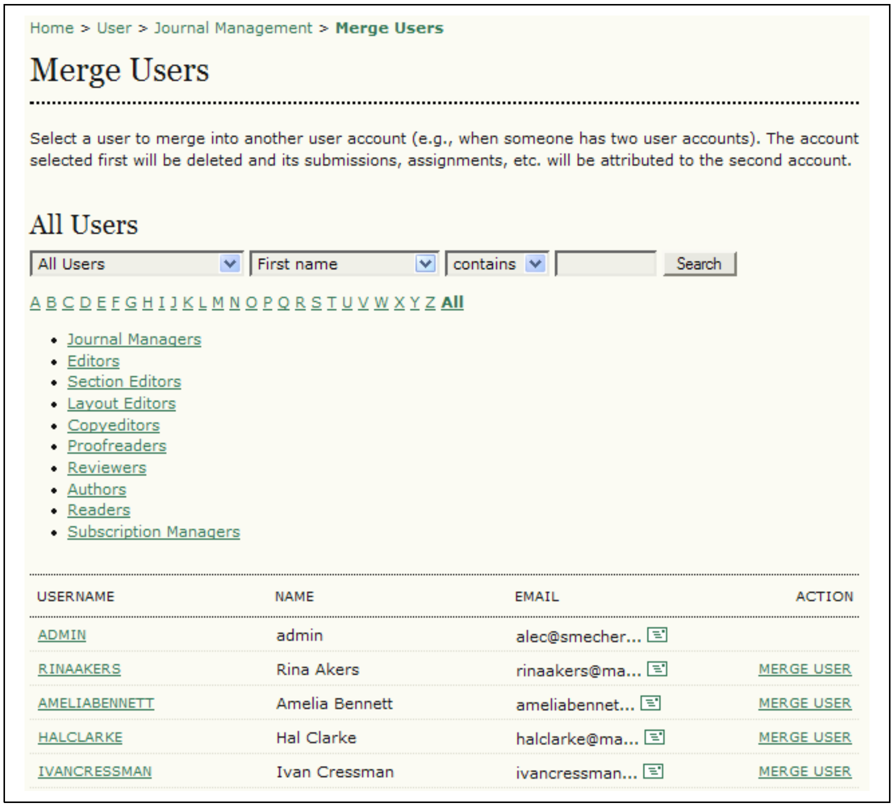


Figure 134: Merge Users

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

Editors

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

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

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

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

Getting Started

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

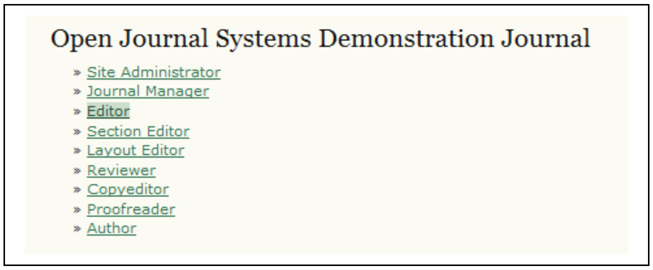


Figure 135: Signing in as an editor

Submissions

Under “Submissions”, you will see articles which are “unassigned”, “in review”, “in editing”, or in the “archives”. Clicking any of these links will provide additional details on each article in these categories:

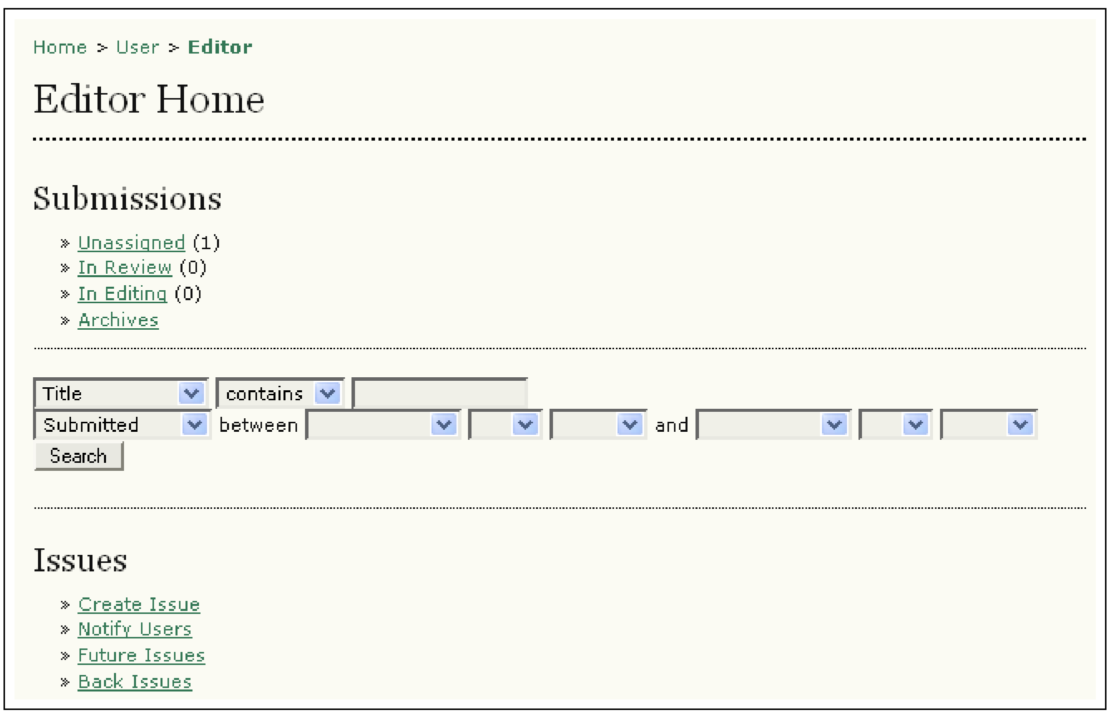


Figure 136: Editor’s Menu

Assigning Articles

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

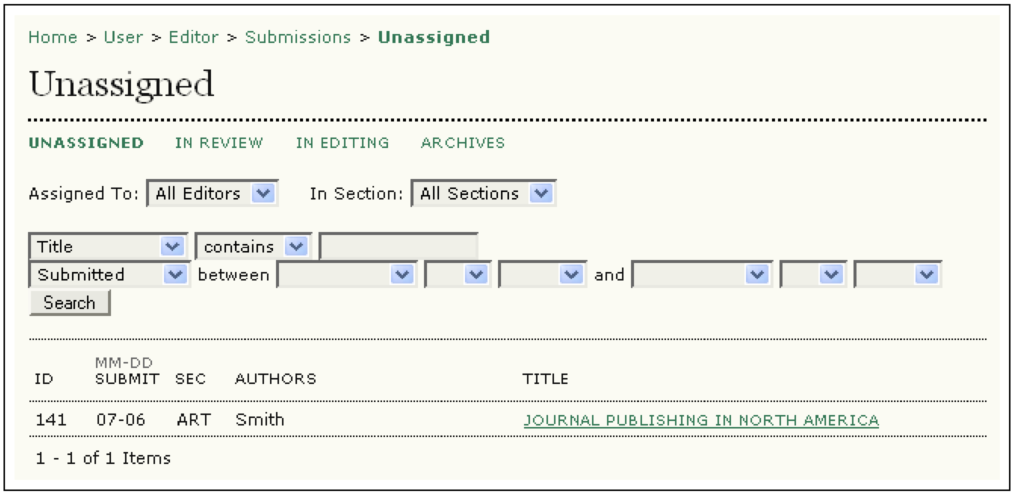


Figure 137: Selecting an unassigned article

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

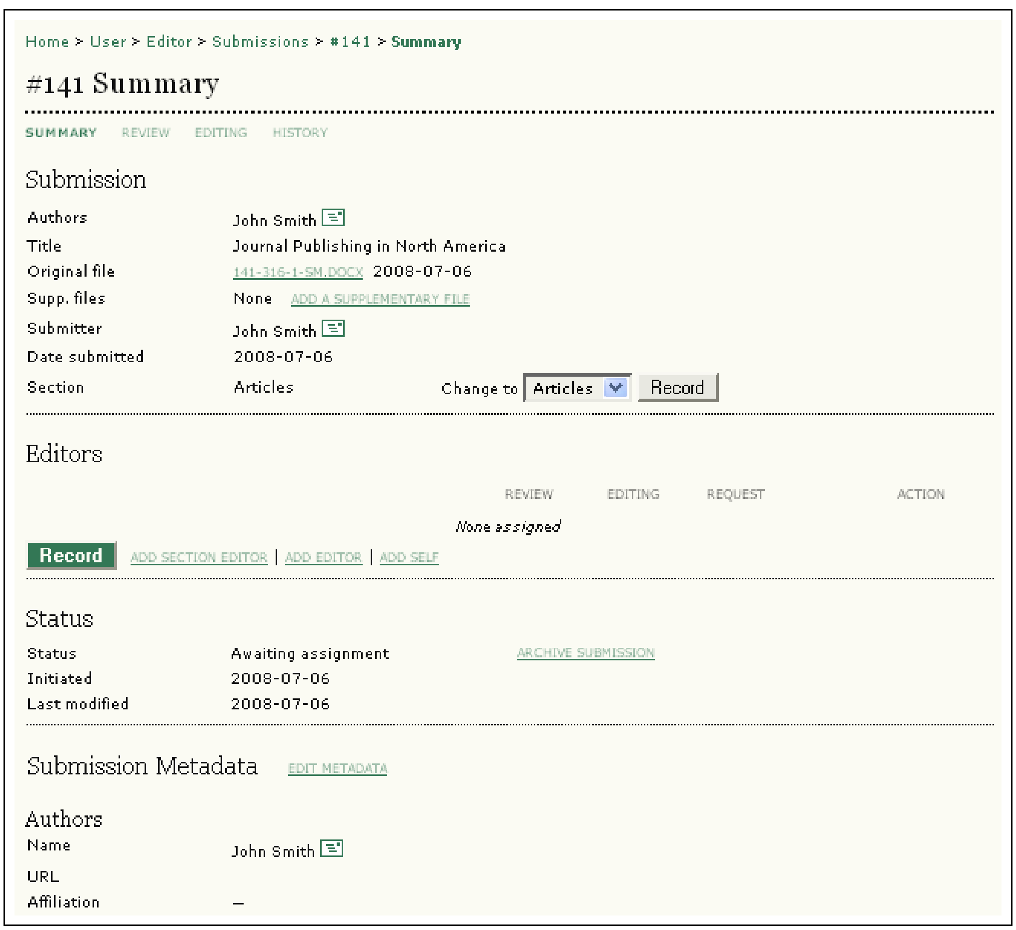
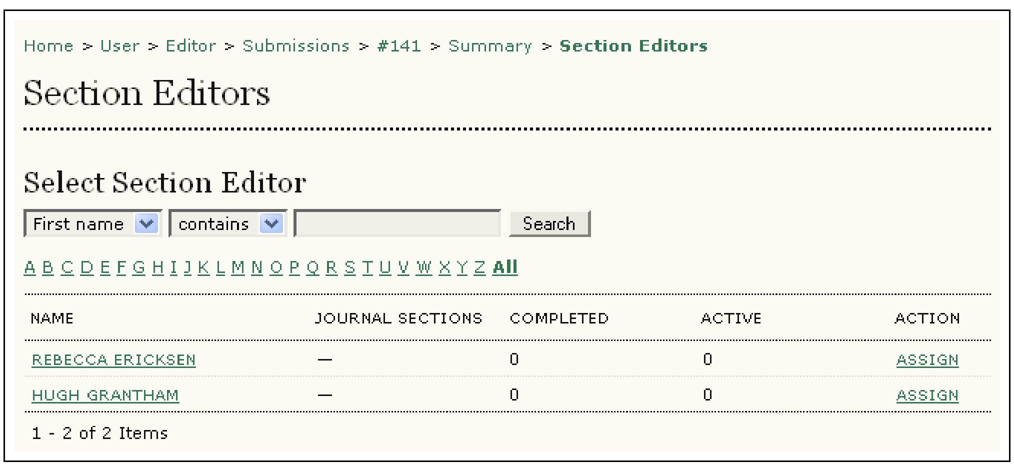


Figure 138: Unassigned article summary page

From here, you have the option to:

- Send an email message to the author (click on the envelope icon next to the author's name)
- Read the original file by clicking on the submission file name.
- Add any supplementary files by clicking on the "Add Supplementary File" link.
- Change the section you want the article to appear in, using the drop down menu.
- Report author fee payments as paid, or optionally, waive those payments, if the Payments module has been enabled.
- Assign an editor or section editor. This will take you to a list of your editors or section editors. Select the "Assign" link to give the submission to that person:


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

Section Editors

Select Section Editor

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

NAME	JOURNAL SECTIONS	COMPLETED	ACTIVE	ACTION
REBECCA ERICKSEN	—	0	0	ASSIGN
HUGH GRANTHAM	—	0	0	ASSIGN

1 - 2 of 2 Items

Figure 139: Assigning a section editor

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

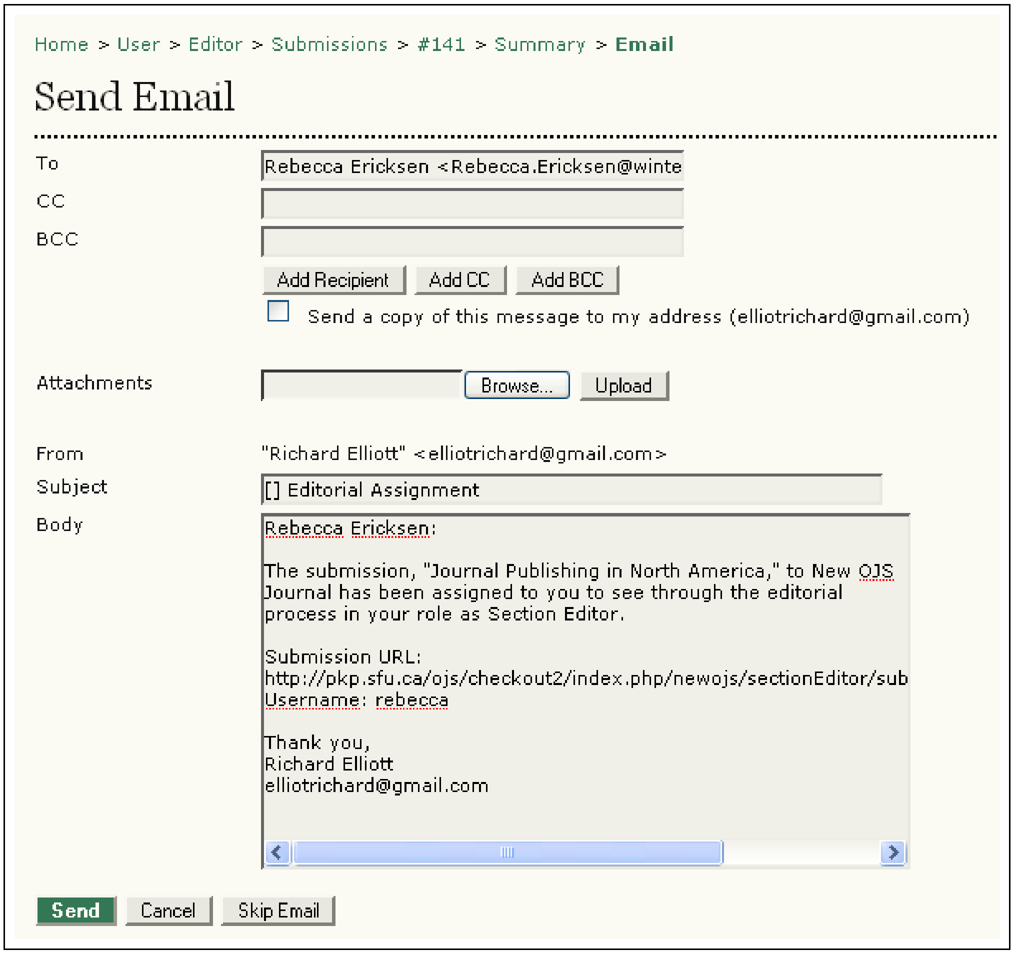


Figure 140: E-mail to the section editor

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

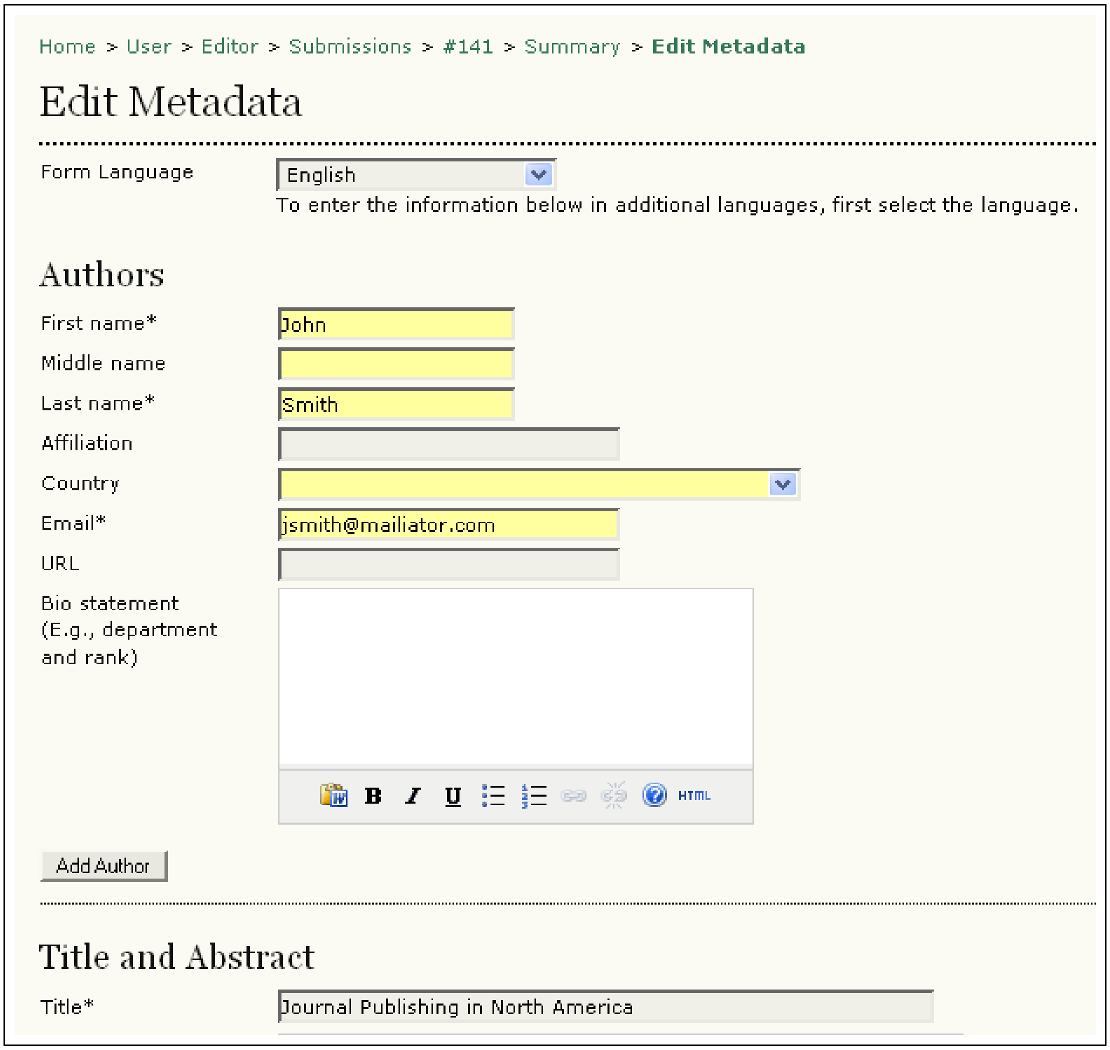


Figure 141: Editing the article metadata

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

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

Figure 142: Summary Links

Issues

Return to the Editor Home page:

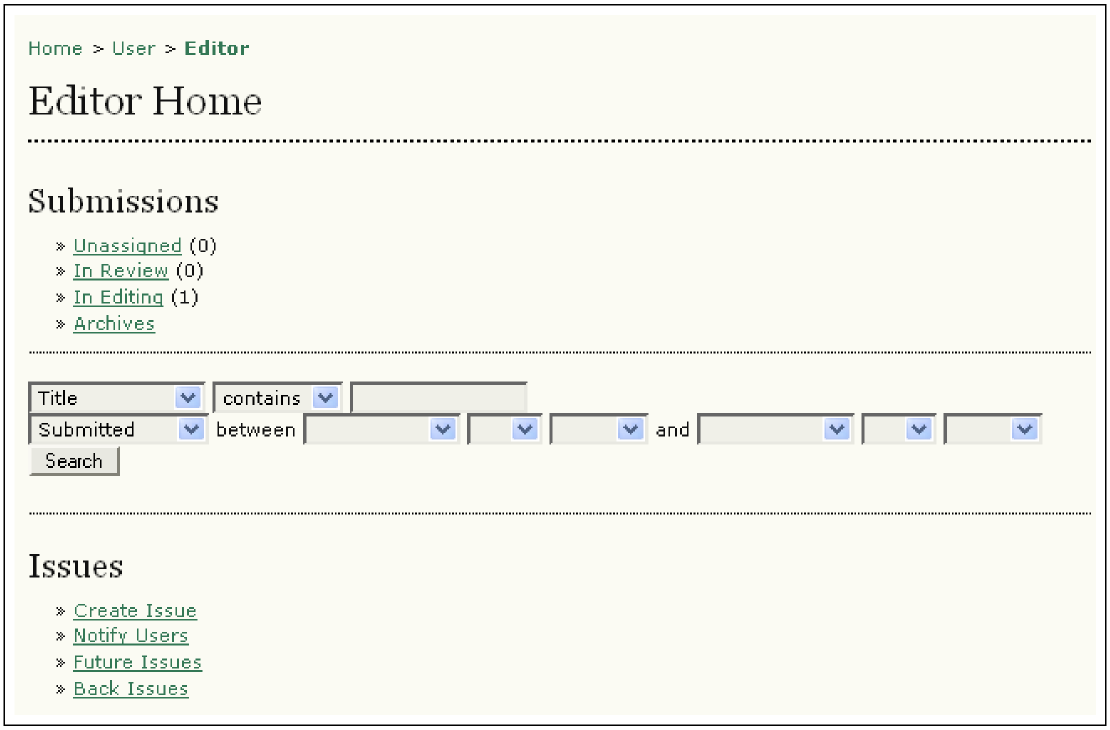


Figure 143: Editor’s Menu

Under “Issues”, you have the option to:

Create a New Issue

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

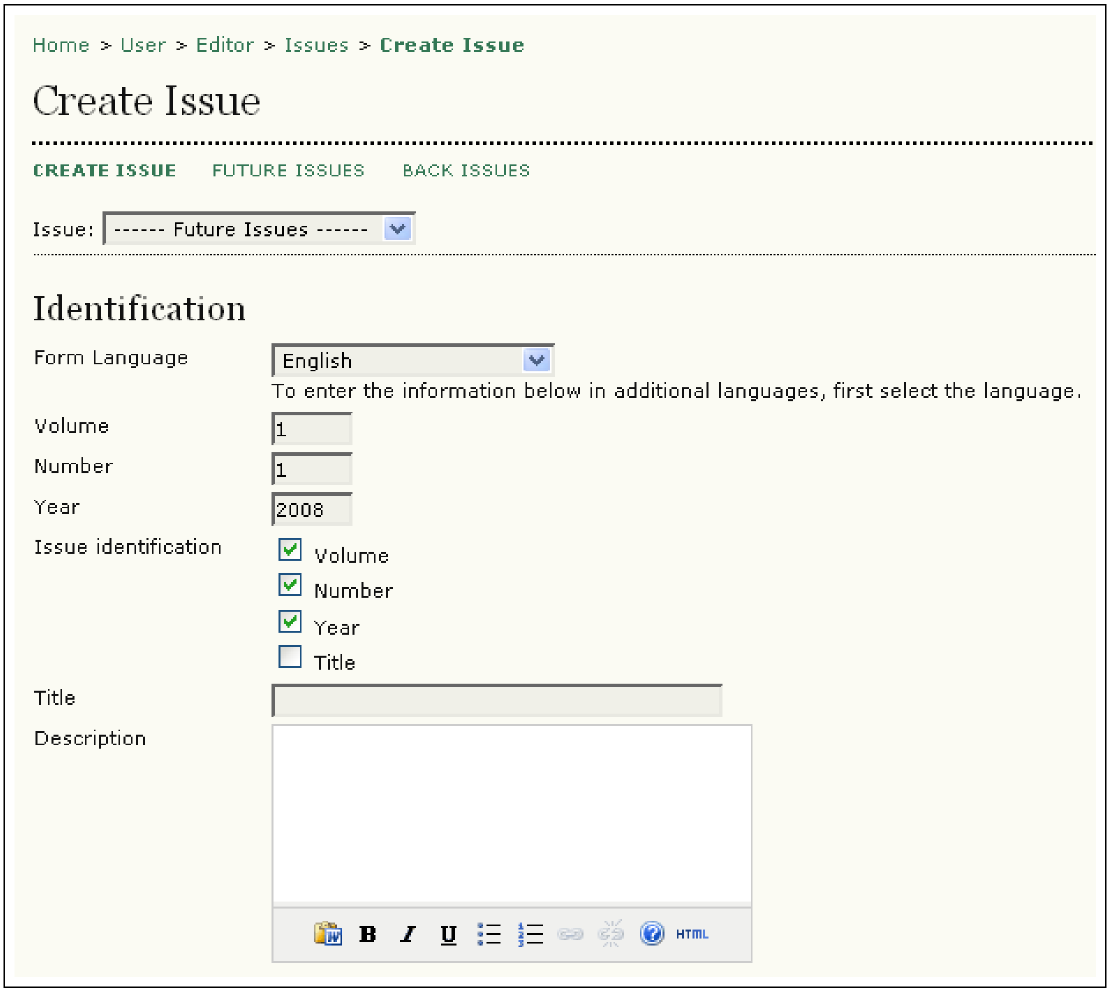


Figure 144: Create issue

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

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

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

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

Figure 145: Specify New Issue

Notify Users

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

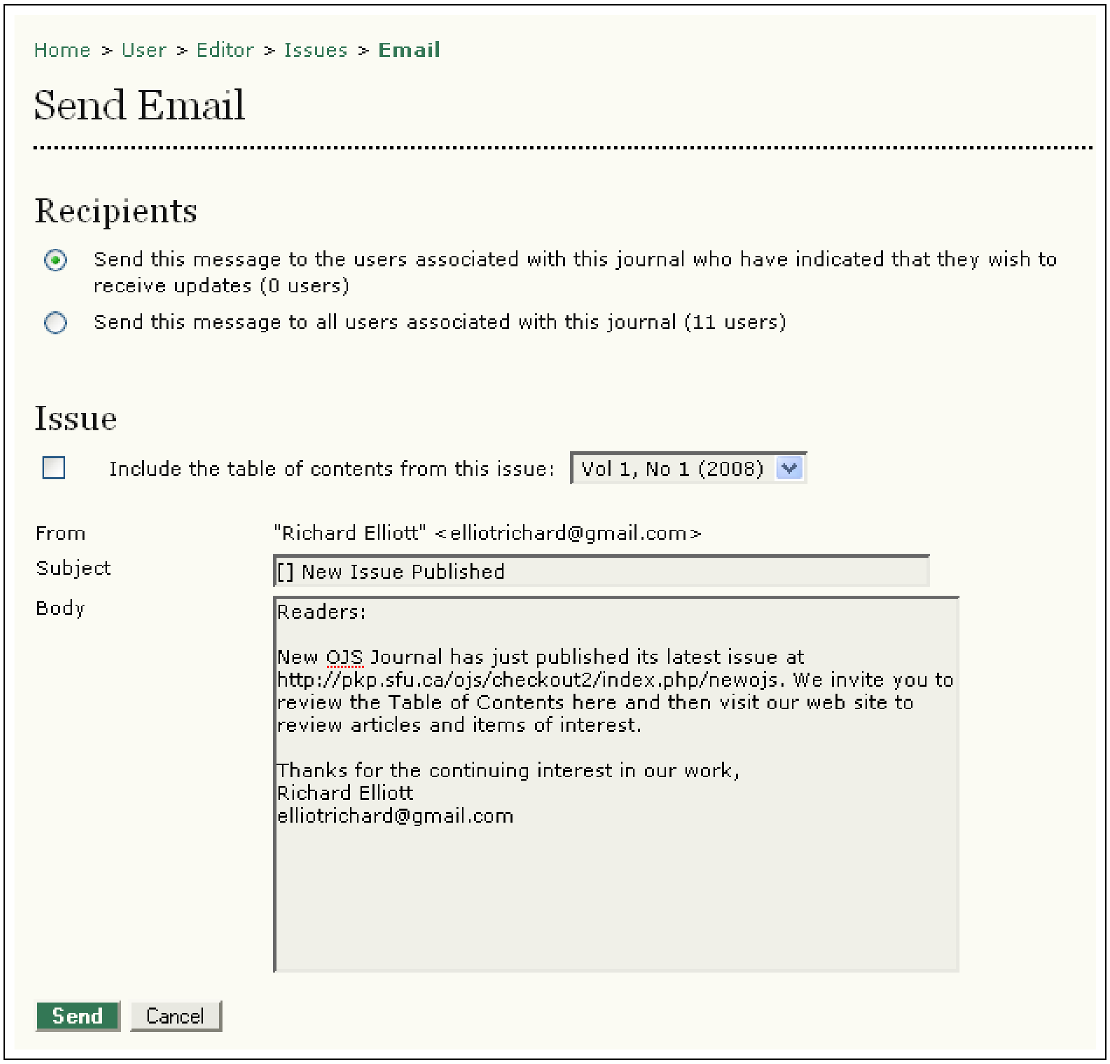


Figure 146: Notifying users

View Future Issues

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

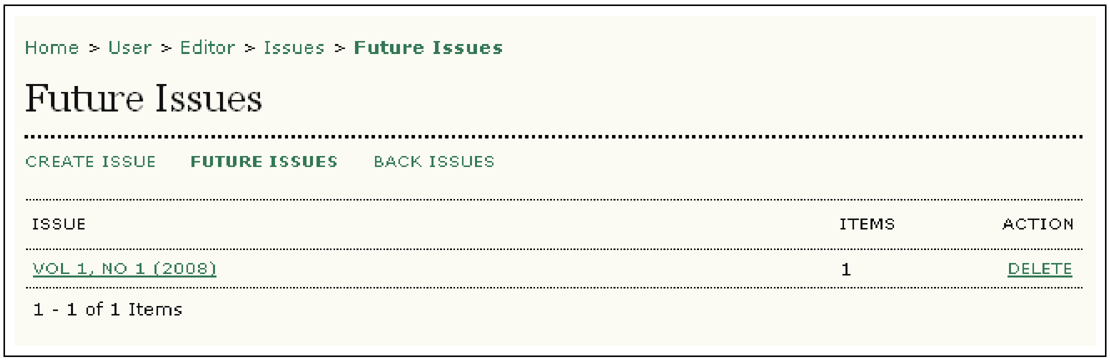


Figure 147: Future Issues

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

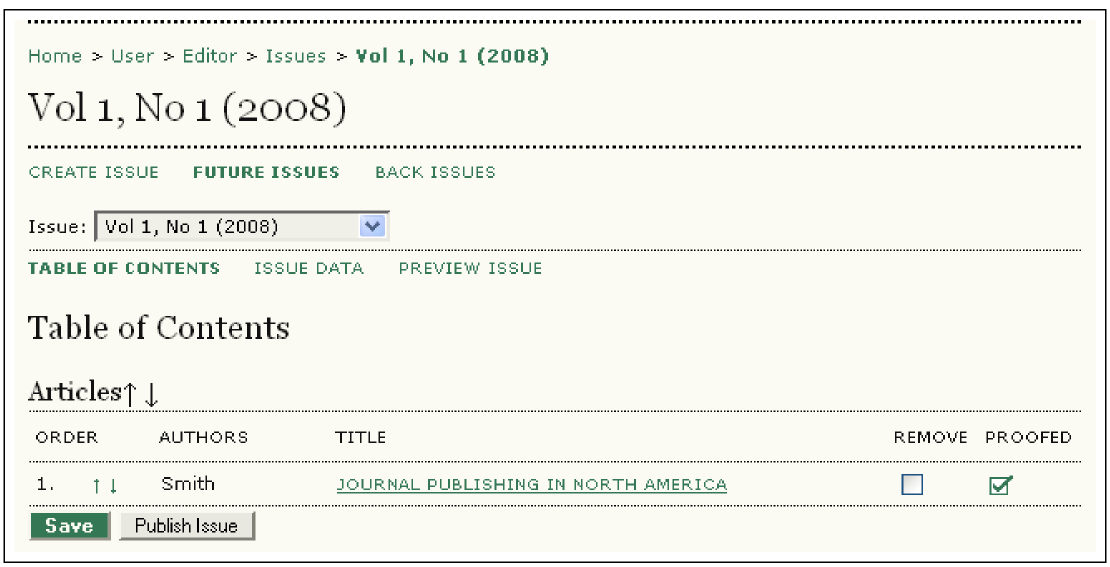


Figure 148: Table of Contents

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

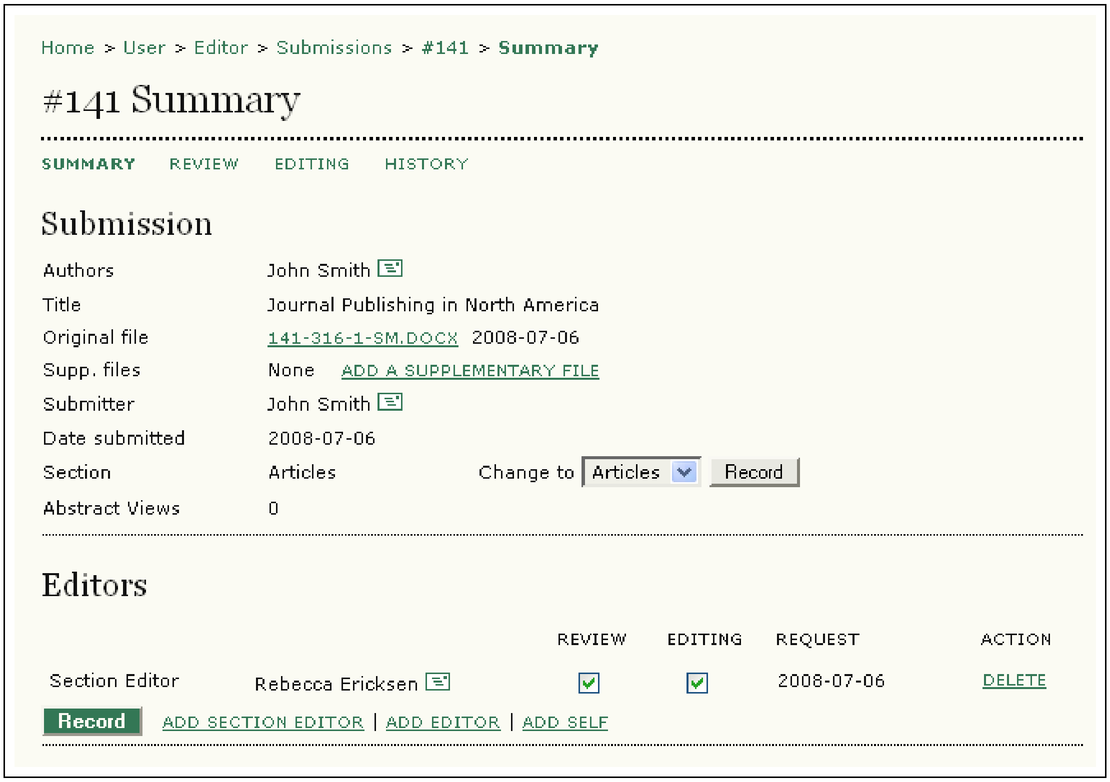


Figure 149: Article History

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

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

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

Back Issues

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

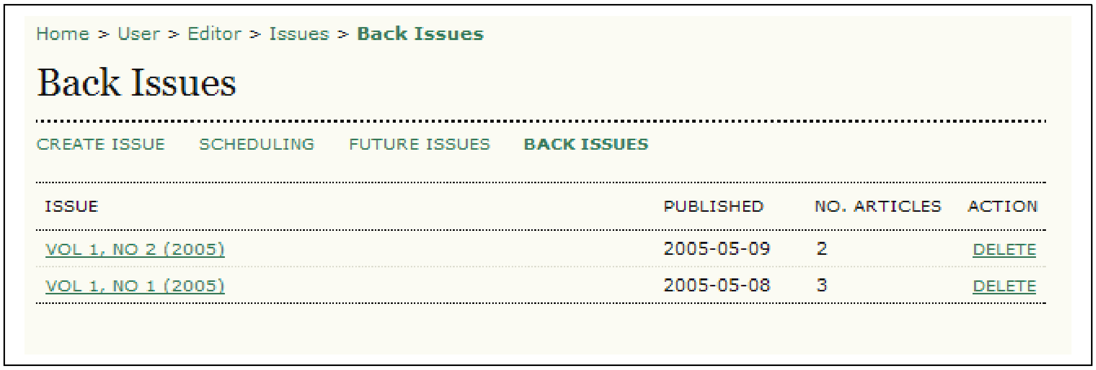


Figure 150: Viewing back issues

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

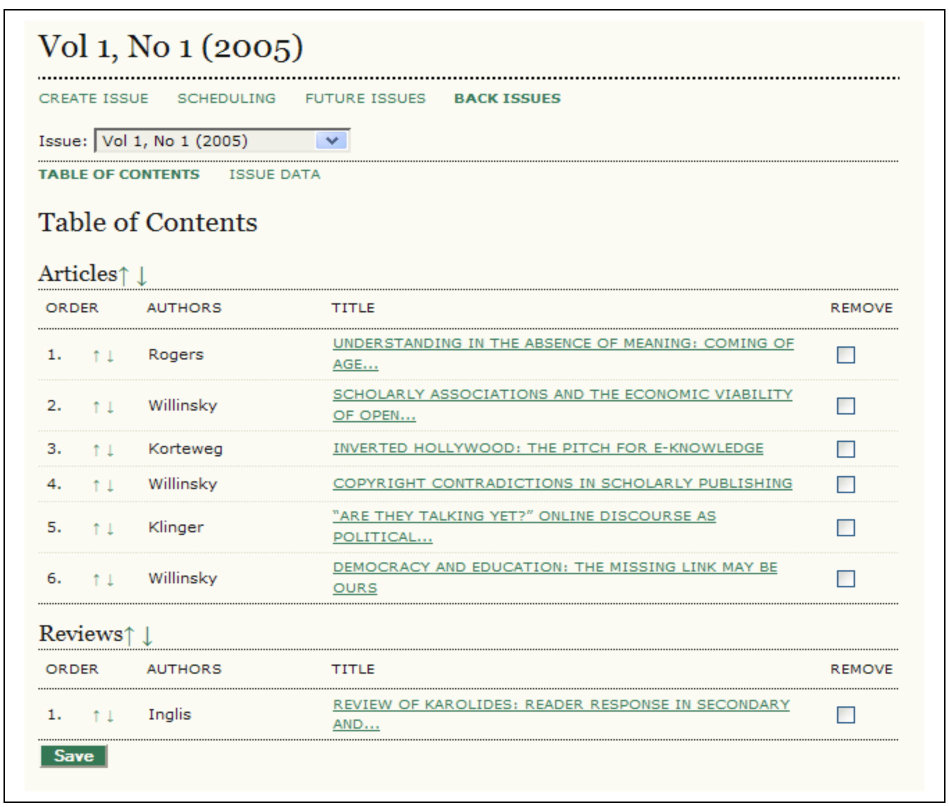


Figure 151: Issue Table of Contents

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

Section Editors

The Section Editor manages the Review and Editing of submissions in those Sections (e.g., Articles, Book Reviews, etc.) for which they have been assigned responsibility. If the article is accepted for publication, the Section Editor may also oversee the editing process; but more often than not, this workflow falls to the Editor. The journal will have a policy on how the tasks are divided.

Getting Started

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

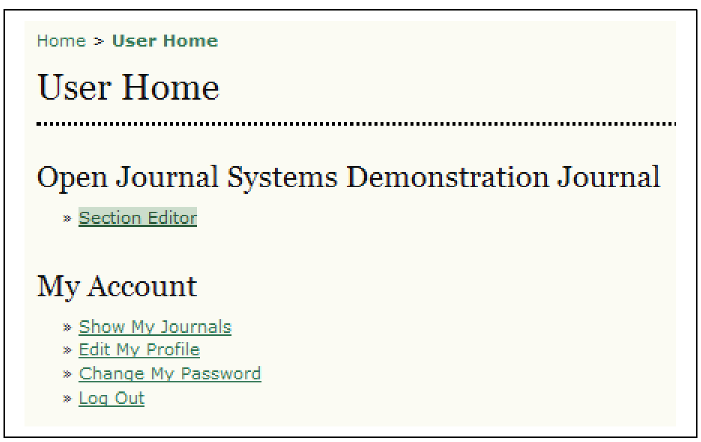


Figure 152: Signing in as a section editor

Submissions

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

Figure 153: Submissions in review

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

Assigning Reviewers

Click on the article title:

Figure 154: Review details

You have the option to:

- Send an email message to the author (click on the envelope icon next to the author's name) or the editor.
- View the original submission file by clicking the link or upload a new version of the document for review.

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

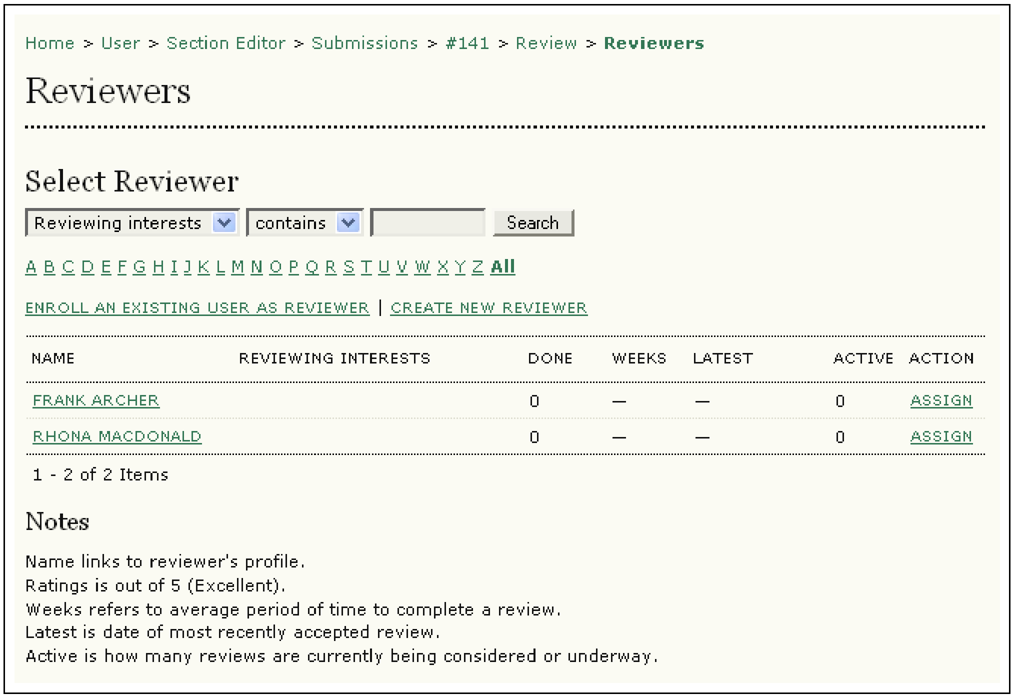


Figure 155: Selecting reviewers

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

- When you have finished assigning reviews, you should be returned to the “Review” Section. Click on “Select Review Form”, and on Review Forms page assign an appropriate review form.

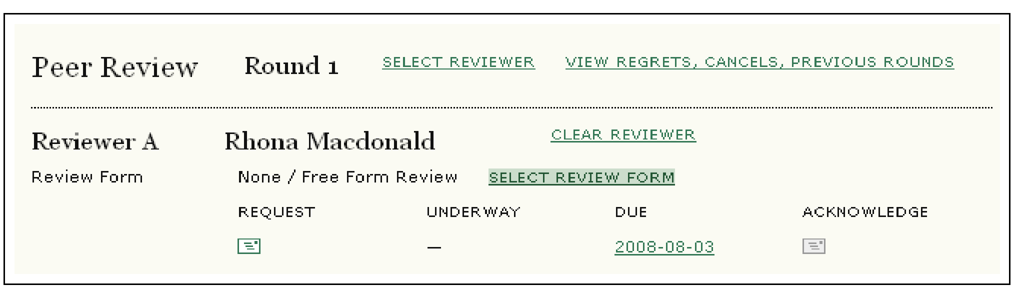


Figure 156: Selecting Review Form

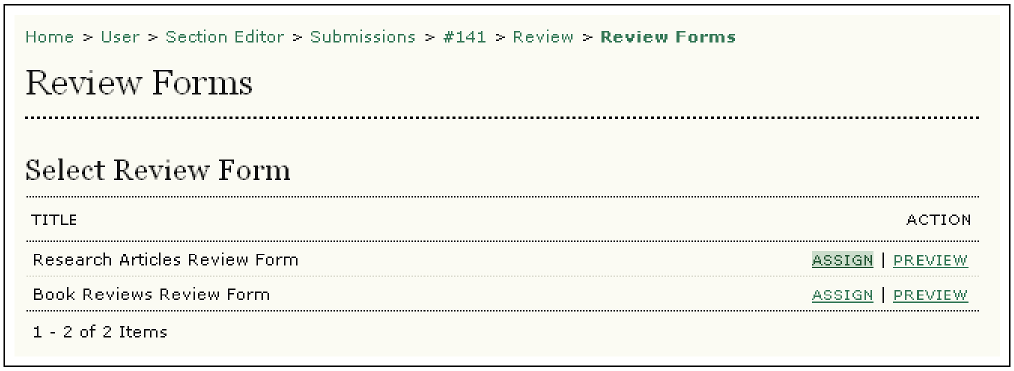


Figure 157: Assigning Review Form

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

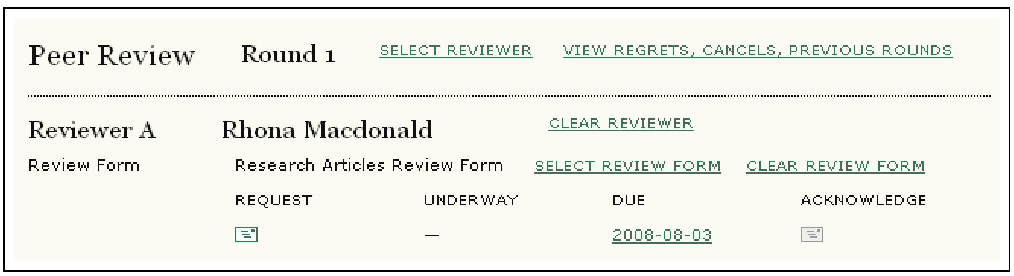


Figure 158: Requesting a review

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

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

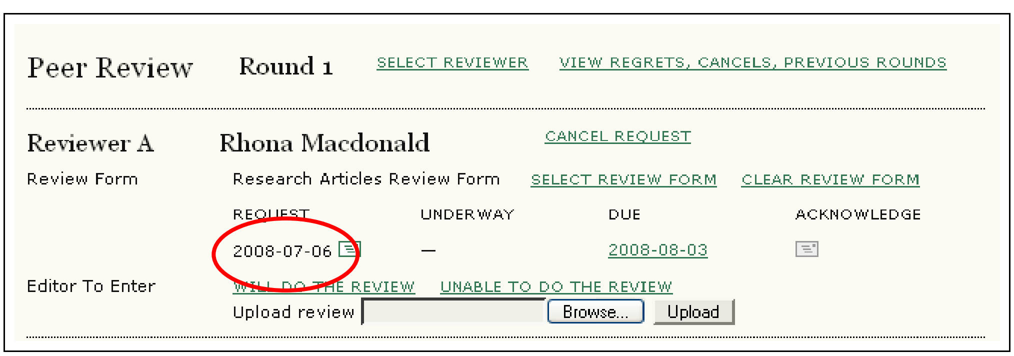


Figure 159: Review Request Date

Working with Reviewers

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

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

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

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

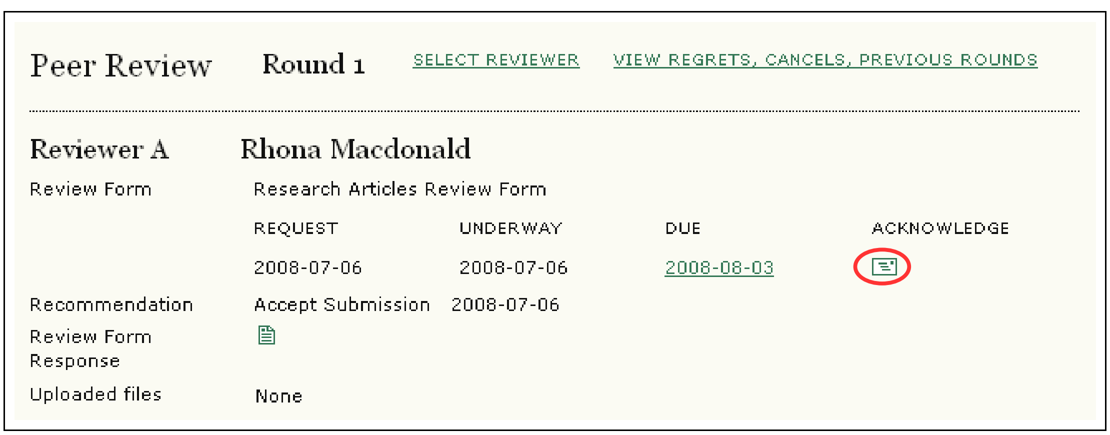


Figure 160: Acknowledging the reviewer

Making a Decision on an Article

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

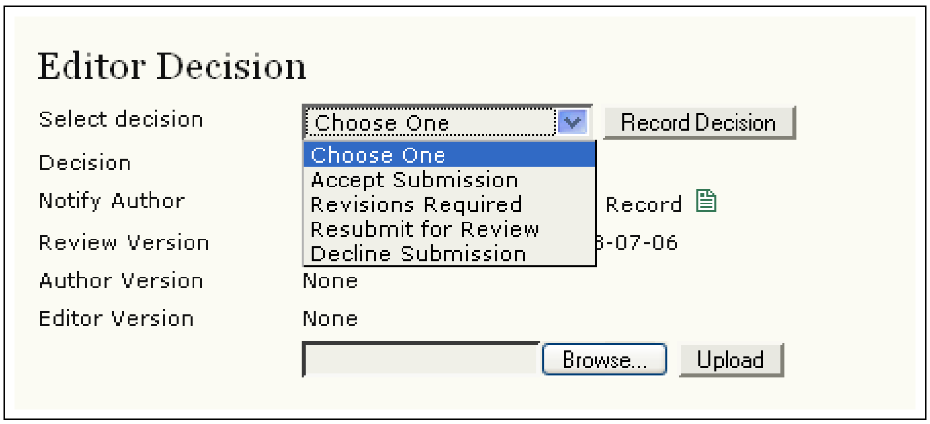


Figure 161: Making your decision

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

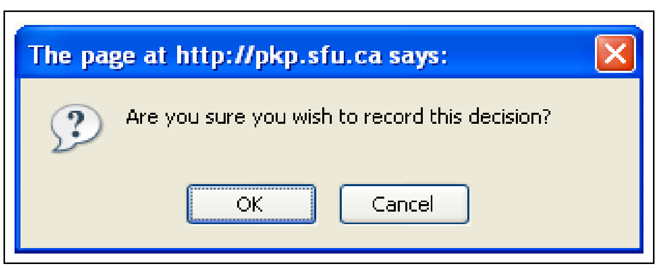


Figure 162: Confirming Message

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

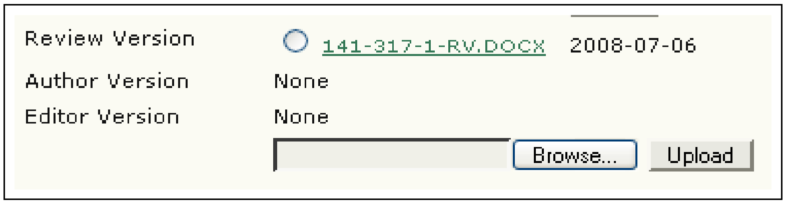


Figure 163: Uploading the Editor Version

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

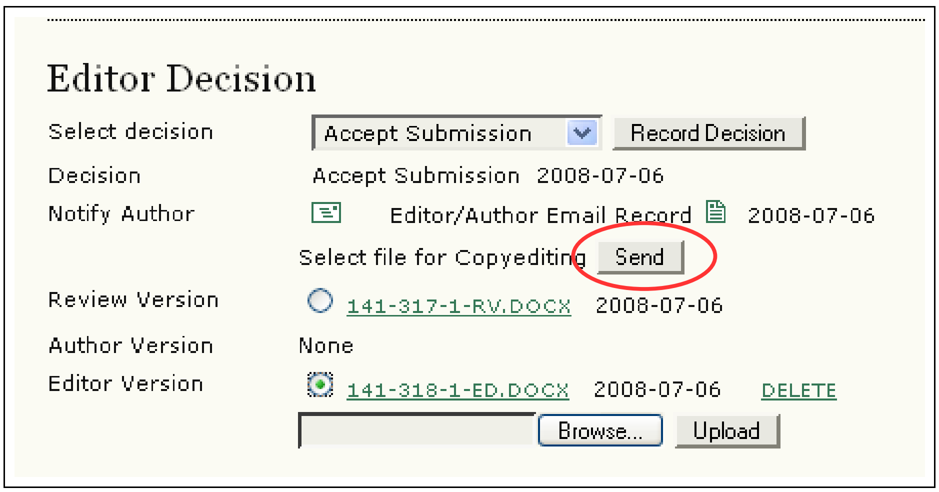


Figure 164: Selecting file for the Copyeditor

Copyediting

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

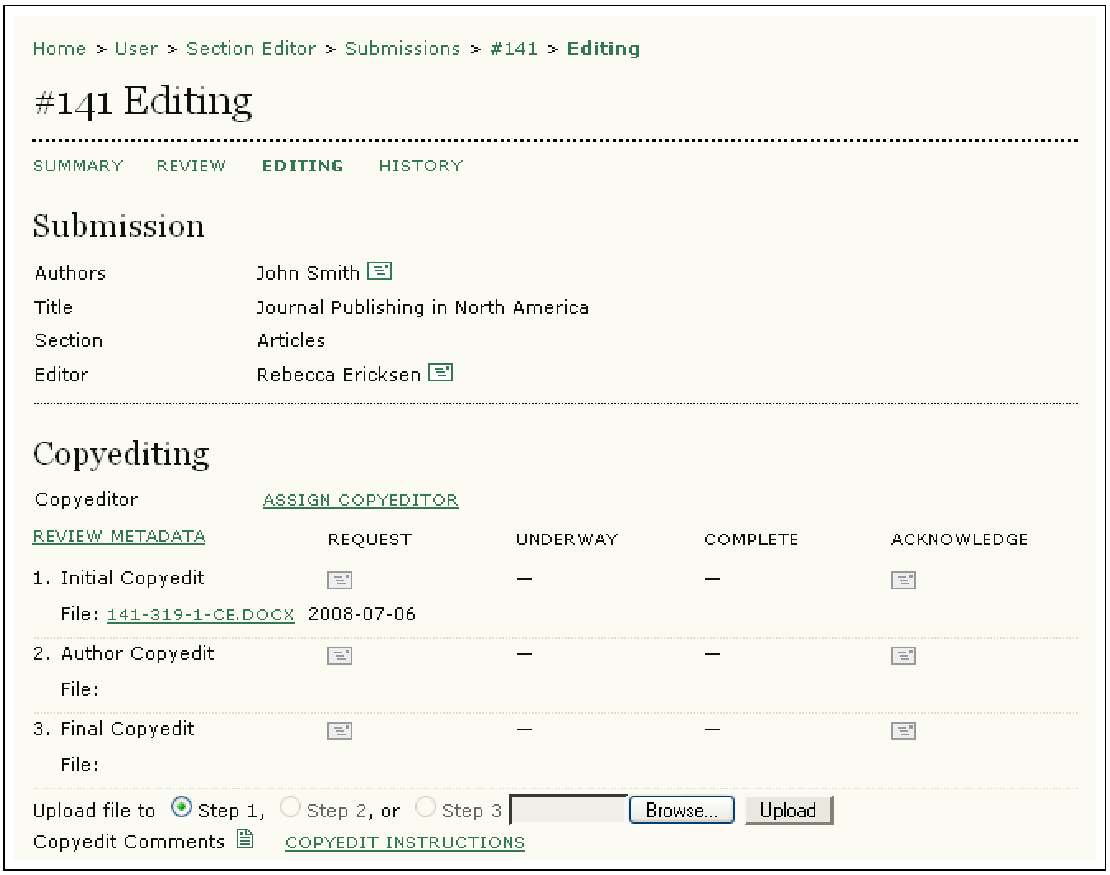


Figure 165: Assigning a copyeditor

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

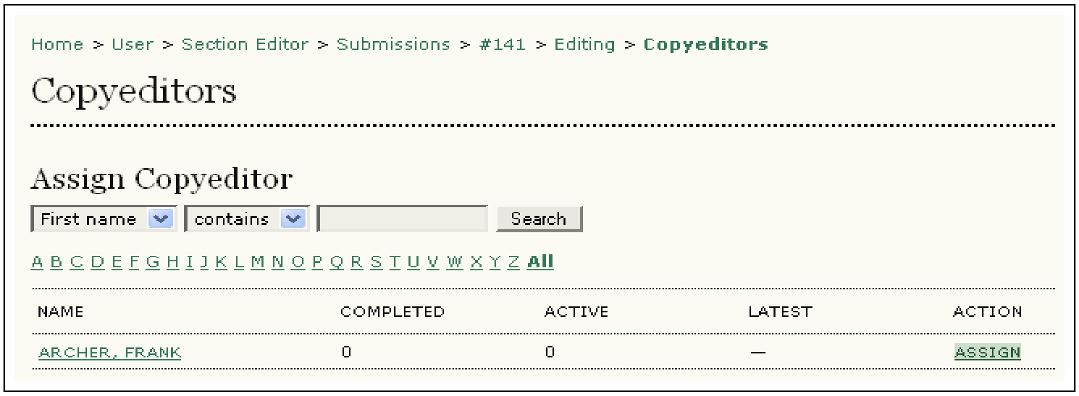


Figure 166: Selecting a copyeditor

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

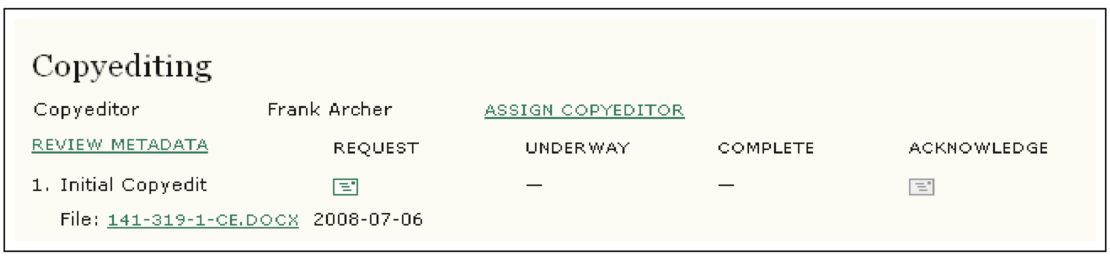


Figure 167: Requesting copyediting

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

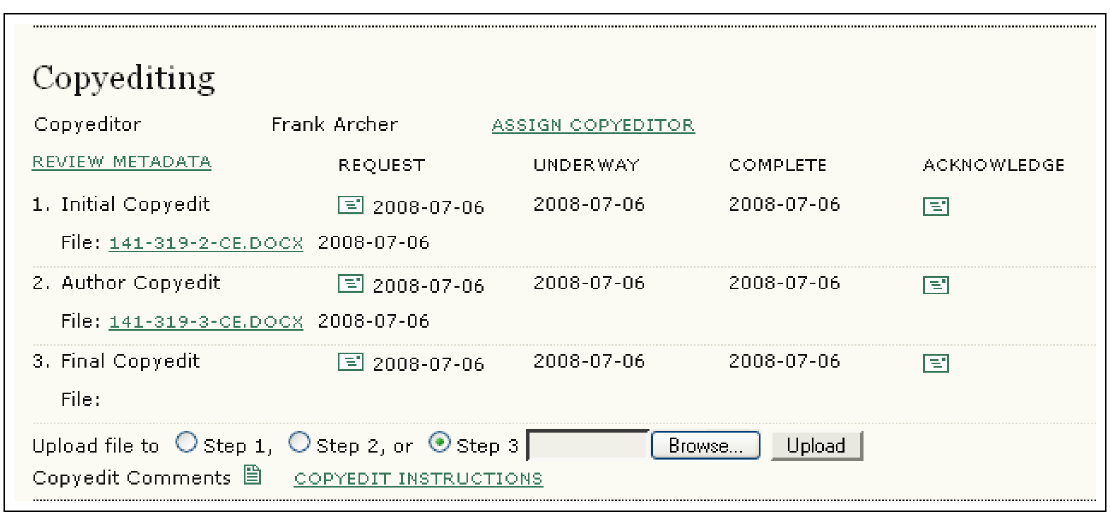


Figure 168: Completing the copyediting process

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

For journals where the section editor acts as the copyeditor, you can begin the copyediting process by selecting the “Initiate” link. The section editor reviews the copyedit version of the article by selecting the file link. He or she then makes any changes and uploads the edited version using the file upload tool. When the copyediting is completed, select the “Complete” link. This will activate the “Request” icon allowing you to send a message to the author asking for them to now review your copyedits and make any changes.

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

Layout Editing

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

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

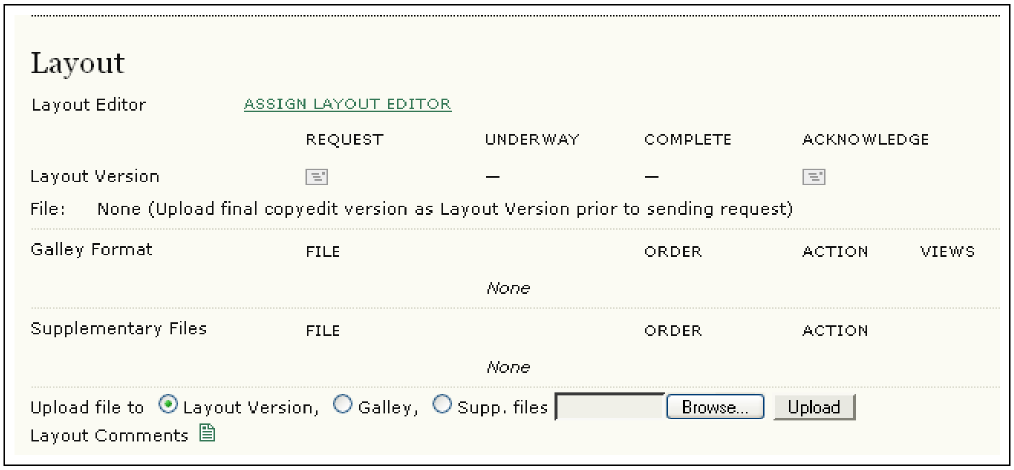


Figure 169: Assigning the layout editor

Choose a layout editor from the list:

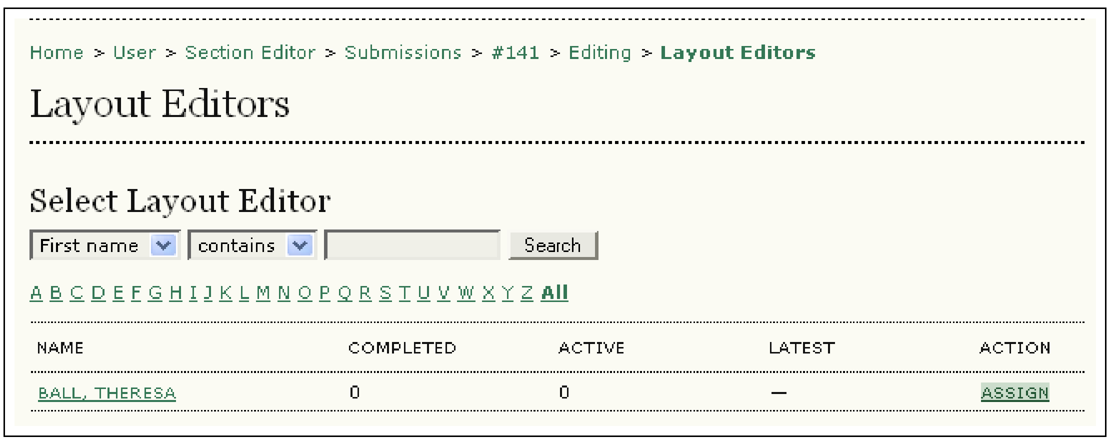


Figure 170: Assigning the Layout Editor

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

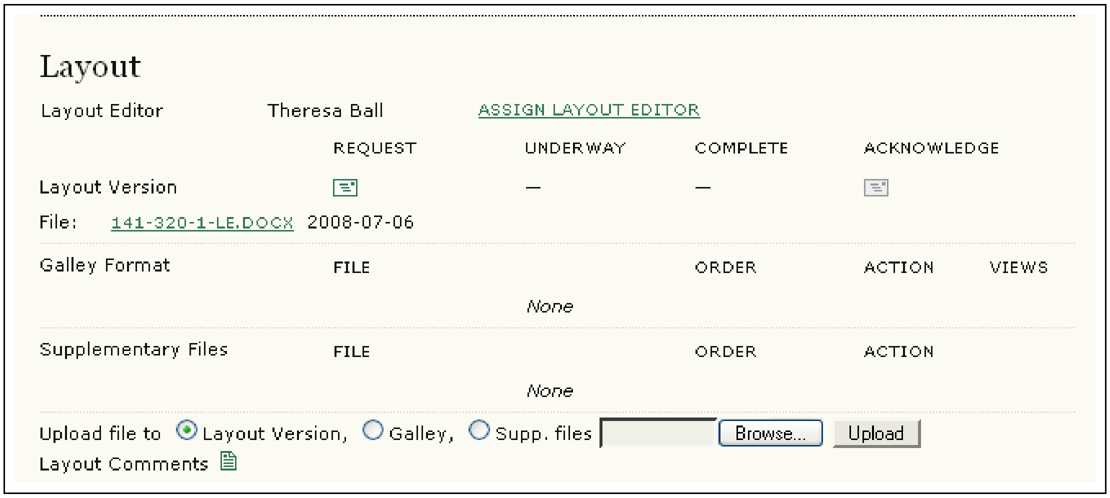


Figure 171: Request Layout Editing

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

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

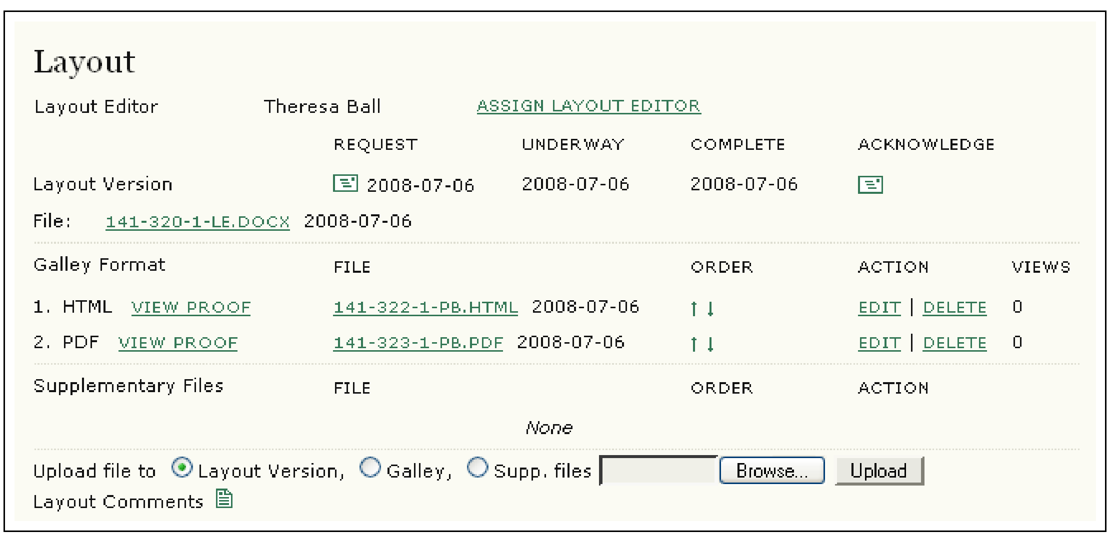


Figure 172: Final layout editing

Proofreading

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

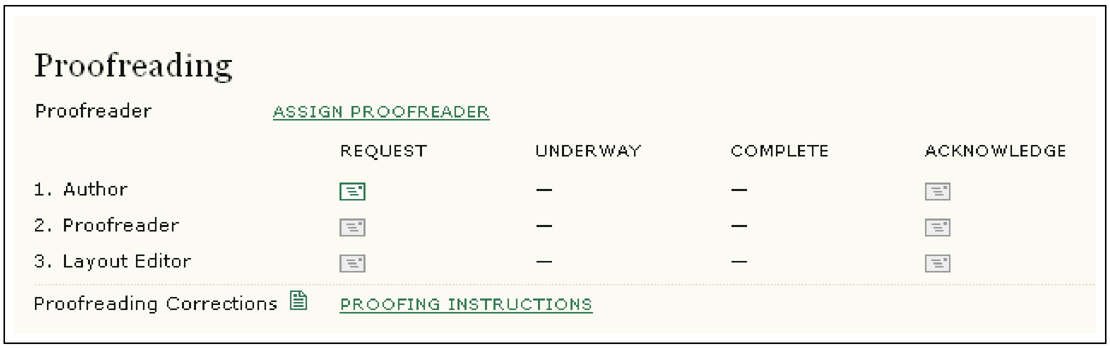


Figure 173: Proofreading request to the author

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

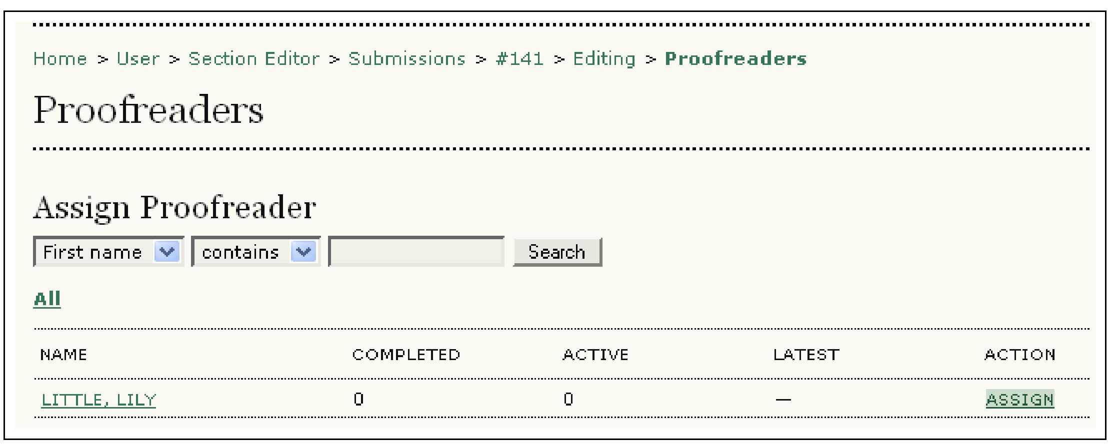


Figure 174: Selecting a proofreader

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

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

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

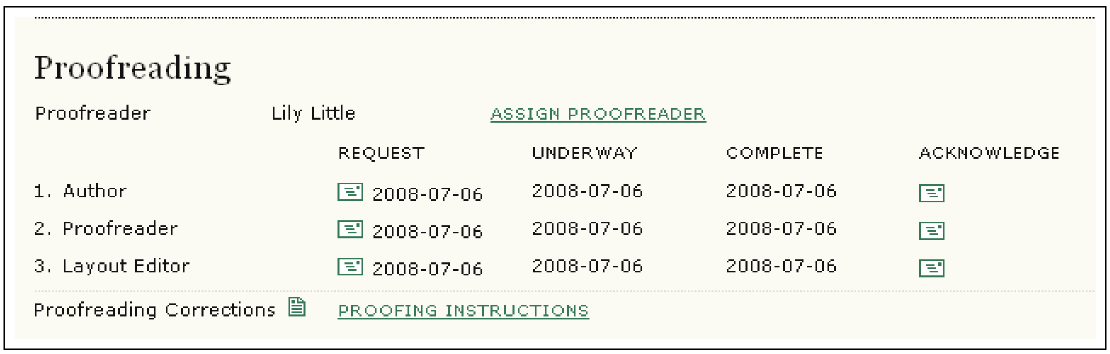


Figure 175: Completing the proofreading process

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

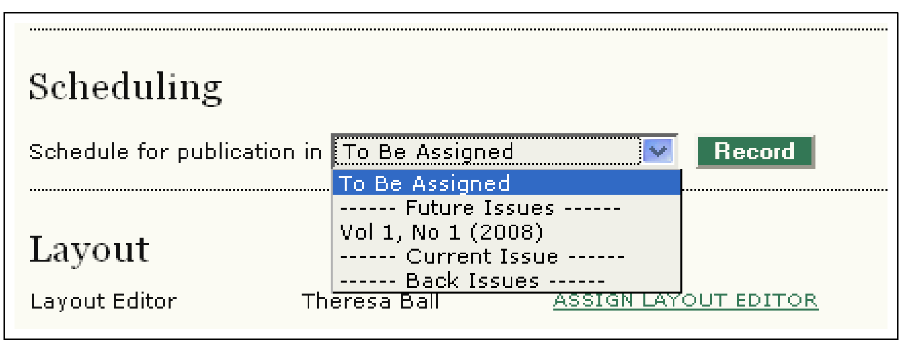


Figure 176: Scheduling the submission

Reviewers

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

Getting Started

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

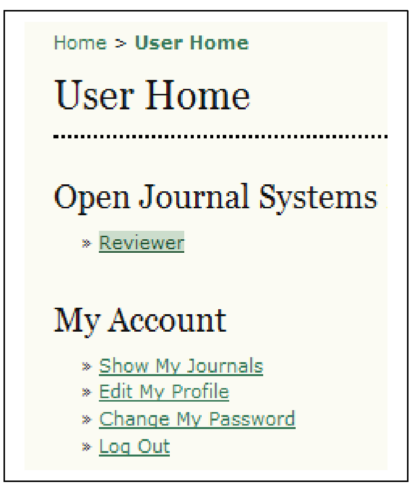


Figure 177: Selecting role as Reviewer

Reviewing Articles

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

Figure 178: Active submissions for review

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

Figure 179: Review page

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

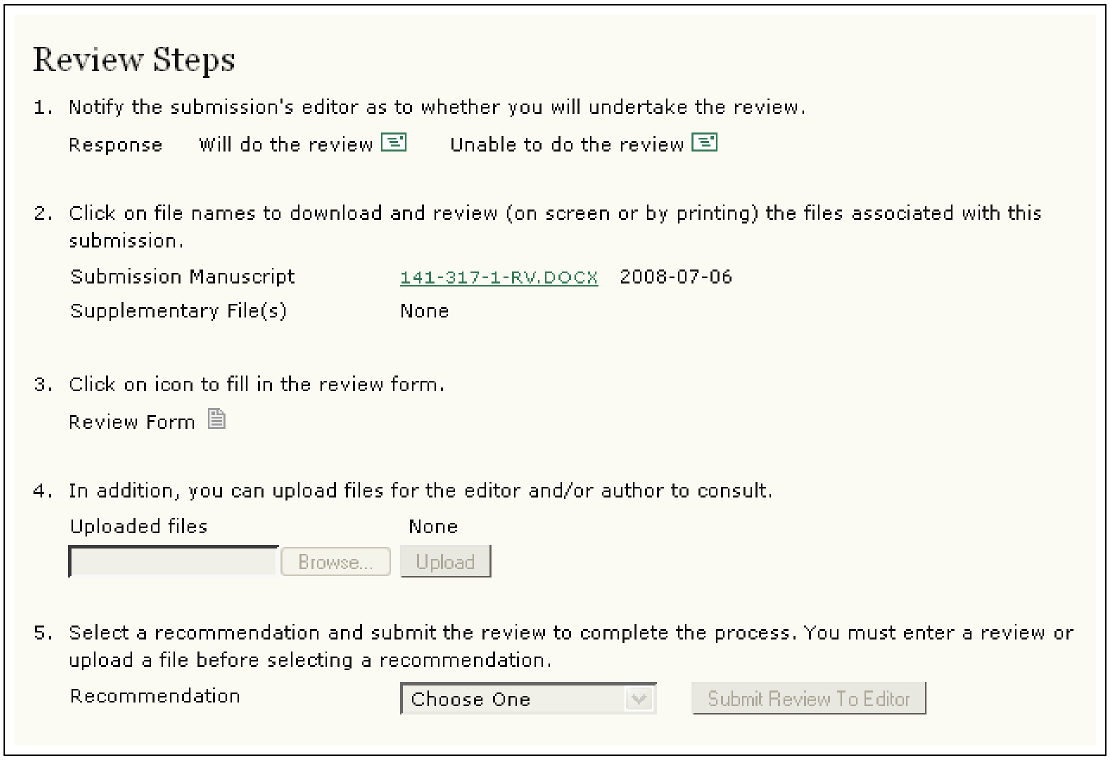


Figure 180: Review Steps

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

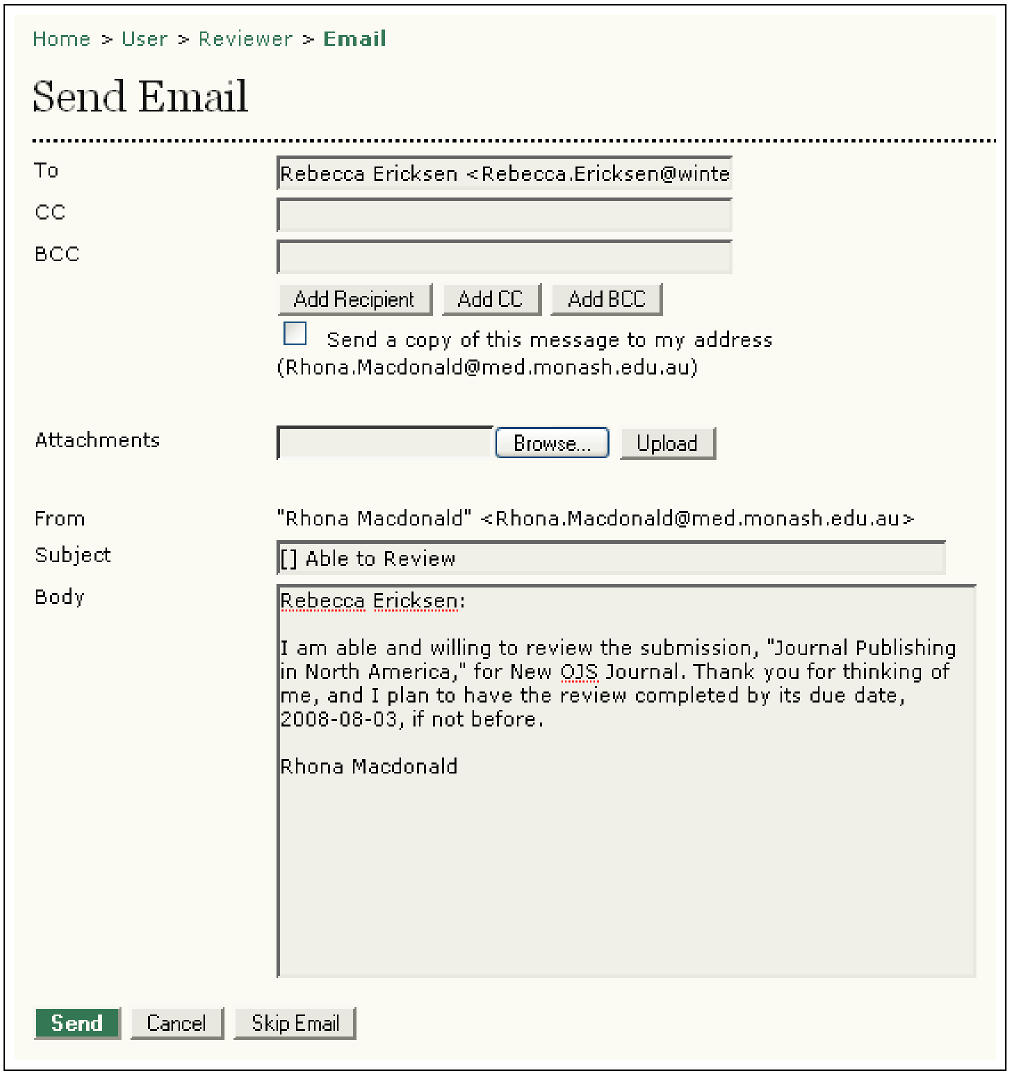


Figure 181: Accepting Review Request

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

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

Step 3: Click the “Review Form” icon to record your review. You need to enter text, check boxes, make selections of all required fields:


Home > User > Reviewer > #141 > Review Form Response

Review Form Response

Research Articles Review Form

This review form is for research articles

Paper Number *

Paper Title *

Provide a rating of the paper's acceptability *

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

- Expert
- Knowledgeable
- Passing knowledge
- No knowledge

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

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

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

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

Write your review of the paper here. *

Figure 182: Review Form

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

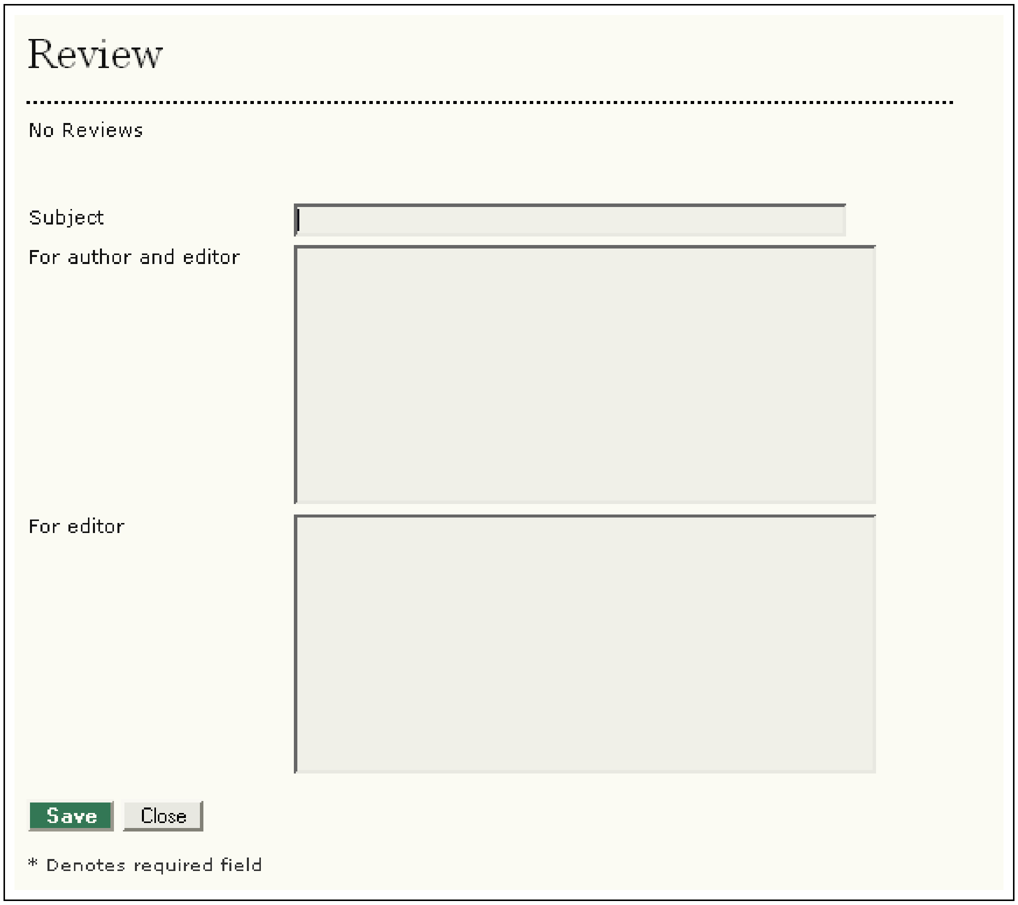


Figure 183: Review Comments

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

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

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

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

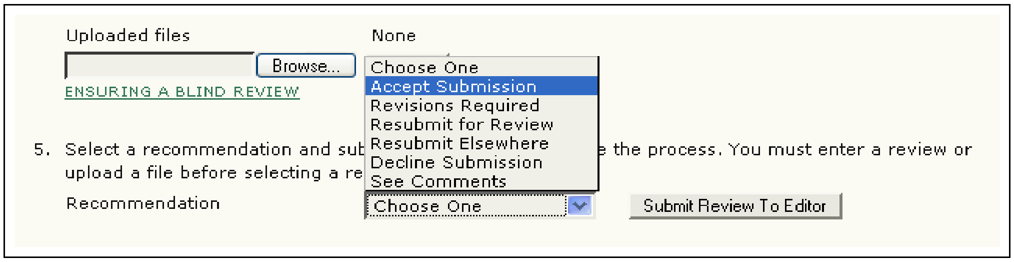


Figure 184: Making a recommendation

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

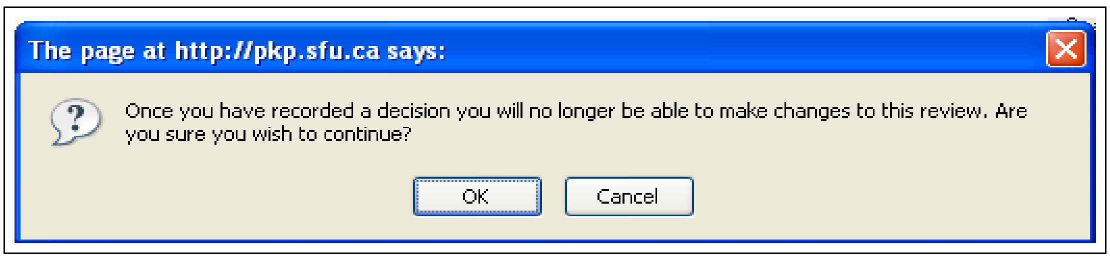


Figure 185: Warning message

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

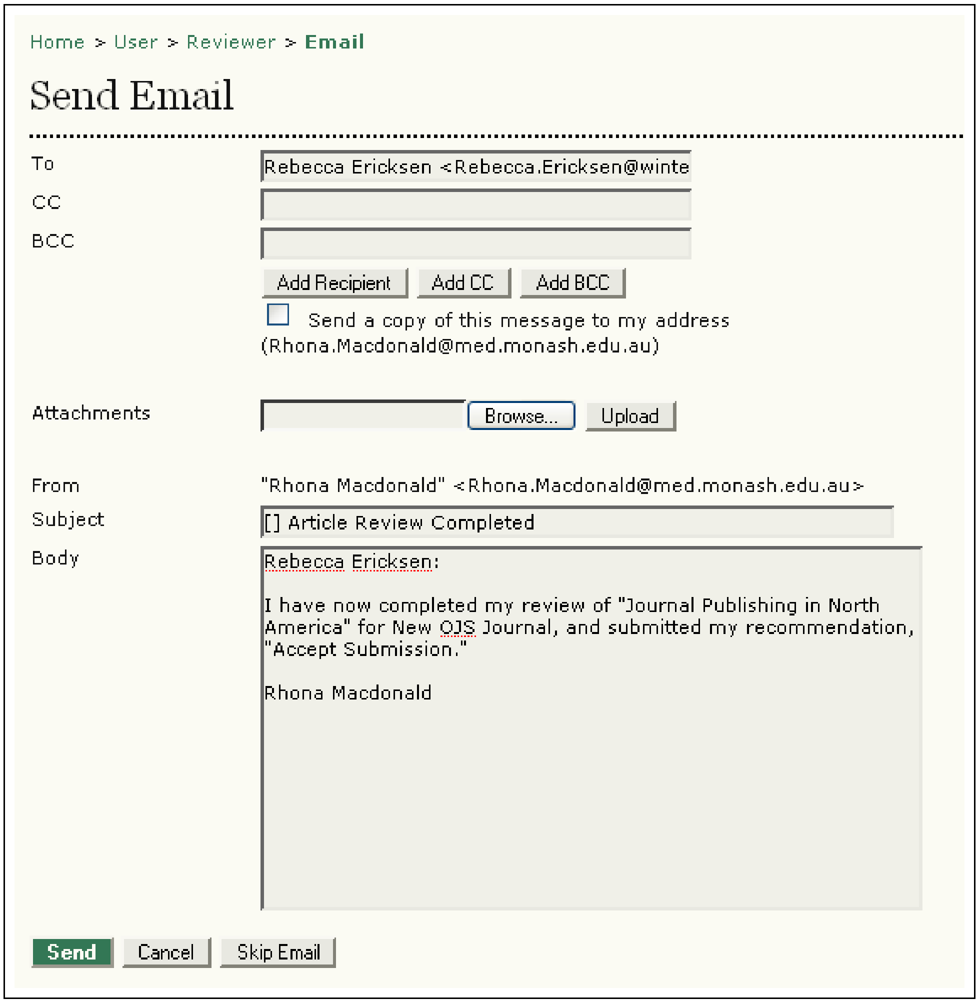


Figure 186: Completed Review Message

Copyeditors

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

Getting Started

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

Figure 187: Signing in as a copyeditor

Copyediting

Choose the title link for the article to begin the copyediting process:

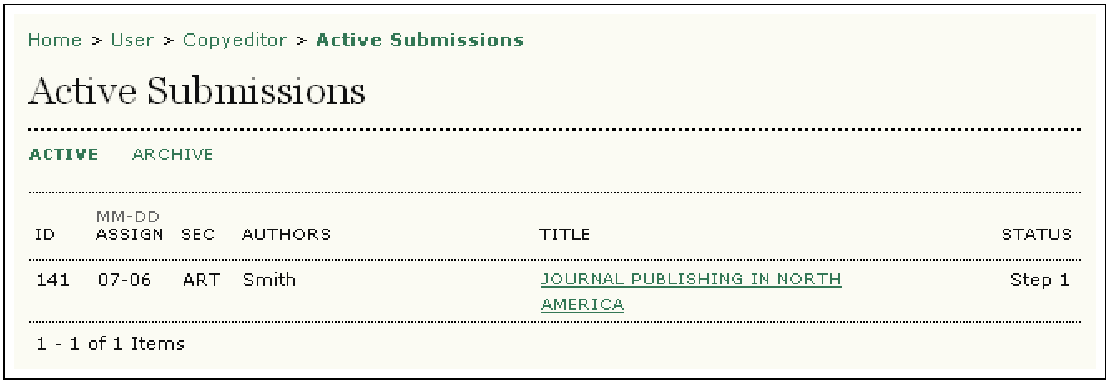


Figure 188: Selecting an article for copyediting

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

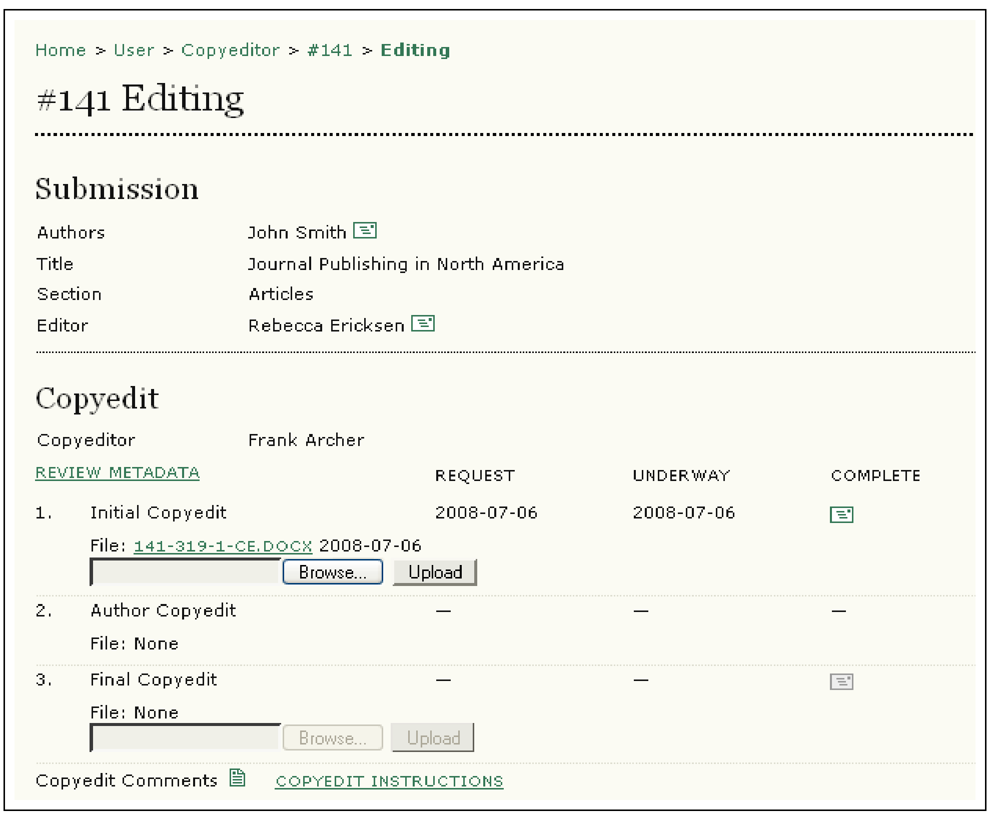


Figure 189: Downloading an article for copyediting

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

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

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

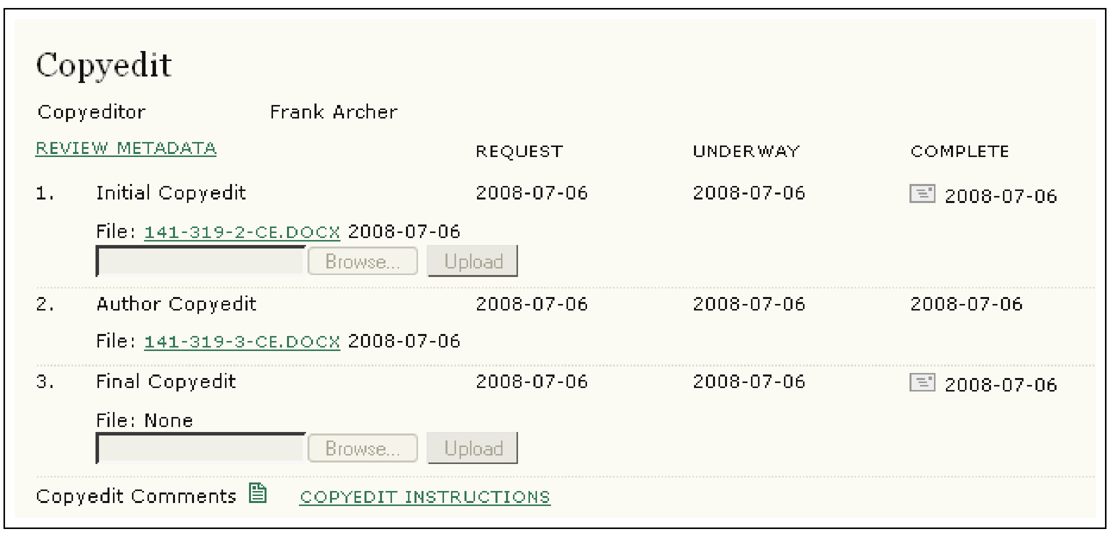


Figure 190: Completing the copyediting

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

Layout Editors

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

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

Getting Started

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

Figure 191: Signing in as a Layout Editor

Layout Editing

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

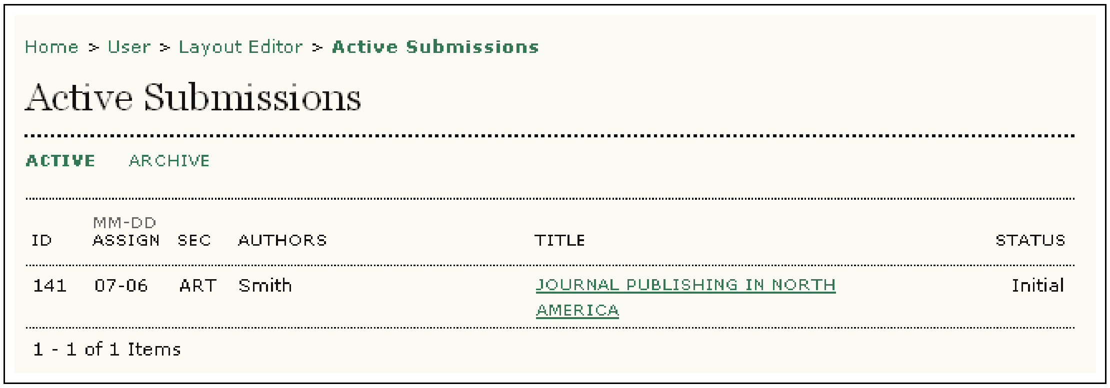


Figure 192: Selecting an article for editing

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

Use the upload galley format tool to submit these documents:

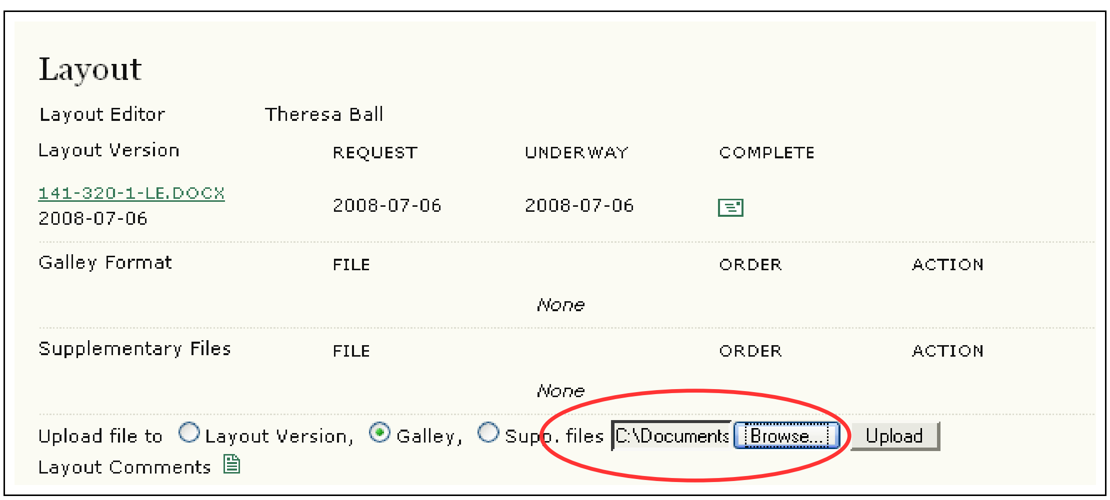


Figure 193: Uploading galley files

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

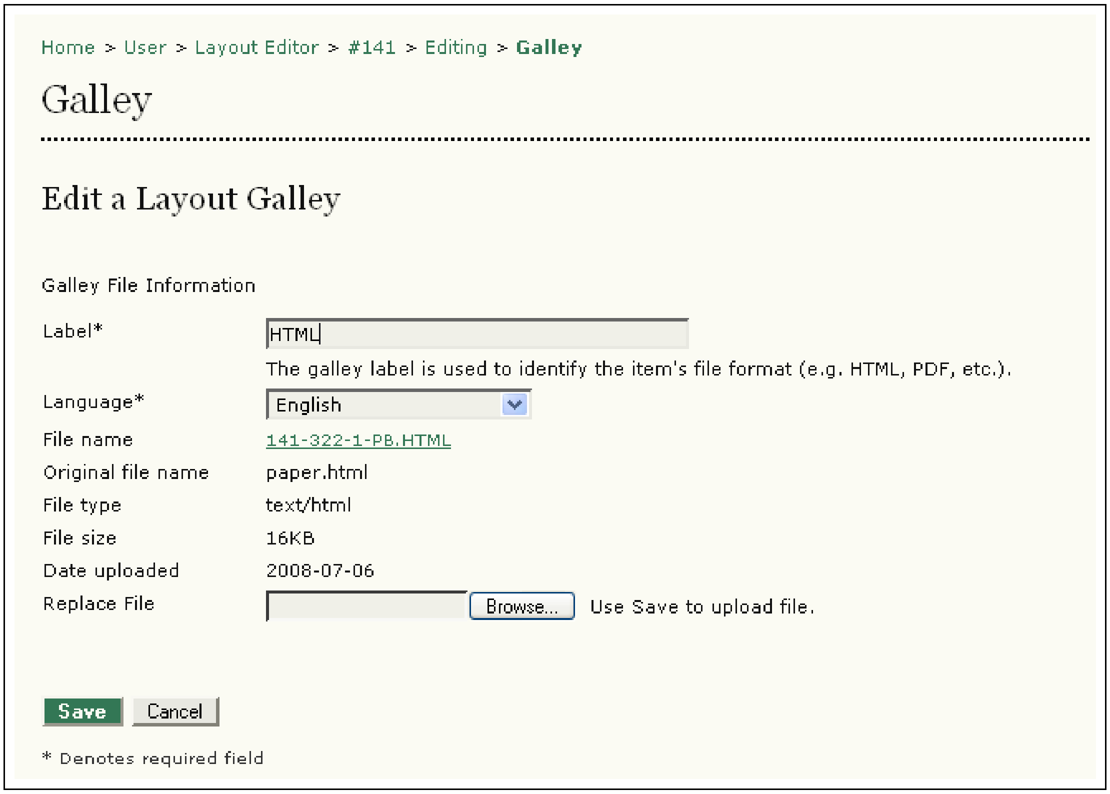


Figure 194: Adding the HTML galley

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

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

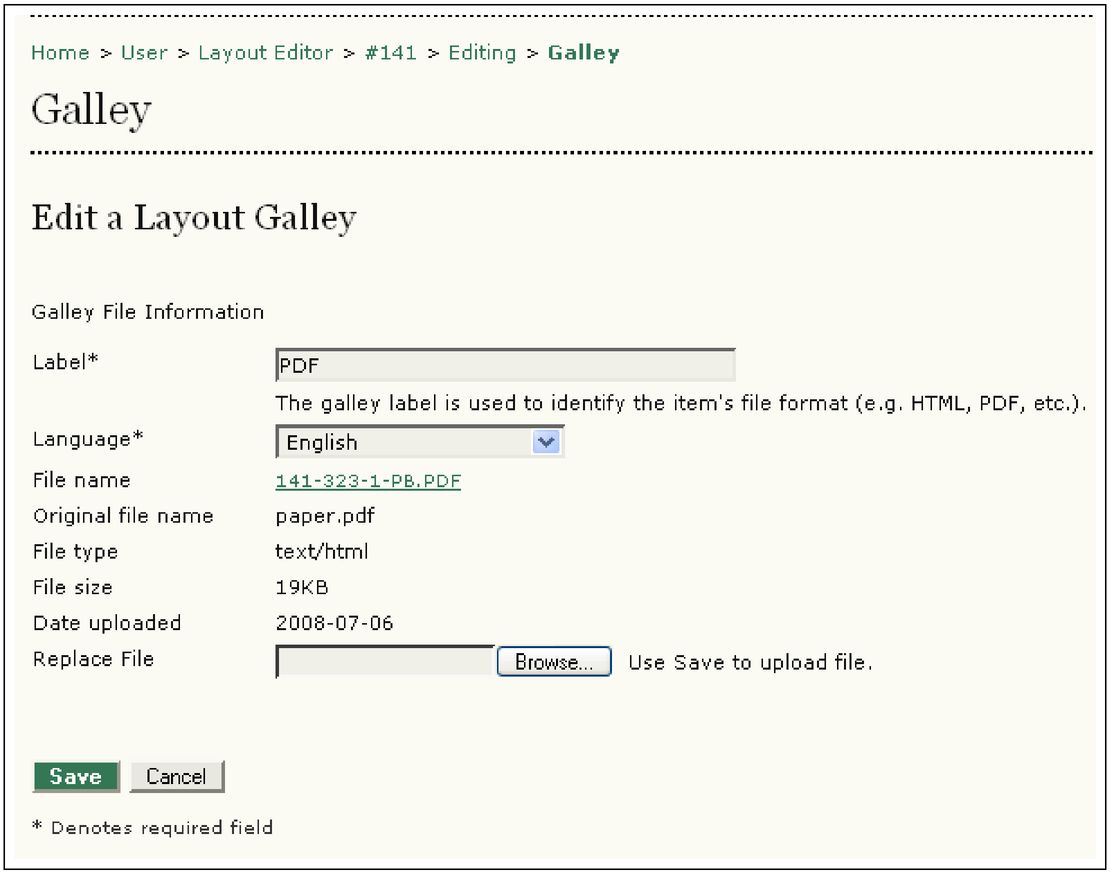


Figure 195: Adding the PDF galley

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

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

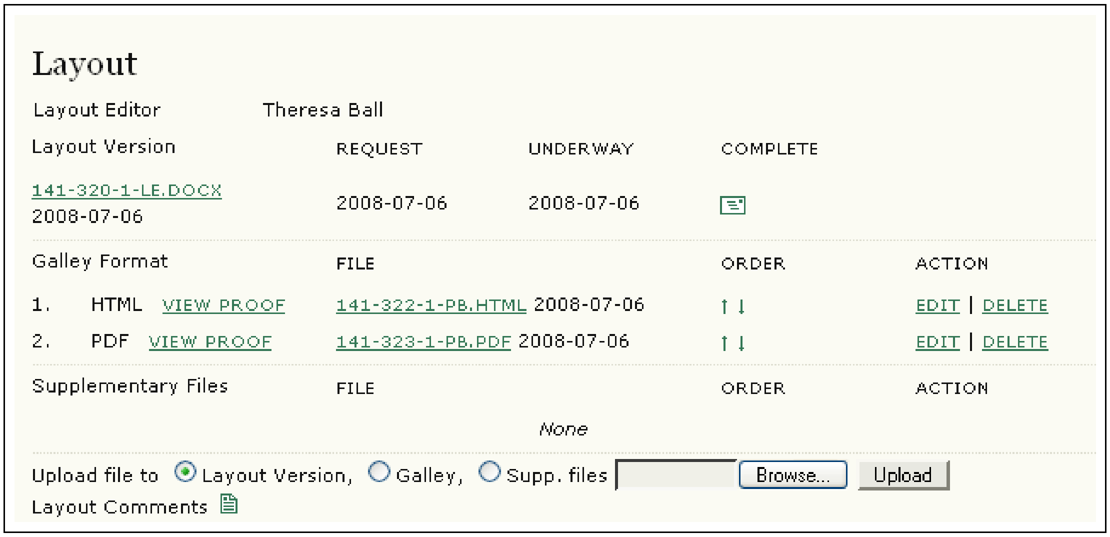


Figure 196: Editing the galley files

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

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

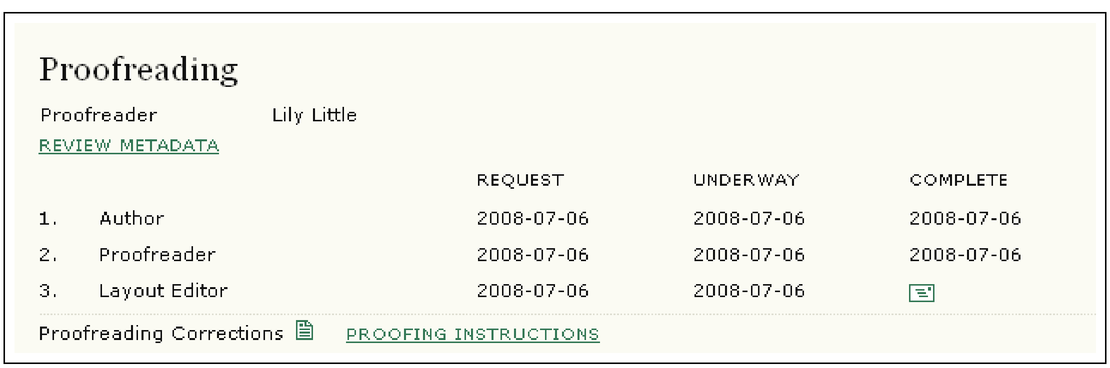


Figure 197: Completing the layout editing

The article is now ready to be published.

Proofreaders

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

Getting Started

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

Figure 198: Signing in as a proofreader

Proofreading

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

The HTML and PDF versions are available in the “Layout” section. Proofreading instructions are linked at the bottom of the section. You may also submit corrections using the “Proofreading Corrections” icon.

When you are finished, use the “Complete” icon to notify the Layout Editor:

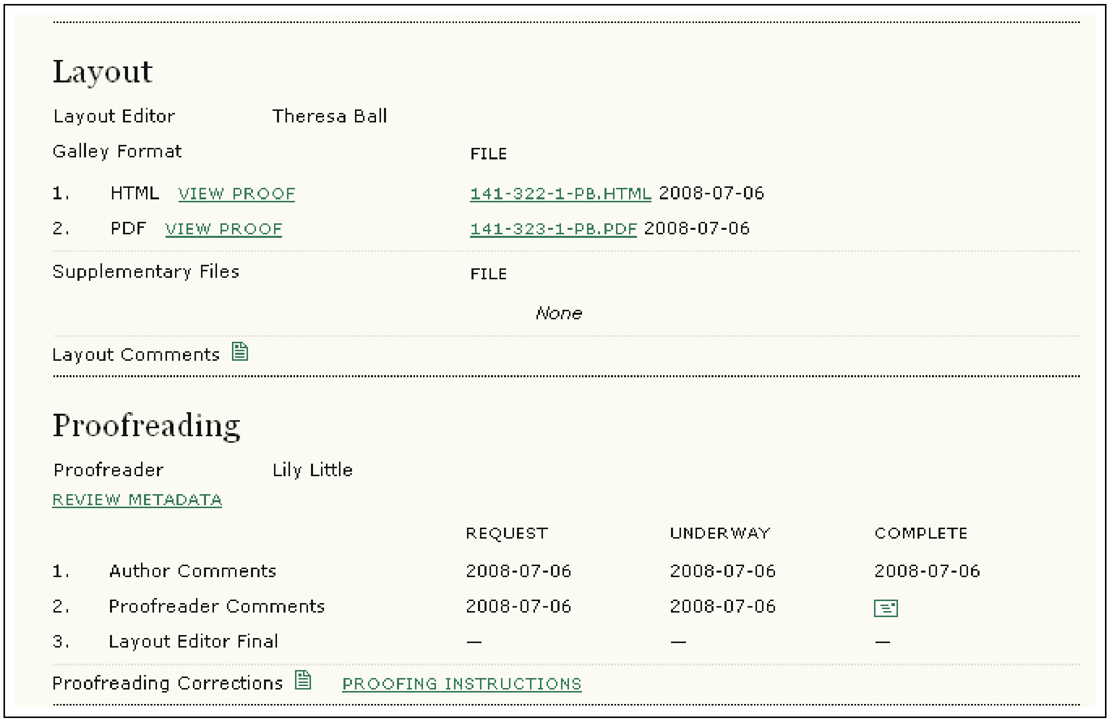


Figure 199: Proofreading

Authors

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

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

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

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

Getting Started

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

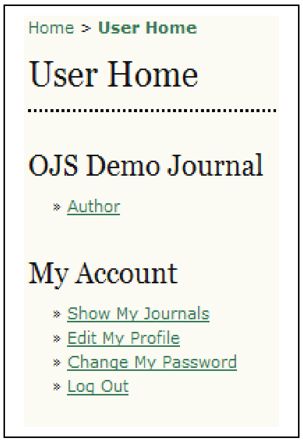


Figure 200: Selecting your role as an author

Submitting Articles

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

Figure 201: Starting a new submission

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

Figure 202: Selecting the Journal Section

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

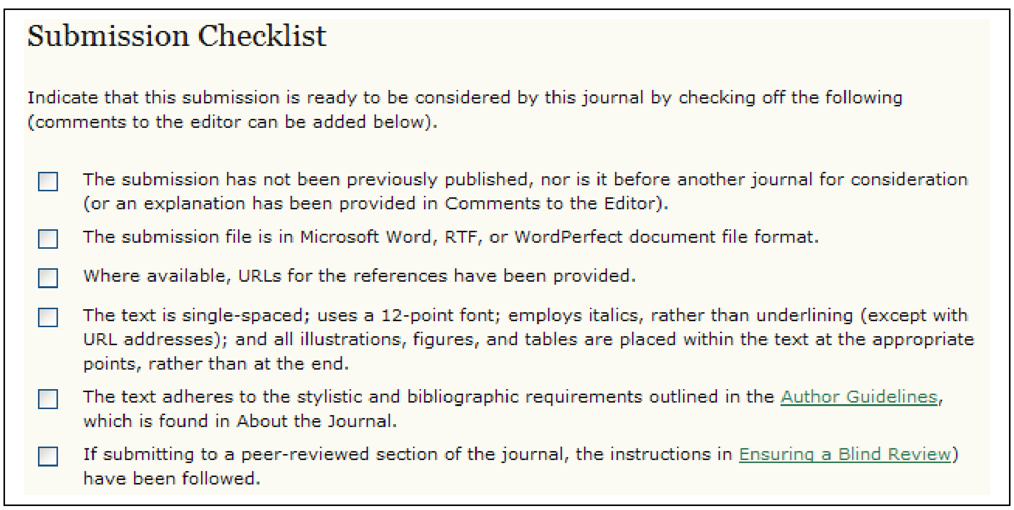


Figure 203: Submission Checklist

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

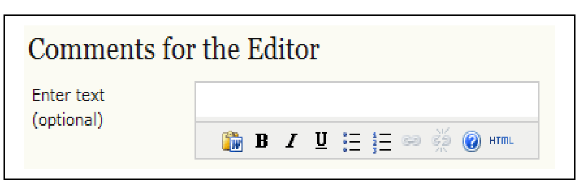


Figure 204: Comments and saving

4. Select “Save and continue”.

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

Step 2: Enter the submission’s metadata.

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

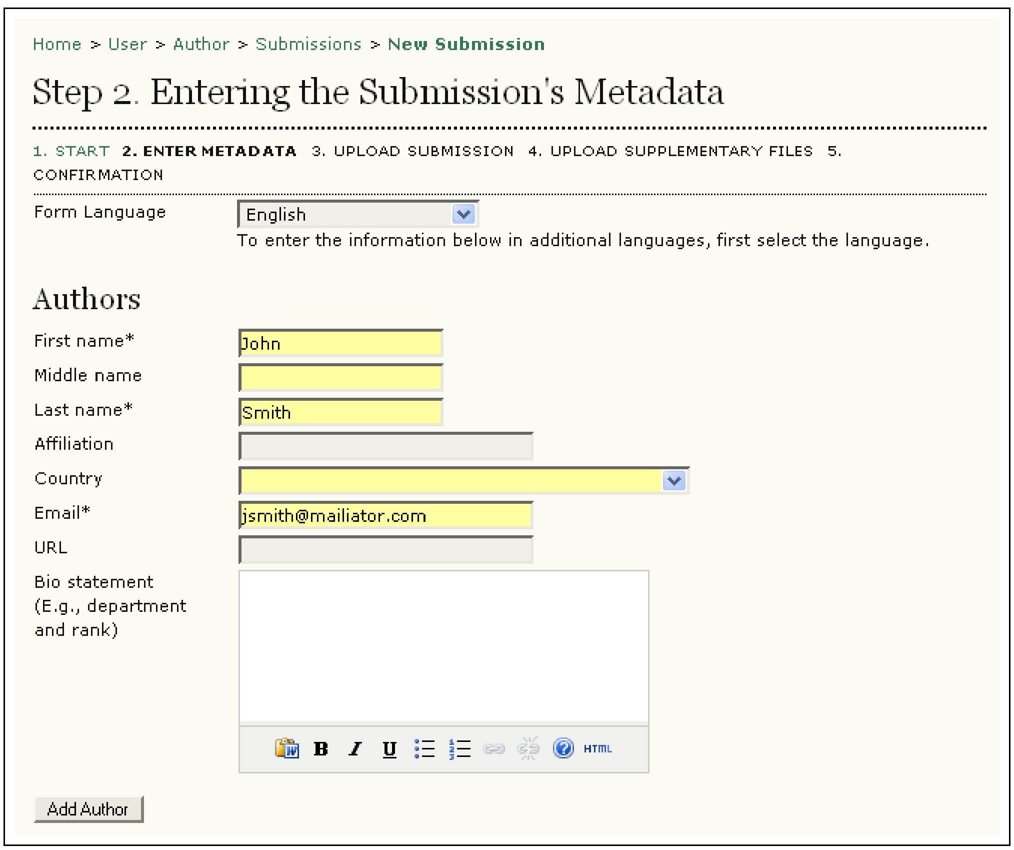


Figure 205: Adding author information

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

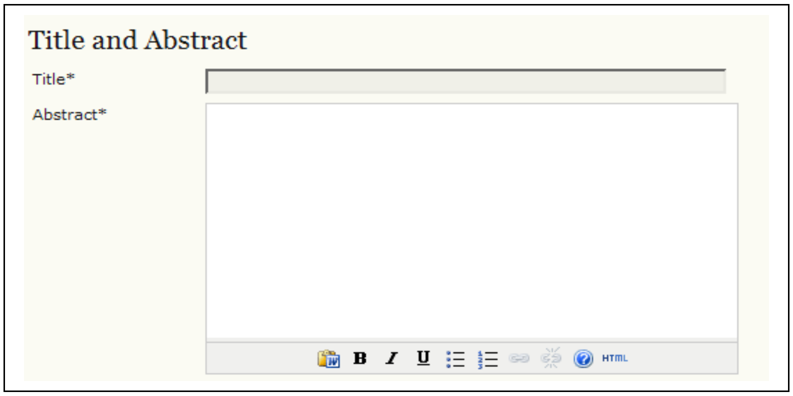


Figure 206: Adding title and abstract information

3. Complete the indexing:

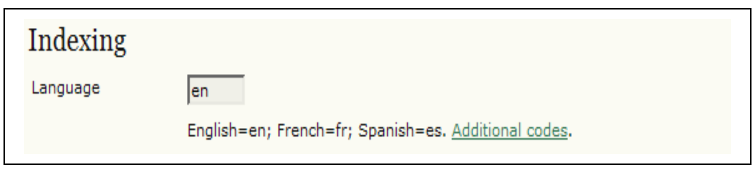


Figure 207: Indexing

4. Enter the names of any supporting agencies:

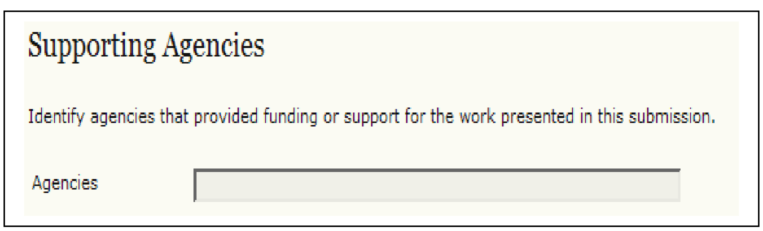


Figure 208: Adding supporting agency information and saving

5. Select “Save and continue”.

Step 3: Upload the submission.

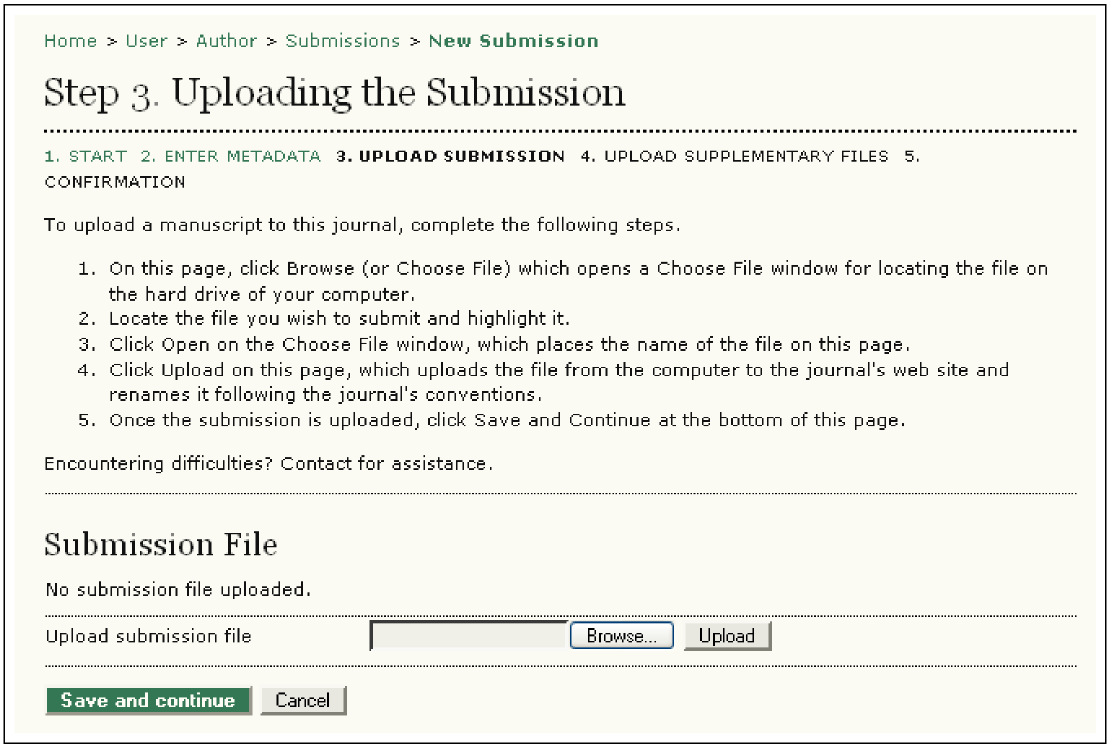


Figure 209: Uploading an article

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

Step 4: Upload supplementary files.

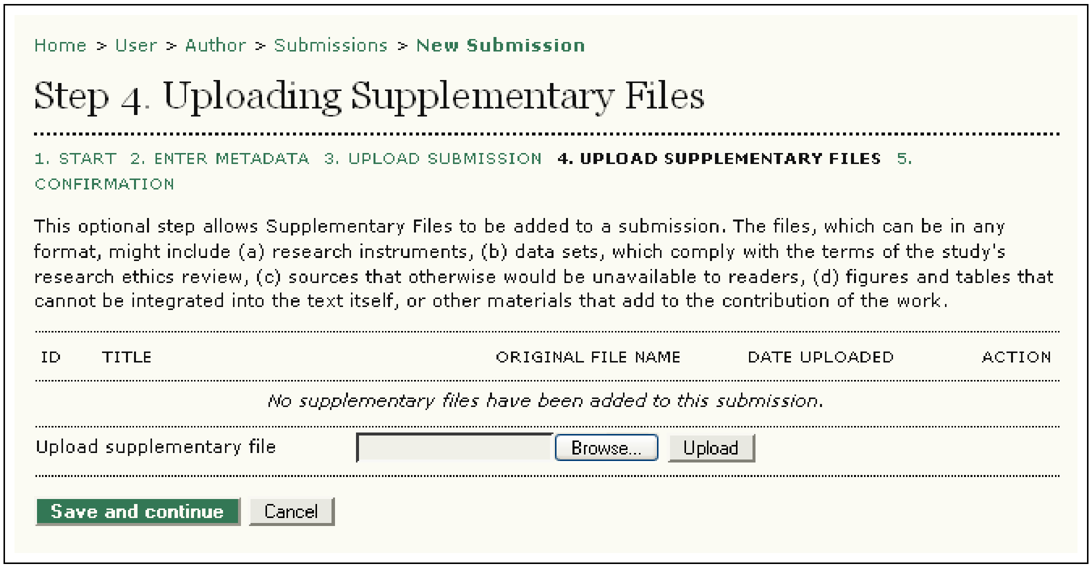


Figure 210: Uploading Supplementary Files

1. This step is optional. If you have any supplementary files, such as research instruments, data sets, etc., you may add them here. These files are also indexed by the author, identifying their relation to the submission, as well as their ownership. Supplementary Files can be uploaded in any file format and will be made available to readers in their original format.
2. Locate the file you wish to submit and highlight it.
3. Click Open on the Choose File window, which places the name of the file on this page.
4. Click Upload on this page, which uploads the file from the computer to the journal's web site and renames it following the journal's conventions.
5. Once the submission is uploaded, click “Save and continue”.

Step 5: Confirming the submission.

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

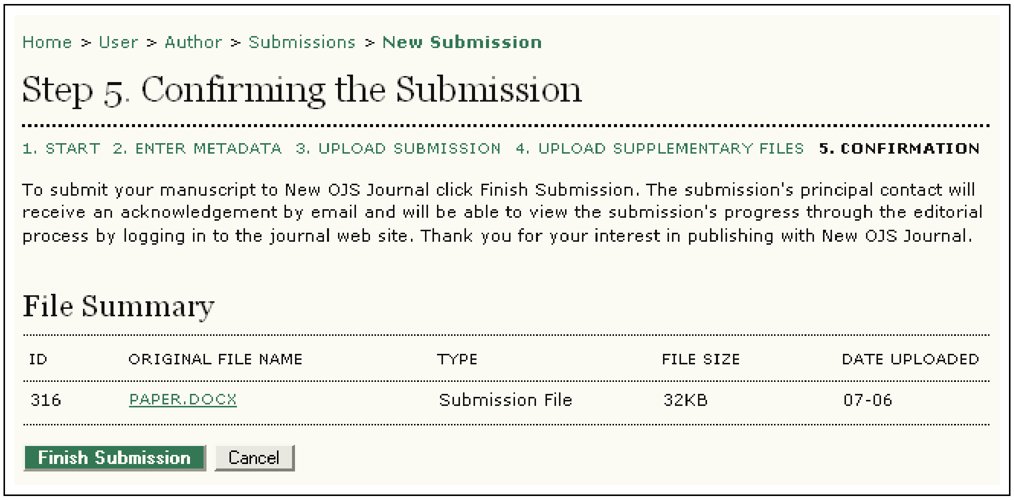


Figure 211: Completing the submission process

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

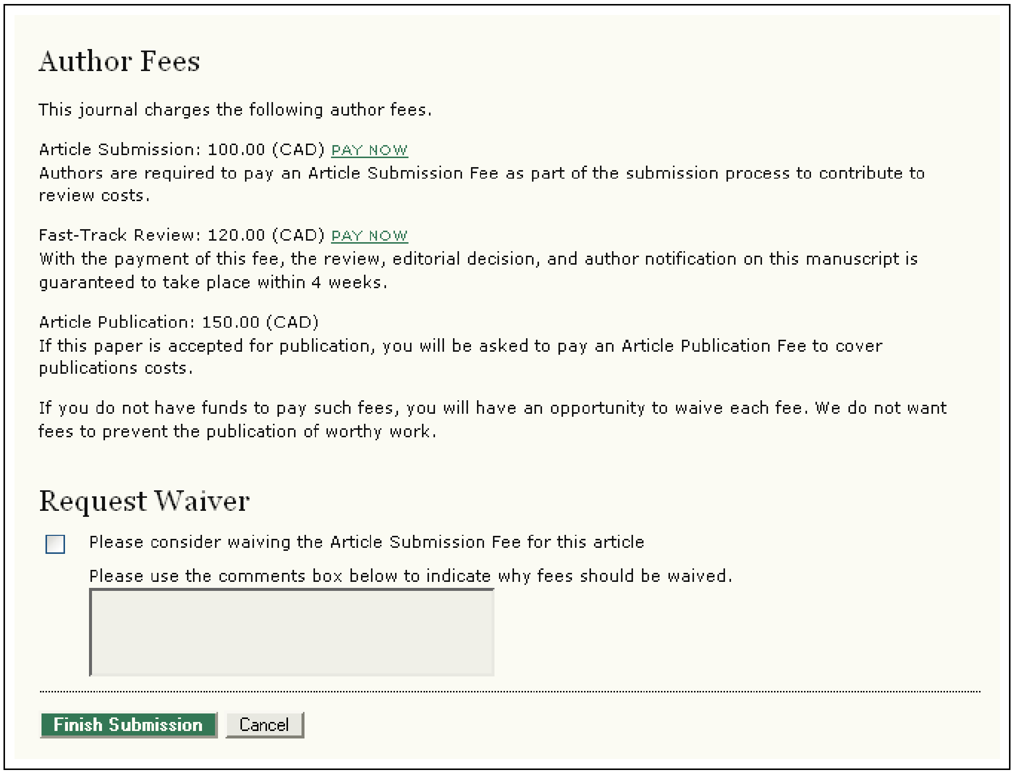


Figure 212: Pay Author Fees

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

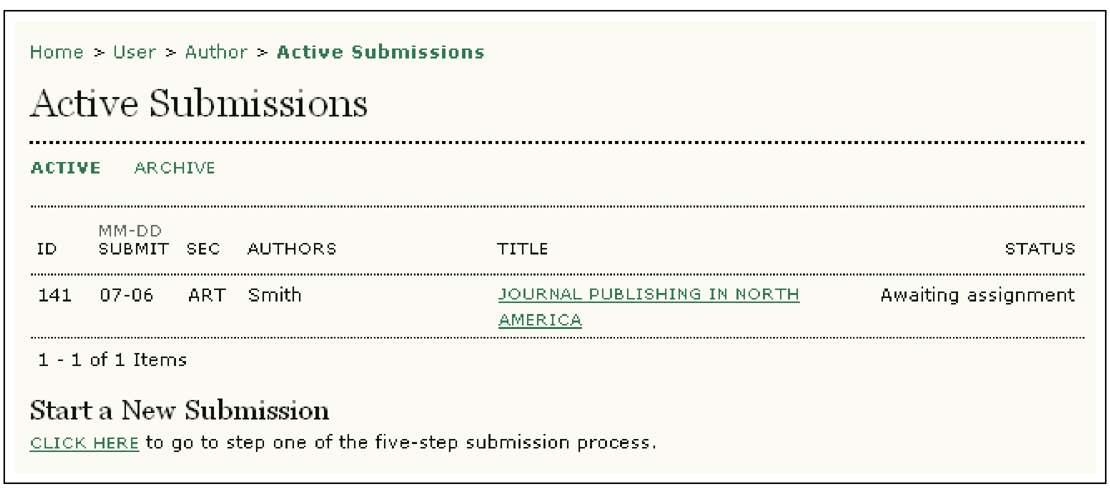


Figure 213: Active submissions

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

Responding to Reviews

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

Go to the "Review" section:

Figure 214: Selecting the "Review" link

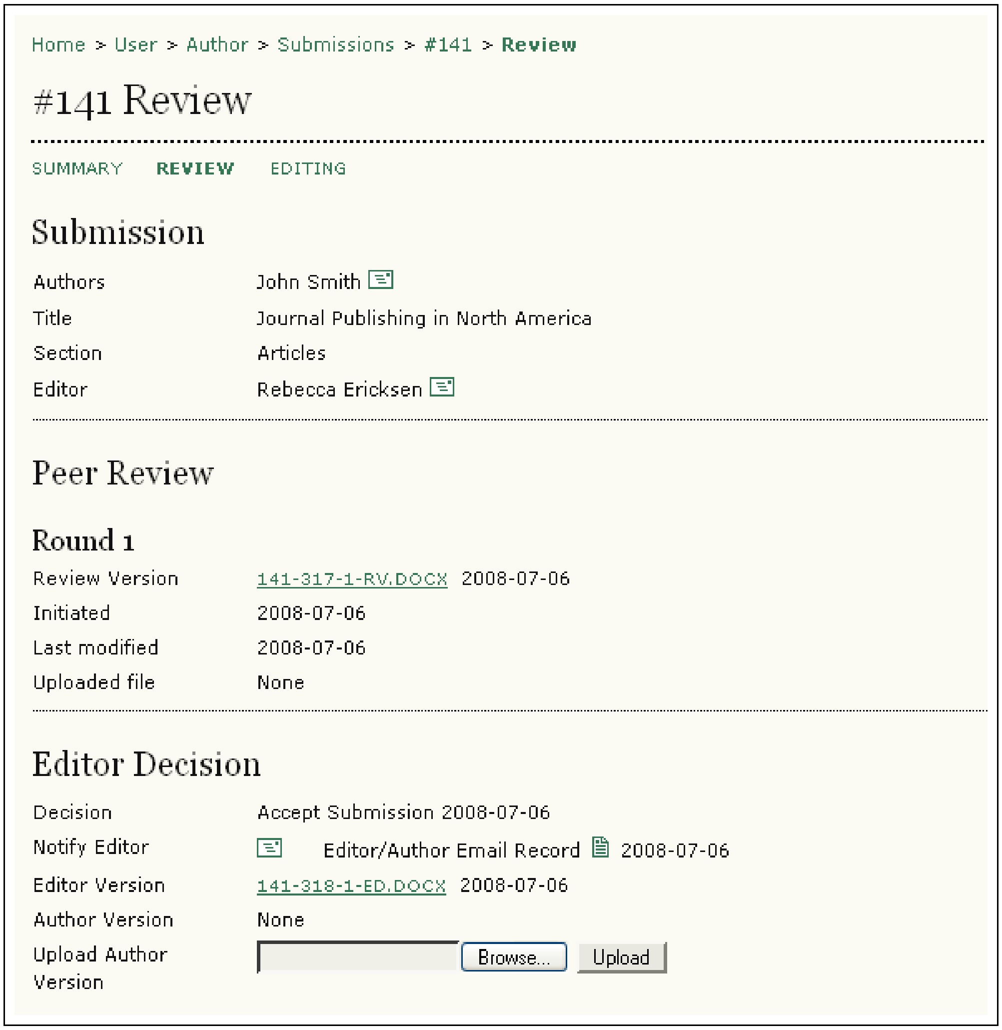


Figure 215: Following the review process

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

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

Copyediting

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

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

Figure 216: Queued for editing

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

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

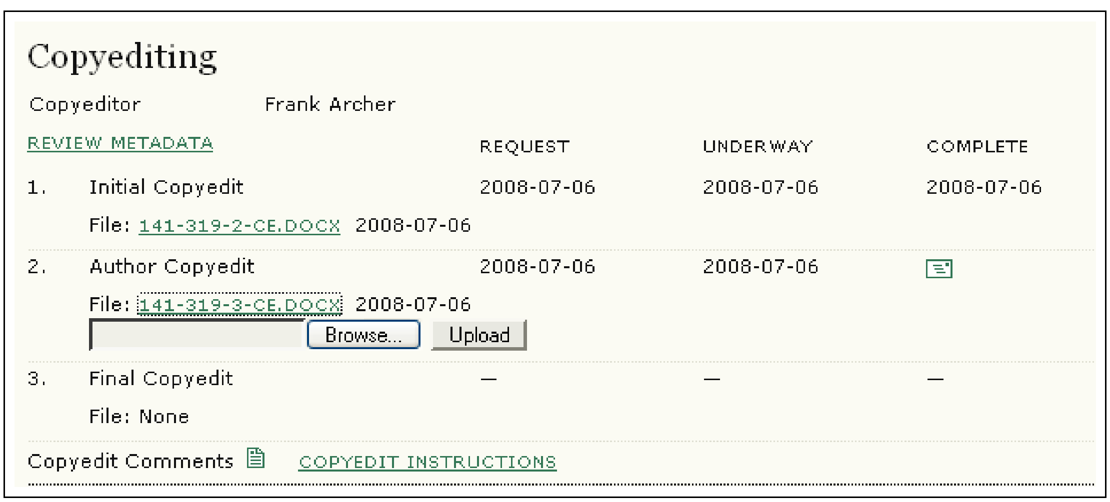


Figure 217: Author copyediting

Proofreading

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

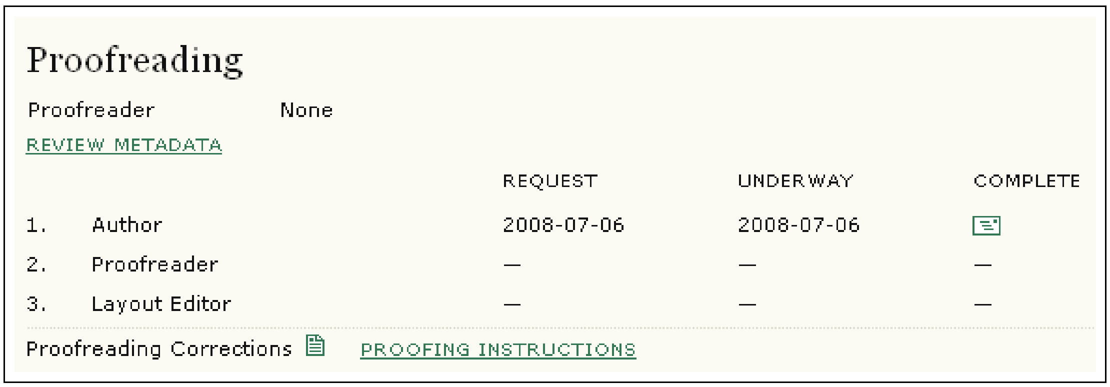


Figure 218: Author proofreading

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

Readers

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

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

Reading Tools

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

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

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

Figure 219: Reading Tools

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

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

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