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Overview

Open Journal Systems (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 which is part of a 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, donations, etc.
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. You can find this context-sensitive help by clicking the Journal Help link (typically located on the right navigation bar). You can also view the help document at http://pkp.sfu.ca/ojs/demo/present/index.php/index/help/.

You will also find relevant documentation on our OJS Documentation page and the OJS Wiki pages. At the end of this document you will also find a list of YouTube videos produced by PKP which will help.

This document was compiled using the following two documents:


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Roles within OJS

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

Available Roles within OJS

Site Administrator

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

Journal Manager

The Journal Manager is responsible for setting up the journal web site, configuring the system options, and managing the user accounts. This does not involve any advanced technical skills, but entails filling out web-based forms and uploading files. The Journal Manager also enrolls the Editors, Section Editors, Copyeditors, Layout Editors, Proofreaders, Authors, and Reviewers. The Journal Manager also has access to the journal's other management features, and can create new Sections for the journal, set up Review Forms, edit the default Emails, manage the Reading Tools, view Statistics and Reports, etc.

Note Although the Journal Manager is a per-journal role, journal managers should generally be considered systemwide trusted users, as they have the ability to assume the identities of other users who may be enrolled in other journals. See the Journal Manager role section for more details.

Reader

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

Author

Authors are able to submit manuscripts to the journal directly through the journal's website. The Author is asked to upload a submission file and to provide metadata or indexing information. (The metadata improves the search capacity for research online and for the journal.) The Author can upload Supplementary Files, in the form of data sets, research instruments, or source texts that will enrich the item, as well as contribute to more open and robust forms of research and scholarship. The Author is able to track the submission through the review and editorial process, as well as participate in the copyediting and proofreading of submissions accepted for publication by logging in to the journal's website. See the Author role section for more details.

Editor

The Editor oversees the entire review, editing and publishing process. The Editor, working with the Journal Manager, typically establishes the policies and procedures for the journal. In the editorial process, the Editor assigns submissions to the Section Editors to see through Submission Review and Submission Editing. The Editor keeps an eye on the submission's progress and assists with any difficulties. Once review is completed, the Editor typically sees the submission through the Editing process (including copyediting, layout editing, and proofreading). In some journals this remains the responsibility of the Section Editor in charge of the submission's review process. The Editor also creates the journal issues, schedules submissions for publication, arranges the Table of Contents, and publishes the issue as part of the Publishing Process. The Editor can restore archived submissions by placing them in the In Review or In Editing lists. See the Editor role section for more details.
**Section Editor**
The Section Editor manages the review and editing of submissions to which they have been assigned. In some cases, a Section Editor who is assigned to see submissions through the Review Process will also be responsible for seeing the submissions that are accepted through the Editing process (that is, through copyediting, layout editing, and proofreading). Often, however, Section Editors only work with the review process, and an Editor, acting in the role of Section Editor, sees the submissions through the Editing process. The journal will have a policy on how the tasks are divided. See the Section Editor role section for more details.

Specific roles have to be setup by the Journal Manager. Editors of journals with insufficient HR compliment can perform several roles.

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

**Subscription Manager**
The Subscription Manager manages the journal's Subscriptions and Subscription Types, and can also configure where and how payments are handled within the system. See the Subscriptions and Payment section for more details.

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

Specific roles have to be setup by the Journal Manager (Setup 4.5). Editors of journals with insufficient HR compliment can perform several roles.

**Layout Editor**
The Layout Editor transforms the copyedited versions of the submission into galleys in HTML, PDF, PS, etc.—files which the journal has elected to use for electronic publication. This system does not provide software for converting word processing documents to galley formats, so the Layout Editor should have access to and be able to use third-party software packages for creating galleys with a well-formatted and readable layout, in the manner of scholarly journals. See the Layout Editor role section for more details.

Specific roles have to be setup by the Journal Manager (Setup 4.6). Editors of journals with insufficient HR compliment can perform several roles.

**Proofreader**
The Proofreader carefully reads over the galleys in various formats (as does the author). The Proofreader (and the Author) record any typographic and formatting errors for the Layout Editor to fix. See the Proofreader role section for more details.

Specific roles have to be setup by the Journal Manager (Setup 4.7). Editors of journals with insufficient HR compliment can perform several roles.
Editorial Process

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

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

OJS Workflow Chart
Navigating through OJS

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

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

The Top Navigation Bar

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

Top Navigation Bar, Site-level and Not Logged In

| HOME | ABOUT | LOGIN | REGISTER | SEARCH |

Top Navigation Bar, Site-level and Logged In

| HOME | ABOUT | USER HOME | SEARCH |

Top Navigation Bar, Journal-level and Logged In

| HOME | ABOUT | USER HOME | SEARCH | CURRENT | ARCHIVES |
|      |       |           |        |         |          |

The Home link takes you to the site homepage if you are navigating at the site-level; if you are looking at a journal, it will take you to the journal's homepage.

If you are browsing at the site level, the About link takes you to the site's About page, which may include a description of the site as a whole, and also includes links to the About pages for every journal on the system. If you are browsing at the journal level, clicking the About link will take you to that journal's About page only.

The Login link will take you to the login page, where you will be prompted to login using your UoM IT Account username and password. You will also be prompted to register with the site if you are not a user.

Once you log in, you will be taken to your site-wide User Home page, which provides information on which journals you are registered with, and in which role. If you log in from the journal level, you will be taken to your journal-specific User Home page, which lists only role information regarding that journal.

If you click the Register link while browsing at the site level, you will be asked to choose a journal to register with. If you click the Register link while browsing at the journal level, you will be presented with a registration form, or a message stating that registrations are not being accepted at this time if registration has been disabled.

Clicking the Search link will bring you to a comprehensive search page. If you are currently browsing at the site level, you will be able to choose whether to search across all journals on the site, or only against a particular journal. If you are browsing at the journal level, your search will only be performed against that journal's contents.

If you have already logged in, you will see a User Home link rather than the Login and Register links. Clicking this will take you to your site- or journal-specific User Home page.
The **Current** link takes you to the table of contents of the most-recently published issue. If the journal has no current material published, the page you see when clicking the link will say so.

The **Archives** link takes you to a listing of all published issues, including the most-recently published issue. You will be able to visit each issues' table of contents by clicking the issue title.

Sometimes you may see even more links in the Journal navigation bar. The Journal Manager may also have created custom links to appear here for example the **Announcements** link, which will take you to a page containing journal-specific announcements.

Other links included by the Journal Manager may take you to specific pages within the system, or even to other websites (see Journal Setup for more information). Neither the **Announcements** link nor the custom links are on by default.

**The Breadcrumb**

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

In this example, the Journal Manager is working on the Journal Setup. You can return to any of these pages by clicking the relevant breadcrumb link.
The Sidebar

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

<table>
<thead>
<tr>
<th>OPEN JOURNAL SYSTEMS</th>
<th>&quot;Developed By&quot; block</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal Help</td>
<td>&quot;Journal Help&quot; block</td>
</tr>
<tr>
<td></td>
<td>&quot;Profile&quot; block</td>
</tr>
</tbody>
</table>

SUBSCRIPTION
My Subscriptions

NOTIFICATIONS
• View
• Manage

JOURNAL CONTENT
Search
Search Scope
All
Search

Browse
• By Issue
• By Author
• By Title
• Other Journals

INFORMATION
• For Readers
• For Authors
• For Librarians

The "Developed By" block at the very top of the navigation bar provides a link to the Public Knowledge Project website.

The "Journal Help" block provides a link to the system's context-sensitive help. No matter where you are in the system, you can click this link to access help specific to the matter at hand.

The "Journal Content" block allows you to search journal content. You can search all fields, or you can pick a particular field (for example, authors) to search against. If you are browsing at the site level, you can search
against all journals; if you are browsing a specific journal, you will only be able to search against that particular journal.

The "Notifications" block allows you to manage and view your journal-specific notifications.

The "Subscription" block will only appear for subscription journals, and display information about the user's account.

The "Browse" block allows you to browse lists of journal content. You can browse by Issue, Author and Title. Additionally, if you click the Other Journals link, you will be brought to the site-level journal list.

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

Unregistered visitors to a journal can normally register as a Reader, Author, and/or Reviewer.

Users will not be able to self-register for an Editorial Role (Editor; Section Editor; Copyeditor; Layout Editor; Proofreader; Subscription Manager; or Journal Manager); if you need to be enrolled at that level, ask a current Journal Manager or Site Administrator.

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

Registering

To register with a journal, click the Register link on the topmost navigation bar.

Users need to select the journal to register with

and fill out the ensuing form

Privacy Statement

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

**UoM patrons**

Users will be prompted to login using your UoM username and password.

![Sign in to UoM IT Account](image)

**Non UoM patrons**

Non UoM patrons need to contact the respective Journal Manager by email to supply them with the adequate authentication information.

**Select Journal**

Once logged in the user will be directed to select the journal to be associated with

![User Home](image)
**Edit profile**

Once the journal is selected, users need to edit their profile.
Site Administration

The Site Administrator can generate as many journal sites as required, and oversee the administration of each journal site that is created. To create a new journal please send an email on ojs.lib@um.edu.mt

In email please include Journal Manager’s details such as name, surname, UoM IT Account username, email and telephone number

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 enrolls the Editors, Section Editors, Copyeditors, Layout Editors, Proofreaders, and Reviewers.

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

Getting Started

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

You will see a menu of options to choose. From here, you will be able to fulfil all of your tasks as the Journal Manager
The Journal Manager's Management Pages allow you to configure the journal's web site, policies, and workflow. This can be done through the Five-Step Setup Process, found by selecting Setup.
The Five-Step Setup Process

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

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

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

Complete as many of the sections as possible, but remember that you can always go back and fill in additional details as they become available. Default options are often pre-selected for common functions.
You can get started quickly by filling in the most important information first (journal name, principal contact, etc.) and returning to the details later.
Step 1: Details
Fields marked with an ‘*’ are mandatory.

1.1 General Information
This form provides general details about your journal, including the name, initials, abbreviation, print or online ISSN and Mailing address.

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

The journal's physical location and mailing address.
1.2 Principal Contact
This position, which can be treated as a principal editorship, managing editorship, or administrative staff position, will be listed on the homepage of the journal under Contact, along with the Technical Support Contact.

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.
1.4 Email Identification

OJS makes extensive use of internal email forms. This signature will appear on the bottom of all emails sent by the system. You can also enter a bounce address, where any undeliverable email messages will be sent.

1.5 Publisher

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

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

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

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

1.7 Sources of Support

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

Additional sources can be added by clicking the “Add Contributor” button.
1.8 Search Engine Indexing
To assist the users of search engines in discovering this journal, provide a brief description of the journal and relevant keywords.

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

When ready click on 'Save and Continue'. Remember that you can always go back and fill in additional details as they become available.
**Step 2: Journal Policies**

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

The following forms will add information to the About the Journal section of your journal web site. Fields marked with an ‘*’ are mandatory.

### 2.1 Focus and Scope of Journal

The statement, which will appear in About the Journal, that speaks to authors, readers, and librarians about the range of articles and other items which the journal will publish.

**Step 2. Journal Policies**

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

#### 2.1 Focus and Scope of Journal

Enter a statement below, which will appear in About the Journal, that speaks to authors, readers, and librarians about the range of articles and other items which the journal will publish.

---

### 2.2 Peer Review

#### 2.2 Review Policy

Outline the journal's peer review policy and processes for readers and authors, including the number of reviewers typically used in reviewing a submission, the criteria by which reviewers are asked to judge submissions, typical time taken to conduct the reviews, and the principles for recruiting reviewers. This will appear in About the Journal.
2.2 Review Guidelines

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

2.2 Review Process

OJS supports two models for managing the review process. The Standard Review Process is recommended because it steps reviewers through the process, ensures a complete review history for each submission, and takes advantage of automatic reminder notification, and standard recommendations for submissions.

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

- **Email-Attachment Review Process**
  Editors send Reviewers the request to review with the submission attached to the email. Reviewers email editors their assent (or regrets), as well as the review and recommendation. Editors enter Reviewers' assent (or regrets), as well as the review and recommendation on the submission's Review page, to record the review process.
2.2 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.

2.3 Privacy Statement

The privacy statement will appear on the About the Journal section of your web site.
2.4 Editor Decision
Check this box to add all co-authors to the include list when an Editor sends a Notify Author email.

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.

2.6 Journal Archiving
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.

Open Journal Systems supports the LOCKSS (Lots of Copies Keep Stuff Safe) system to ensure secure and permanent preservation of your journal. You have several options for including your journal in a LOCKSS network:

Other LOCKSS Networks
If you believe you have access to one or more of the LOCKSS networks listed here, please contact the appropriate LOCKSS Network administrator to apply for inclusion. Completing the form below will allow for inclusion of your journal in those networks. No content will be preserved before you have notified the appropriate network.

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

See other versions of a LOCKSS license.
2.7 Potential Reviewer Database
You can add a link to a relevant Reviewer database here.

When ready click on ‘Save and Continue’. Remember that you can always go back and fill in additional details as they become available.
31

Step 3: Submissions
Fields marked with an ‘*’ are mandatory.

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

<table>
<thead>
<tr>
<th>Order</th>
<th>Item Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The submission has not been previously published, nor is it before another journal for consideration (or an explanation has been provided in Comments to the Editor).</td>
</tr>
<tr>
<td>2</td>
<td>The submission file is in OpenOffice, Microsoft Word, RTF, or WordPerfect document file format.</td>
</tr>
<tr>
<td>3</td>
<td>Where available, URLs for the references have been provided.</td>
</tr>
<tr>
<td>4</td>
<td>The text is single-spaced; uses a 12-point font; employs italics, rather than underlining (except with URL addresses); and all illustrations, figures, and tables are placed within the text at the appropriate points, rather than at the end.</td>
</tr>
<tr>
<td>5</td>
<td>The text adheres to the stylistic and bibliographic requirements outlined in the <strong>Author Guidelines</strong>, which is found in About the Journal.</td>
</tr>
<tr>
<td>6</td>
<td>If submitting to a peer-reviewed section of the journal, the instructions in <strong>Ensuring a Blind Review</strong> have been followed.</td>
</tr>
</tbody>
</table>
3.2 Copyright Notice
This copyright notice will appear on the About the Journal page.
3.3 Competing Interests

This allows for the option of requiring authors and/or reviewers to file a Competing Interests statement.
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. In OJS, authors index their own submissions, but this information can be changed by the editors prior to publication.

<table>
<thead>
<tr>
<th>Academic Discipline and Sub-Disciplines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Useful when journal crosses disciplinary boundaries and/or authors submit multidisciplinary items.</td>
</tr>
<tr>
<td>Provide examples of relevant academic disciplines for this journal:</td>
</tr>
<tr>
<td>(E.g., History; Education; Sociology; Psychology; Cultural Studies; Law)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subject Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
</tr>
<tr>
<td>URL</td>
</tr>
<tr>
<td>(E.g., Mathematics Subject Classification; Library of Congress Classification)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Keywords</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide examples of keywords or topics as a guide for authors:</td>
</tr>
<tr>
<td>(E.g., Photosynthesis; Black Holes; Four-Color Map Problem; Bayesian Theory)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refers to geo-spatial location, chronological or historical coverage, and/or characteristics of research sample.</td>
</tr>
<tr>
<td>Provide examples of relevant geo-spatial or geographical terms for this field:</td>
</tr>
<tr>
<td>(E.g., Iberian Peninsula; Stratosphere; Boreal Forest; etc.)</td>
</tr>
<tr>
<td>Provide examples of relevant chronological or historical terms for this field:</td>
</tr>
<tr>
<td>(E.g., European Renaissance; Jurassic Period; Third Trimester; etc.)</td>
</tr>
<tr>
<td>Provide examples of research sample characteristics for this field:</td>
</tr>
<tr>
<td>(E.g., Age; Gender; Ethnicity; etc.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type (Method/Approach)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide examples of relevant research types, methods, and approaches for this field:</td>
</tr>
<tr>
<td>(E.g., Historical Inquiry; Quasi-Experimental; Literary Analysis; Survey/Interview)</td>
</tr>
</tbody>
</table>
3.5 Register Journal for Indexing
You can register the contents of your journal with the Open Archives registry, which will allow for comprehensive searching among sites that adhere to the OAI Protocol for metadata harvesting.

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.

3.7 Citation Markup Assistant
You can configure a Citation Markup Assistant for your Editors, Section Editors and Copyeditors to use during the manuscript editing process. This Assistant will allow Editors to check the Author's list of references against external databases, and will convert approved citations into NLM XML or any of a variety of citation styles for inclusion into the final galley files. If you enable this feature, Authors will be asked to submit their list of references in a separate field during Step 3 of the submission process.

Configuration of the Citation Markup Assistant consists of 4 general steps:

**Enabling the Citation Markup Assistant.** Unless this step is done, Editors will not have access to the Assistant.
Configuring the Citation Extraction Services. These services allow the system to extract and parse citation information from the list of references the Author provides.

Configuring the Citation Database Connectors. These connectors will allow Editors to check the extracted citations against external databases for added accuracy.

Configuring the Citation Output. This allows you to configure which kind of citation style Editors will use to compare extracted citations against.

When ready click on ‘Save and Continue’. Remember that you can always go back and fill in additional details as they become available.
Step 4: Management

Here you can set the journal’s Open Access policy, control how users register on the site and for what, and enable user action and email logging. Fields marked with an ‘*’ are mandatory.

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.

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

Publication Schedule

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

Format

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

- Volume
- Number
- Year
- Title

Starting Point and Frequency

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

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

Note: Leave items blank if not used with this journal, and editors can re-set numbers in the publishing process.
4.3 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.
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. The instructions will be made available to copyeditors, authors, and section editors in the Submission Editing stage.
4.6 Layout Editors

The Layout Editor transforms the copyedited versions of the submission into galleys in HTML, PDF, PS, etc., files which the journal has elected to use for electronic publication. If you have individuals to act as layout editors, select the first option. If your editors will be acting as layout editors, select the second option. The instructions will be made available to layout editors and section editors on the Editing page of each submission.
Under the Layout Editors section, you also have the option of supporting reference linking, and providing editable instructions to your Layout Editors.

Reference Linking

To enable readers to locate online versions of the work cited by an author, the following options are available.

1. Add a Reading Tool

   The Journal Manager can add "Find References" to the Reading Tools that accompany published items, which enables readers to paste a reference’s title and then search pre-selected scholarly databases for the cited work.

2. Embed Links in the References

   The Layout Editor can add a link to references that can be found online by using the following instructions (which can be edited).

   - Provide Layout Editors with instructions.

Layout Instructions for Reference Linking

1. Copy the title of the work referenced in the Reference list (it appears to be too common a title—e.g., "Book"—then copy author and title).

2. Paste the reference’s title between the %22's, placing a + between each word: http://scholar.google.com/scholar?q=%22MATERIAL-TITLE+HERE%22

3. Add the phrase OS SEARCH to the end of each citation in the submission’s References list.

4. Turn that phrase into a hyperlink by highlighting it and using Word’s Insert Hyperlink tool and the URL prepared in #2.

C. Enabling Readers to Search for References with a DOI

1. While the submission is still in Word, copy a batch of references into CrossRef Test Query http://www.crossref.org/freeTestQuery/.

2. Paste each DOI that the Query provides in the following URL (between
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. The instructions will be made available to proofreaders, authors, layout editors, and section editors in the Submission Editing stage.

When ready click on ‘Save and Continue’. Remember that you can always go back and fill in additional details as they become available.
Step 5: The Look

Fields marked with an ‘*' are mandatory.

5.1 Journal Homepage Header

Titles and images can be added to give your journal a unique appearance and identity. Title Text will add the text to the top of your journal web site’s home page (NOT to all the other pages -- see below). Title Image allows you to upload an image-based header (.gif, .jpg, .png). A common size is 800px X 150px, but it can be as large or as small as you wish. The Logo Image allows you to add an image to the upper left corner of your site’s home page. Often these are square image (e.g., 125px X 125px). Whether using Title Images or Logo Images, remember to hit the Upload button before moving on to the next step.
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. Experiment with what looks good, but be careful not to make it too busy! The appearance of your home page will be the first impression many have of your journal, and if it doesn't look professional, it will undermine its credibility.

Journal Description

Add a brief 20-25 word description in text/HTML which will appear just below the navigation links.

Homepage image

Add an image or graphic file to the middle of the page.

Current issue

Add the table of contents for the current issue (if available).

Additional Content

Add the following content, using text/HTML, which will appear below the homepage image, if one is uploaded.
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.

5.3 Journal Page Header

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

Journal title
- Title text
- Title image

Journal Logo
Logo image

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

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

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

5.5 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, move them up or down the sidebar, or eliminate them altogether. You can also find a thorough guide on customing your journal's style and using themes in the online documentation.
5.7 Information
Each of these descriptions will appear on your journal's web site, on the right sidebar at the bottom by default. If you can change the information here, and if you delete the information, the link will automatically disappear from your site's sidebar.

For Readers
We encourage readers to sign up for the publishing notification service for this journal. Use the Register link at the top of the home page for the journal. This registration will result in the reader receiving the Table of Contents by email for each new issue of the journal. This list also allows the journal to claim a certain level of support or readership. See the journal's Privacy Statement, which assures readers that their name and email address will not be used for other purposes.

For Authors
Interested in submitting to this journal? We recommend that you review the About the Journal page for the journal's section policies, as well as the Author Guidelines. Authors need to register with the journal prior to submitting or, if already registered, can simply log in and begin the five-step process.

For Librarians
We encourage research librarians to list this journal among their library's electronic journal holdings. As well, it may be worth noting that this journal's open source publishing system is suitable for libraries to host for their faculty members to use with journals they are involved in editing (see Open Journal Systems).
5.8 Lists
You can control the number of items to appear on any given list (e.g., 100 items will appear 25 per page over 4 pages), and the number of page links shown at the bottom of any list (e.g., 1, 2, 3, 4, Next).

When ready click on ‘Save and Continue’. Remember that you can always go back and fill in additional details as they become available.
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.

Creating “Announcement Types”

First, create a new Announcement Type by selecting Announcement Types and then Create Announcement Type.
Fill in the name for a new announcement type.

You may only have one or more types (e.g., Quarterly Issue, Special Issue etc.), and this does give you the opportunity to create others at anytime. You can also return here to edit this announcement type. Return to the main Announcement page by selecting Announcements.

Creating “Announcements”

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.
Fill in the announcement title, provide the short and detailed descriptions for the announcement, and specify the expiry date for the announcement to display.

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

**The Files Browser**

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

Creating a journal section:
Go to Management Pages and select Journal Sections

Select Create Section
Complete the form with the new section’s information, and check the appropriate options.

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

Section Editors

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

Available Section Editors

<table>
<thead>
<tr>
<th>USERNAME</th>
<th>NAME</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:porter@gmail.com">porter@gmail.com</a></td>
<td>Porter</td>
<td>ADD</td>
</tr>
</tbody>
</table>

This Section’s Editors

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

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

To create a new review form click on “Create Review Form”

Fill in title and description for a review form, then press Save button.

Back to the previous page, the title of a newly-created review form appears. Click on Edit link next to the title of review form, and then on Review Form page select Form Items to embody this review form.
Clicking on **Create New Item** on Form Items page leads one to **Create New Item** page, where one is able to describe the item, pre-define whether the item is obligatory to be completed to the reviewer, and choose an item type from the dropdown menu: single word text box, single line text box, extended text box, checkboxes, radio buttons, drop-down box. If you already have a form ready you can ‘cut’ and ‘paste’.

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

Once a review form is ready it can be activated, and it is ready to be used by editors when assigning a reviewer. The created form items of one review form can be selected and copied to another review form. Once done, these form items will be migrated to the target review form.
Masthead

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

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

After you entered the Position Titles used by your journal, you will be presented with the list:
From here you can add members to each title by clicking on Membership; rearrange their display order by using the up and down arrows; or send an email to all members of a group by clicking on the email icon next to the title name.

**Prepared Email**

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

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

<table>
<thead>
<tr>
<th>EMAIL TEMPLATES</th>
<th>SENDER</th>
<th>RECIPIENT</th>
<th>SUBJECT</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVIEW REQUEST</td>
<td>Section Editor</td>
<td>Reviewer</td>
<td>Article Review Request</td>
<td>EDIT</td>
</tr>
<tr>
<td>REVIEW DECLINE</td>
<td>Reviewer</td>
<td>Section Editor</td>
<td>Unable to Review</td>
<td>EDIT</td>
</tr>
<tr>
<td>REVIEW REMIND</td>
<td>Section Editor</td>
<td>Reviewer</td>
<td>Submission Reminder</td>
<td>EDIT</td>
</tr>
<tr>
<td>REVIEW REMIND AUTO</td>
<td>Reviewer</td>
<td></td>
<td>Automated Submission Reminder</td>
<td>EDIT</td>
</tr>
</tbody>
</table>

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

---

**Edit Email**

This email from the Section Editor to a Reviewer requests that the reviewer accept or decline the task of reviewing a submission. It provides information about the submission such as the title and abstract, a review due date, and how to access the submission itself. This message is used when the Standard Review Process is selected in Journal Setup, Step 2. (Otherwise see REVIEW_REQUEST.Attached.)

**Email Template (English)**

Subject

Article Review Request

I believe that you would serve as an excellent reviewer of the manuscript, "$articleTitle", which has been submitted to "$journalName". 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 "$weekLaterDate") to indicate whether you will undertake the review or not, as well as to access the submission and to record your review and recommendation. The web site is "$journalUrl".

The review itself is due "$reviewDueDate".

If you do not have your username and password for the journal's web site, you can use this link to reset your password (which will then be emailed to you along with your username). "$passwordResetUrl".

Submission URL: "$submissionReviewUrl"
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 select Reading Tool Options in the Reading Tools page.

### Reading Tools

**Status**
- Reading tools: Disabled
- Related Items: Disabled

**Configuration**
- Reading Tool Options
- Related Item Sets

**Management**
- Validate URLs for Reading Tools

**Sharing**
- Configure AddThis
Checking **Enable Reading Tools**... will activate them for your journal

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

Under **Related Item Tools**, you will find a dropdown menu of subject areas. You can select the subject that best matches your journal to provide additional reading tools that are specific to that discipline.
Returning to the Reading Tools menu, you can now choose **Related Item Sets** to customize the Reading Tools for your journal; from there, you will see a list of subject areas, and the configuration options for each of them.

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

### Related Item Sets

<table>
<thead>
<tr>
<th>TITLE</th>
<th>LOCALE</th>
<th>VALIDATE</th>
<th>METADATA</th>
<th>CONTEXTS</th>
<th>EXPORT</th>
<th>DELETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Art &amp; Architecture</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Astrophysics</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Biology</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Business</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Chemistry</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Cognitive Science</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Computer Science</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Economics</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Education</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Environment</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>General Science</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Generic</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Humanities</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Life Sciences</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Mathematics</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Music</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Physics</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>en_US</td>
<td>VALIDATE</td>
<td>METADATA</td>
<td>CONTEXTS</td>
<td>EXPORT</td>
<td>DELETE</td>
</tr>
</tbody>
</table>

- **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. 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.

<table>
<thead>
<tr>
<th>METADATA</th>
<th>CONTEXTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>TITLE</td>
<td>ABBREV</td>
</tr>
<tr>
<td>Author's work</td>
<td>Other Works</td>
</tr>
<tr>
<td>Look up terms</td>
<td>Look up terms</td>
</tr>
<tr>
<td>Related studies</td>
<td>Related studies</td>
</tr>
<tr>
<td>Government policy</td>
<td>Gov Policy</td>
</tr>
<tr>
<td>Book searches</td>
<td>Book searches</td>
</tr>
<tr>
<td>Relevant portals</td>
<td>Relevant portals</td>
</tr>
<tr>
<td>Databases</td>
<td>Databases</td>
</tr>
<tr>
<td>Online forums</td>
<td>Online forums</td>
</tr>
<tr>
<td>Data sets</td>
<td>Data sets</td>
</tr>
<tr>
<td>Pay-per-view</td>
<td>Pay-per-view</td>
</tr>
<tr>
<td>Media reports</td>
<td>Media reports</td>
</tr>
<tr>
<td>Web search</td>
<td>Web search</td>
</tr>
</tbody>
</table>

1 - 12 of 12 Items

- **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.

[File upload interface]
**Statistics and Reports**

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

**Statistics**

OJS provides a summary of your journal’s usage. You can use the checkboxes to make these statistics available to readers in About the Journal.

### Stats & Reports

#### Journal Statistics

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

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

![Checkboxes for journal statistics](image)

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issues published</td>
<td>1</td>
</tr>
<tr>
<td>Items published</td>
<td>1</td>
</tr>
<tr>
<td>Total submissions</td>
<td>3</td>
</tr>
<tr>
<td>Peer reviewed</td>
<td>3</td>
</tr>
<tr>
<td>Accept</td>
<td>2 (67%)</td>
</tr>
<tr>
<td>Decline</td>
<td>1 (33%)</td>
</tr>
<tr>
<td>Resubmit</td>
<td>(%)</td>
</tr>
<tr>
<td>Days to review</td>
<td>0</td>
</tr>
<tr>
<td>Days to publication</td>
<td>0</td>
</tr>
<tr>
<td>Registered users</td>
<td>8 (8 new)</td>
</tr>
<tr>
<td>Registered readers</td>
<td>5 (5 new)</td>
</tr>
</tbody>
</table>

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

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

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

Report Generator

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

- Articles Report
- Timed Views Report
- COUNTER Report
- Subscriptions Report
- View Report
- Review Report
- OJS usage statistics report

Generate custom report

Payment Options

Fee Payment Options

By default the Payment Module is disabled. To enable, click on the Payments link and in the ‘Fee Payment Options’ page 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.
You can then enable and customize **author fees** for article submission, fast-track peer review, and article publication.

### Author Fees

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

<table>
<thead>
<tr>
<th>Fee</th>
<th>Fee Name</th>
<th>Fee Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Submission</td>
<td>0</td>
<td>Authors are required to pay an Article Submission Fee as part of the submission process to contribute to review costs.</td>
</tr>
<tr>
<td>Fast-Track Review</td>
<td>0</td>
<td>With the payment of this fee, the review, editorial decision, and author notification on this manuscript is guaranteed to take place within 4 weeks.</td>
</tr>
<tr>
<td>Article Publication</td>
<td>0</td>
<td>If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publication costs.</td>
</tr>
</tbody>
</table>

### Waiver Policy

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

Reader Fees

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

- Purchase Issue
  - Fee
  - Fee Name
  - Fee Description

- Purchase Article
  - Fee
  - Fee Name: Purchase Article
  - Fee Description: The payment of this fee will enable you to view, download, and print this article.

- Only Restrict Access to PDF version of Issues and articles

General fees for donations and association membership

General Fees

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

- Association Membership
  - Fee
  - Fee Name: Association Membership
  - Fee Description: The payment of this fee will enroll you as a member in this association for one year and provide you with free access to this journal.

- Donations to journal
  - Fee Name: Donations to Journal
  - Fee Description: Donations of any amount to this journal are gratefully received and provide a means for the editors to continue to provide a journal of the highest quality to its readers.
Enabling gift fees will activate payments for gift subscriptions, allowing journal readers to buy gift subscriptions for other readers.

**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.

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

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.
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.

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

---

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

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

**Subscription Manager**

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

**Subscription Information**

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

Upon subscription expiry, readers may be denied access to all subscription content, or to those published after subscription expiry date. Useful reminders can be sent out to your subscribers, informing them of expiry dates. The Site Administrator will need to enable and configure scheduled tasks within config.inc.php to allow for these options to be enabled.

Subscription Expiry Reminders

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

- Notify subscribers by email $1$ week(s) before subscription expiry.
- Notify subscribers by email $1$ week(s) after subscription expiry.

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

Online Payment Notifications

Use this option to allow for automatic notification of online payments for the Subscription Manager

Online Payment Notifications

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

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

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

Note: To enable these options, the Journal Manager must enable the online payments module, including online payments for subscriptions, under Reader Fees.
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. It is also possible to send readers a notice when content becomes open, and to add a statement about delayed open access to the About 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.

**Payments**
Selecting the Payments option here will take you immediately to the Fee Payment Option page.
**Individual Subscriptions**

The Individual Subscriptions section allows you to see all individual subscribers, edit their accounts, and create new ones. To create a new individual subscription, select the Create New Subscription link.

### Select User

If the user already has an account with the journal, you can sign them up here using their Select link. Once that is selected, fill in the resulting form.

### Create New Subscription

If the new subscriber does not already have an account, you can create one for them by selecting the Create New User link at the bottom of the screen. You then need to fill in the resulting form. After filling in the form, you will then need to Select them from the list of existing users and fill in their subscription details (as in the previous section).
**Institutional Subscriptions**

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

Select Institutional Subscriptions to configure or manage institutional subscriptions. You can view/edit any existing institutional subscriptions, or use the Create New Subscription link to create a new one.

**Institutional Subscriptions**

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

**Select Subscription Contact**

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

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

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

Emailing Users

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

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

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

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

Occasionally, a user may have created two separate accounts (using two different email addresses), or you may find yourself in a situation where one or more users have to be removed entirely from the system. To accomplish either task, you must use the Merge Users feature.

Select Merge Users from the Journal Management User Home page. On the resulting page, select a user you wish to merge with another user (or select more than one user to merge at once by using the checkboxes next to the account names). In this example, Library has two accounts. Therefore, we will select one of the Library and merge with the other.

This action has effectively deleted one of the Library accounts from the system. To remove garbage, test or spam accounts, simply merge the unwanted accounts into your Journal Manager account. Again, you can merge more than one account at a time by clicking the checkboxes next to the unwanted accounts.
Editorial workflow

1. Creating an Issue
Editors are responsible for creating new Issues

To create an issue, click on Create Issue

Journal Identification
Select the type of issue from the drop down menu.
Enter the required issue information in the Identification section.
**Access**

If the **Journal Manager** has enabled subscription control for the journal (available under Journal Setup Step 4.1), the **Editor** has the option of enabling subscription control on a per-issue basis. Switching **Access Status** to **Subscription** will allow access only to subscribed users and institutions, while switching **Access Status** to **Open Access** will allow the entire issue's contents to be openly available. Furthermore, if **Access Status** is switched to **Subscription**, the **Editor** can provide an **Open Access** date, at which time the issue's content will be openly available.

![Access Options](image)

**Cover**

You can upload a **Cover Image** for the issue as well as a **Stylesheet** of your preference. Enter the **Cover Caption** section if needed and tick the **Display** options according to the Journal's needs.

![Cover Options](image)

After entering all the information required, click **Save**

Further editing of already created issues can be done by click on the **issue number**.

![Future Issues](image)

A **Future issue** is now created. Please note that a current issue can be created instead if the user wants to publish content immediately. Further editing of already created issues can be done by click on the **issue number**.
2. Submitting an Article

To upload a new article, click on New Submission to progress.

At this stage, the five-step process of submitting an article will be initiated.
Submission Step 1: Starting the Submission

Read the checklist and tick the boxes accordingly.
Note that to make a submission, the Author must agree with the terms.

Step 1. Starting the Submission

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

Encountering difficulties? Contact [Contact information] for assistance.

Submission Checklist

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

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

Journal's Privacy Statement

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

You can also add any comments to the Editor.

Comments for the Editor

Enter text (optional)

Click Save and continue.
**Submission Step 2: Uploading the Submission**

In this step, click **Choose File**.
After locating and selecting the file from your computer, click **Open**.
It is now important to click **Upload**.
Upon uploading the selected file, click **Save and Continue**.
Submission Step 3: Entering the Submission’s Metadata

In this step, all relevant Metadata to the article is entered by the Author.

**Author**

If there is more than one author for the submission, their relevant information can be added by clicking on Add Author.

**Title and Abstract**

A title and a comprehensive abstract need to be included with each article submitted.
Indexing
In the next sections, you are required to enter **Indexing** information, basically the language of the article. This will help for retrievability purposes.

Contributors and Supporting Agencies
This field should be used when third party organizations, agencies, etc. are providing funding or support for the work being submitted, e.g. when getting EU research grants.

References
Enter **References list** used in the submission article (check with editor what reference style is used in the respective journal).

Click **Save and Continue** when details are ready.
Submission Step 4: Uploading Supplementary Files

This step is for those submissions that have any supplementary files. If the submission has a Supplementary file, click Choose File. After locating and selecting the file from your computer, click Open. It is now important to click Upload. Upon uploading the selected file, click Save and Continue.

If there are no Supplementary files, click Save and Continue.
**Submission Step 5: Confirming the Submission**

This is the final step to submit the submission. This step provides a summary of the submission. Click **Finish Submission**.

---

**Step 5. Confirming the Submission**

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

To submit your manuscript to [Journal](http://example.com) click Finish Submission. The submission’s principal contact will receive an acknowledgement by email and will be able to view the submission’s progress through the editorial process by logging in to the [Journal](http://example.com) website. Thank you for your interest in publishing with [Journal](http://example.com).

**File Summary**

<table>
<thead>
<tr>
<th>ID</th>
<th>ORIGINAL FILE NAME</th>
<th>TYPE</th>
<th>FILE SIZE</th>
<th>DATE UPLOADED</th>
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</thead>
<tbody>
<tr>
<td>47</td>
<td>00-</td>
<td>DOCX</td>
<td>Submission File</td>
<td>16KB</td>
</tr>
</tbody>
</table>

[Finish Submission] [Cancel]

---

After clicking **Finish Submission**, this Submission completion screen will show.

---

**Active Submissions**

Submission complete. Thank you for your interest in publishing with Library Testing Journal.

If this submission is in a format that is ready to be published without further review, editing, or layout work, it can be placed directly in the last stage of the Editing queue by [CLCING HERE](http://example.com). (Note: Only journal editors have this option for their submissions.)

- [Active Submissions](http://example.com)
3. Accepting or Rejecting the Submitted Article

The Editor will receive a notification that a new submission has been submitted to the Journal. The new submissions are shown in main screen of each Journal.

**Unassigned Submissions**

Click on the Unassigned submission to view the submission’s details

---

**Assigning Submissions**

Click on the submission title.
Assigning Section Editor

The Editor has the option of assigning a Section Editor for the editing process of the submission. The roles of Sections Editors would have been previously assigned by the Journal Manager according. Until a Section Editor is assigned to a section, notification of submissions will go to the Editor, who will need to manually select a Section Editor. However, once a Section Editor has been added to a specific section, all submissions to this section will go directly to him/her, bypassing the Editor completely.

Section editors will be assigned subject to the Journal’s needs, journals with insufficient HR compliment managing the journal, will only have one Editor performing both tasks.

Selecting Section Editors

Click on Assign to select the Section Editor responsible for the Submission

Rejecting the Submitted Article

Editors can reject articles subject to the relevancy of the article to the journal in line with the journal submission policies
4. Assigning Article to Reviewers

Selecting a Reviewer can be done by Editor or Section Editor according to the journal. This can be done by clicking Review in the navigation menu.

**Selecting Reviewer**

Click on Select Reviewer
Choose the reviewer by clicking Assign of the relevant name. (Multiple reviewers can be assigned to the same article)

Thus the article will be assigned to the specific Reviewer as seen below.
**Sending email to Reviewer**

By clicking on the small envelope, can send an email to the **Reviewer**

Finally by clicking the envelope icon a prepared email (editable) has to be sent by the **Editor** to the **Reviewer**.

---

**Reviewer Assigned**

On the **User Home**, the respective article will appear as **In Review** in the editors section and **Active** in the **Reviewer** section.

---

**User Home**

---

**My Journals**

**Library Testing Journal**

**Journal Manager**

<table>
<thead>
<tr>
<th>Editor</th>
<th>0 Unassigned</th>
<th>1 In Review</th>
<th>2 In Editing</th>
<th>[Create Issue] [Notify Users]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>3 Active</td>
<td>0 Archive</td>
<td></td>
<td>[New Submission]</td>
</tr>
<tr>
<td>Reviewer</td>
<td></td>
<td>1 Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In the **Editor Home** page, the article will also show as **In Review**
Submission in Review

Item are highlighted indicating the action required by Editor.

Notes

1. Highlighted items indicate action is required by an editor, labelled as follows:
   - A Reviewer has been assigned but not notified by email
   - All Reviewers have returned with their comments, but no decision is recorded
   - Author has uploaded a revised manuscript
   - Reviewer is overdue to confirm peer review invitation
   - Reviewer is overdue to complete review

2. "Due" is filled in when reviewer accepts request to review; it displays number of weeks to review's due date or (-) weeks that it is overdue.
5. Reviewing

When an Editor assigns a submission to a Reviewer, the Reviewer will get an email that he has a pending submission and in the Reviewer section of the User Home, the article will show as Active.

Accept or Reject Reviewing Assignment

Click Active link and to proceed select the submission by clicking on the title of the submission, as indicated below.

In the Review page, the Reviewer will have some details about the submission to be reviewed.

And the scheduled date for the completion of the reviewing.
The **Reviewer** must now decide to either accept or decline the review task by selecting either one of the links “Will do the review”, or “unable to do the review”.

Irrespective of the decision, this will lead to prepared email (editable) which will be sent to the **Editor**.

**Reviewing of Article and Feedback Submission to Editor**

Once the review task has been accepted the Reviewer can now download the article for review, by clicking the link highlighted.

**Downloading article**

The article has to be downloaded, and reviewed using a word processor. The **Reviewer** can add comments or amend the article altogether, and save it to be sent back to the **Editor**.
Compiling comment to Authors and Editors

The Reviewer also has the ability to send direct comments to both the Editor and Author (through the Editor) or just the Editor, by clicking the Review callout icon as indicated above.

Once the user clicks the Review callout icon, a pop-up window will open, as shown below. In this window the Reviewer can include comments for the Editor and Author. Click Save

Uploading reviewed document and other relevant files

The Reviewer can upload other files that may be deemed relevant for Editor or Author to consult and also re-upload reviewed article with comments.

Further recommendations

Once the review is finalised, the last step is to enter a recommendation using the dropdown menu.

Then the Reviewer has to click Submit Review to Editor
This will lead to a prepared email (editable) to the Editor, making the necessary recommendations.
Once the selected recommendations and the email have been sent to the Editor and Author, the article has now gone through **Round 1** of the reviewing stage. The article in the **Submission in Review** page will be updated and the colour changed according to status of the submitted article i.e. *the reviewers have returned their comments.*

### Submissions in Review

- **Title:** ME AND MY SHADOW
- **Submission Date:** 08-19
- **Ruling:** MP

### Notes

1. Highlighted items indicate action is required by an editor, labelled as follows:
   - A Reviewer has been assigned but not notified by email
   - All Reviewers have returned with their comments, but no decision is recorded
   - Author has uploaded a revised manuscript
   - Reviewer is overdue to confirm peer review invitation
   - Reviewer is overdue to complete review

2. "Due" is filled in when reviewer accepts request to review; it displays number of weeks to review's due date or (-) weeks that it is overdue.

In the **Review** page, the submission shows that **Reviewer A** has reviewed the submission and has recommended that **Revisions are Required**
6. Forwarding Reviewed Article and Feedback to the Author

It is through the Review page that the Editor has to forward the reviewed article and the review comments suggested by the Reviewer.

**Recording Decisions**

Tick Let author view file and click on Record so that Author can see reviewed article.

Read the reviews suggested by the reviewer and act accordingly by selecting the required decision from the dropdown menu. Click Record Decision (and upload any additional files).

**Notifying Author**

The Editor has to notify the Author by sending the prepared email (editable). By clicking the No Comments callout icon, Editor can include further comments to the Author.
Including Reviewer Comments to email

Clicking on Import Peer Reviews will add the review comments sent by Reviewer to the Author.
7. Revising Submission

In the **User Home** page, the submission has passed on from the **Reviewer** to the **Author** and can be seen as **Active** in the **Author** section. Click on Active to check the submission’s status.

### Active Submissions

In the **Status** column, the **Author** can see that the article is in the review process. For example, in this instance, the submission is **In Review** and that **Revisions are Required**.
Summary

Clicking on the article title will give the Author a summary of the submission, and Authors can subsequently check what revisions are required by Reviewer and Editor by clicking on Review. In the Summary page the Author can also edit the metadata supplied during the initial submission.

#11 Summary

### Submission

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authors</td>
<td>Mark</td>
</tr>
<tr>
<td>Title</td>
<td>Me and my shadow</td>
</tr>
<tr>
<td>Original file</td>
<td>11-47-J-SPA.DOCX 2015-08-19</td>
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<td>Section</td>
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<td>Mark</td>
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### Status

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<tbody>
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### Submission Metadata

#### Authors

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</thead>
<tbody>
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Principal contact for editorial correspondence.

#### Title and Abstract

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<tr>
<td>Abstract</td>
<td>Shadows are related to the angles of the sun</td>
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#### Indexing

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#### Supporting Agencies

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#### References

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<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>References</td>
<td>—</td>
</tr>
</tbody>
</table>
Checking Reviewer’s Requests

Downloading document
The article has to be downloaded, and reviewed using a word processor. The Author can download the reviewed document from the Peer Review section in the Review page (in case the submission was reviewed by more than one Reviewer, these will be listed under each other)

Checking comments
In the Editor Decision section in the Review page, Authors can access the requests by the Reviewer (sent through Editor) by clicking on the Editor/Author Email Record callout icon

A pop-up window will open showing the comments sent by the Reviewer/s
Uploading Updated Document

Once the **Author** finishes all necessary modifications, the new file can be re-uploaded, through the **Editor Decision** section in the **Review** page.

Notifying Editor

Click email icon to **Notify Editor** that the required modifications have been made.
8. Further Peer-Reviewing (subject to Reviewer’s suggestions during Round 1)

Once the Author has uploaded the modified version and sent the email, the Editor can access the document through the User Home page.

On the Submissions in Review page, the article is highlighted in light blue showing that the Author has uploaded a revised manuscript, and the Editor should act according to the Reviewer’s suggestions during Round 1.

Notes

1. Highlighted Items indicate action is required by an editor, labelled as follows:
   - A Reviewer has been assigned but not notified by email
   - All Reviewers have returned with their comments, but no decision is recorded
   - Author has uploaded a revised manuscript
   - Reviewer is overdue to confirm peer review invitation
   - Reviewer is overdue to complete review

2. “Due” is filled in when reviewer accepts request to review; it displays number of weeks to review’s due date or (-) weeks that it is overdue.
If in Round 1 the **Reviewer** suggested further reviewing, the manuscript has to go through the peer-reviewing process (i.e. follow steps 4-7) and to do so the **Editor** must record the his decision in the **Editor Decision** section in the **Review** page, by choosing **Resubmit for Review** and clicking on **Record Decision**

![Editor Decision](image)

Tick **Authors Version** and click on **Resubmit**

![Editor Decision](image)

In the Review page the **Round 2 Peer Review** section is added. Now the article has to go through **steps 4-7**
9. Copyediting

Copyediting is the process of editing the text to improve flow, clarity, grammar and wording.

Once the Author has uploaded the modified version and sent the email, the Editor can access the document through the User Home page.

On the Submissions in Review page, the article is highlighted in light blue showing that the Author has uploaded a revised manuscript, and the Editor should act according to the Reviewer’s suggestions.
Accepting Submission

If the Reviewer has suggested that no further reviewing is necessary, the Editor can move forward with the process. This is done in the Editor Decision section in the Review page, by choosing Accept Submission and clicking on Record Decision.

![Editor Decision](image)

Now the submission can be sent for the Copy Editing.

Sending Manuscript for Copyediting

Tick latest Authors Version and click on Send to Copyediting.

![Editor Decision](image)
**Initial Copyediting**

**Assigning Copyeditor**

The Editor has the option of assigning a Copyeditor for the editing process of the submission. The role of Copyeditor would have been previously assigned by the Journal Manager according.

Copyeditors will be assigned subject to the Journal’s needs, journals with insufficient HR compliment managing the journal, might have the Editor performing this tasks.

The Editor, has to manually select a Copyeditor through the Copyediting section of the Editing page.

In the Copyeditors page, click on Assign to select the Copyeditor.
Notify Copyeditor

Once the Copyeditor is assigned, and the Editor has to inform and officially request the Copyeditor to proceed.

Click on the email icon, the Editor can send the prepared email (editable) to the Copyeditor.
**Downloading Manuscript**

In the **User Home** page the **Copyeditor** can access the manuscripts that have been edited and the ones which are awaiting his editing.

In the **Active Submission** page, the **Copyeditor** can select the manuscripts awaiting the **Initial Copyediting**.

The **Copyeditor**, can download the manuscript from the **Copyediting** section of the **Editing** page.

**Uploading Copyedited manuscript**

The article has to be downloaded, and **Copyedited** using a word processor. Once the **Initial Editing** is complete, the **Copyeditor** can upload the new file, through the **Copyediting** section of the **Editing** page.
The **Copyeditor** can include any comments he deems fit by clicking on the **Copyedit Comments** callout icon at the bottom of the **Copyediting** section of the **Editing** page. The **Copyeditor** has to click on the email icon to notify the **Author** and **Editor** that the **Initial Copyediting** is **Complete**.

This email will be sent to **Author** and **Editor**.

---

**Send Email**

- **To**: Mark
- **Subject**: [LTJ] Copyediting Completed
- **Body**: We have now copyedited your submission "Me and my shadow" for Library Testing Journal. To review the proposed changes and respond to Author Queries, please follow these steps:
  1. Log into the Journal using URL below with your username and password (use Forget link if needed).
  2. Click on the file at 1. Initial Copyedit File to download and open copyedited version.
  3. Review the copyediting, making changes using Track Changes in Word, and answer queries.
  4. Save file to desktop and upload it in 2. Author Copyedit.
  5. Click the email icon under COMPLETE and send email to the editor.

---
**Author Copyediting**

Authors can either access the Copyedited manuscript from the email received or from their User Home page.

In the Active Submissions page the manuscript is shown as In Editing and the Author can access the document by clicking on In Editing.

The Author can now download the manuscript.
The **Author** should accept/reject any changes made during the **Initial Copyediting**, as appropriate. When finished with the revisions, the **Author** should upload the revised document on the **Copyediting** section of the **Editing** page. To complete the process, the **Author** has to click on the email icon to notify the **Editor** and **Copyeditor** the **Author Copyediting is Complete**.

If the **Author** accepts all the changes suggested by the **Copyeditor** he can just click on the **Complete** email icon.

This email will be sent to **Editor** and **Copyeditor**.

---

**Copyediting**

**COPYEDIT INSTRUCTIONS**

**Copyeditor**: Mr. Luke

**REVIEW METADATA**

1. **Initial Copyedit**: 2015-08-22 2015-08-22 2015-08-22
   - **File**: 11-53-25.docx
2. **Author Copyedit**: 2015-08-22 2015-08-22
   - **File**: None
   - **Choose File**: No file chosen
   - **Upload**
3. **Final Copyedit**: -- -- --
   - **File**: None

**Copyedit Comments**: No Comments

---

**Send Email**

**To**: Mr. Luke @um.edu.mt
**CC**: Mark @um.edu.mt

**Attachments**
- **Choose File**: No file chosen
- **Upload**

**Subject**: [LJ] Copyediting Review Completed

**Body**:

Mr. Luke,

I have now reviewed the copyediting of the manuscript, "Me and my shadow," for Library Testing Journal, and it is ready for the final round of copyediting and preparation for Layout.

Thank you for this contribution to my work,

Mark
Final Copyediting

The Copyeditor will verify changes made by the Author and incorporate the responses to the Author queries to create a final manuscript. When finished, the Copyeditor will upload the final document on the Copyediting section of the Editing page.

Clicking on the Complete email icon, will finalize the Copyediting process and an email will be sent to the Editor.
10. Layout Editing

Assigning Layout Editor

The Editor has the option of assigning a Layout editor for the formatting of the articles prior to publication. The role of Layout editor would have been previously assigned by the Journal Manager according.

Layout editors will be assigned subject to the Journal’s needs, journals with insufficient HR compliment managing the journal, might have the Editor performing this tasks.

The Editor, has to manually select a Layout Editor through the Layout section of the Editing page.

In the Layout Editors page click on Assign to select the Layout Editor.
**Notify Layout Editor**

Once the Layout Editor is assigned, the Editor has to inform and officially request the Layout Editor to proceed.

Click on the email icon, the Editor can send the prepared email (editable) to the Copyeditor.
**Downloading Manuscript**

In the **User Home** page the **Layout Editor** can access the manuscripts which are awaiting his editing.

Clicking on the title will give the **Layout Editor** access to the respective articles awaiting editing.

The **Layout Editor**, can download the manuscript from the **Layout** section of the **Editing** page.
Uploading Manuscript

Layout version
The article has to be downloaded, and the layout modified using a word processor. Once the Layout Version is complete, the Layout editor can upload the new file, through the Layout section of the Editing page. To do so the Layout editor has to tick the Layout Version, Choose File and click on Upload.

Galley
Apart from the Layout Version, the Layout editor has to prepare the Galley1 for publishing. To upload the Galley tick the Galley, Choose File and click on Upload.

The Layout editor can upload more than one Galley file (according to the formats needed by the Journal).

1 A Galley is the penultimate proof of a page being typeset for printing, before it is set (imposed) as a page of a book or booklet. This is usually in HTML (produced by using Dreamweaver) or a PDF (using Adobe Acrobat, Microsoft Word or Open Office).
In the **Edit the Layout Galley** section of the **Galley** page, the **Layout Editor** can find information related to each galley including the file type based on its suffix (e.g., PDF, HTML), as well as provide information on the file size, language (if your journal is multilingual), original file name, etc. The label is added automatically, and will appear as such on the journal's **Table of Contents** in association with the item published. The **Layout Editor** can also manually label the file.

When uploading an **HTML Galley**, the **Edit page** provides the option to upload a stylesheet (unique to the submission) or images.
Once the necessary modification are saved in the **Edit the Layout Galley** section, the **Galleys** will show in the **Layout** section of the **Editing** page, and the **Galleys** can be edited or deleted accordingly.

The **Layout Editor** can include any comments he deems fit by clicking on the **Layout Comments** callout icon at the bottom of the **Layout** section of the **Editing** page.

If the **Author** had uploaded any **Supplementary Files**, they will already be in place. They will to be published in the journal in their original file format by default, unless the journal has a special policy with regard to their preparation (similarly with Figures or illustrations). Even if the policy is to publish them in their original format, editors should consult the files to ensure that they are legible and to see whether they can be readily made to further conform to journal style and standards, and inform **Layout Editor** accordingly.

The **Layout Editor** has to click on the **Complete** email icon to notify the **Editor** that the **Layout Editing** and the **Galleys** are ready.
This email will be sent to the **Editor**

---

**Send Email**

**To:** Mark

**CC:** Mark

**BCC**

- Add Recipient
- Add CC
- Add BCC

- Send a copy of this message to my address
  (email: @um.edu.mt)

**Attachments**

- Choose File
- No file chosen
- Upload

**Subject**

[LTJ] Galleys Complete

**Body**

Mark

Galleys have now been prepared for the manuscript, “Me and my shadow,” for Library Testing Journal and are ready for proofreading. If you have any questions, please contact me.

Mr. Luke
11. Proofreading Galley

The Author and Proofreader will proofread the Galley in their various formats for typographical and formatting errors and pass them on to the Layout Editor to produce the Final Galley.

The Author and Proofreader need to follow the Proofreading Instructions provided by the Journal

Notifying Author

The Editor has to inform and officially request the Author to proceed with the Proofreading

Send Email

Clicking on the email icon, the Editor can send the prepared email (editable) to the Author
**Downloading Galley**

The **Author** needs to access the **Galley** from the **User Home** page

---

**User Home**

**My Journals**

<table>
<thead>
<tr>
<th>Library Testing Journal</th>
<th>Journal Manager</th>
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<tbody>
<tr>
<td>Editor</td>
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<tr>
<td>0 In Review</td>
<td>4 In Editing</td>
</tr>
<tr>
<td>1 Active</td>
<td>[Create Issue]</td>
</tr>
<tr>
<td>Reviewer</td>
<td>[Notify Users]</td>
</tr>
</tbody>
</table>

The **Galley** can be downloaded from the **Layout** section on the **Editing** page

---

**Layout**

<table>
<thead>
<tr>
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<td>1. PDF VIEW PROOF</td>
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</tr>
<tr>
<td>2. HTML VIEW PROOF</td>
<td>11-58-1-PR.HTML 2015-08-22</td>
</tr>
</tbody>
</table>

Supplementary Files | FILE

None

Layout Comments | No Comments

---

Any **Proofreading** comments have to be recorded by using the **Proofreading** callout icon

---

**Proofreading**

<table>
<thead>
<tr>
<th>Proofreader</th>
<th>ASSIGN PROOFREADER</th>
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</thead>
<tbody>
<tr>
<td>REQUEST</td>
<td>UNDERWAY</td>
</tr>
<tr>
<td>1. Author</td>
<td>-</td>
</tr>
<tr>
<td>2. Proofreader</td>
<td>-</td>
</tr>
<tr>
<td>3. Layout Editor</td>
<td>-</td>
</tr>
</tbody>
</table>

**Proofreading Corrections** | No Comments

PROOFING INSTRUCTIONS
In the **Comments** box of the resulting **Corrections** pop up window, the **Author** needs to include the modifications that must be carried out.

When ready the **Author** needs to click on the **Acknowledge** email icon so that **Editor** can proceed to assign a **Proofreader**
**Assigning Proofreader**

The Editor has the option of assigning a Proofreader for checking galley files for typographical and formatting errors. The role of Proofreader would have been previously assigned by the Journal Manager according.

Proofreaders will be assigned subject to the Journal's needs, journals with insufficient HR compliment managing the journal, might have the Editor performing this task.

The Editor, has to manually select a Proofreader through the Proofreading section of the Editing page.

In the Proofreaders page click on Assign to select the Proofreader

**Notify Proofreader**

Once the Proofreader is assigned, the Editor has to inform and officially request the Proofreader to proceed.

Clicking on the email icon, the Editor can send the prepared email (editable) to the Proofreader.
[LTJ] Proofreading Request

Mr. Luke

The submission "Me and my shadow" to Library Testing Journal now needs to be proofread by following these steps.
1. Click on the Submission URL below.
2. Log into the journal and view PROOFING INSTRUCTIONS.
3. Click on VIEW PROOF in Layout and proof the galley in the one or more formats used.
4. Enter corrections (typographical and format) in Proofreading Corrections.
5. Save and email corrections to Layout Editor.
6. Send the COMPLETE email to the editor.

Manuscript URL:
https://www.um.edu.mt/library/1j/webapp/index.php/lj/proo
**Downloading Galley**

The **Proofreader** needs to access the manuscript from the **User Home** page.

In the **Active Submission** pages, the **Proofreader** can select the submissions awaiting **Proofreading**.

The **Galley** can be downloaded from the **Layout** section on the **Editing** page.

Any Proofreading comments have to be recorded using the **Proofreading Corrections** callout icon.
In the Comments box of the resulting Corrections pop up window, the Proofreader needs to include the modifications that must be carried out.

When ready the Proofreader needs to click on the Acknowledge email icon so that Layout Editor can proceed with finalizing the Galley.
Notifying Layout Editor

The Editor has to inform and officially request the Layout Editor to proceed with modifying the Galley with the corrections supplied by Author and Proofreader.

Clicking on the email icon, the Editor can send the prepared email (editable) to the Layout Editor.
Downloading Galley

The Layout Editor need to access the Galley from the User Home page

Select Title marked as Initial

The Final Version can be downloaded from the Layout section on the Editing page

Any Proofreading comments recorded by the Author and Proofreader can be seen from the Proofreading callout icon
In the Comments box of the resulting Corrections pop up window, the Layout Editor can check the corrections suggested by the Author and Proofreader.

Once downloaded, the layout can be modified using a word processor and saved according to the required formats (pdf, html, etc.).

**Uploading Final Galley**

In the Layout section of the Editing page, click on Edit.
In the **Edit a Galley** section of the **Galley** page, choose the new replacement file and click on **Save**.

When ready the **Layout Editor** needs to click on the **Acknowledge** email icon.
Clicking on the email icon, the **Layout Editor** can send the prepared email (editable) to the **Editor** so that the **Editor** can proceed to **Publish**.
12. Publishing Submission

The submission is now ready for publishing.

Scheduling

In the Scheduling section of the Editing page, the Editor can now schedule the article for publication, by assigning the article to an issue from the dropdown menu issue and clicking Record.

Once the issue has been selected, the Editor can now select the publishing date of the issue and click Record when ready.

Publishing Issue

To publish the Issue, the Editor must access the issue from the Editor Home page, and select Future Issues.
Select and click on the issue that will be published

**Future Issues**

<table>
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<tr>
<th>ISSUE</th>
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<td>DELETE</td>
</tr>
<tr>
<td>VOL 1, NO 3 (2015)</td>
<td>0</td>
<td>DELETE</td>
</tr>
<tr>
<td>VOL 1, NO 4 (2015)</td>
<td>1</td>
<td>DELETE</td>
</tr>
<tr>
<td>VOL 10, NO 2 (2016)</td>
<td>0</td>
<td>DELETE</td>
</tr>
</tbody>
</table>

1 - 4 of 4 Items

Click on **Publish Issue**

**Vol 1, No 4 (2015)**

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**Articles**

<table>
<thead>
<tr>
<th>AUTHORS</th>
<th>TITLE</th>
<th>REMOVE</th>
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<tbody>
<tr>
<td></td>
<td>ME AND MY SHADOW</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

The issue can be accessed by clicking on **Current** on the Navigation menu

The **Table of Contents** of each respective issue will show the Title, Author, and links to access articles

**Vol 1, No 4 (2015)**

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<tr>
<th>Me and my shadow</th>
<th>PDF HTML</th>
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</thead>
<tbody>
<tr>
<td>Mark</td>
<td></td>
</tr>
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</table>
YouTube Videos

These video clips were created by Public Knowledge Project

General

Introduction to PKP and OJS
Getting Help
Registering and Logging In
User Home Page
Roles in OJS

Journal Managing

Managing Users
Creating New Users
Journal Setup Step 1 - Details
Journal Setup Step 2 - Policies
Journal Setup Step 3 - Submissions
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Masthead
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Submitting an Article
Responding to a Submission
Assigning a Section Editor
Assigning a Reviewer
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Responding to the Reviews
Making the Editorial Decisions
The Author’s Revisions
Assigning a Copyeditor
The Initial Copyedit
The Final Copyedit
Assigning a Layout Editor
Layout Editing
Assigning a Proofreader
Completing the Proofreading
Scheduling a Submission
Publishing the Issue
Making Changes After Publication