Open Journal Systems Training

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Texas Digital Library

OJS
Open Journal Systems

Texas Digital Library

Agenda

- Introduction to OJS
- Setting up your Journal
- Users & Roles
- Managing Reviews
- Editorial process
- Publishing
- OJS Plugins

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Introduction to OJS

Introduction to OJS

Texas Digital Library

The Texas Digital Library (TDL) is a consortium of higher education institutions that builds capacity for preserving, managing, and providing access to unique digital collections of enduring value.

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Introduction to OJS

Open Journal Systems

- ✓ Open source
- ✓ Online
- ✓ Open Access
- ✓ Peer Review
- ✓ Publication Management

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Introduction to OJS

Online Journal Systems

PKP

PUBLIC
KNOWLEDGE
PROJECT

- PKP is a multi-university initiative developing (free) open source software and conducting research to improve the quality and reach of scholarly publishing.

- https://pkp.sfu.ca/

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Introduction to OJS

OJS Key Features

- Editors configure requirements, sections, review process, policies, etc.

- Online submission and management of content

- Email notification and commenting ability for reviewers

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What OJS does really well:

Manage workflows for scholarly publishing
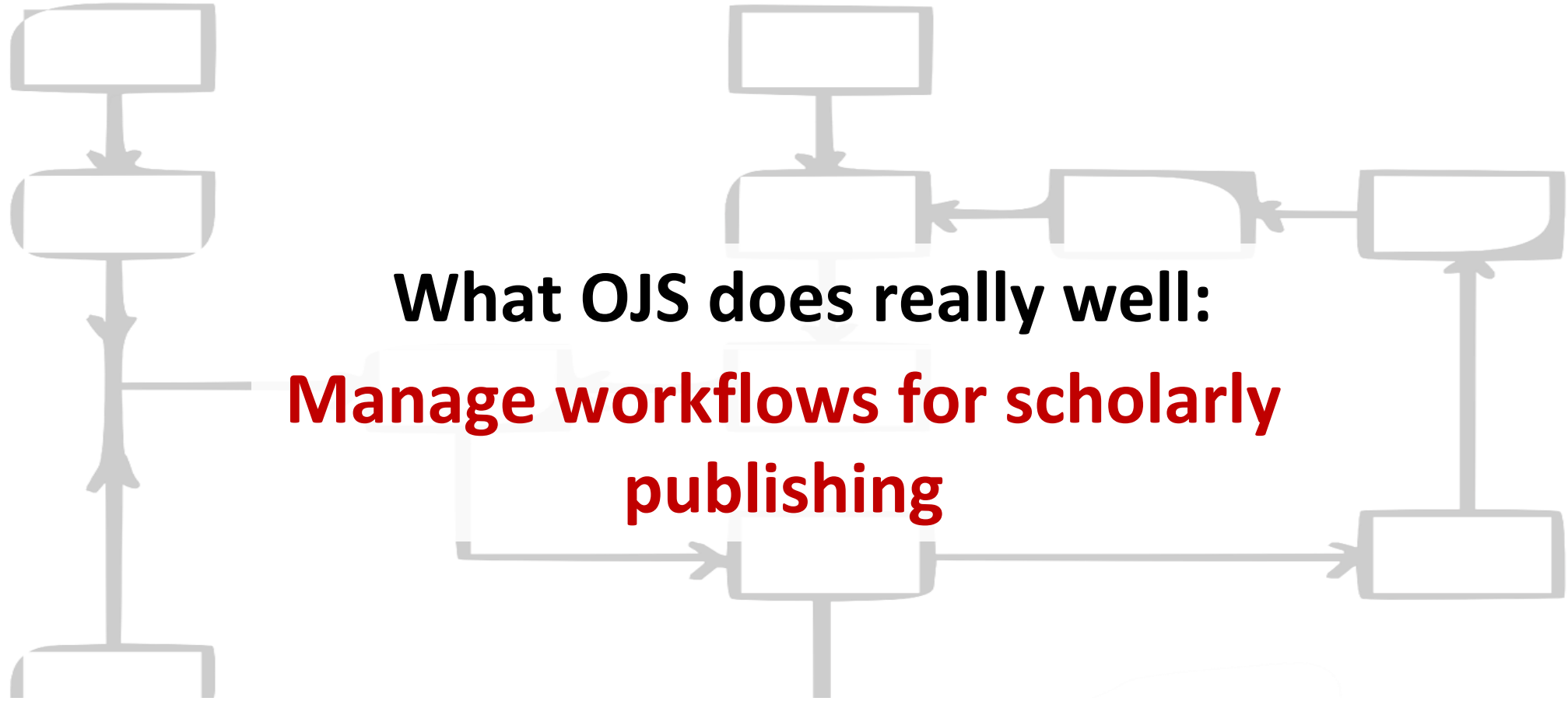
OJS doesn't provide tools copyediting manuscripts or doing layout, just tools for managing workflow and communications around these processes.

Introduction to OJS

PKP Documentation

- https://pkp.sfu.ca/wiki/index.php?title=OJS_Documentation

PKP Support Forum

- http://forum.pkp.sfu.ca/

TDL Helpdesk

- https://tdl.org/support/helpdesk/

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Users & Roles

Users & Roles

Assign roles options:

- Users Enrolled in this Journal
- Enroll a User from this Site in this Journal
- Show users with no role
- Create New User
- Merge Users

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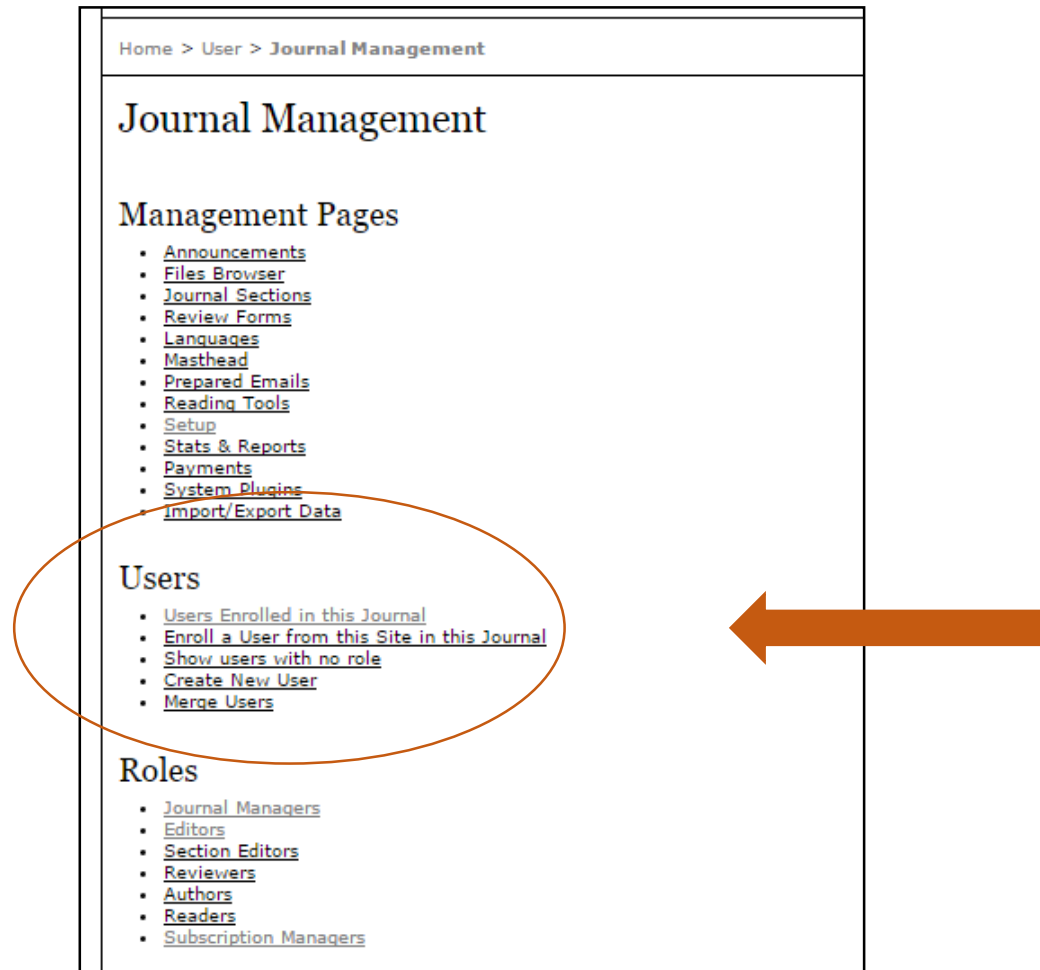
Users & Roles

Users & Roles

Assigning roles to "Users Enrolled":

Users & Roles

Assign Role to User

- Select user (click box)

- Select "Enroll user as" from the drop-down menu

- Click "Enroll User"

Users & Roles

Unenroll a User from a "Role"
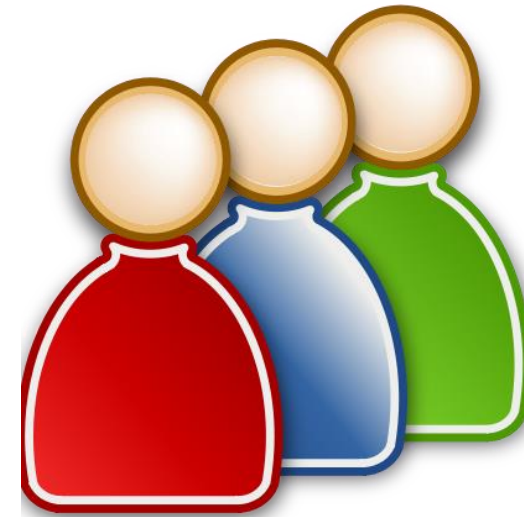
- Select user (click box)
- Click "UNENROLL"

Users & Roles

Unenroll a User from the entire journal

- Select the profile of the user
- Click "UNENROLL"

Users & Roles

OJS uses **roles** to organize activities and spaces:

- Users may have more than one role (e.g., Journal Manager and Editor)

- Multiple users can hold the same role (e.g., a team of 6 Editors)

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Users & Roles

Assign roles:

- Journal Managers
- Editors
- Section Editors
- Reviewers
- Authors

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Users & Roles

Journal Manager	Sets up journal and journal policies, manages users
Editor	Oversees editorial workflow, creates and publishes issues; assigns submissions to reviewers
Section Editor (optional)	Manages editorial process for assigned articles
Reviewer	Reviews assigned articles and makes recommendations for publication
Author	Submits article through online submission interface
Additional roles – copyeditor, layout editor, proofreader, subscription manager (optional)	Optional roles that may be used depending on journal needs and size of journal staff

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Users & Roles

Users & Roles

Users & Roles

Create a New User: Options

- First and Last Name is required

- May select one or more roles for the new User

- May go back and change or add roles for the user at a later time

Users & Roles

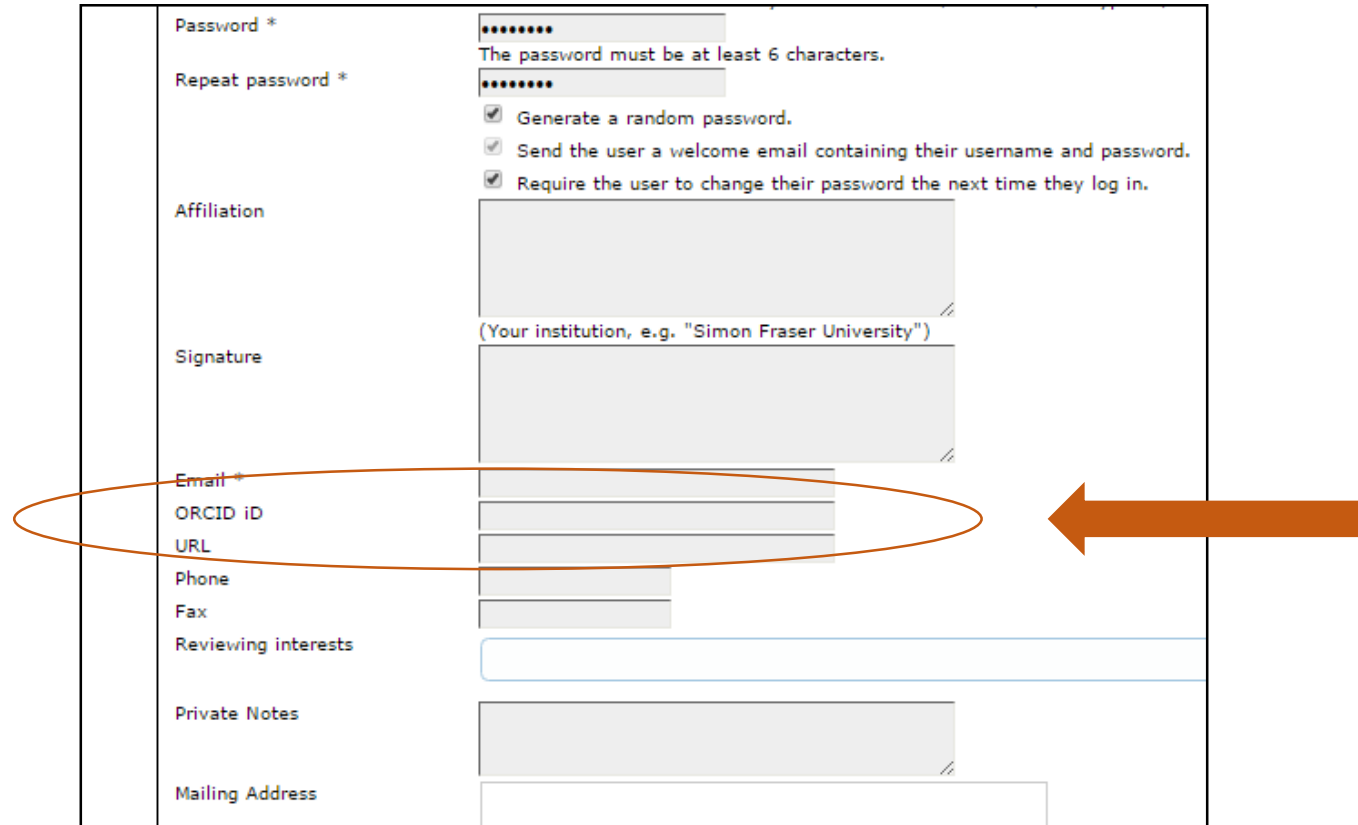**Create a New User: Options**

- "Suggest" a username

- "Generate a random password"

- "Send the user a welcome email containing their username and password"

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

Users & Roles

http://orcid.org/

Setting up your Journal

Setting up your Journal

Initial Setup: Things to think about

Basic Info	Policies	Submissions (Author Requirements)	Workflow	Site design and customization
• Name • Contact info • ISSN (if applicable) • DOI (if applicable)	• Focus/scope • Review policies • Privacy statement	• Guidelines for authors • Checklists • Copyright • Metadata • Citation lists	• Standard or email attachment model • Editorial staffing and processes • Publishing frequency	• Logo/headers • Article formatting • Sidebar information • Custom pages • CSS customizations?

Check out this resource: http://pkp.sfu.ca/wiki/index.php?title=Start_Here:_Basic_Workplan_For_New_OJS_Journals
(You can ignore the first few topics dealing with technical infrastructure and installation of the software)

Setting up your Journal

Go through the 5-step process:

- "SETUP" in the Journal Manager Interface
  - Details (including principal contact)
  - Policies
  - Submissions
  - Management
  - The Look

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Setting up your Journal
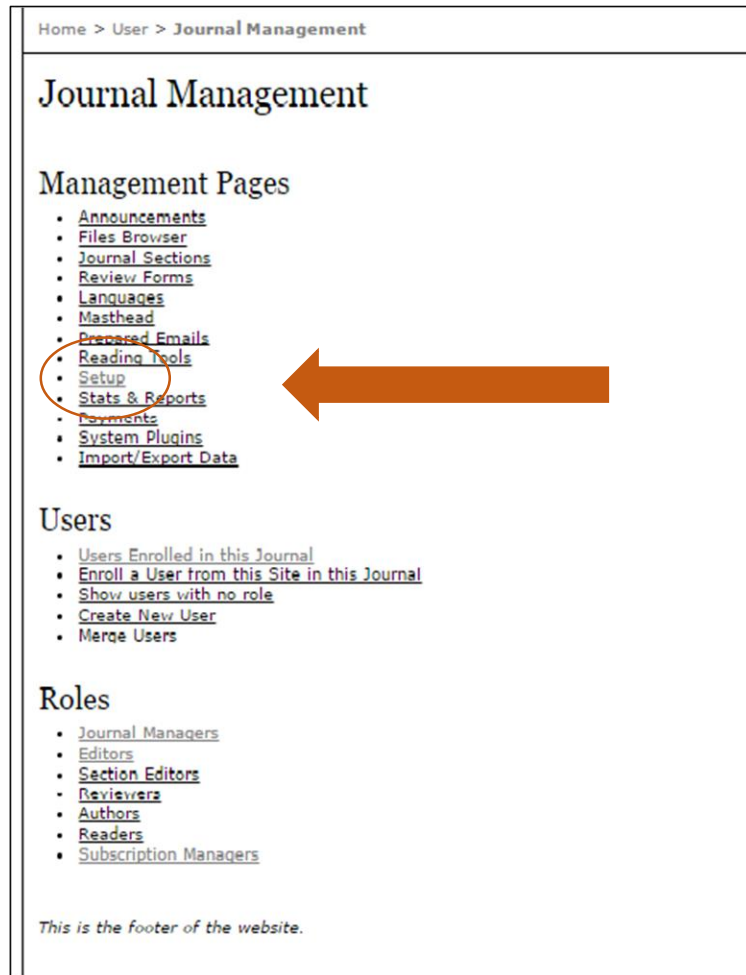
Select "Setup" under Journal Management

Setting up your Journal

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

Journal Setup

Five Steps to a Journal Web Site

1. Details
   Name of journal, ISSN, contacts, sponsors, and search engines.

2. Policies
   Focus, peer review, sections, privacy, security, and additional about items.

3. Submissions
   Author guidelines, copyright, and indexing (including registration).

4. Management
   Access and security, scheduling, announcements, copyediting, layout, and proofreading.

5. The Look
   Homepage header, content, journal header, footer, navigation bar, and style sheet.

- Complete as many of the sections in the five steps as possible

- Remember, you can always go back and fill in additional details later

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Setting up your Journal

Details:

- General Information

- Principal Contact

- Technical Support Contact

- Email Identification

- Publisher

- Sponsoring Organizations

- Sources of Support

- Search Engine Indexing

- Journal History

Setting up your Journal

Policies:

- Focus and Scope of Journal

- Peer Review

  - Review Policy

  - Review Guidelines

  - Review Process

  - Review Options

- Privacy Statement

- Editor Decision

- Journal Archiving

Setting up your Journal

Submissions:

- Author Guidelines
  - Submission Preparation Checklist
- Permissions
  - Copyright Notice
- Competing Interests
- Authors Index Their Work
- Register Journal for Indexing
- Notification of Author Submission

Setting up your Journal

Management:

- Access and Security Settings

- Publication Scheduling

- Identification of Journal Content

- Announcements

- Copyeditors

- Layout Editors

- Proofreaders

Setting up your Journal

The Look:

- Journal Homepage Header
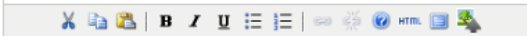
- Journal Homepage Content

- Journal Page Header

- Journal Page Footer

- Navigation Bar

- Journal Layout

- Information

- Lists

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Managing Submissions

Managing Submissions

Register and/or log in

Select "New Submission"

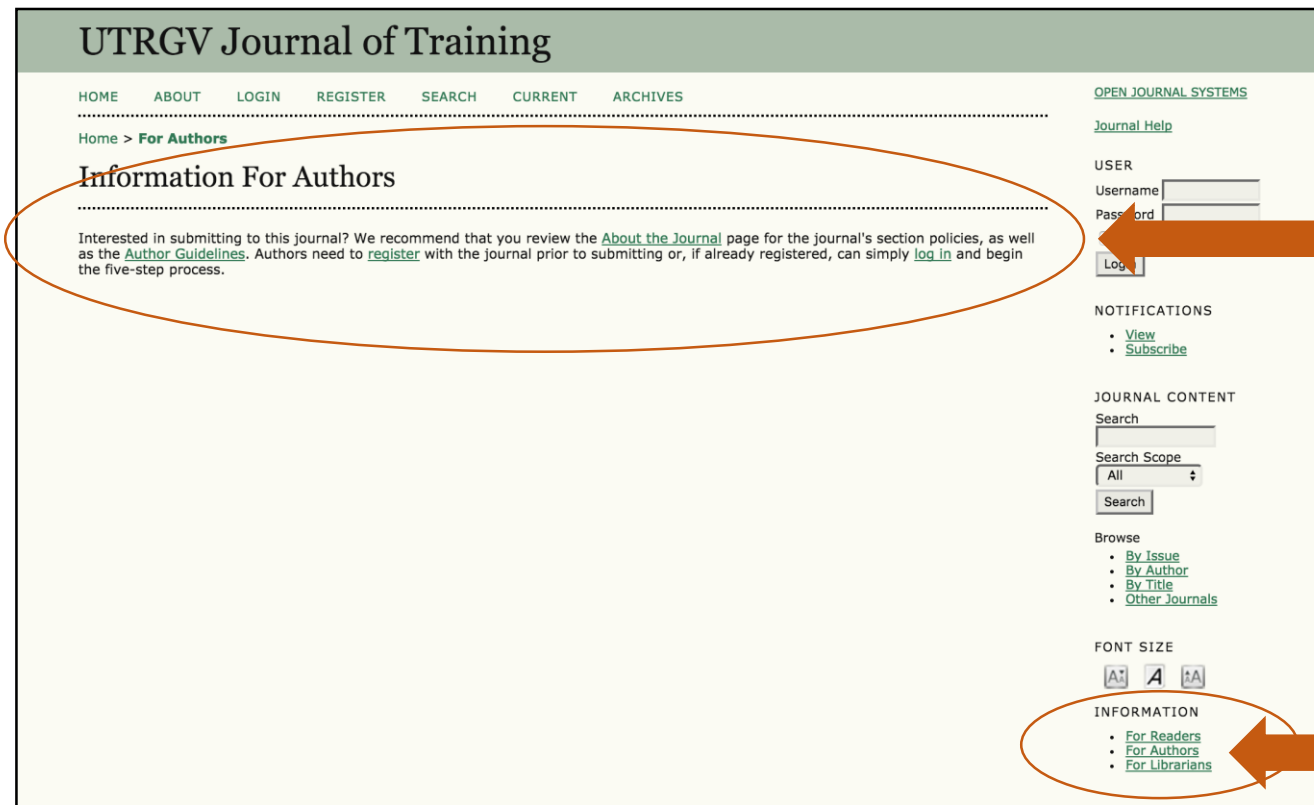Complete 5-step submission process

Start

Upload

Enter metadata

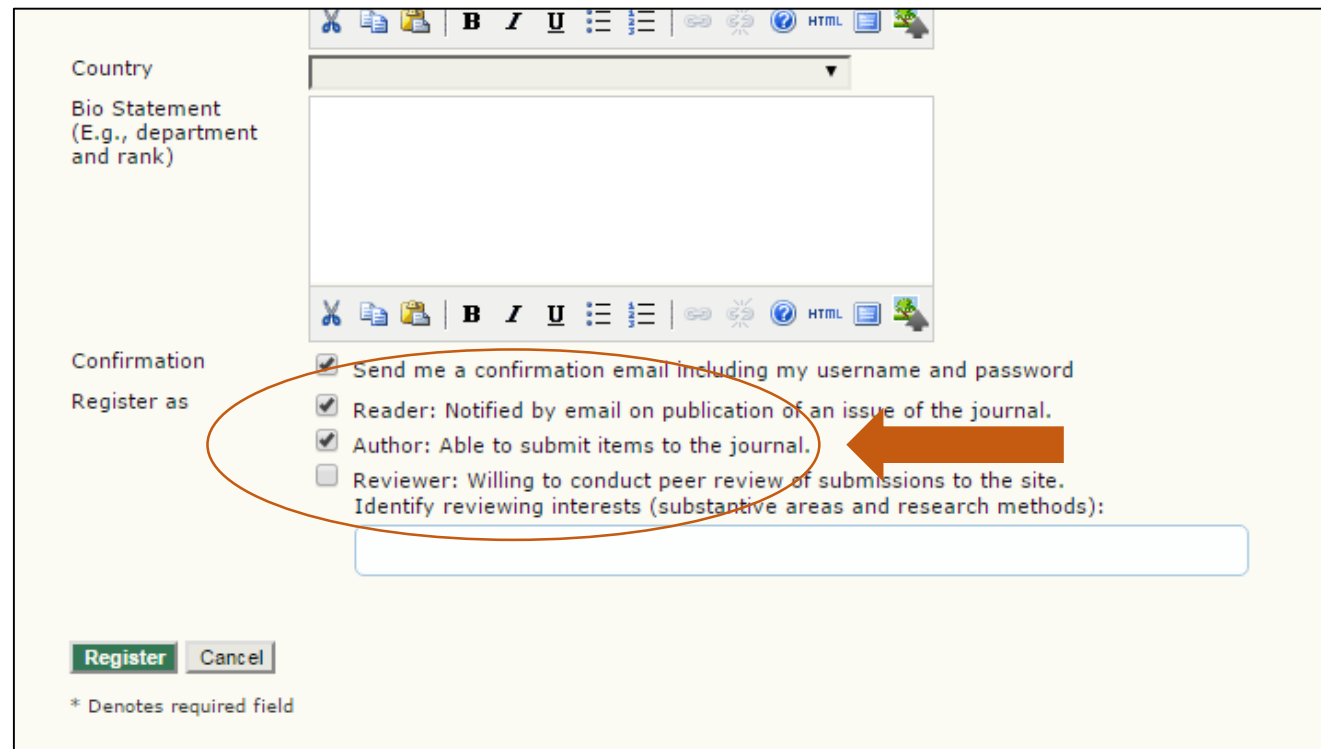Upload supplementary files

Confirm

Managing Submissions

Authors will see this page:

Managing Submissions

Authors:

- Create a log-in through OJS

Managing Submissions

Author submission process:

- Step 1: Start (checklist)
- Step 2: Upload Submission
- Step 3: Enter Metadata
- Step 4: Upload Supplementary Files
- Step 5: Confirmation

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Managing Submissions

Review Process Models

Standard Review Process

- Reviewers login to the OJS journal (or are taken directly to the journal interface via one-click access)
- Reviewers enter comments and recommendations directly into the system

Email Attachment Process

- All communication with reviewers is handled by email attachments.
- Editor enters reviewer comments and recommendations into the OJS system.

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What a Reviewer sees (email):

[TST4] Article Review Request

From: Sven Sven Sectioneditor <sven_sectioneditor@yahoo.com> 😊 Add to Contacts

To: Ralph Reviewer <ralph_reviewer@yahoo.com>

Ralph Reviewer:

I believe that you would serve as an excellent reviewer of the manuscript, "Believer Me Alone," which has been submitted to TDL Test Journal. The submission's abstract is inserted below, and I hope that you will consider undertaking this important task for us.

Please log into the journal web site by 2017-07-01 to indicate whether you will undertake the review or not, as well as to access the submission and to record your review and recommendation.

The review itself is due 2017-08-01

Submission URL:
https://labs.tdl.org/ojs/index.php/ryanTDL_test_4/reviewer/submission/181?key=CPwSdxCS

Thank you for considering this request.

Sven Sven Sectioneditor
sven_sectioneditor@yahoo.com

What a Reviewer sees (email):

#294 REVIEW

SUBMISSION TO BE REVIEWED

Title	Believe Me Alone
Journal Section	Articles
Abstract	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolores eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserun mollit anim id est laborem.
Submission Editor	Sven Sectioneditor
Submission Metadata	VIEW METADATA

REVIEW SCHEDULE

Editor's Request	2017-06-08
Your Response	—
Review Submitted	—
Review Due	2017-09-01

REVIEW STEPS

1. Notify the submission's editor as to whether you will undertake the review.

   Response   Will do the review   Unable to do the review

2. If you are going to do the review, consult Reviewer Guidelines below.

3. Click on file names to download and review (on screen or by printing) the files associated with this submission.

Submission Manuscript	294-2348-1-RV.DOC 2017-08-01
Supplementary File(s)	None

4. Click on icon to enter (or paste) your review of this submission.

   Review

5. In addition, you can upload files for the editor and/or author to consult.

Uploaded files	None

   Browse...   Upload

Reviewer sees cont.:

Recommendation options:

- Accept submission

- Revisions required

- Resubmit for review

- Resubmit elsewhere

- Decline submission

- See comments.

REVIEW STEPS

1. Notify the submission's editor as to whether you will undertake the review.

   Response   Will do the review 📧   Unable to do the review 📧

2. If you are going to do the review, consult Reviewer Guidelines below.

3. Click on file names to download and review (on screen or by printing) the files associated with this submission.

   Submission Manuscript   294-2348-1-RV.DOC   2009-09-17
   Supplementary File(s)   None

4. Click on icon to enter (or paste) your review of this submission.

   Review 📄

5. In addition, you can upload files for the editor and/or author to consult.

   Uploaded files   None

   [   ] [Browse...] [Upload]
   ENSURING A BLIND REVIEW

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

   Recommendation   [Choose One   ▾]   [Submit Review To Editor]

REVIEWER GUIDELINES

1. Articles submitted to this journal must be good.
2. Articles submitted to this journal must contain original research.
3. Articles submitted to this journal must be relevant to the subject of this journal.
4. Reviews should give good reasons for accepting or rejecting a submission.
5. Reviewers should reveal any conflicts of interest in reviewing a submission.

Editorial Process

Editorial Process

Editor Role

- View Editor optional via the User Home page

- View status of submissions:

    - Unassigned

    - In Review

    - In Editing

- Create Issue

- Notify Users

Editorial Process

TDL Training Journal

Journal Manager [Setup]
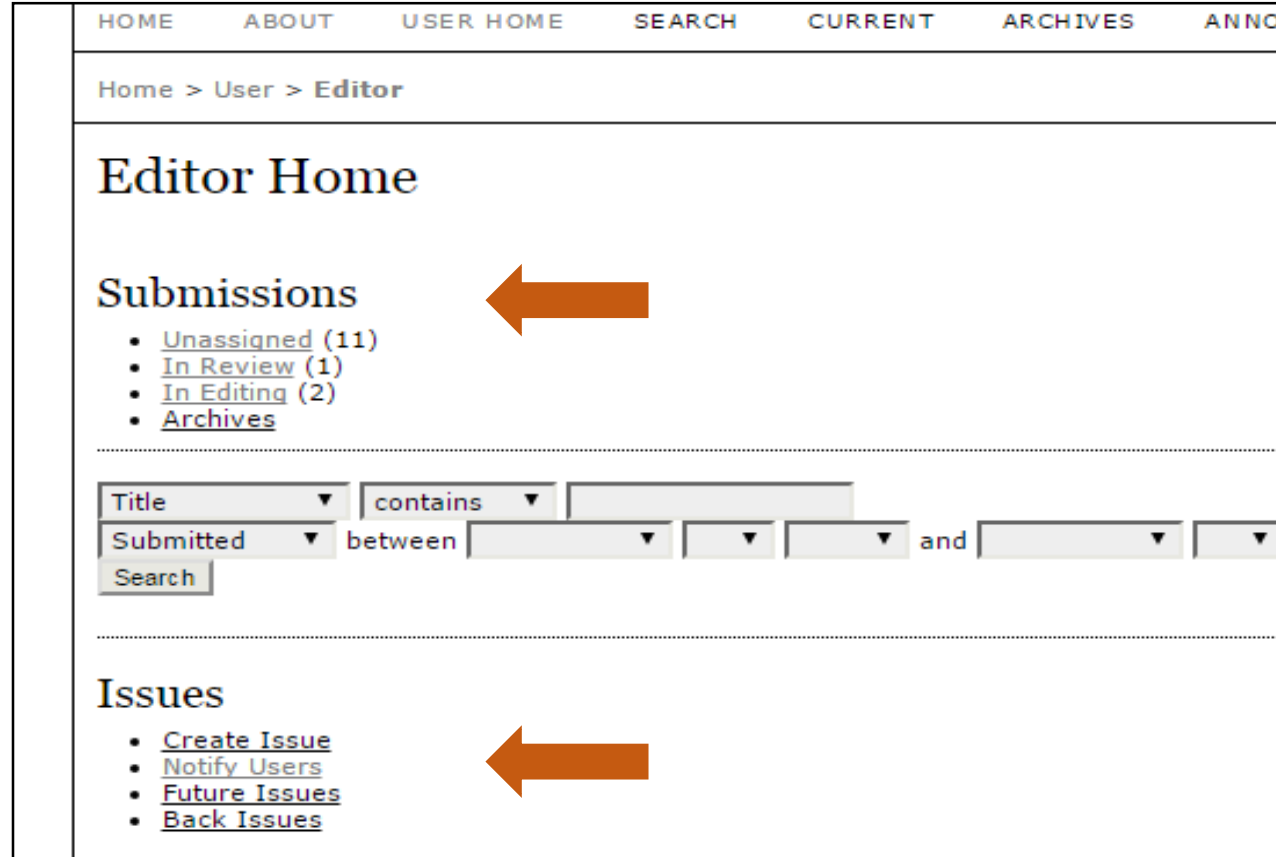
Editor 11 Unassigned 1 In Review 2 In Editing [Create Issue] [Notify Users]

Reviewer 0 Active

My Account

- Show My Journals
- Edit My Profile
- Change My Password
- Logout

Editorial Process

HOME   ABOUT   USER HOME   SEARCH   CURRENT   ARCHIVES   ANNO

Home > User > Editor

Editor Home

Submissions
⬅
- Unassigned (11)
- In Review (1)
- In Editing (2)
- Archives

Title ▼   contains ▼   _____
Submitted ▼   between ____ ▼ ▼ ____ ▼ and ____ ▼ ▼
Search

Issues
⬅
- Create Issue
- Notify Users
- Future Issues
- Back Issues

In the Editor Home Page

- View all submissions

- Create a new Issue

- Notify Users

- Access Future Issues

- Access Back Issues

Editorial Process

In the Editor Home Page

- Summary

- Review

- Editing

- History

- References

Editorial Process

Summary

- View the submission and author information

- Email the authors

- Add supplementary files

- Change the type of the submission (e.g., Articles, Book Review, Invited Papers, etc.)

Editorial Process

Summary

- Assign an Editor, Section Editor, or Self as the Editor
- View the review status, and reject and archive submission
- Edit the submission metadata

Editorial Process

Review

- Upload a revised Review version

- Select Reviewer

- Select decision

- Notify author(s)

Editorial Process

Review

- Upload a revised Review version

- Select Reviewer

- Select decision

- Notify author(s)

Steps in Editorial Process

Editorial Process

Step 1: Select Manuscript

- Select "Unassigned"

- Choose an "unassigned" article to begin the editorial process

- For this example, we chose submission #64 "Test Title"

Editorial Process

Step 2: Add Editor(s)

- For submission #64 that has been selected, you'll need to add an editor:
  - Add Section Editor
  - Add Editor
  - Add Self
- Click "Record"

Editorial Process

Step 2: Add Editor(s) cont.

- For this example, we've selected "Add Self"

- Note: You may choose more than one Editor/Section Editor

Editorial Process

Step 2: Review:

- Click on "Review" in the breadcrumb menu

Editorial Process

Step 3: Review (cont.)

- Click on "Select Reviewer"

Editorial Process

Step 3: Review (cont.)

- Select one of the enrolled reviewers and click "Assign"

- Note: You may also "Enroll an Existing User as a Reviewer" or "Create New Reviewer"

Editorial Process

Step 3: Review (cont.)

- Note: You may assign more than one reviewer

- Send the assigned reviewer an email request

- Select review form

- Assign the due date

Editorial Process

Step 3: Review (cont.)

- OJS automatically generates the reviewer request based on the initial setup by the Journal Manager

- The Editor sending the email may modify the text, if needed

Editorial Process

Step 3: Review (cont.)

- Enter whether the reviewer accepts, "Will Do The Review" or declines "Unable To Do The Review"

- The Editor sending the email may modify the text, if needed

- Review will automatically be entered into OJS and the Editor(s) will receive notification

Editorial Process

Step 4: Editorial Decision

- Select the decision from the drop-down menu

Editorial Process

Step 4: Editorial Decision (cont.)

- Select the version that will be accepted, and go on to the next phase to be published:

  - Review Version

  - Author Version

  - Editor Version

  - *Or,* choose file

Editorial Process

Step 4: Editorial Decision (cont.)

- Click on the "letter icon" to notify the author via email of the decision (or skip email)

Editorial Process

Step 4: Editorial Decision (cont.)

• Click "Send to Copyediting"

Editorial Process

Step 5: Editing

- Select "Editing" from the breadcrumb menu

Editorial Process

Step 5: Copyediting (cont.)

- Initial copyedit: Journal copy editor

- Author copyedit: Authors may accept/reject any changes during the initial copyediting

- Final copyedit: Journal copy editor will verify changes made by the author and complete formatting

Editorial Process

Step 5: Copyediting (cont.)

- Once the copyediting is complete for your versions, click on "COMPLETE"

Editorial Process

Scheduling

- Select the publication issue for the article to be published in from the drop-down menu

Editorial Process

Step 6: Galley

- Upload the final, copyedited version as a "Galley"

  - Select "Galley"

  - Choose File

  - Click "Upload"

Editorial Process

Step 6: Galley (cont.)

- Label for the final copyedited version

- Note: You may also use this screen to "Replace File"

- Click "Save"

Editorial Process

Step 7: Publishing

- Galley versions will be in the "Layout" section for you to view

- Note: You may "EDIT" or "DELETE" these versions for the final publication

Editorial Process
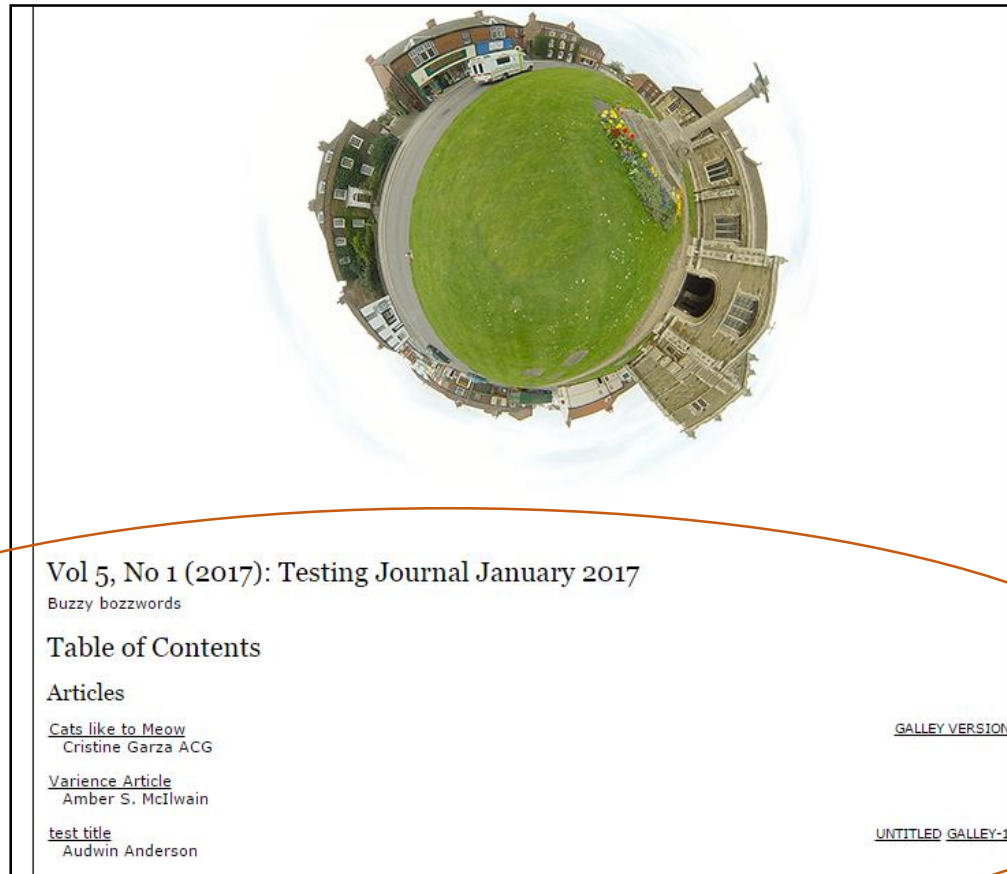
Published:

- Galley versions will be in the "Layout" section for you to view

- Note: You may "EDIT" or "DELETE" these versions for the final publication

Plugins

Plugins
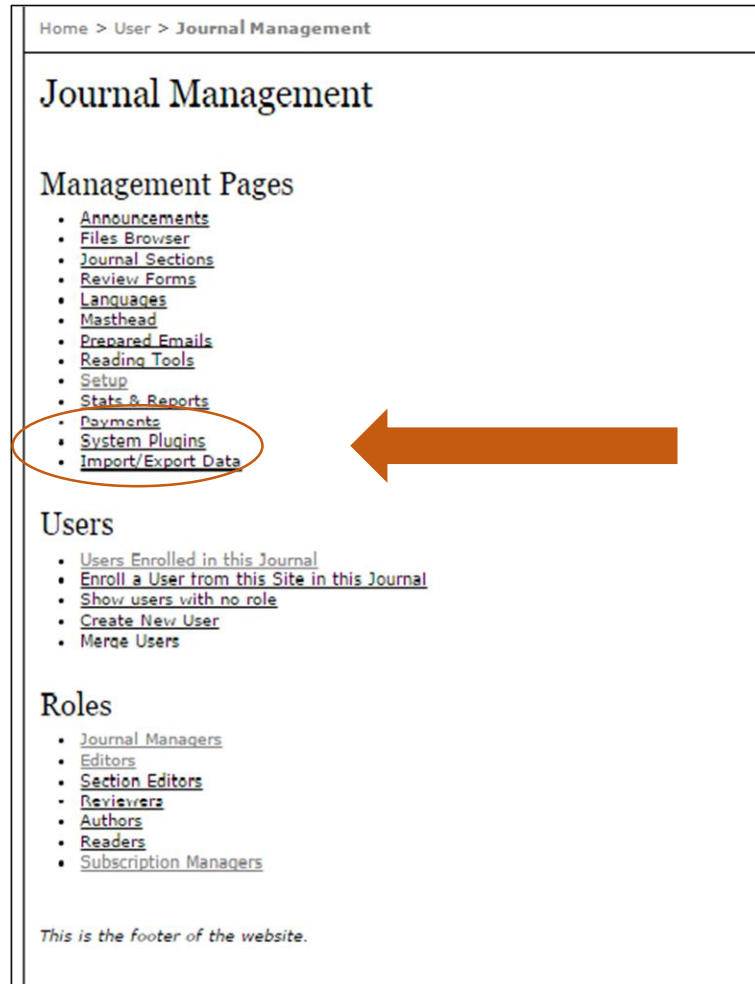
Select "System Plugins" under Journal Management

Plugins

OJS Plugins

- As a Journal Manager, you have system plugins that can be upgraded and managed
- Please **contact the TDL** to upgrade and install plugins
- The TDL will make sure that the right version is uploaded

Plugins

Quick Submit Plugin

- Allows you to bypass entire editorial process
  - Publish the first issue
  - Must be a Journal Manager

OJS: Quick Submit Plugin Tutorial

- http://hdl.handle.net/2249.1/79241

Plugins

Plugin Management

This page allows the Journal Manager to review and potentially con[figure] plugins that are currently installed. Plugins are divided into catego[ries] according to their function. The categories are listed below, and wit[hin each] category, its current set of plugins.

- Metadata Plugins
- Authorization Plugins
- Block Plugins
- Citation Format Plugins
- Citation Database Connector Plugins
- Citation Output Plugins
- Citation Extraction Plugins
- Gateway Plugins
- Generic Plugins
- Implicit Authentication Plugins
- Import/Export Plugins
- OAI Metadata Format Plugins
- Payment Plugins
- Public Identifier Plugins
- Report Plugins
- Theme Plugins

- **Install A New Plugin**

Quick Submit Plugin

- Click on "Import/Export Plugins"

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Plugins

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

- **METS XML Export Plugin**

  Export Journals in METS XML
  IMPORT/EXPORT DATA UPGRADE PLUGIN DELETE PLUGIN

- **Erudit Article Export Plugin**

  Export articles using the English Erudit DTD
  IMPORT/EXPORT DATA UPGRADE PLUGIN DELETE PLUGIN

- **DOAJ Export Plugin**

  Export Journal for DOAJ and supply journal information for inclusion
  IMPORT/EXPORT DATA UPGRADE PLUGIN DELETE PLUGIN

- **DataCite Export/Registration Plugin**

  Export or register issue, article, galley and supplementary file metadata in DataCite format.
  IMPORT/EXPORT DATA SETTINGS UPGRADE PLUGIN DELETE PLUGIN

- **CrossRef Export/Registration Plugin**

  Export or register article metadata in CrossRef format.
  IMPORT/EXPORT DATA SETTINGS UPGRADE PLUGIN DELETE PLUGIN

- **mEDRA Export/Registration Plugin**

  Export issue, article and galley metadata in Onix for DOI (O4DOI) format and register DOIs with the mEDRA registration agency.
  IMPORT/EXPORT DATA SETTINGS UPGRADE PLUGIN DELETE PLUGIN

- **QuickSubmit Plugin**

  One-step submission plugin
  IMPORT/EXPORT DATA U

- **Public Identifiers XML Plugin**

  Import and export public identifiers
  IMPORT/EXPORT DATA UPGRADE PLUGIN DELETE PLUGIN

- **PubMed XML Export Plugin**

Quick Submit Plugin

- Click on "IMPORT/EXPORT DATA"

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Plugins

Quick Submit Plugin

- Submission Destination
- Submission File (Upload)
- Submission Data
    - Authors
    - Title and Abstract
    - Indexing
    - Contributing and Supporting Agencies
- Click "Save and Continue"

Partnering with TDL

TDL Responsibilities

- **Hosted OJS installation for your journal** (maintenance, upgrades, backup, trouble-shooting)
- **TDL Helpdesk** (for journal staff and readers)
- **Training and other resources**

User Responsibilities

- **Editorial** policy-making and work
- Extensive **design** work
- Registration of journal with **external indexers** (CrossRef, e.g.,) if desired
- Maintenance of an **Open Access** policy

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Additional Documentation & Training

- Video-based courses at the PKP School
  http://pkpschool.sfu.ca/
- OJS Documentation
  https://pkp.sfu.ca/wiki/index.php?title=OJS_Documentation

Texas Digital Library

TDL Helpdesk

- support@tdl.org
- http://www.tdl.org/support/helpdesk/
- 1-855-495-4317 (toll free)

- Contact us: info@tdl.org

Texas Digital Library

Thank you!

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