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NEW JOURNAL PLANNING

Questions to Ask Before you Begin

In addition to choosing what type of journal to publish, content, and title, there are a number of other decisions that you will need to make during the planning stage. Whether you are launching a new journal or transitioning an existing journal to Open Journal Systems (OJS), consider the following questions:

● What need will your journal be filling?
● Are you offering a unique contribution to the field?
● What discipline(s) does this journal fall into?
● How will the journal be funded? Time and money?
● Who will be on the editorial board?
● Do you have defined aims and scope?
● Who is the journal for?
● What type of material will be accepted?
● How often will issues be published?
● How will you recruit items for the journal?
● Is the journal going to be peer-reviewed?
● Who can be a peer reviewer?
● What will the copyright policy be?

Guides to Setting up an OA Journal

There are many paths to open access publishing and elements to consider in your planning. A key element in an open access publishing model is making the research information available to readers at no cost, as opposed to the traditional subscription model for paywall-only access through a subscription (usually via an institutional library). Below are guides to resources on setting up an OA journal:

● PsyOA: The Fair Open Access Principles
● Society Publishers’ Coalition
● Transitioning Society Publications to OA
● Mathematics in Open Access
● University of Toronto Journal Publishing Guide
Generating a New Journal Prospectus

TDL Open Journal Hosting Application

○ Name of journal

○ Slug for journal (an abbreviated form of the journal title that serves as part of the website URL after journals.tdl.org/...)

○ Name and email address(es) for Journal Manager(s)

○ Purpose and scope of journal

○ Plan for publication, including publication frequency, editorial board, journal staffing, and estimated timeline to first issue

○ Is this an existing journal with back issues that must be migrated?
  ■ If so, how many issues?
  ■ How many articles?
  ■ In what format are the articles (e.g. PDF)?
  ■ In what platform do the issues currently reside (e.g. OJS, Bepress journal, on a hard drive, etc.)?

○ What is your Open Access policy?

○ What language(s) does the journal use?

ADDITIONAL RESOURCES

● SPARC OA Journal Publishing Index 1
● SPARC Declaring Independence Guide
● SPARC: Flipping a Subscription Journal to OA
● SPARC: Campus-Based Partnerships Guide
● EDUCOPIA: Library Publishing Curriculum
● Library Publishing Coalition: Library Publishing Curriculum

OPEN JOURNAL HOSTING SERVICE

The Texas Digital Library (TDL) hosts peer-reviewed Open Access scholarly journals using Open Journal Systems (OJS), the world’s most widely used journal management and publishing system. OJS is an open source software platform developed by the Public Knowledge Project (PKP), "a multi-university initiative developing (free) open source software and conducting research to improve the quality and reach of scholarly publishing."
Faculty, staff, and students at TDL member institutions who subscribe to this service can set up and publish an online journal without any costs to faculty for the software or TDL technical assistance.

TDL’s open journal software helps with every stage of peer-reviewed publishing, handling online submissions from authors, managing the peer-review process, publishing issues online, and indexing content. Workflow for faculty, staff, and student journals are managed within the software.

If you’re new to OJS, there are many resources available to help familiarize and guide you through the process. More information is available on the TDL OJS Hosting guide, below, and through the PKP School with online, self-paced courses to help teach basic OJS concepts and skills divided into a series of modules.

ADDITIONAL RESOURCES

- TDL Open Journal Systems Hosting
- PKP School Modules
- Setting up a Journal in OJS 3.x
- Editorial Workflow in OJS 3.x
- Becoming an Editor
- Becoming a Reviewer
- Writing for Publication

Roles and Responsibilities for Service Provision

The Journal Hosting service is a collaboration among (at least) three parties, each with important roles to maintaining a successful journal:

- **Journal Team** (including the Journal Manager(s), Editors(s), other journal staff and Editorial Board), which undertakes the work of policy setting, workflow decision-making, and editorial workflow management within the journal site. The Journal Team is also responsible for custom site design.

- **The Library**, which serves as a liaison between the TDL and the Journal Team and provides value-added services like consulting on scholarly communications issues.

- **The Texas Digital Library**, which provides hosting and technical support for the journal.

Roles and Responsibilities for Journal Team

In addition to your institutions’ Library Liaison(s) and the Texas Digital Library, your Journal Team will have important roles in the process. Key roles for your Journal Team Members:

- **Managing Editor** This person is the main contact for the journal and is responsible for assigning articles to reviewers or editorial board members.
● **Editorial Board** - The board is absolutely crucial. Every journal should have a board willing to serve, before setting up the journal. An editorial board should be made up of respected individuals in the field.

What will be the structure of your editorial board?

○ Are the editorial board going to be faculty members?

○ How are you going to recruit for the editorial board?

○ Do they have a range of expertise?

○ How much work is expected of editorial board members?

○ What will be the term and process for regular replacement/ongoing reappointment of members?

○ How many members will you need on your editorial board?

● **Reviewers** - People knowledgeable in the field who are willing to read and review the articles that are submitted to the journal.

○ How will you solicit reviewers?

○ How many peer reviews are needed?

○ How long will you give your reviewers to review the papers?

**Elements of TDL Journal Hosting Service**

The Texas Digital Library (TDL) provides hosting and professional management of OJS installations in the Amazon Cloud including:

● **Journal hosting through OJS**

  ○ A journal website

  ○ Online submission tools

  ○ Editorial administration tools for managing the peer review and copy-editing workflows, and for creating online issues

  ○ Reporting on acceptance rates and journal usage, including via optional integration with Google Analytics

  ○ The ability to configure submission requirements, sections, and review processes

  ○ Indexing of content with search engines

● All system administration tasks handled by TDL staff.

● Asynchronous training and documentation available for Journal Teams via PKP.
- TDL Helpdesk support for library staff, Journal Teams, and other users (e.g. peer reviewers, readers, etc.).

TDL currently deploys new journals in OJS version 3.2.1.4 (as of June 2019)

- If you would like to create an e-journal, please complete this form or contact the TDL Helpdesk at support@tdl.org. A TDL staff member will help you claim and set up your journal.

Hosting Policies and Requirements

Faculty, staff, and students at TDL member institutions with OJS hosting are eligible for free hosting and technical support for open access, peer-reviewed journals. Below are general criteria and guidelines. Contact your local library liaison(s) for more information.

- **Eligibility**: Journal Managers must be affiliated with a TDL member institution. If journal management transfers to individuals affiliated with another institution, the sponsoring TDL Member Institution may choose to continue sponsorship of the journal at their discretion.
  - Journal teams may apply for a TDL-hosted journal site via the TDL Helpdesk. More information on the TDL Wiki Starting a New Journal.
  - Student-run journals must be sponsored by a faculty member or academic department.
  - TDL does not provide hosting services to individuals or individual journals outside of institutional memberships.
  - TDL Member Institutions may have additional eligibility requirements.

- **Open Access**: TDL-hosted journals must have a posted Open Access policy that provides free access to published articles.

- **Migration**: TDL can provide support for migration of OJS journals hosted elsewhere. It does not currently provide system administration support for journals currently housed in other platforms (such as WordPress or BePress). That said, OJS does come with import tools and a Quick Submit plugin that can help Journal Teams move issue and article archives into a new TDL-hosted journal.

- **Theming**: TDL journals come out of the box with several theme options. Journal teams may use these theming options or adapt and upload customized CSS for their journal site. TDL does not at this time provide theme customization services.

- **Code customization**: TDL does not provide customization services that require changes to the php code.
POLICIES & GOVERNANCE

Best practice indicates establishing policies for journal managers, editors, as well as authors in order to establish guidance on issues such as publishing, copyright and licensing, as well as journal governance and editorial policies. SPARC offers guidance and examples in these areas. Please note, these are suggestions on how to set up policies for individual journals, TDL member institutions may have additional policies as to how to start a new journal on your campus. Please contact your library liaison for more information.

Publishing Policies, Copyright and Licensing

- SPARC offers guidance on Publishing Program Policies:
  - Examples for Submission and Content Policy are included
  - Examples for Access and Preservation Policy are also included

Governance and Editorial Policies

- SPARC offers guidance on Governance of Journal Issues
- SPARC offers guidance on Editorial Issues:

PROCESSES & MANAGEMENT

Staffing

When starting a new journal, there are many considerations, and those include accounting for sustainability in staffing and time commitments. Recruiting members for the journal’s editorial board should be one of the first actions. A strong editorial board of leaders in the field and those with a commitment to the journal help build the credibility of the journal and attract submissions and reviewers.

Some tips to help you get started:

- Reach out to established scholars in your field. These may be colleagues at your institution or elsewhere that are willing to actively participate and collaborate in building and sustaining your journal.

- Start with a small group on the editorial board and, as needed, those can recommend other new members to bring on board.

- Reach out to your institution’s departmental faculty and ask around for recommendations to discuss the topics and issues that you will be addressing in the journal.

Students often play an integral role in journal publishing. These may be undergraduate or graduate students serving as editors, reviewers, and/or authors. Involving students in an open access journal provides hands-on experience and opportunities to be involved in all areas of academic publishing.
A requirement for the TDL OJS hosting service is that journals that incorporate students must also have at least one faculty sponsor from the member institution.

Some tips for including students in journal staffing:

- Keep in mind that student efforts with the journal will likely be time-limited. Students will be managing time between other coursework and move on after graduation.
- Incorporate documentation for all roles, and especially for student roles. These can serve as reference points and be updated later as new students are brought in.
- Consider timelines and having current students begin training incoming students before they graduate. This offers valuable experience to the students as part of their role in the journal publication process.

Roles in OJS
In the OJS system, users must have one or more roles. Roles define what a user can do within the system. One user can have more than one Role, for example, being a Journal Manager, Editor, and Author in the same journal. OJS includes multiple roles available with different permission levels.

Journal Managers can add, edit, disable, and remove a user account, and assign one or more of the 17 default roles to the journal account. These roles have six permission levels: Journal manager, author, reader, reviewer, section editor, and assistant. A brief explanation of each permission level is available in Settings > Users & Roles > Roles > Help.

To access, Journal Managers can go to the Settings > Users & Roles > Roles to view the default roles. This page displays each role in the editorial stage and allows the Journal Manager to check or uncheck a box to define the access and permissions. These are default roles, but the Journal Manager also has the option for Editing Roles or Creating New Roles.

Tip: The Role setting determines the list of Participants you can assign tasks to (see Assign your team to their roles). Click on Help in the upper right corner to read more about how to invite participants to the workflow.

ADDITIONAL RESOURCES
- Open Journal Systems User Guide to Roles
- PKP Guide to Available Roles in OJS
- Editing and Creating New Roles in OJS

Editorial Workflow
In OJS 3, the editorial workflow consists of the following four stages:

1. Submission
2. Review
3. Copyediting
4. Production

In Dashboard → Submissions → All Active, you’ll see all submissions in progress. The progress status is marked by the current workflow stage.

Submissions
This is where new submissions land while being assigned to Section Editors and considered for moving into the Review stage. This is where the journal editor/manager can modify the metadata, check the editorial history, assign tasks to fellow staff members, and initiate discussions.

Note: Some submissions are clearly inappropriate and never make it beyond this stage.

In Dashboard → Submissions, a click on the article title or author names will lead you to the detailed submission record (as shown below):

![Submission Record]

This is where the journal editor/manager can modify the metadata, check the editorial history, assign tasks to fellow staff members, and initiate discussions.

ADDITIONAL RESOURCES
- Becoming an editor by PKP School
- Responding to Submissions [video] by PKP School
- Module 4: Responding to Submissions and Delegating Tasks by PKP School

Review
This is where the peer review happens, as well as any revisions required by the author. Some submissions will not pass review and end here. Those that are accepted move to the next stage. It is important to note that open access journals provide service to the academic community with advantages in increasing access and furthering research. It is equally imperative that open access journals consistently apply rigorous processes from article submission through publication.

Types of Review
● **Editorial review**: An assessment of an article undertaken by members of the editorial staff. For some sections of the journal, such as book reviews and commentaries, an editorial review may be the only assessment for an article. Editorial review can also be a part of the peer-review process. The purpose is to evaluate if the article is within the journal’s publishing scope and of sufficient quality to send out for peer review.

● **Peer review**: The process of obtaining advice on individual manuscripts from experts in the field who are NOT part of the journal’s editorial staff. Peer review is the widely accepted method for validating the quality of a research article. It is a crucial step for:

  ○ Journal content quality assurance

  ○ Managing competition for publication space

  ○ Meeting the precondition to be indexed by major databases, such as PubMed, Scopus, DOAJ, etc.

Journals typically have one to three reviewers per article. The peer review procedures and policies should be clearly described on the journal’s website.

Reviewer Guidelines

It is important for journals to provide guidelines for reviewers. This provides a framework for the reviewers’ assessment. Some journals also provide forms or rubrics for their peer reviewers.

**ADDITIONAL RESOURCES**

- [COPE: Ethical Guidelines for Peer Reviewers](#)
- [Elsevier’s guidelines for reviewers](#)
- [Ethical guidelines for reviewers](#) for Science Magazine
- [Guidelines for reviewers](#) by ASM Journals
- [Reviewers Guidelines](#) by JScholar

For setting up your journal’s review guidelines, see also the [Editorial Workflow in OJS 3 document](#). The editorial and review process workflows are further explained in the below flowchart:
### Types of Peer Review

<table>
<thead>
<tr>
<th>Type of peer review</th>
<th>Description</th>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-blind review</td>
<td>Authors’ names are disclosed to reviewers, but reviewers are anonymous to authors.</td>
<td>Encourage reviewers to give feedback without fear of a negative reaction from the author(s).</td>
<td>Potential bias on the reviewer’s part based on the author rather than the article itself.</td>
</tr>
<tr>
<td>Double-blind review</td>
<td>Both the reviewer and the author are anonymous.</td>
<td>Reduce potential reviewer bias based on an author's country of origin, previous work, affiliation, or reputation.</td>
<td>Lack of information about the author that may assist in completing the review.</td>
</tr>
</tbody>
</table>
### Open review

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Names of both the author and reviewers are</td>
<td>Encourage honest, accountable reviewing and persuade reviewers to do a thorough</td>
</tr>
<tr>
<td>available, and the review may be</td>
<td>job.</td>
</tr>
<tr>
<td>made publicly available.</td>
<td>Reviewers’ concerns about the consequences of being identified as the source of</td>
</tr>
<tr>
<td></td>
<td>a negative review and the potential inclination of refusing to review in an</td>
</tr>
<tr>
<td></td>
<td>open system.</td>
</tr>
</tbody>
</table>

### ADDITIONAL RESOURCES

- [Becoming a Reviewer](#) by PKP School [video tutorial]
- [Types of Review](#) by McGill University
- [Resources for Editors: Peer-review](#) by University of Kansas
- [Peer Review Process](#) by Nature
- [Becoming an Editor](#) by PKP School
- [Editorial Workflow Guide](#) by University of Toronto Libraries
- [How to Perform a Peer Review](#) by Wiley

### Set up Review

In the Dashboard of your OJS account, in the Navigation panel, choose **Settings → Workflow → Review**. You can set up the following:

- Reviewing deadlines
- Automated email reminders for reviewers
- Peer review type
- Feedback form for reviewers

Watch the PKP video tutorial here: [Setting up your journal in OJS 3: Module 9 Unit 3](#) or on YouTube: [Module 9 Unit 3](#).

### Implement Reviews

For a demonstration of reviewer assignment, watch the PKP video tutorial here: [Editorial Workflow in OJS 3: Module 5 Assigning a Reviewer](#) or on YouTube: [Module 5](#).
To see how to respond to a review, watch the PKP video tutorial here: Editorial Workflow in OJS 3: Module 7 Responding to the Reviews or on YouTube: Module 7.

Tip! If you have reviewers who are new to OJS, you can send them this 6-minute PKP tutorial link: Editorial Workflow in OJS 3: Module 6 The Reviewer’s Steps or the YouTube link: Module 6.

Ensure Blind Peer Review

In Dashboard → Submissions → My Queue (or All Active), click on the article title to get access to the detailed submission record. Click on Add Reviewer (as shown below).

Choose **Double-blind**, **Blind**, or **Open** in the bottom of the pop-up window (as shown below).

**NOTE:** If you have decided on Double-blind or Blind peer review for your journal content, you need to customize the review setting before you proceed to the editorial workflow.

In **Settings → Workflow → Review**, check the box for “Present a link to ‘Ensuring a Blind Review’ during upload” (as shown below):
With this option chosen, your authors will see an “Ensuring a Blind Review” link when they are making a new submission:

Clicking on the “Ensuring a Blind Review” link will bring out a checklist for removing the identities of the authors and/or the reviewers. Here is the checklist for your reference:

- The authors’/reviewers’ names are removed from the manuscript text
- With Microsoft Office documents, author/reviewer identification can be removed from the properties of the file. In File → Info → Check for Issues → Inspect Document, check the box of “Document Properties and Personal Information,” and click on Inspect. Then click on Remove.
- With PDFs, you can anonymize the file by removing the metadata. Choose File → Properties → Description, and remove all the personal information about the authors/reviewers.

**ADDITIONAL RESOURCES**

- [Introduction to Peer Review](#) by BioMed Central
- [How to facilitate double-blind peer review](#) by Elsevier
Copyediting

Manuscripts that have been revised based on peer-review suggestions and have been accepted for publication are then usually assigned for copyediting.

Copyeditors will:

1. Polish the language, including spelling, grammar, terminology, and making improvements for the manuscript wherever necessary.

2. Check style and formatting

Each journal should have a style manual of its own. You can find an off-the-shelf manual that works for your journal content, such as The Chicago Manual of Style, Publication Manual of the American Psychological Association, etc. Or you could put together your own guide based on the speciality of your content. Typically, copyeditors will check the references against the reference style the journal adopts.

ADDITIONAL RESOURCES

- Becoming an Editor: Module 4 The Editorial Role and Responsibilities by PKP School
- Becoming an Editor: Module 6 Unit 2 Copyediting by PKP School

Production

Layout

When the edited manuscript is ready for publishing, you need to apply page layout to the content. You can outsource the task to a typesetting service provider or choose to use typesetting software and carry out the work in-house. For additional information on Layouts, see Learning OJS Production Publication: Layout Editing by PKP School.

Galleys

A Galley is the final publication-ready file that has been prepared for readers and will be published on the article page. Galleys should be in a stable non-editable format (e.g., HTML, PDF, ePub, or XML). If you are planning to publish your articles in HTML, ePub, XML, or other media format, refer to the Galley File Formats Tutorial by the PKP School. In this tutorial, you will find not only the steps to follow, but links to the recommended tools.

From the Production Ready Files panel, download the files to your desktop and work outside of OJS to convert them to galley files. Galleys can also include supplementary material such as multimedia files and research data. You can publish a galley for an article or for an entire issue. For more information and step-by-step instructions, see Prepare and Add Galley Files by PKP School.
Publishing

For a formatted manuscript, uploading is a straightforward procedure. In Dashboard → Submissions, click on the article title to get into the editorial status. In the Production tab, click on Add Galley (as shown below) and upload your ready-to-publish file (e.g., PDF, ePub, XML).

Before you click on Schedule for Publication, make sure that:

- You have checked the metadata for completeness and accuracy
- You have created a journal issue where the article will be published

To create a new journal issue, click on Issues → Future Issues → Create Issue. Fill out the volume, issue number, year, and title information, and add a brief description and cover image if available.

Now that you have created a new journal issue, when you Schedule for Publication for an article, the issue will appear in the drop-down menu (as shown below).
Once the journal has accumulated enough submissions, it is ready for publication. In the Issues tab, go to **Future Issues → Issue → Publish Issue** (as shown below).

![Future Issues Tab](image)

If you want to send a notification to all registered users about the new issue release, check the box for Send notification email to all registered users and click OK (as shown below).

![Publish Issue Dialog](image)

**ADDITIONAL RESOURCES**
- [Editorial Workflow in OJS 3: Module 9 Production](https://docs.ojs.org/301-080-m9.html) by PKP School [video tutorial]
- [Journal Publishing Guide: Production](https://www.tdl.org/journals/production-guide/) by University of Toronto Libraries

**Journal Interface Design**

Web design may be the last thing on your mind when setting up a journal, but the journal website will be the primary way your audience will interact with your publication. OJS provides options for customizing your site’s appearance and user interface, most of which can be found at: **Dashboard → Settings → Website**

**Theming**

OJS provides six theme plugins which will change the layout, formatting, and look of your site. PKP provides an overview and preview of each theme at this page: [https://docs.pkp.sfu.ca/pkp-theming-guide/en/themes](https://docs.pkp.sfu.ca/pkp-theming-guide/en/themes)

- Keep in mind that TDL does not support all themes: The OJS Bootstrap theme is the most notable example because it relies on an unsupported version of Bootstrap. Users may request the addition of a theme plugin not included in the default installation, and TDL will review it for appropriateness.
Colors
In the Appearance menu, you can choose your journal’s header and accent color. Any additional color changes can be made via a CSS Stylesheet.

● A color palette will make your site feel more cohesive.

■ Coolors is a website that lets you browse popular color schemes and generate palettes based on images: https://coolors.co/

■ If you need more examples, Visme compiled 50 color palettes from popular website: https://visme.co/blog/website-color-schemes/

Plugins
The Plugin Menu lists dozens of plugins that can customize your user experience, everything from tailored search functions to language toggling. Not all plugins are created equal, but depending on your journal’s goals and specific workflow, they can make your site more powerful and user-friendly.

● The Sidebar Management tool on the Dashboard → Settings → Website → Appearance page allows you to configure the way certain plugins display on your website. This can be especially useful if you want to display institutional sponsorships, website settings, or search features alongside your content.

The PKP school covers several of these topics in depth in their Setting up a Journal in OJS 3.x course. Upon registering for the course, PKP will provide you with a sandbox website of your very own, but be mindful that TDL has limits on what you can customize that will not be reflected in PKP sandbox website. For example, the Bootstrap theme is not supported by TDL.

CSS Customization
For more advanced users, CSS is a tool to further customize your site, but it also carries more risk than OJS’ built in customization tools.

● CSS allows you to change fonts and colors, alter the placement of some objects, and even add background images to your site. This makes theming consistent across your entire site, which makes your journal look more professional.

● However, if done incorrectly, CSS can also make your site less responsive, slower, and less accessible to users, which is why we don’t recommend making a stylesheet unless you have experience working with CSS. Another constraint is that CSS cannot change the HTML code of your OJS site.

● CodeAcademy offers free CSS tutorials and CSS Zen Garden is a lovely illustration of the power and versatility of CSS

All of these features are optional; OJS allows you to customize to your comfort level.

Open Access Journals Business Models
There are various approaches to an open access business model. Below are some examples:
• APC: Article Processing Charges (APCs) are made to the author (or their funder or institution) to cover the publishing costs. Different publishers seek to cover different costs, depending on their model and their other sources of income, therefore APCs vary greatly from publisher to publisher.

• Collaboration/Coalition: By joining forces, institutions or organizations can bring different skills and funding sources together to boost OA publishing.

• Community: OA publishing is also undertaken by some academic-led presses, who operate on a community/volunteer basis.

• Endowment: Many university presses receive a regular endowment to fund part of their operations, for both OA and for traditional publishing. This is particularly prevalent in the USA where subsidizing traditional university presses to a certain degree has always been common.

• Freemium: Publishers make one online version free, and charge for other formats and additional functionalities, e.g. PDF, enhanced HTML or for e-readers.

• Grant: Grants to launch open access ventures, or to fund open access publishing projects, are one of the ways publishers fund their OA activities.

• Institutional: Many university presses in Europe, and newer OA publishers in the UK, receive funding from their institution to cover varying degrees of their publishing costs.

• Library Funding: Some publishers and publishing services companies such as Knowledge Unlatched, operate library funding schemes, to secure library contributions to make books and journals available at the point of use.

• Sales Revenue: Many publishers sell print copies, or other formats, while operating a fully OA press.

• Services Revenue: Some publishers offer publishing services to other presses or institutions, alongside publishing books and journals in their own imprint.

Listed above are various business model examples of open access publishing. TDL member journals have operated in the following ways:

• Volunteer effort
• APC model
• Sponsorship by university press or research center
• Advertising
• Sales of print copies

For more information: SPARC Report: Income Models for Open Access
Marketing & Promotion

Promoting a New Journal

An important aspect of Starting a new journal is to gain exposure to as wide an audience as possible. To be a success, readers will need to know about your journal, and be able to find it. By putting your content online and making it freely available through open access, you can reach millions of people around the world. But if they don’t know you are out there, they will not be able to become part of your scholarly community. However, as more people discover your journal, some will become regular readers, contributors, and reviewers. Getting your journal recognized and read is critical for its success.

One method of letting potential readers know about your journal is through marketing. Traditional methods of marketing may include expensive promotions and advertising. While this is one way of getting the word out, more economical alternatives exist. Professional networks can be used to inform the right people about your new journal. Take advantage of discussion lists, blogs, social media or other forums to announce the release of your new publication and make a “call for papers.”

Ask editors, authors, and other collaborators to do the same. You can also add the journal’s website to your email signature. Have your host institution add a link to your journal on their web site, libguides, list of journals in library resources, etc. It is important to make sure that your administrators are aware of your activities, and can include information about your project in their reports or goals and objectives.

For many researchers, Internet search engines are the primary tool for finding information online. Your electronic journal can be made more visible to search engines through good website design, application of meaningful metadata tags, and submitting your site to the major search engines (see Indexing). More information on search engine optimization is available here: Webmasters Complaining about Google by Search Engine Watch.

Social media
Social media is a valuable way to reach specific audiences to introduce and amplify the work of your journal’s contributors. It can also supplement your communication with contributors by providing a channel that acknowledges and promotes their work. Your chosen platform(s) should apply the established brand of your journal (for example, your journal’s logo, wordmark, or colors), as this consistency will support perception of credibility.

Managing Multiple Platforms
While most platforms are available for use without fees, effective use requires a sustained investment of attention to plan and maintain. Tools such as Twitter, Facebook, Instagram, etc. can help you target your audience, but there is huge competition and lots of “noise.”

Building an engaged social media following can absorb as many resources as you are willing to commit. Your social media plan should include recruiting the support of those who have already developed a credible profile and following among the target audience. Social media management tools bring multiple social media accounts into a single platform to facilitate scheduling of content,
supervising contributors, and tracking metrics. It is worthwhile to determine your needs and capacities to select a suitable management tool. Few are free, most are subscription based. Examples include Hootsuite or Social Pilot.

Building a Team
It is common for scholarly social networking platforms, such as Academia.edu, ResearchGate, or Humanities Commons, to provide social features to network users by encouraging them to follow one another and to receive alerts when a followed person publishes. Educating authors about these features can increase their findability and also increase visits to your journal.

Your authors and editorial team are the logical “core” of a journal’s social media team. Useful things they can do to bolster your publication's social media presence include the following:

- Like, follow, and share the content on the journal’s social media platforms.
- Follow and promote each other as co-contributors to the journal on their personal or professional social media accounts. For example, point to articles published in the same issue of a journal: “Appreciate the methodology used by Dr. Hernandez in this article just published in [Journal Name with URL].”
- A member of the editorial team can build and oversee a team of staff or volunteers to populate your journal’s social media platforms with content that is vetted before publication. Online management tools such as Hootsuite can help to streamline the process.

The New Release
The inverted pyramid style media release remains a valid tool for getting information to key individuals and organizations about content published in your journal. The method of delivery has changed, but the media release is still a valuable way to pitch a story to a reporter who is almost always a layperson. We may consume media on different platforms, but commercial or traditional media remain the producers of trusted content that is shared across new platforms. Videos from TV news, stories from newspaper websites and blogs, and audio from radio stations continue to be widely shared on the news media. These traditional media still confer credibility and reliability to sources. Reporters and their editors still turn to news releases as a way to discover stories. With some exceptions, a news story shared on social media about something in your journal will be perceived with a higher degree of credibility among a wider (though shallower) audience than if you simply post a link to the information on your social media platform.

Reasons to Use Media Releases
It might be tempting to rely on an article abstract in place of a media release, but abstracts, regardless of effort to use “plain language,” perform a different function and are not accessible to a general audience. The decision to create and use a media release will depend on your journal’s public profile needs and how important it is that your contributors’ work is noticed and by whom.
It is increasingly common that funders require projects to include a knowledge translation or mobilization component. Getting a story into the local community paper may or may not fulfill this requirement, but an article or mention in an industry magazine such as *Nature*, *Aviation Week*, or *CPA Magazine* might. News reporters rarely spend time researching stories on their own. They rely on trusted sources. Unless they are assigned to a beat, which is rare now, most reporters will need explicit guidance to understand your subject area. Reporters rely on media releases to understand and shape a story. Media releases point out the relevance of an article to the media outlet’s audience, position an author as an expert and invite reporters to connect with the expert. Keep in mind that reporters may not be able to read the original journal article and may not have the necessary disciplinary background to interpret it appropriately.

### Considerations in Developing a News Release

- **Who is your audience and what do you want them to do?** Example: If your journal is for perfusionists and you want them to subscribe or read your new journal about perfusion, consider a media release to The Canadian Society of Clinical Perfusion, not *The Globe and Mail*.

- **Are you the person who should write the release?** An editor may have the support of an institution’s communications staff who will have the skill set and contacts to help you get the story out. In this situation, an editor serves the role of guide and educator to the communications person who is usually not an expert in your field. The editor may also be an important go-between with the author(s).

- **A modern media release can be multi-media, incorporating video, animation, live links, and text.**

- **The findings or content of specific articles is much more interesting than the fact that you have published a new issue.** So each issue offers many promotional opportunities as long as each is tailored to specific audiences.

- **It may be a better use of resources to recruit others who already have a following to promote the content in your journal than to devote resources to building a following from**
scratch. The support of influencers who use social media will also help build a journal’s following.

● Social media can amplify your story, but the substantive content usually resides elsewhere such as a news website, institutional blog, or your journal’s announcement page.

● Journal content can have a long life. Consider promoting articles published several years earlier, especially if an article can fill an information vacuum for something current.

ADDITIONAL RESOURCES

● ORCID in Publishing Workflows by Library Publishing Coalition

● Creating Accessible PDFs by Library Publishing Coalition

● 10 Tips to Make Your PDFs SEO Friendly by Clark Boyd

ATTRIBUTION

● “Starting a New Scholarly Journal in Africa” by Kevin Stranack is licensed under a CC BY-SA 2.5

● “Getting Found: Building Visibility: Promotion and Marketing” by Public Knowledge Project is licensed under a CC BY-SA 3.0

Web Accessibility¹

The Texas Digital Library strives to ensure our web spaces conform with Level AA standards, as per WCAG 2.0 (Web Content Accessibility Guidelines 2.0) standards and timelines.

Public Knowledge Project (PKP), which created the open source OJS platform that TDL uses for hosting, is working towards a default accessible journal template that will become available in OJS version 3.3. (TDL currently hosts journals in version 3.2x.) If journal teams choose to implement design changes or customizations, it is their responsibility to ensure that their journal website remains accessible. It is of equal importance for journal editors to make sure that journal content (articles, issues, supplementary materials, media etc.) can be accessed and read by a variety of individuals using adaptive/assistive technologies.

Website and Content Accessibility

The below resources can help you ensure that both the journal website and the articles can be accessed by visitors with disabilities and by readers using different types of web-enabled devices. Please note that no single tool can test for all accessibility issues.

¹ Adapted from University of Toronto's Journal Publishing Guide https://jps.library.utoronto.ca/index.php/pubguide/accessibility
Resources for the Journal Website

- Become familiar with the WCAG 2.0 Guidelines; see also the Quick Reference for Web Content Accessibility Guidelines and the Stamford WCAG 2.0 Map (pdf document)
- Use an online website checker like AChecker to uncover accessibility barriers
- Install the WAVE accessibility evaluation tool as a Chrome or Firefox Extension or visit the WAVE website for quick and regular checking
- Use WebAim’s Contrast Checker, Contrast Ratio Checker or the Colour Contrast Analyser to make sure your colour ratio is satisfactory
- Use a screen reader like ChromeVox (free), NVDA (free) or JAWS to ensure a low vision or blind person can navigate your site
- Review the website using only your keyboard to test its navigability. Use WebAIs Keyboard Testing tips to guide you.
- Engage a person with a disability for a hands-on experience

Resources for the Published Content

- Creating Accessible Content: A Guide for Journal Editors and Authors, PKP guide for OJS editors
- AccessAbility: A Practical Handbook on Accessible Graphic Design, RGD Ontario (pdf document)
- Using Microsoft Word (and other Office applications) Accessibility Checker
- Using the Acrobat X Pro Accessibility Checker (pdf Document)
- Create & verify PDF accessibility (Acrobat DC Pro)

Privacy Policies
Texas Digital Library and the OJS platform collect certain data from registered and non-registered users of each journal site for the purposes of service provision and service improvement. The data collected falls within the scope of the standard functioning of peer-reviewed journals. It includes information that makes communication possible for the editorial process; it is used to inform readers about the authorship and editing of content; it enables collecting aggregated data on readership behaviors, as well as tracking geopolitical and social elements of scholarly communication.

Each journal’s editorial team may use this data to guide its work in publishing and improving the journal. As the hosting provider, the Texas Digital Library may use user data in an anonymized and aggregated form. The data will not be sold by Texas Digital Library. Journal teams and the authors
published in each journal are responsible for the human subject data that figures in the research reported there.

Information about specific data collected by the OJS system is available at the following link: https://docs.pkp.sfu.ca/gdpr/en/what-data

Cookies

OJS uses cookies to manage user sessions (for which they are required). Cookies aren’t required to simply visit the site and read content.

If a journal site is using the Google Analytics plugin to monitor site usage: Google Analytics uses First-Party Cookies to track user interactions and are used to collect information about how users use the journal site.

Default Privacy Policy Statement

A Privacy Policy can be edited in the application’s settings and subsequently made available on the journal’s About page and at various specific stages of the registration or data submission process, Journal Managers may specify a Privacy Policy in their journals at Settings > Workflow > Submission.

The default privacy statement in any new journal is as follows:

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

TDL does not currently mandate any particular privacy policy.

User Consent

The version of OJS that Texas Digital Library currently hosts requires new users to consent to the Privacy Policy Statement as part of user registration, as seen below.

☐ Yes, I agree to have my data collected and stored according to the privacy statement.

GETTING FOUND & BUILDING VISIBILITY²

Ensuring the success of your journal involves developing a regular readership from the scholarly community that will cite the content in their own work and tell others about the value of your

publication. This section outlines ways to increase the visibility of your journal through indexing libraries, open databases, and media.

Journal Standards and Identifiers
There are various commonly used standards and identifiers in academic publishing and it is important for journal managers to become familiar with these and their unique roles in the publishing process. Among the three most prominent are: ISSN (International Standard Serial Number) for journals, Digital Object Identifier (DOIs) for articles, and ORCID (Open Researcher and Contributor ID) for authors.

ISSNs

The International Standard Serial Number (ISSN) is an eight-digit international standard for serial publications (e.g., a journal published on a repeating or “serial” basis) regardless of medium, language, location, or frequency of publication. ISSNs are widely used by libraries, citation indexes, and other organizations in the publishing industry to uniquely identify and distinguish journals. A journal manager can register the journal for an ISSN free of charge from a local ISSN Center.

Tips on ISSNs in an OJS Journal

- ISSNs are required for many indexing services, such as the Directory of Open Access Journals, Digital Object Identifiers, and online search engines.
- ISSNs should be displayed on the journal’s website where it can be easily located (e.g., footer or sidebar)
- If the publication appears in print and online editions there is typically an ISSN assigned to each one (print version and online version).
- In OJS, you will be asked to enter your ISSN as part of the Journal Settings, but this is for metadata purposes and not shown to readers. To make the ISSN visible, include it in the footer text field (under Website Settings) or in the sidebar (create Custom Block).
- For the final published version of an article (e.g., PDF), you may also want to include the ISSN. This can be useful when PDFs are downloaded and shared via email or social media and can include a link back to the journal site.

ADDITIONAL RESOURCES

- Understanding the ISSN: What is an ISSN?
- Guidelines to Register and Assign an ISSN (updated January 2018)
- University of Toronto Journal Publishing Guide: Obtaining an ISSN
Digital Object Identifiers (DOIs)

A Digital Object Identifier (DOI) is a globally unique character string that references physical, digital, or abstract objects.\(^3\) DOIs are assigned by a DOI registry agency that issues the unique number sequence. Even if the journal URL changes, articles can still be located if registered with a DOI. Many indexing databases, search engines, and other research platforms rely on DOIs to identify distinct works accurately and track citations.

A DOI consists of a series of characters divided into two parts - a prefix and a suffix, separated by a slash. The prefix uniquely identifies the registrant (i.e., the publisher) of the title, and the suffix identifies the specific object (e.g., individual article). Many publishers use a random number assigned by the DOI registration agency, but using a journal abbreviation (if available) is a good way of allowing users to more quickly identify your journal. There are several DOI registration agencies. The two most common DOI registration agencies for journals are CrossRef and DataCite.

**CrossRef:** CrossRef charges an annual membership fee for the DOI service, and a per article fee (approximately $1.00 per article). TDL member institutions with a hosted journal in OJS will be responsible for setting up, managing, and payments for DOIs. An ISSN is required in order to assign DOIs.

**DataCite:** Since 2018, TDL has had a consortial membership with DataCite for a small subset of TDL members who have opted in to participate according to an additional cost structure negotiated with DataCite. Using their DataCite credentials, Texas A&M librarians have successfully set up DOI minting from within OJS using the DataCite DOI plugin.

**Setting up DOIs in OJS**
To set up DOIs in OJS, the journal manager(s) must first register with CrossRef or DataCite and make arrangements for the payment of fees. Once registration is complete, the journal manager will need to enable the DOI plugin within the OJS Journal Settings.

**ADDITIONAL RESOURCES**
- University of Toronto Publishing Guide: DOI Instructions | https://jps.library.utoronto.ca/index.php/pubguide/DOI (institution specific)
- Digital Object Identifier Website | https://www.doi.org/index.html

**ORCID**
ORCID (Open Researcher and Contributor Identifier) is a persistent identifier that distinguishes individual researchers and supports automated links between researchers and their professional activities. For an overview on ORCID, see this Introduction to ORCID video.

The ORCID Profile Plugin for OJS versions 3.1.2 and above allows an OJS journal to:
- Collect and authenticate a contributor's ORCID iD
- Automatically send an email to contributors requesting their ORCID iD authentication

● Display a contributor's authenticated ORCID iD on the journal article, which will link to the contributor's ORCID record.

● NOTE: Additional functionality for ORCID Members with access to a members-only API will automatically send publication details to the contributor's ORCID record once the work has been published in OJS. This feature will depend on your institution and may incur a fee. Contact your local library liaison for more information.

By integrating ORCID with your OJS journal, you will be able to support publishing best practices by:

● Allowing authors to collect their published work in one reliable place

● Distinguishing authors with a similar name, and keeping an up-to-date record regardless of changes in name or affiliation

● Demonstrating a commitment to transparency and credibility by accurately attributing authors to their published works

● Supporting the collection of accurate article metadata, including author information, by sharing publication details

ORCID offers a Public API that is free and available to anyone. It allows for ORCID iD authentication and reading public data from ORCID records. It allows the journal to have contributors’ ORCID iDs authenticated and displayed on OJS articles.

**Test the ORCID Plugin**

ORCID provides plugin users with an option to test how the plugin works with your OJS journal installation in a Sandbox (testing) environment before going live with the Production environment. You will need a different set of credentials for the Sandbox vs Production API. Testing the plugin first in the Sandbox will allow you to do the following:

● Check that the ORCID plugin works in your OJS installation

● Learn how to use the plugin and try all of its features without affecting any real ORCID iDs or sending emails to researchers

Public API credentials are connected to an individuals’ ORCID iD. For testing purposes, you will need to create a fake “sandbox” ORCID iD.

To obtain your Sandbox Public API credentials:

1. Register for a Sandbox ORCID iD account at the ORCID sandbox site
   ○ Go to the ORCID Sandbox registration page and fill in the form. Make sure to use a made-up email address using @mailinator.com - for example: test123@mailinator.com. Note: The Sandbox only allows @mailinator.com addresses.
○ Write down the email address and password that you used to create the sandbox ORCID id.

○ Go to mailinator.com and in the “Enter Public Mailinator Index” box, type in your made-up address and click “Go”.

○ You should be taken to the inbox where a confirmation email from ORCID should appear. Follow the prompts in the email to verify your sandbox ORCID id account. You can now add information and make changes in your sandbox ORCID record.

○ Troubleshooting: If your email does not appear in the mailinator.com mailbox, there could be several reasons. For example, your OJS is not properly configured for sending emails, you have misspelled the credentials, or you may have swapped the client id and secret.

2. Connect your Sandbox ORCID id with OJS and Submit a Test Publication

○ There are multiple ways that an author can connect their ORCID id with their works in OJS. The method by which an author’s ORCID id is connected to their publication in OJS will depend on the number of authors and who is submitting the article. For testing, you can follow instructions for different scenarios explained in more detail here: Appendix- Testing in the ORCID Sandbox.

○ If you plan to test more than one scenario, it is recommended to register for multiple ORCID id accounts following the instructions above, and use a different sandbox ORCID id to test different scenarios.

Setup the ORCID Plugin
To use the ORCID plugin, you will first need to obtain Public API credentials (Client ID and Client Secret) and then configure the ORCID plugin in OJS with this information. Once you have tested via the Sandbox, the below information will guide you through setting up the ORCID plugin in production (live) in your OJS journal.

Note: Do not enable the plugin until you have the credentials and are ready to set up the plugin.

Request Public API Credentials

1. Sign in to your ORCID iD, or Register for an ORCID iD (if you do not already have one).
   ○ ORCID iD registration is free and only requires your name and email.
   ○ If your institution is an ORCID Member, you may have the option to sign in with your institutional affiliation credentials.

2. Click your name in the top right and select “Developer Tools” from the drop-down menu.

3. Click the button “Register for the free ORCID public API”.

4. In the registration form, enter:
Your journal name

Your journal URL

A brief message about your journal - it will be displayed to your users when they connect their ORCID iDs

Redirect URI - this is the page your users will be taken to after they have authenticated their ORCID iDs. It must begin with “https://” and include the link to your specific TDL hosted OJS journal. For example:

- “https://journals.tdl.org/ABCD/index.php/ABCD”

5. Click on the save icon in the bottom right to save the form. Your credentials (Client ID and Client Secret) will be displayed right away. Copy and note these credentials to be added in the OJS Profile Plugin.

Enable and Configure ORCID Plugin

After you’ve obtained your Client ID and Client Secret from ORCID, you can enable and configure the plugin in OJS.

1. Login to your OJS journal as an administrator. Go to Settings > Website > Plugins and click on the Plugin Gallery. Select ORCID Profile from the list. Check the box to enable plugin.

2. Click the arrow to the left of the plugin name to make “Settings” appear, then open Settings. Select your API type and enter your Client ID and Client Secret.

ADDITIONAL RESOURCES

- ORCID Plugin Setup Walkthrough [video] by PKP School
- About the ORCID Plugin and Setup by PKP School

Indexing

Here are some of the most reputed journal indexing agencies: Google Scholar, Scopus, PubMed Central, EBSCO, DOAJ

Google Scholar

Google Scholar is a popular scholarly journal indexing engine that crawls the web looking for publications such as articles, books, theses, and other works. There is no need to register your journal with Google Scholar. Google Scholar will eventually find and automatically begin crawling your OJS journal site. The best way to ensure Google recognizes your journal is by registering it on Google Search Console. Go to “add property” and select the “URL prefix” method. Google Console will give you multiple ways to prove your ownership of the website, the easiest being using the HTML snippet provided and putting it into the OJS journal site. The best place to put the HTML snippet in OJS 3 is to go to Settings> Distribution Settings> Search Indexing, and post the HTML snippet in Custom Tags. This will inform Google Console that you are indeed the owner of the site,
and will schedule the site for indexing. It will also open up other tools for checking that the OJS website is properly tagged for optimum discoverability.

The PKP School Google Scholar Indexing site has more information and some troubleshooting tips if you think your OJS journal is not being indexed.

Scopus

Scopus encompasses research across multiple scholarly disciplines but primarily consists of science and technology articles. It is known for its high level of academic rigor and provides a wide range of metrics for indexed content. Scopus also has drawbacks such as access. There is no cost to be included in Scopus but the content is only available via an annual subscription. Generally, only researchers affiliated with a subscribing institution or organization will be able to access Scopus. Criteria includes that the journal must:

- Be peer reviewed and have publicly available policies
- Have an ISSN and publish on a regular basis
- Have English language abstracts and article titles
- Publish content relevant to an international readership
- Include references in Roman script
- Have a publicly available publication ethics and malpractice statement
- Generally, have a publication history of at least 2 years

More information and the Scopus application form is available on the Scopus Agreement site.

Directory of Open Access Journals (DOAJ)

The DOAJ indexes and promotes quality, peer-reviewed open access journals from around the world. Open access journals in any language can apply. For more information, see the Guide to Apply. Criteria includes:

- The journal must be actively publishing scholarly research and all research subject areas are accepted.
- The journal must publish at least 5 research articles per year.
- The primary target audience should be researchers or practitioners.
- Before applying to DOAJ, a new journal must demonstrate a publishing history of more than one year, or have at least 10 articles. This is in addition to the standard requirement to publish a minimum of 5 research articles per year.
- The following information must be available on the journal website and easily accessible from the journal homepage:
O Open access policy
○ Aims and scope
○ Editorial board (including institutional affiliations of all members)
○ Instructions for authors
○ Editorial process (peer review)
○ Licensing terms
○ Copyright terms
○ Author charges (and a statement to say if the journal does not charge any fees)
○ Contact details

● The journal must have at least one ISSN (International Standard Serial Number) displayed on the journal homepage.

ADDITIONAL RESOURCES

● Overview of Journal Indexes and Aggregators, Wikipedia
● Quick Guide to Academic Journal Indexing, Scholastica
● Getting Found, Staying Found, Increasing Impact, PKP School

SUSTAINABILITY

For information on how to ensure your journal is sustainable, please consult the following resources:

● OA Journal Publishing Resource Index 7: Sustainability, SPARC
● Strategies for Developing Sustainable Open Access Scholarly Journals, First Monday, by David J. Solomon
● Working with publication technology to make open access journals sustainable, (2021). Wrzesinski, Marcel; Riechert, Patrick Urs; Dubois, Frédéric; Katzenbach, Christian. HIIG Discussion Paper Series, No. 2021-2, Alexander von Humboldt Institut für Internet und Gesellschaft (HIIG), Berlin, http://dx.doi.org/10.5281/zenodo.4558781

RESOURCES

Although this guide includes additional resources throughout, here are some additional resources to consult:

● Judith Johnson’s “How to start a journal...”
● OASPA’s “Principles of Transparency and Best Practices...”
Survey of TAMU editors slides:
The slides here summarize a brief 2020 survey of 4 unique OJS journal editors at Texas A&M toward a snapshot of a general sense of what level of staffing and skills their journals require in our TDL OJS context:

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