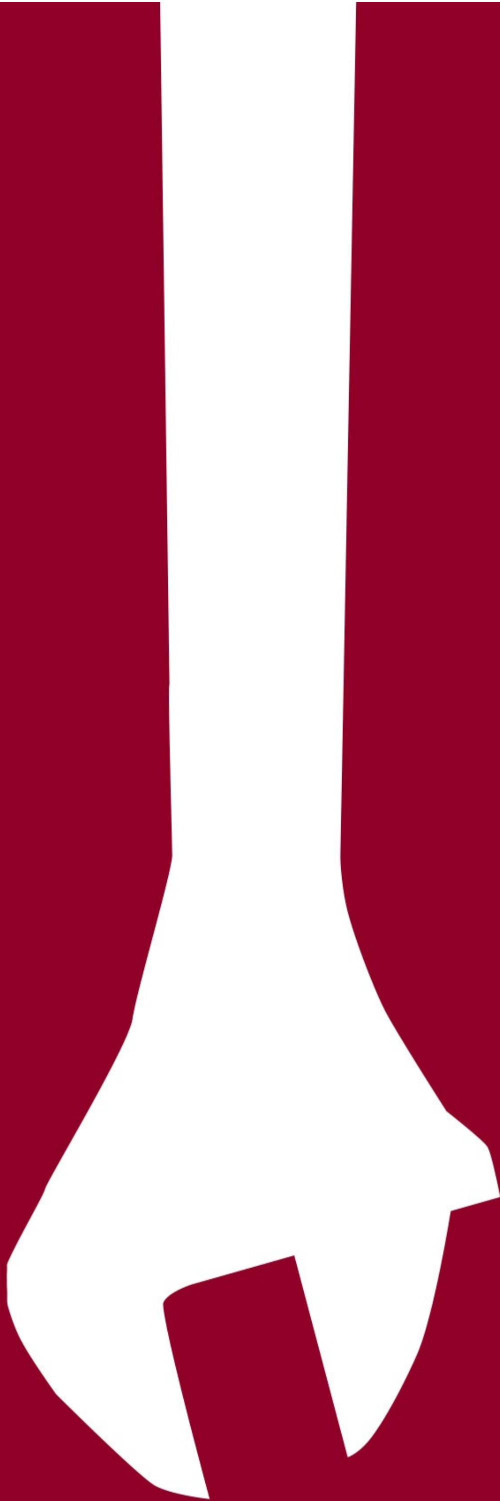


Learning OJS

A Visual Guide to Open Journal Systems

Version 2.4.6

The Public Knowledge Project

2015

Table of Contents

1. Front Matter
2. Chapter 1: Introduction
   i. System Background
   ii. Management Structure
   iii. Support
3. Chapter 2: Site Administration
   i. Installation
   ii. Site Management
   iii. Administrative Functions
4. Chapter 3: Journal Management
   i. Management Pages
      i. Announcements
      ii. Files Browser
      iii. Journal Sections
      iv. Review Forms
      v. Languages
      vi. Masthead
      vii. Payments
      viii. Prepared Emails
      ix. Reading Tools
         i. Reading Tools Options
         ii. Related Item Sets
         iii. Contexts
      x. Setup
      xi. Stats & Reports
      xii. Subscriptions
      xiii. System Plugins
      xiv. Import/Export Data
   ii. Users
      i. Users Enrolled in This Journal
      ii. Create New User
      iii. Merge Users
   iii. Roles
      i. Journal Manager
      ii. Editor
      iii. Section Editor
      iv. Copyeditor
      v. Layout Editor
      vi. Proofreader
      vii. Reviewer
      viii. Author
      ix. Reader
      x. Subscription Manager
5. Chapter 4: Submission Process
   i. Author Guidelines
   ii. Submission Requirements
   iii. Indexing and Metadata
   iv. Supplementary Files
6. Chapter 5: Editorial Process

i. Editor's Role
   i. Submissions
      i. Unassigned
      ii. In Review
      iii. In Editing
      iv. Archives
   ii. Submission Summary
      i. Submission Management
      ii. Submission Metadata
   iii. Ensuring a Blind Peer Review
ii. Section Editor's Role
   i. Submissions
      i. In Review
      ii. In Editing
      iii. Archives
   ii. Review
      i. Review Version
      ii. Peer Review
      iii. Editor Decision
   iii. Editing
      i. Copyediting
      ii. Layout
      iii. Proofreading
iii. Reviewer's Role
   i. Submissions
   ii. Review
iv. Author's Role
   i. Submissions
   ii. Review
      i. Peer Review
      ii. Editor Decision
   iii. Editing
      i. Copyediting
      ii. Proofreading
v. Copyeditor's Role
   i. Submissions
   ii. Copyediting
vi. Layout Editor's Role
   i. Submissions
   ii. Layout
   iii. Proofreading
vii. Proofreader's Role
   i. Submissions
   ii. Proofreading

7. Chapter 6: The Publishing Process
   i. Create Issue
   ii. Schedule Submissions
   iii. Table of Contents
   iv. Publish
8. Chapter 7: Journal Web Site
   i. Home
   ii. About
   iii. User Home

iv. Register & Profile
v. Current & Archives
vi. Search & Browse
vii. Reading Tools

Learning OJS: A Visual Guide to Open Journal Systems, Version 2.4.6

Chapter 1: Introduction

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.

System Background

OJS is a journal and web site management and publishing system. OJS covers all aspects of online journal publishing, from establishing a journal website to operational tasks such as the author's submission process, peer review, editing, publication, archiving, and indexing of the journal. OJS also helps to manage the people aspects of organizing a journal, including keeping track of the work of editors, reviewers, and authors, notifying readers, and assisting with the correspondence.

OJS is flexible and scalable. A single installation of OJS can support the operation of many journals. Each journal has its own unique URL as well as its own look and feel. OJS can enable a single editor to manage all aspects of a journal and the journal's website, or OJS will support an international team of editors with diverse responsibilities for a journal's multiple sections.

OJS supports the principle of extending access. This system is intended not only to assist with journal publishing, but to demonstrate how costs of journal publishing can be reduced to the point where providing readers with "open access" to the contents of the journal may be a viable option. The case for open access is spelled out over a wide series of articles stemming from this project which are freely available under Publications at the University of British Columbia Public Knowledge Project website.

The origins of OJS. The system was first released in 2002 as a research and development initiative at the University of British Columbia, with the support of the Social Sciences and Humanities Research Council of Canada, Max Bell Foundation, the Pacific Press Endowment, and the MacArthur Foundation. Its continuing development is currently overseen by the Simon Fraser University Library. For more information, see the Public Knowledge Project website.

Management Structure

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. Unassigned Queue: Items begin here and are assigned to one or more editors.
2. Submission Review: Items undergo peer review and editorial decision.
3. Submission Editing: Items undergo copyediting, layout, and proofreading. The submission is assigned to an issue for publication.
4. Table of Contents: Items are ordered for publication and are published.

Editorial Roles

(Assigned in Journal Management)

Journal Manager: Sets up the journal and staffs editorial roles (can also serve as an Editor and other roles).

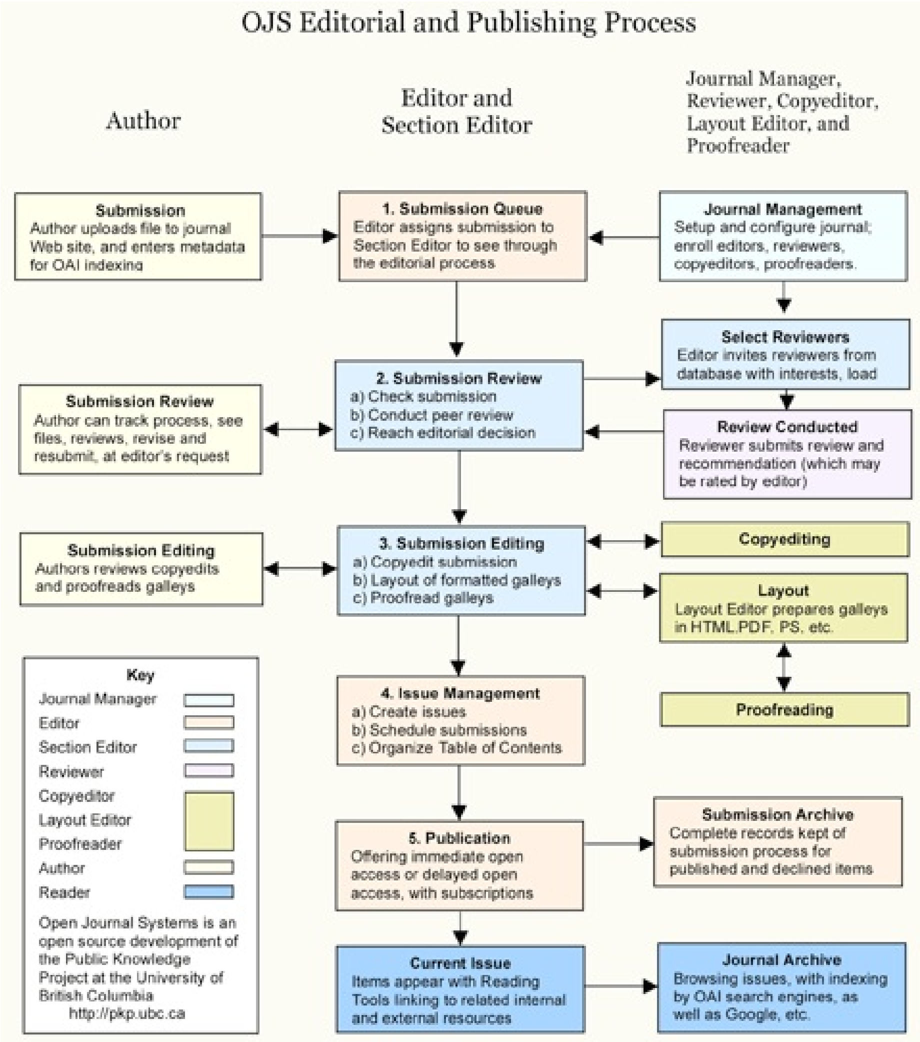
Editor: Oversees editorial process; can assign submissions to Section Editors to see through Submission Review and Submission Editing; undertakes scheduling of content and publishing of journal.

Section Editor: Oversees Submission Review and possibly Submission Editing for assigned submissions.

Copyeditor: Works with submissions to improve grammar and clarity, poses questions to author on possible errors, and ensures strict adherence to journal's bibliographic and textual style.

Layout Editor: Transforms copyedited submissions into galleys in HTML, PDF, and/or PS files in the proper format for electronic publishing.

Proofreader: Reads galleys for typographic and formatting errors.


OJS Editorial and Publishing Process
Author
Editor and Section Editor
Journal Manager, Reviewer, Copyeditor, Layout Editor, and Proofreader
Submission
Author uploads file to journal Web site, and enters metadata for OAI indexing
1. Submission Queue
Editor assigns submission to Section Editor to see through the editorial process
Journal Management
Setup and configure journal; enroll editors, reviewers, copyeditors, proofreaders.
Select Reviewers
Editor invites reviewers from database with interests, load
2. Submission Review
a) Check submission
b) Conduct peer review
c) Reach editorial decision
Submission Review
Author can track process, see files, reviews, revise and resubmit, at editor's request
Review Conducted
Reviewer submits review and recommendation (which may be rated by editor)
Submission Editing
Authors reviews copyedits and proofreads galleys
3. Submission Editing
a) Copyedit submission
b) Layout of formatted galleys
c) Proofread galleys
Copyediting
Layout
Layout Editor prepares galleys in HTML,PDF, PS, etc.
Proofreading
Key
Journal Manager
Editor
Section Editor
Reviewer
Copyeditor
Layout Editor
Proofreader
Author
Reader
Open Journal Systems is an open source development of the Public Knowledge Project at the University of British Columbia
http://pkp.ubc.ca
4. Issue Management
a) Create issues
b) Schedule submissions
c) Organize Table of Contents
5. Publication
Offering immediate open access or delayed open access, with subscriptions
Submission Archive
Complete records kept of submission process for published and declined items
Current Issue
Items appear with Reading Tools linking to related internal and external resources
Journal Archive
Browsing issues, with indexing by OAI search engines, as well as Google, etc.

Support

A support forum and issue reporting system for technical issues can be accessed via the PKP web site.

Users who have questions about interacting with a particular journal site using OJS or that journal's policies are encouraged to contact the journal's principal or support contacts, listed on the journal web site's About page.

Chapter 2: Site Administration

This journal management and publishing system is designed to be installed and administered on a local web server. Once installed, the Site Administrator can use it to create as many individual journals as are required, and oversee the administration of each journal site that is created.

Installation

Open Journal Systems is an open source application that can be freely downloaded and installed on nearly any desktop or server computer.

License

OJS is distributed under the terms of the GNU General Public License. A copy of the license terms for redistributing OJS code in original or modified form is included with the OJS download.

System Requirements

A server environment meeting the following requirements is recommended:

- PHP >= 4.2.x
- MySQL >= 3.23.23 (including 4.x) or PostgreSQL >= 7.1 (including PostgreSQL 8.x)
- Apache >= 1.3.2x or >= 2.0.4x or Microsoft IIS 6+
- Operating system: Any OS that supports the above software, including Linux, BSD, Solaris, Mac OS X, and Windows

OJS has currently only been tested on MySQL and PostgreSQL, although other database management systems supported by ADOdb may work (in full or partially). Compatibility reports and/or code patches for alternative DBMSs are welcome.

Download

OJS can be downloaded from the Public Knowledge Project web site.

Installation

OJS comes with a web-based installation script that guides the system administrator through the installation process. Alternately, a command-line installation tool is available.

1. Download the OJS archive.
2. Decompress the OJS archive on your web server and place it in the desired location in your web documents tree: $ tar -zxf ojs-2..*tar.gz $ mv ojs-* /var/www/myjournal
3. Make the following files and directories writable (i.e., using chown or chmod):
    - config.inc.php (optional)
    - public
    - cache
    - cache/t_cache
    - cache/t_config
    - cache/t_compile
    - cache/_db
4. Open a web browser to the location of your OJS installation (e.g., http://www.mydomain.com/myjournal/) and follow the on-screen instructions to complete the install. See docs/README for more information on the installation process.

Site Management

OJS is designed to be a multi-journal system, and the Site Administrator is responsible for configuring site-level settings and creating new journals to be hosted within a single site. Journal sites are entirely independent, with the exception of user accounts; while a user may participate in any combination of roles and journals, the same email address and username will refer to the same user regardless of journal.

Site Settings

Basic information is entered by the Site Administrator that is applicable to all journals hosted by the site, including the site title and description, and contact information.

Journal Redirect. This setting can be used to ensure that all requests are redirected to a particular journal web site. Typically this setting is used when a site is hosting a single journal.

Hosted Journals

As OJS allows any number of individual and distinct journal web sites to be generated, new journals can be created and managed at any time. Each journal that is created can be accessed through a unique URL based on a path name entered by the Site Administrator. Journals that are currently in the process of being set up and configured can be hidden from the main site until such time that they are ready to go live.

Languages

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

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

Authentication Sources

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

Administrative Functions

Several administrative functions are available in the site administration area. These functions should generally be used with caution, as improper use could lead to unexpected results.

System Information

General information about the server environment and OJS version history (including past upgrades). A web-based interface to view the OJS configuration file is also provided.

Expire User Sessions

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

Clear Data Caches

Clears all cached data, including locale information, help cache, and search cache.

Clear Template Cache

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

Merge Users

The Merge Users feature allows the Site Administrator to merge two user accounts into a single account, transferring edit assignments, submissions, and numerous other records from one account to the other and effectively deleting the first.

Unlike the Merge Users feature available to a Journal Manager, which is limited to merging user accounts for a particular journal, the Merge Users feature under Site Administration allows the Site Administrator to merge any two user accounts, even across different journals.

The following items are transferred:

- Article authorship
- Public comments on articles
- Article notes
- Editor assignments and decisions
- Review assignments
- Layout editor assignments
- Proofreader assignments
- Article email and event log entries
- Reviewer access keys
- Roles
- Subscriptions (please see below)

The following items are **not** transferred:

- Sessions
- Notification status (i.e. whether the user has signed up to receive notifications about journal news)
- Editorial team memberships
- Section Editor status on sections
- User profile information (e.g. first name, last name, etc.)

This feature should be used with caution, as it is not reversible and involves the transfer of records from one user to another.

For subscriptions, the merge feature performs the following actions: For Individual Subscriptions, the second user's subscription is transferred to the first user only if is valid and if the first user does not already have a valid subscription for a given journal. For Institutional Subscriptions, all of the subscriptions for which the second user is identified as the contact person are transferred to the first user, who becomes the new contact person for the subscriptions.

Chapter 3: Journal Management

Management Pages

The Journal Manager configures and customizes the system to suit the journal through a series of Management Pages. The process begins with the five steps of the Setup, but also includes the Sections which are to be published, the tone and wording of the journal's standard emails, the languages available to the journal, the statistics it publishes, and the tools it makes available to readers.

Announcements

OJS enables Journal Managers to post announcements that are then available to readers who visit the site. Posted announcements appear on the Announcements page and, optionally, on the journal's homepage.

Deploying the Announcement Module

The Journal Manager must indicate in Journal Setup Step 4.4 that the journal will be publishing announcements. In addition, the Journal Manager must indicate whether or not announcements should be displayed on the journal's homepage. An introductory text may also be provided that will appear at the top of the Announcements page.

Creating Announcements

The Journal Manager creates an announcement by selecting the announcement type (if any), indicating a title for the announcement, and providing both a short description and a full description of the announcement. The short description text is displayed to readers as a summary of the announcement, whereas the full description text is displayed when readers select to read the full announcement details. An optional expiry date may also be specified. Announcements that include an expiry date will no longer be displayed to readers once the expiry date has passed.

Files Browser

The Files Browser allows Journal Managers to peruse and manage the hierarchy of files uploaded for the journal (including all files uploaded through submission management). Files can be viewed, deleted, and moved as if interacting with a local file system.

Note that this is intended as an administrative facility only and will generally not be needed in the day-to-day management of the journal. Submission information is maintained as a combination of files and database records; deleting submission files with the Files Browser will not delete the associated database records.

Journal Sections

The Journal Manager is able to create different sections within the journal in Journal Sections, under Journal Management. A journal might typically include such sections as Articles, Book Reviews, Research Notes, Clinical Applications, Commentary, Editorial, etc.

If Section Editors are to be used, the Journal Manager is able to specify Section Editors who may be assigned to see through the editorial process those submissions that have been submitted to the Section. (The Editor assigns submissions in the Unassigned submissions queue to one of the designated Section Editors as part of the Editorial Process).

Sections may be presented in different formats or layout design within the journal. The Table of Contents, which the Editor arranges for each issue, will be divided into the Sections that have been created, although if there is no content for a particular Section in a given issue, the Section will not appear in the Table of Contents.

Creating a Section Policy

In setting up a Section, the Journal Manager should enter a brief Policy Statement for the Section, which will be made available to authors and readers in About the Journal under Section Policies. The statement should describe the scope of the Section and type of submissions sought. It should include information on whether submissions to the section are peer reviewed and indexed, whether the Section is open or restricted to invited work (or to Editors), the desired length for the articles, etc.

Specifying a Review Form

The Journal Manager can specify a custom review form to be used in place of the default free-form set of text boxes. The form chosen here will be the new default, but Editors will be able to override this default when choosing a reviewer, if need be.

Indexing the contents of a Section

Items in a section should be indexed if they contribute to the literature (which is not the case, for example, with a section devoted to conference announcements or job notices). The indexing option will enable authors to enter the relevant metadata for indexing the items which they submit. The metadata will be made available to research search engines that adhere to the Open Archives Initiative Metadata Harvesting Protocol and to other indexing services once the item has been published. Items in Sections that are indexed will also have their authors added to the Author List on the Search page and will be accompanied by the Reading Tools selected by the Journal Manager for this journal.

Enabling or Disabling Abstracts

Some sections, such as Book Reviews, will not require abstracts; this option allows the Journal Manager to disable abstracts for the section. When abstracts are disabled, they will not be requested in the article submission process, or displayed in the Table of Contents.

Configuring Item Identification

When presenting metadata to viewers or to external systems (e.g. via OAI harvesting), the item's type must be identified. For example, an item could be a peer-reviewed article, non-refereed article, invited article, etc.

Restricting the Contents of a Section

The Restrictions box should be checked for Sections of the journal (such as Editorials or Interviews) that are not open to author submissions in an unrestricted way. Restricted submissions must come from the editors or are invited. Such a section can only be submitted to by authors who are also registered as Editors or Section Editors.

Hiding the Section Title in the Table of Contents

It may be desirable to solicit submissions for a section and/or organize published articles into a section but hide the name of the section when presenting it to readers.

About

You may wish to remove information about this section from appearing in About the Journal. This is useful if, for instance, you have a Journal Section that only updates very occasionally, or an errata section.

Review Forms

By default, OJS allows Reviewers to enter their review findings via a simple two-field review form: one field for Editor-only text, and one for both Authors and Editors. The Journal Manager can extend this functionality by making custom review forms.

The Journal Manager can associate a custom review form with a Journal Section so that it will be the default form for that section; if more than one form is active, the Editor will also be able to override the default form when a reviewer is assigned to a submission.

Locked Reviews

Any number of review forms can be created; however, review form edits and deletions can be committed only until the form has been put to use (specifically, when an editor assigns a reviewer to a submission, and mandates they use a custom review form). As soon as a form has been put to use, it becomes locked; this happens to ensure a permanent review record. A used review form can be deactivated and removed from the list of forms that can be used; it can also be duplicated by using the Copy action. Both actions are discussed below.

Creating a Review Form

To create a custom review form, the Journal Manager must click the Review Forms link from the Journal Management page, and then click the Create Review Form link at the bottom of the resulting page. A form title and description must be entered. On clicking the Save button the Journal Manager will be returned to the main Review Forms page, where the new form will now be listed.

Managing Review Forms

The Journal Manager will now have a number of options available from the Review Forms page for each review:

Edit: Clicking the Edit link will allow the Journal Manager to change the form title and description. The Journal Manager will also be able to extend the form by clicking the Add Form Items subheading: the resulting page will list any form items (text fields; radio buttons, drop-down boxes and checkboxes; etc.) that have been added to the form, and allows for new items to be added by clicking Create New Item. When a new item is created, the Journal Manager can provide descriptive text, and can make the item mandatory for the Reviewer to complete. Once an item is created, it can be edited or deleted until the review form is locked due to use. Finally, the Journal Manager can click the Preview Form subheading to see what the form will look like to a Reviewer. The Edit option is only permitted until the review form has been used once, at which point the form is locked.

Activate/Deactivate: Clicking the Activate link will allow the form to be chosen as a default form for a journal section (this can be applied in Journal Sections from the Journal Management page), and to be selected by the Editor as an optional form at the time of review assignment. Deactivating the form removes it as an option from these locations, but does not delete the form.

Copy: The Copy action allows the Journal Manager to copy a review form that has already been used in its entirety. Clicking the Copy link will duplicate the form in the Review Forms list, and will populate the duplicated form with the original form's items. The Journal Manager can then change the form name, and edit the form items if need be.

The Journal Manager can also copy any form items from one editable form to another, pre-existing form. To do this, the Journal Manager must click the form name that includes the item to be duplicated; click the Form Items subheading; select the items to be duplicated by checking the box to the left of their name (or alternatively, by clicking the Select All button to choose all of them); choose the form that the items will be copied to from the drop-down menu; and then click Copy to commit the change. Please note that copied items can still be deleted while the form hasn't yet been locked; and that individual items cannot be copied from forms that have already been locked.

Preview: The Preview link allows the Journal Manager to see what the review form will look like to a Reviewer.

Delete: The Delete link only shows up if the form has not yet been locked. If clicked, the Journal Manager will be prompted on whether or not the delete action should indeed be carried through.

The Review Forms page also lists the number of reviews currently being processed against the listed review forms, and the number of reviews that have been completed using each form.

Languages

This system can support multi-lingual journals, as well as journals in languages other than English. Those languages that have been made available for the system by the Site Administrator are listed under Languages in Journal Management, and can in turn be selected for use with the journal site. If more than one language is selected under Supported Locales, visitors to the site will be able to toggle between languages via a drop-down menu in the navigation bar. Additionally, users will be able to enter form information in any enabled language.

Masthead

There are two methods the Journal Manager can use to define the Masthead for the journal, which appears in the Editorial Team page under About the Journal: using assigned editorial roles, and creating custom editorial team titles.

Generating The Editorial Team Using Assigned Editorial Roles

When this option is selected, the Editorial Team information in About the Journal will be automatically generated using the editorial roles defined in the Journal Manager's Roles pages. Users registered as Editors, Section Editors, Layout Editors, Copyeditors, and Proofreaders will be listed.

Generating The Editorial Team Using Custom Editorial Team Titles

If a Journal Manager wishes to have more control over the information presented in the Editorial Team page under About the Journal, they can enable this option from the Masthead page (see Journal Management). When this option is enabled, the various titles created under the Masthead page will be used to generate public Editorial Team information as well as information about other people related to the journal, if desired.

To create a custom title, the Journal Manager clicks on Create Position Title, enters the Title name (ie., Editor in Chief, Section Editors, Editorial Board, etc.), and decides whether the title will appear under the Editorial Team in About the Journal, or just under People in About the Journal. The Journal Manager can arrange the display order of Editorial Titles on the main Masthead page by using the up and down arrows, and can edit and delete titles if necessary.

To view, add and remove users to a specific title, the Journal Manager clicks on the Membership link beside the title name. This will display the current user list for that particular title. The Journal Manager can arrange the display order of listed members, and can delete members if necessary. To add a new member, the Journal Manager clicks Add Member, and can enroll a user from the list of journal members.

Payments

From the Journal Management page, the Journal Manager can enable the Fee Payment Module to accept payments, either via PayPal or through a manual process, for author fees and article access. The Fee Payment Module keeps track of paid users, and also displays fee information in the journal's About page. Additionally, with the Fee Payment Module enabled it is possible for users to renew subscriptions and memberships from their User Home page.

The Fee Payment module is split into three different subsections: Fee Payment Options, Fee Payment Methods, and Records.

Fee Payment Options

The first step to setting up the Payments module is to activate all desired options on the Fee Payment Options Page.

General Options

The Payments module can be turned on and off under General Options, and the currency can be selected as well. Please note that your currency selection in the Payments module should match your subscription currency, if subscriptions are also being used.

Author Fees

The Journal Manager can enable individual fees for Article Submission, Fast-Track Review, and Article Publication under the Author Fees heading. Additionally, the Journal Manager can edit the fee amounts, titles, and descriptions for each, and can edit a general waiver policy as well. All of this information will appear on the About page under Author Fees, and will also appear in the Author's submission process.

If enabled, the Article Submission fee must be paid by the Author before Step 5 of the article submission process is completed. Authors will be able to request a waiver and can still submit the article, however, but the request must be reviewed by the Editor from the Unassigned Submission page.

The Fast-Track Review fee, if enabled, is optional and as such does not have to be paid to complete the submission process. If paid, the submission is coloured grey in the Editor's submission tracking queues to note that it is a fast-track submission.

If the Article Publication fee is enabled, the Author must pay the requested fee before the article is published. This fee does not have to be paid at the time of article submission. The Author will receive notification from the Editor on acceptance of the article for publication, and must then log in and pay the Article Publication; this can be done from the Author's Active Submission queue. As with the Article Submission fee, the Author can request that this fee be waived as well.

Reader Fees

The Journal Manager can enable fee payments for Subscriptions, as well as for Article Purchase payments.

If Subscription payments are enabled, subscribed users will be able to renew their subscription from their User Home page. Please note that subscriptions are not automatically updated on receipt of payment. Subscription payments will appear on the Payment Records page with a link to the corresponding user subscription page, but the user's subscription will have to be manually renewed on that subscription page by either the Journal Manager or Subscription Manager.

If Article Purchase payments are enabled, access to subscription-protected content will be available on a per-article basis. Users must be registered with the journal to purchase content. Once purchased, users will have ongoing access to said content.

General Fees

Under General Fees, The Journal Manager can enable Association Membership fee payment and Donations to the journal.

If the Association Membership fee payment option is enabled, its description will appear in About the Journal, under Policies. Registered users will also have the option of paying membership fees from their User Home.

If the Donation fee payment option is enabled, a Donations link will appear, located on the right navigational bar by default. Clicking this link will allow registered users to donate to the journal by using whichever fee payment method the Journal Manager selects.

Fee Payment Methods

The Journal Manager has the option of enabling either Manual Fee Payment or PayPal Fee Payment from this page. This choice dictates whether users will encounter a PayPal or a Manual Fee Payment page wherever they wish to make a payment.

Manual Fee Payment

If this option is selected, the Journal Manager must also include instructions for users to make manual payments, ie., whom to contact, or where to mail a payment. These instructions will appear on a Manual Fee Payment page wherever a payment is required: at time of article submission, for example, or when a user wishes to renew a subscription or membership.

When the Manual Fee Payment is enabled, the Editor must manually mark Submission, Fast-Track Review and Publication fees as either paid or waived. This can be done from the submission Summary page, and appropriate records will appear on the payments Records page.

PayPal Fee Payment

If this option is selected, the Journal Manager must decide between a testing- or production-level URL to interact with PayPal's Instant Payment Notification (IPN) service, and must enter the correct seller account email address into the form provided.

Users will be given the ability to sign into PayPal and pay a fee wherever fee payment is required: at time of article submission, for example. After PayPal has processed the payment, the user will be prompted to return to the journal site and the processed fee will be added automatically to the Records page.

Records

The Records page keeps track of users making payments, payment type, time of payment, and other details.

Prepared Emails

The journal uses a variety of prepared emails to direct the Editorial and Publishing Processes. The emails are all addressed to the appropriate recipient(s) in advance (for example, the Section Editor notifies the Copyeditor that copyediting for a submission is ready to begin). The Journal Manager can edit default versions of these emails (available under Prepared Emails on the Journal Administration page). As well, the emails can be edited by the user before they are sent. The system automatically inserts relevant and specific information into the email prior to presenting it to the user to send (for example, the title and abstract of the submission in question or the date which a review is due). The email also provides the addressee with instructions to find their way to the appropriate web page, so that they can undertake the task requested of them.

Sending Emails

OJS uses email to coordinate the functioning of the editorial and publishing process. All of the prepared emails have default versions, which come up each time the relevant email icon is clicked. The default emails can edited by the Journal Manager at any point. As well, an email can be edited by the sender prior to mailing it. When an email icon is clicked, it will have the intended recipient automatically filled in, along with all of the pertinent information needed for the editorial or publishing function. The sender can add comments or further direction, as needed. The sender can alter the recipient's email address and additional recipients, except in those cases that involve the sending of passwords (for security reasons). Note that correcting a recipient's address does not alter the email address listed on their Profile page in this system. Correcting the recipient's email address on a permanent basis for this system requires notifying the Journal Manager, who has the authority to make such changes to users' profiles.

Reading Tools

The Journal Manager is able to select a set of Reading Tools that will appear in a frame to the right of all items in sections of the journal that are indexed (e.g., Articles and not Conference Announcements). 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.

In Reading Tool Options, the Journal Manager can select general Journal Item Tools, such as "About the Author", "How to Cite Item" and "Print Item", and can also select between a number of Related Item Tools (e.g., Humanities, Education, Physics, etc.), which will provide discipline- or area-specific resources. The Journal Manager is able to edit or delete existing Related Item Tools and add new ones as well. Also see Reading Tools under Journal Web Site.

Reading Tools Options

The Journal Manager can select one or all of the generic optional links to appear as part of the set of tools, to appear in a frame to the right of all items in sections of the journal that are indexed (e.g., Articles and not Conference Announcements). The Journal Manager can also select a discipline- or area-based set of Reading Tools, shown as Related Items to be displayed. The Journal Manager can examine, edit, delete or add to the tools in each Related Items set by going to Related Item Sets, under Reading Tools.

The same set of Reading Tools appears with every item in the indexed sections of the journal. However, the Reading Tools use the indexing terms provided by the author to ensure that the materials found in the databases provided is relevant. The Journal Manager can change the selected Reading Tools at any point.

Related Item Sets

Journal Managers can edit, add to, and check any of the discipline- and area-based sets of Reading Tools. These Tools use databases that have been selected because of their relevance and accessibility by all readers. Because the location and URLs of these databases do change, the Journal Manager needs to be able to change or even delete listings. The tools are grouped into categories (e.g., Related Studies, Dissertations, etc.), with a number of databases in each.

Validate Reading Tools

This feature will check the validity of the search URLs that are used with each database to find items that are relevant to the item the tools accompany (by using the author's indexing terms). If the URL is invalid the Journal Manager can fix the settings by finding the new URL, seeking help from someone else, or deleting the database from the set of Reading Tools. As this feature runs through each database, it takes some time to complete and will result in a statement for each of the databases attesting to its validity or the source of the problem.

Metadata for Each Set of Reading Tools

The metadata for each set of tools provides the title of the tools, and a brief description, allowing the Journal Manager to modify the organization of the tools or create new sets.

Contexts for the Set

Each set of tools consists of various groupings, or contexts, of databases (e.g., Related Studies, Online Forums, etc.) with each context consisting of a number of relevant databases. These databases can be created, edited or deleted. The groupings can also be reordered.

Export the Data

If the Journal Manager develops additional reading tools, these can be exported to the Public Knowledge Project for use by other journals in related fields.

Contexts

Each set of Reading Items is made up of individual tools (e.g., Related Studies, Online Forums, etc.) with each tool consisting of a number of relevant databases grouped into a context. These databases, and the contexts they are organized into, can be created, edited or deleted.

Metadata for Items in a Context

The Journal Manager can alter the title of the tool. It also provides an option to determine whether the author's keywords (the default), the author's name (e.g., for use with Author's Other Works), or geographical indexing terms will be used for the searching of the database. Another option, used with Define Terms, allows the reader to select the search term by double clicking on any word in the text of the item being read in the journal. Journal Managers can use these options in building their own reading tools.

Edit Searches for Each Tool

Using Searches, the Journal Manager can edit or delete the search URL for each database in a tool, as well as reorder the databases that appear in the tool. For each database, a URL is provided that will enable the reader to learn more about the database, and a URL for that enables the search to be conducted. There are two types of searches that can be set up, a GET search, and if that will not work with the database, a POST search is also supported.

GET Searches

For GET searches, run a search and look at the resulting URL. E.g., on Google, a search for "FOOBAR" gives the URL

http://www.google.ca/search?hl=en&q=FOOBAR&meta=

Replace the search term, FOOBAR, with the variable {$formKeywords}. When OJS encounters this variable, it will be replaced with the appropriate value from the item's metadata. This gives us a search URL of

http://www.google.ca/search?hl=en&q={$formKeywords}&meta=

for the RT. However, since the other parameters are unnecessary in this case, we can use a simplified URL of

http://www.google.ca/search?q={$formKeywords}

for the RT.

POST Searches

For POST forms, it is more complicated. Again, looking at Google, you can view the page's source, and notice

, giving us a starting base URL ofhttp://www.google.com/search. You can then look at each of the
and

A somewhat easier way for POST forms is to copy the HTML source to a file, changemethod=post tomethod=get in the appropriate form field, and change the form'saction= value such that it is a complete URL, e.g.,http://www.google.com/search rather than just/search. You can then view the modified HTML file in your browser and use the GET method above to construct the URL.

As some search engines do not support GET queries, if you find that the above method does not work, you can enter

POST form data in the "Search post data" field. If the example given above required that the data be posted, you would enterhttp://www.google.com/search for the search URL andq={$formKeywords} for the post data.

Make sure you test the URLs make sure they work correctly, by replacing {$formKeywords} with a term in the URL and testing it to see if it shows the expected search results. Note that with POST forms this might not always be possible, depending on the site. For URLs that don't have proper search engines another possibility is to use Google and restrict by site. You can use a query likesite:mysite.com FOOBAR in Google to search for the term "FOOBAR" only within mysite.com. This is used in the current RTs for several sites.

Setup

The Journal Manager sets up the journal, after the system has been installed on a web server, by working through five steps, filling in templates and configuring the management of the journal. The setup does not have to be done all at once: the templates can be filled in and saved; then the Journal Manager 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 templates. Setting up the journal's web site will require decisions and texts for the following items, among others, which can be prepared in advance in consultation with the Editors or added at a later point.

- Principal contact for the journal
- Technical contact
- Scope and Focus Statement for the journal
- Journal Sections and policies
- Author Guidelines
- Submission requirements for authors
- Indexing elements and appropriate examples
- Peer Review Policy
- Reviewer Guidelines
- Copyright Policy
- Open Access Policy
- Editorial Board/Review Board
- Subscription Policies
- Use of layout editors, copyeditors, and/or proofreaders

Stats & Reports

Statics & Reports provides the Journal Manager with the ability to extract information about the history of the journal's usage in two forms. First, under Statistics, year-by-year statistics are available for at-a-glance data on submissions, editorial practices, and users. Second, the Journal Manager can generate one of several types of reports on a specific range of dates.

There are four types of reports available:

- Journal Report: Reports on all journal submissions in the given period.
- Editor Report: Reports on submissions, grouped by Editor.
- Review Report: Reports on submissions, grouped by Reviewer.
- Section Report: Reports on submissions, grouped by Section.

These reports are generated in Comma-Separated Values (CSV) format and should be opened using a spreadsheet application.

Subscriptions

OJS supports subscription journals by providing a subscription management component and a corresponding password protection for the journal's online content. The subscriptions can be managed for individual users, organizations or institutions. A subscription journal can also offer free access to its back issues through a form of delayed open access. In Issue Management, the Editor allows readers free access to the content of an issue or individual articles from zero to 24 months after their initial publication and availability to subscribers.

A journal's Managers, Editors, Section Editors, Layout Editors, Copyeditors, and Proofreaders are always free to access the journal as though they were subscribers.

Deploying the Subscription Module

The Journal Manager must indicate in Setup, 4.1 Access and Security Settings, that the journal will be using this system to manage its subscriptions and that someone, enrolled as a Journal Manager or Subscription Manager, has been designated to manage this feature. The person designated, along with contact information, should be identified as the Subscription Contact under Subscription Policies (please see below).

Subscription Types

Setting up the Subscription Types

The first step in setting up the subscription management is to designate the types of subscriptions the journal offers. Journals typically offer, for example, 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). A subscription type may be designated as non-expiring for more permanent subscriptions that should never expire (e.g. partner institutions).

Options for Subscription Types

Each subscription type must be identified as either an Individual subscription type or an Institutional subscription type. Individual subscriptions require users to login to the journal to validate their subscription and access subscription content. In contrast, users accessing subscription content via an Institutional subscription are not required to login, since the institutional domain and/or IP addresses are used to validate the subscription and permit access. For both Individual and Institutional subscriptions, the option "Subscriptions require membership information" can be used to identify membership subscriptions, whether free to members or at a discount. With this option enabled, each subscription will require membership information as part of the subscription record. The option "Do not make this subscription type publicly available or visible" can be used to disable the type's availability to users when purchasing subscriptions and its visibility under Subscriptions on the About the Journal page. While most subscription types are typically available and publicly displayed, a type created for internal accounting, staff subscriptions, and/or management purposes, for example, can be restricted via this option.

Subscriptions

Individual Subscriptions

For individual subscriptions, the Journal (Subscription) Manager has to first register the user as a reader, if not already registered, and then on the Create Subscription page, select this user as the subscriber. The Journal (Subscription)

Manager can then select the subscription type, set the dates for the subscription, and enter any membership and/or reference information, if applicable. The Journal (Subscription) Manager can also update the user's profile and contact information, if required. All updates via the Create and Edit Subscription pages are saved directly to the user's system-wide profile. Lastly, the Journal (Subscription) Manager may select the option "Send the user an email with their username and subscription details" to email the user login instructions and the details of the subscription.

Institutional Subscriptions

For institutional subscriptions, the Journal (Subscription) Manager has to first register the user that will be the contact person for the subscription as a reader, if not already registered, and then on the Create Subscription page, select this user as the institutional contact person for the subscription. The Journal (Subscription) Manager can then select the subscription type, set the dates for the subscription, enter the institution name, mailing address, domain, and/or IP addresses, and enter any membership and/or reference information, if applicable. The Journal (Subscription) Manager can also update the contact person's profile and contact information, if required. All updates via the Create and Edit Subscription pages are saved directly to the user's system-wide profile. Lastly, the Journal (Subscription) Manager may select the option "Send the user an email with their username and subscription details" to email the institutional contact person login instructions and the details of the subscription. This login information is solely for the contact person listed in the subscription. Users at the institution do not need to login to access subscription content and are authenticated automatically via the institutional domain and/or IP addresses.

Subscription Status

Each subscription includes a status field to indicate the current state of the subscription. In order for a subscription to be considered valid by the system and enable the corresponding user or institution access to subscription content, the subscription status must be set to "Active" and the subscription must have valid start and end dates. The Journal (Subscription) Manager may use the subscription status for fine-grained management of subscription records and/or to temporarily suspend subscriptions, for example, if waiting to receive additional information from a subscriber or if waiting to receive payment from a subscriber.

Subscription Policies

Under Subscription Policies, the Journal Manager can enter Subscription Manager contact information, which will appear in About the Journal; enter additional information about subscriptions to appear in About the Journal (subscription types and the fee structure will already appear there); set subscription expiry reminders; set open access options; and define an Author self-archiving policy, also to appear in About the Journal.

System Plugins

The System Plugins page allows the Journal Manager to view a list of plugins installed in OJS and perform any management tasks made available by each plugin. For more information, refer to the documentation included with each plugin, found within OJS' plugin directory (/path/to/install/plugins).

Import/Export Data

The Import/Export Data feature, available from Journal Management, allows the Journal Manager to inject data into and extract data from OJS.

Data import/export is implemented using plugins, with each format or type of data being provided by a different plugin. For more information, refer to each plugin's documentation, found within OJS' plugin directory.

Five Import/Export plugins ship with OJS, and are documented below.

Import/export functionality is also available as a command-line tool; see tools/importExport.php for more information.

Users XML Plugin

The Users XML Plugin can be used to import and export users and their roles. See the XML DTD in "plugins/importexport/users/users.dtd" for more information.

Erudit Article Export Plugin

The Erudit Article Export Plugin implements single-article export for full-text indexing using Erudit's XML DTD. See http://www.erudit.org for more information.

Articles & Issues XML Plugin

The Articles & Issues XML Plugin is the primary method for batch import and export. It can be used to import and export single articles, multiple articles, single issues, and multiple issues, including comprehensive metadata. For information on this plugin, see the XML DTD in "plugins/importexport/native/native.dtd".

PubMed XML Export Plugin

The PubMed XML Export Plugin provides an import/export plugin to generate bibliographic information for articles in the current issue in PubMed standard publisher data format XML for indexing in NLM PubMed/MEDLINE. Details on the XML format and data requirements is available at: http://www.ncbi.nlm.nih.gov/entrez/query/static/spec.html. More information on this plugin can be found in "plugins/importexport/pubmed".

Crossref XML Export Plugin

The Crossref XML Export Plugin provides an import/export plugin to generate metadata information for articles and issues for indexing in CrossRef. Details on the XML format and data requirements is available at: http://www.crossref.org/schema. More information on this plugin can be found in "plugins/importexport/crossref".

Users

It is the Journal Manager's responsibility to manage users in OJS. This includes creating users, disabling accounts, managing roles, etc. The Journal Manager can browse and add to existing enrollments, modify profiles, merge accounts, and contact groups of users.

Users Enrolled in This Journal

This list includes everyone who is registered with this journal in some capacity. The Journal Manager has the ability to sign in as any registered user. This can be extremely helpful when trying to provide the user with assistance at a distance, because it allows the Journal Manager to gain a more precise sense of what may be going wrong.

From here, the Journal Manager can also enroll existing users from the OJS site as a whole, can create new users, and can sync enrollment between journals.

Create New User

The Journal Manager can use the Create New User link to register someone and assign them a role, from Journal Manager to Reader. The user can, on logging in to the journal, complete and change the profile information entered by the Journal Manager.

Changing a Password

Users can change their passwords once they have logged into the journal. The Journal Manager cannot access a password once it has been assigned. However, the system will generate a new password and email it to users who click on the "Forgot your password?" link under the login box.

Enroll Existing User

The Journal Manager can assign an existing user to one or more new roles.

Sync Users

Enrollment synchronization will enroll all users enrolled in the specified role in the specified journal into the same role in this journal. This function allows a common set of users (e.g., Reviewers) to be synchronized between journals.

Merge Users

The Merge Users feature, available from Journal Management under the Users heading, allows the Journal Manager to merge two user accounts into a single account, transferring edit assignments, submissions, and numerous other records from one account to the other and effectively deleting the first.

The following items are transferred:

- Article authorship
- Public comments on articles
- Article notes
- Editor assignments and decisions
- Review assignments
- Layout editor assignments
- Proofreader assignments
- Article email and event log entries
- Reviewer access keys
- Roles
- Subscriptions (please see below)

The following items are **not** transferred:

- Sessions
- Notification status (i.e. whether the user has signed up to receive notifications about journal news)
- Editorial team memberships
- Section Editor status on sections
- User profile information (e.g. first name, last name, etc.)

This feature should be used with caution, as it is not reversible and involves the transfer of records from one user to another.

For subscriptions, the merge feature performs the following actions: For Individual Subscriptions, the second user's subscription is transferred to the first user only if is valid and if the first user does not already have a valid subscription for a given journal. For Institutional Subscriptions, all of the subscriptions for which the second user is identified as the contact person are transferred to the first user, who becomes the new contact person for the subscriptions.

Roles

Journal Manager

The Journal Manager is responsible for managing the 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. Alternately, names and emails of Reviewers, if they already exist in another database, can be imported into the system, through the Import People function under Import/Export Data. 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.

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

Editor

The Editor oversees the entire editorial and publishing process. The Editor, working with the Journal Manager, typically establishes the policies and procedures for the journal, which are entered in Setup. 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, and proofreading) although in some journals this remains the responsibility of the Section Editor in charge of the submission's Review process. The Editor also schedules submissions for publication, arranges the Table of Contents and publishes the issue as part of the Publishing Process. The Editor can restore archived submissions to the active In Review or In Editing lists as outlined in Archives.

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, 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.

Copyeditor

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

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 Adobe Acrobat for PDFs, for example; or Dreamweaver for HTML), which present the articles on the screen with a well-formatted and readable layout, in the manner of scholarly journals, and with an eye to this new publishing medium (by consulting the layout used by other publishers of online journals, such as Highwire Press, for example, in the life sciences or Project Muse in the humanities).

Proofreader

The Proofreader carefully reads over the galleys in the various formats in which the journal publishes (as does the author). The Proofreader (and the Author) record any typographic and formatting errors for the Layout Editor to fix. In the case of some journals, the Editor or Section Editor will also serve as Proofreader.

Reviewer

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

Author

Authors are able to register and submit items to the journal directly through the journal's website. The Author is asked to upload the item and to provide metadata or indexing information on the item. (The metadata improves the search capacity for research online and for this 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 editorial process — as well as participate in the copyediting and proofreading of submissions accepted for publication — by logging in to the journal's website.

Reader

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 after initial publication of journal content). Registered Readers receive a notification email with the publication of each issue, which includes the Table of Contents for that particular issue. On registering themselves with the journal, Authors are given the option of enrolling as Readers as well.

Subscription Manager

The Subscription Manager manages the journal's Subscriptions and Subscription Types.

Chapter 4: Submission Process

Author Guidelines

The journal provides a set of Author Guidelines in About the Journal that cover the bibliographic and other formatting standards employed by the journal. For aspects not covered in the examples provided by the Guidelines, Authors may also wish to browse through published articles in the journal to see how the journal handles other sorts of material.

Submission Requirements

n order to ensure that submissions to the journal have been properly prepared and are in a suitable format for processing, the Journal Manager and Editor have developed a set of Submission Requirements with which the Author must indicate compliance before being allowed to proceed to Step Two of the Author Submission process. If the Author is unable to comply with one of the Requirements for some reason, the Author can check the Requirement and provided an explanation in the Comments to the Editor.

Indexing and Metadata

Supplementary Files

Chapter 5: Editorial Process

The Editorial Process for a submission to the journal consists of a review, typically a blind peer review, followed by a section editor's decision to accept or decline the submission. If accepted in the Review stage of the Editorial Process, the submission then goes through the Editing stage which consists of copyediting, layout and proofreading. Then the submission is scheduled for publication in an issue of the journal. Depending on how the journal has been organized, the Editorial Process can be conducted by a single Editor or by a team of Editors, Sections Editors, Copyeditors, Layout Editors, and Proofreaders.

Editor's Role

The Editor oversees the editorial process, beginning with the assignment of the Section Editor to a submission. Depending on the policies of the journal, the Editor often plays the role of Section Editor in seeing accepted submissions through the Editing stage of the editorial process.

The Editor can also create and manage journal issues, and notify users of new issues and/or events.

Submissions

All submissions to the journal are to be found in one of the four queues on the Submissions page, depending on what stage they are at in the editorial process. The Editors have access to all of the journal's submissions through this page, while the Section Editors have access only to those submissions to which they have been assigned.

Unassigned

Each submission to the journal enters the process in the Editors' Unassigned queue. To assign a submission in this list to a Section Editor, the Editor clicks on the submission's title. This takes the Editor to the appropriate Submission page where the Section Editor is assigned. When a submission is assigned to a Section Editor, it moves from the Unassigned Queue to In Review Queue.

In Review

Submissions in this queue are subject to review and a decision by the Section Editor to accept or decline the submission. The extent of the review process is spelled out in the journal's Review Policy (e.g., Is every Section of the journal subject to Peer Review? How many peer Reviewers per submission?). When a Section Editor or an Editor clicks on a submission title in the In Review Queue, they are taken to the submission's Review page. If the Section Editor accepts a submission, it moves to the In Editing queue; if declined, it moves to the Archives.

In Editing

Submissions in this queue are going through copyediting, layout and proofreading. When a Section Editor or an Editor clicks on a submission title on the In Editing Queue, they are taken to the submission's Editing page.

Archives

Submissions in this queue have been through the editorial process, whether they have been declined, scheduled to be published, or are published. This queue provides Editors and the assigned Section Editor complete access to the submission's editorial history (Summary, Submission, Review, Editing, and History).

To Restore an Archived Item to the Active List

The Editor should go to the Archives on the Editor Home page and find the submission. Clicking on the submission's title will lead to the Summary, Review, Editing and History pages for the submission, and on the Summary page there is a link, "Restore to Active List," that will move the submission into the In Review or In Editing list, depending on what stage the submission was at when it was archived.

Submission Summary

The Summary page for each submission is used by the Editor to manage the submission files and its associated metadata or indexing information.

Submission Management

Various aspects of submission management can be undertaken from a submission's Summary page.

Submission

Under Submission, the Editor can email the Author; review the original submission file and supplementary files; ensure that the submission is in the correct journal Section; and review Author comments.

Before assigning a Section Editor to manage the Review of the submission, the Editor should click on the submission's file name to open the file and ensure that the text appears to be suitable for review by the journal, and that it is in the right Section for the journal.

Author Fees

If the journal is accepting online payments, the Editor will have the ability to mark Author Fees as either received or waived. Fees that are marked as such here will also appear in the journal's payment records.

Editors

In order for the submission to proceed to the Review stage, the Editor must assign a Section Editor from a list of enrolled users to oversee the review process. If Section Editors are not used by the journal, the Editor may click "Add Self", and personally oversee the review process. Multiple Section Editors can be assigned to a submission, and can be tasked with either the review or the editing process, or both. This action will send an automated email to the Section Editor with notification of the assignment.

Status

The Submission Summary Page keeps track of the submission's progress through the review, editing and publishing process. If at any time the submission is deemed unsuitable for the journal, it may be archived here.

If the submission is obviously not appropriate for the journal, the Editor may click on the Archive Submission link, which will initiate an email to the author indicating that the submission will not be sent out for review. Once the email is committed, the submission will be sent to the Archives. The assigned Section Editor is also in a position to take this action.

Submission Metadata

The metadata which will be used to index the submission on publication has been entered by the Author, and can be edited by the Section Editor, as well as the Author and Copyeditor during the Editorial Process.

Ensuring a Blind Peer Review

To ensure the integrity of the blind peer-review for submission to this journal, every effort should be made to prevent the identities of the authors and reviewers from being known to each other. This involves the authors, editors, and reviewers (who upload documents as part of their review) checking to see if the following steps have been taken with regard to the text and the file properties:

The authors of the document have deleted their names from the text, with "Author" and year used in the references and footnotes, instead of the authors' name, article title, etc. With Microsoft Office documents, author identification should also be removed from the properties for the file.

For Microsoft 2003 and previous versions, and Macintosh versions of Word:

- Under the File menu select: Save As > Tools (or Options with a Mac) > Security > Remove personal information from file properties on save > Save.

For MacIntosh Word 2008 (and future versions)

1. Under the File menu select "Properties."
2. Under the Summary tab remove all of the identifying information from all of the fields.
3. Save the File.

For Microsoft 2007 (Windows):

1. Click on the office button in the upper-left hand corner of the office application
2. Select "Prepare" from the menu options.
3. Select "Properties" for the "Prepare" menu options.
4. Delete all of the information in the document property fields that appear under the main menu options.
5. Save the document and close the document property field section.

For Microsoft 2010 (Windows):

1. Under the File menu select "Prepare for sharing."
2. Click on the "Check for issues" icon.
3. Click on "inspect document" icon.
4. Uncheck all of the checkboxes except "Document Properties and Personal information".
5. Run the document inspector, which will then do a search of the document properties and indicated if any document property fields contain any information.
6. If the document inspector finds that some of the document properties contain information it will notify you and give you the option to "Remove all," which you will click to remove the document properties and personal information from the document.

For PDF files:

- With PDFs, the authors' names should also be removed from Document Properties found under File on Adobe Acrobat's main menu.

Section Editor's Role

Section Editors usually manage the Review of submissions and the editing of those that are accepted. Depending on the journal's policies, however, a Section Editor initially assigned to a submission by an Editor may be asked only to see it through the Review stage, after which, if the submission is accepted, the Editor takes over (in the role of Section Editor). Editors send requests to Section Editors to see a submission through the editorial process.

Submissions

Submissions to the journal that are assigned to the Section Editor by the Editor appear in that Section Editor's Submissions In Review queue. Section Editors have access to only those submissions to which they have been assigned. Depending on the journal's policies, Section Editors may be responsible for just the Review of the submission or for both the Review and the Editing of the Submission.

In Review

Submissions that are listed In Review are subject to a review process that leads to a decision by the Section Editor to accept or decline the submission. The extent of the review process, including which journal sections have a peer review conducted on the submissions and how many reviewers are used, is spelled out in the journal's Review Policy prepared by the Editors and Journal Manager. When a Section Editor or an Editor clicks on a submission title in the In Review Queue, they are taken to the submission's Review page, where the peer review is conducted and editorial decision reached for the item. If the Section Editor accepts a submission for publication, it then moves to the In Editing queue. If the submission is declined, it is moved to the Archives.

For further information on the Review process, see In Review.

In Editing

Submissions in the In Editing queue are going through copyediting, layout and proofreading processes. When a Section Editor or an Editor clicks on a submission title in the In Editing queue, they are taken to the submission's Editing page. When a submission has gone through the editing stage and is scheduled to be placed in an issue, it is removed from this list and enters the Archive.

For further information on the Editing process, see In Editing.

Archives

Submissions in this queue have been through the editorial process, whether they have been declined or published. This queue provides Editors and the assigned Section Editor complete access to the submission's editorial history (Summary, Submission, Review, Editing, and History).

Review

The article Review page lists all necessary elements for the Section Editor to organize and complete the review process. The Section Editor assigns a Review Version of the article, assigns one or more Reviewers to the article, and enters an Editorial Decision. Depending on the editorial decision, the article will be moved from the Review queue to either the Editing queue or the Archives, or it will be resubmitted for review.

Review Version

The first task for the Section Editor with each submission is to check the text to ascertain whether the Original Version can serve as the Review Version or if a revised copy needs to be uploaded. To view the original file, the Section Editor clicks on the file name next to Review Version.

Ensuring a blind Peer Review.

See instructions for Ensuring a Blind Peer Review. The Section Editor should also consult the Submission page to check whether Supplementary Files can be shared with Reviewers. If the author wishes to present files to Reviewers, they will be checked; the Section Editor can uncheck them if they are not suitable for sharing with Reviewers.

Establishing the submission's Review Version.

The Section Editor sets the Review Version which Reviewers will see, by (a) selecting the Original Version, if it is suitable, or (b) by uploading a more suitable version. The Section Editor can choose to fix minor problems with the original file using a word processor to make the changes, saving the file to the desktop and then uploading the file, using the Browse/Upload buttons in Review Version.

Inadequately prepared submissions.

If the Author has clearly failed to ensure that the submission adheres to the journal's Author Guidelines, including the need to ensure that the submission supports a blind review, the Section Editor can elect to notify the Author that the work needs to be resubmitted. The author can then resubmit the improved version by email directly to the editor, who can then upload it as the Review Version. The Section Editor can also decide that the submission is simply not suited for the journal and notify the author to that effect. Going to the Submission page and clicking "##editor.article.archiveSubmission##" sends the submission to the Archives.

Peer Review

Once the Review Version has been selected, the Section Editor can begin the Peer Review process. The Section Editor first clicks on the "##editor.article.selectReviewer##" button which directs the Section Editor to a list of Reviewers, their interests and their work with the journal. The Section Editor then clicks "Assign" next to the names of the Reviewers that appear suitable for the assignment.

Changing Reviewers.

If the Section Editor realizes that a name chosen is not suitable, the "##editor.article.clearReview##" button can be used to clear the Reviewer's name before initiating the review (once the Reviewer has been notified by email, this button changes to "##editor.article.cancelReview##"). To replace a Reviewer who has been notified, the Section Editor clicks "##editor.article.cancelReview##" which leads to a Cancel email to send to the existing Reviewer. The Section Editor then clicks Select Reviewer to assign another Reviewer, and sends out the Request email to that Reviewer. If a Section Editor cancels a review but the Reviewer has already updated the submission indicating that the review is done, the Section Editor can re-initiate the review by sending a Request email to a new Reviewer. A list of the Reviewers who declined the request to review the submission or were cancelled is kept under "Regrets, Cancels, and Earlier Rounds of this Submission."

Requesting and initiating a Peer Review.

The Section Editor clicks on the email icon under Request for the Reviewer which opens a prepared email addressed to the Reviewer. After clicking Send, the Section Editor will also have a chance to change the number of weeks given for the review to be completed. The Journal Manager sets the default number of weeks in Setup 2.2. If a Reviewer has not responded to the request in a timely fashion, the Section Editor can send another request email by clicking on the "Send Reminder" link, or the Section Editor can opt to select another Reviewer (following the procedures in "Changing Reviewers" above). The Section Editor can also change the due date for individual Reviewers to complete their review by clicking on the date that appears under Due.

The Reviewer responds on the web site.

Typically, the Reviewer responds to the invitation to review by logging in to the journal's website and notifying the Section Editor with a prepared email that the review will or will not be undertaken as requested. If the Reviewer declines the request, their name goes to "Regrets, Cancels, and Earlier Rounds of this Submission" and the Section Editor selects another reviewer. If the Reviewer agrees to conduct the review, the date of the acceptance appears under Response for that Reviewer. The Journal Manager has the option in Setup 2.2 of activating an automatic reminder to be sent to Reviewers who do not respond top the request within a certain number of days.

The Reviewer responds by email.

If instead of going to the journal's website, the Reviewer sends the Section Editor an email either accepting or declining the Review opportunity, the Section Editor can make this decision by going to the Review page and choosing either "Will do Review" or "Unable to do Review" under Editor to Enter. The first selection will allow the Reviewer to access the submission online, and the second will clear the Reviewer's name from the Peer Review stage (and place it on the page with Regrets, Cancels & Previous Rounds). The Section Editor can then select another Reviewer.

The Reviewer completes the review online.

The Reviewer completes the review by entering their comments in Review (based on the Reviewer Guidelines which have been entered in Setup 2.2 by the Journal Manager) and selecting a Recommendation (from a pull-down menu: Accept, Accept with Revisions, Resubmit for Review, Resubmit Elsewhere, Decline, See Comments). The Reviewer may also opt to upload files, whether an annotated version of the submission or some additional relevant information, which the Section Editor will decide whether the author will see, using the "Let Author View File" option. The Journal Manager has the option in Setup 2.2 of activating an automatic email reminder to be sent to Reviewers who do not complete the review within a certain number of days of the deadline. The Section Editor can also send a reminder by using the email icon under Request for that Reviewer, and modifying the content to reflect the need for the review.

The Reviewer completes the review via email.

If the Journal Manager has selected "Email-Attachment Review Process" in Setup 2.2, then the Reviewer will receive the submission as an email attachment with the request to review, along with the Review Guidelines. The Reviewer is asked to email the Section Editor indicating a willingness, or not, to review. If willing, the Reviewer follows with an email containing the review of the submission and a recommendation. The Section Editor will then enter on the submission's Review page the Reviewer's comments, using the Review box and record the Reviewer's recommendation, under the Reviewer's name.

Editor Decision

Once all the reviews are in, the Section Editor must arrive at a decision on the submission.

Recording the Decision.

The Section Editor selects a Decision from among Accept Submission, Revisions Required, Resubmit for Review, or Decline Submission.

The Section Editor should outline the basis of their decision to the Author in Editor/Author Correspondence (as the Author cannot see the Decision recorded by the Editor). The Section Editor can also upload a version of the submission possibly with suggestions or comments. Finally, the Section Editor must email the Author using the Notify Author email icon under Editor Decision. Reviewer Comments can be imported into this email by clicking Import Peer Reviews above the email subject line. Please note that comments designated by the Reviewer as editor-only are not imported.

The Section Editor can make an initial decision (Revisions Required), and then after being satisfied by the Author Version uploaded by the Author, make a second decision to Accept.

If the Section Editor selects Accept, then the next step is to designate a version of the submission to go to Copyediting on the Editing page, from among the Editor and Author versions. The default Editor Version is simply the Review Version, and the Section Editor can make changes to this version — restoring the author's name, for example — and upload it as suitable to go to Copyediting.

If the Section Editor selects Decline, the submission moves to the Archives list, with its status recorded as Declined.

Resubmit for Review.

The Section Editor can initiate a second round of reviews for a submission by selecting Resubmit for Review as the Decision. The Section Editor then emails the Author of this (as the Author cannot see the Decision) and includes an outline of what needs to be done with the submission prior to resubmitting it for review. When the Author re-submits a version for review, it appears under Author Version, and the Section Editor designates it for resubmission. It then becomes the Review Version for Round 2 (and should again be checked for anonymity, and if need be, uploaded again under Review Version). The Reviewers from Round 1 will still be in place, although their reviews and recommendations will have been cleared and placed under "Regrets, Cancel, and Earlier Rounds of this Submission." The Section Editor can activate the request for each of the Reviewers from Round 1 by clicking on the email icon under Request, or the Section Editor can use Clear Reviewer and select another Reviewer for Round 2. The Editor/Author Correspondence for Round 1 is also placed under "Regrets, Cancels, & Previous Rounds" of this Submission, where the Section Editor can review it as needed.

Editing

The Section Editor oversees the copyediting, layout and proofreading by selecting and assigning members of the editorial team to see the submission through each stage, and by ensuring that the submission moves through the process in a timely fashion. The process begins when the Section Editor selects the Copyeditor and requests the copyediting of the submission. The Section Editor may want to select the Layout Editor and Proofreader at the same time (depending on how many of these distinct editorial roles the journal is using), or wait until the preceding stage is complete. To replace those selected, the Section Editor simply clicks Select again and assigns a new person, who will replace the existing assignee. The Editing stage is complete when the submission has completed the Proofreading stage, at which point the Section Editor schedules it for publication.

Submissions in Layout that need further Copyediting.

The Editor can see to a further copyediting of the Layout Version, if it turns out to be needed, by downloading the Layout Version and sending it as an email attachment to the Copyeditor (who may also want to contact the Author). Once this further copyediting is completed and the submission returned to the Editor, the Editor can upload the file to the Layout Version.

Changing a galley after submission is scheduled.

Once the submission is sent to scheduling, the Editing page (along with its associated Summary, Review, and History pages) are sent to the Archives. The Editor can ask the Layout Editor, who will have access through Archives, to alter the galleys and upload them again. This can take place after the submission has been published. The newly uploaded galley will appear as the published version, although one needs to be extremely cautious about changing the galleys in this way, so as to preserve the integrity of the journal's publishing process, and the Editor may wish to append a note recording the changes on the published item.

Copyediting

Once the Copyeditor has been selected and an email sent requesting the process begin, the Copyeditor will work directly on the submission marking up the proposed changes according to the journal's Copyediting Instructions. In Step 1, Initial Copyedit, the Copyeditor will copyedit the submission and upload the initial copyedit version, and the edited file will be sent to Step 2, Author Copyedit. The Copyeditor will then send the "Complete" email to the Author, with a cc to the Section Editor, requesting that Step 2 begin. After the Author has reviewed the changes, answered any queries, and uploaded the file in Step 2, the Copyeditor creates a clean and final copyedited version in Step 3, Final Copyedit. This final copyedited version is sent to Layout, where it serves as the Layout Version. Before the Layout Editor begins work preparing Galleys based on this version, the Section Editor may wish to look it over to ensure that it meets the standards and guidelines of the journal.

Editor Queries in copyediting.

In the initial copyedit, the Copyeditor may wish to pose Editor Queries (with regard to journal style, for example), which the Copyeditor will refer to in the email sent to the Author and Section Editor on the completion of Step 1. The Section Editor should review the Editor Queries by clicking on the file name in Step 2, and emailing a response to the queries directly to the Copyeditor (by clicking on the email icon under Request). This will avoid uploading a version of the file on top of the Author's responses to the initial copyediting of the Submission.

Copyediting Options.

Should the need arise (if, say, the Section Editor is acting as the Copyeditor), the Section Editor can upload a version of the submission to each of the Copyediting stages. Care must be taken not to over-write a version that was uploaded by the Copyeditor or Author.

Layout

Once the Copyeditor completes the "clean" copy in Step 3 of Copyediting, that version of the submission goes to the Layout stage. The Section Editor, on receiving notification of the completion of the copyediting, needs to then select a Layout Editor, if that has not already been done, and request that the Layout Editor begin work, by using the email icon under Request Layout. The Layout Editor will prepare galleys for the submission in each of the journal's publishing formats (e.g., HTML, PDF, PS, etc.). The Supplementary Files, which remain in the original file format in which they were submitted, will be reviewed by the Layout Editor and Proofreader to ensure that basic formatting is in place, and that the files conform as well as possible to journal standards. When the Layout Editor has completed the initial production of the galleys, which are the files that will be published online, the Layout Editor will email the Section Editor.

Note that the Editor can schedule a submission for publication at any point in the editing process; this information will be made available to Layout Editors and Proofreaders and will give them the ability to preview the issue before publication.

Proofreading

The Section Editor, on being notified by the Layout Editor on completion of the galleys, selects the Proofreader, if that has not already been done. The Section Editor then sends the Request email to the Author to begin the Proofreading process. The Author, upon completing a review of the galleys and Supplementary Files, if any, sends a completion email to the Proofreader, with a CC. to the Section Editor. Any typos or formatting errors are noted by the Author and Proofreader in the Corrections text-box in Proofreading because the Authors and Proofreaders cannot mark up the galleys. The Proofreader, on completing the review of the galleys and Supplementary Files, if any, notifies the Layout Editor, with a cc to the Section Editor, and the Layout Editor proceeds to correct the galleys and Supplementary Files, if any. Finally, The Layout Editor notifies the Section Editor that the submission is ready to be scheduled for publication. At that point, the Section Editor may again wish to review the files, and if satisfied, schedule the submission for publication by choosing an issue under Scheduling, and pressing "Record". The submission then enters the Publishing Process.

Note that the Editor can schedule a submission for publication at any point in the editing process; this information will be made available to Layout Editors and Proofreaders and will give them the ability to preview the issue before publication.

Reviewer's Role

The Reviewer is invited by email to review a submission, which includes its title and abstract, as well as the journal's URL and a username and password for the Reviewer to use to enter the journal. The journal has the option of using a reviewer option that sends the submission as an email attachment to the Reviewer along with an invitation to review. In this case, the Reviewer then responds by email. What is described here is the principal method for reviewing (and ensuring complete records of the process), which involves the Reviewer conducting the Review on the journal's web site.

Submissions

On logging in to the journal, the Reviewer arrives at the User Home page. By clicking on the role of Reviewer (as a Reviewer may be enrolled under other roles, such as an Author), the Reviewer is led to the Submissions page. This page lists the submissions which the Reviewer has been invited to review or is currently in the process of reviewing. The Submissions queue also notes what round the review is, as some reviews may have entered a second round of reviewing, following the Section Editor's decision that the submission must be "resubmitted for review." This page also provides access to past reviews which the Reviewer has completed for the journal.

Review

The Review process is divided into six or seven steps, intended to lead the Reviewer through the Review process.

Step 1

Reviewer has first to indicate to the Section Editor whether they will undertake the review. The decision should be made after reviewing the submission's Abstract and perhaps looking at the submission, by clicking on the file name in Step 3 (depending on the journal's policies, the file may not be available prior to the Reviewer agreeing to review it).

If unable to do the review.

The Reviewer who is unable to do the review clicks on "Unable to do the review" which leads to a standard email to the Section Editor, which the Reviewer can revise to indicate, if they wish, why they are cannot do the review (e.g., timing, conflict of interest, lack of expertise, etc.).

If able to do the review.

The Reviewer who is able to do the review clicks on "Will do the review," which leads to a standard email to the Section Editor, and which will indicate to Section Editor and Author that the review is underway.

Step 2

Consult the Reviewer Guidelines, found at the bottom of the Review page. The Reviewer Guidelines have been prepared by the Editors of the journal to ensure that the Review is as helpful as possible to them and the author.

Step 3

The Author has uploaded the submission as a file, which the Reviewer can download from the journal's web site to the Reviewer's computer by clicking on the file name. The file can be opened or saved to the computer and opened, using typically available programs such as Word or Acrobat. It can be printed out or read on the screen. The Supplementary Files refer to materials the Author may have uploaded in addition to the submission, such as data sets, research instruments, or source texts.

Step 4 (Optional)

In some cases, the journal may require the Reviewer to declare whether or not they have competing interests with the article being reviewed. If this is the case, Step 4 becomes a form requesting a declaration of Competing Interests, and all following steps change their step number accordingly. The Journal Manager can toggle this setting in Journal Setup Step 3.3.

Step 4

The Reviewer clicks on the Review icon and is presented with two Review text-boxes where the Review can be either entered by hand or pasted: one for the Editor and Author, and one visible to the Editor only. The Reviewer may enter or paste partial reviews into these boxes and click the Save button at the bottom of the form to return and make changes later. The Reviewer may return to make such changes until a recommendation on the main Review pages is chosen, at which time the Review process is complete.

Please note: the Journal manager, in conjunction with the journal's Editor(s), may have created an extended custom review form to be filled out here. More information on the custom form should be found in the Reviewer's Guidelines. The form can be returned to and edited until a recommendation has been chosen.

Step 5

The Reviewer also has the option, in addition to entering a Review, of uploading files for the Section Editor and/or the Author to see. These files may be a Reviewer-annotated version of the submission or some relevant data or other materials that will assist Editor and/or Author. It will be at the Editor's discretion whether these files are shown to the Author, but Reviewers can certainly comment on this in the Review (Step 4).

Step 6

The Reviewer must select a Recommendation for the submission from among the following options: Accept, Revisions Required, Resubmit for Review, Resubmit Elsewhere, Decline Submission, See Comments. When the Reviewer clicks "Submit Review to the Editor," it leads to a prepared email to the Section Editor, as well as making visible to the Editor the Recommendation, the saved Review (which are now locked) and any uploaded files. The email can be edited by the Reviewer before sending.

Author's Role

The author of a submission is able to log into the journal's web site to track the progress of the submission and participate in the editorial process. If there is more than one author, the author submitting the item is asked to identify the principal contact who becomes the one with whom all editorial correspondence is conducted and who accesses the journal web site.

Submissions

On logging in to the journal and selecting the role of Author on the User Home page, the Author is led to the Active Submissions queue. This page lists the submissions currently in the editorial process. The Author also has access to past submissions that have been made to the journal under the Archive link, and can submit a new article for consideration by clicking the appropriate link under Start a New Submission.

If the journal is accepting online payments, the Author may be able to make submission-specific payments from this page. If required by the journal, links to pay submission fees, to fast-track submissions, and to pay publication fees will appear on this page, on a per-article basis, under Status. Clicking on these links will take the Author to either a Manual Fee Payment page, or a PayPal payment page, where the required transaction can be completed. More information on the payment process can be found here.

More information on the Submission process can be found here.

Review

The Author is able observe the progress of the submission through the Review process, as well as upload revised versions, as required by the Section Editor overseeing the Review process.

Peer Review

Several dates are recorded on this page, including the date of the editor's request to Reviewers, dates when Reviews are underway, and dates Reviews are completed by each Reviewer. The Author can consult the Review Policy in About the Journal to learn more about how submissions are reviewed by the journal. Reviewers are able to upload files for the Author to consult, including annotated versions of the submission. (To consult uploaded files, the Author clicks on the file name linked beside Uploaded File, and opens the file or saves the file to the computer and then opens it.)

Editor Decision

Once the review process is complete, the Section Editor commits a decision and notifies the Author via email. The decision is also recorded in the Editor/Author Correspondence on the Author's Review page. If the Section Editor requests revisions before arriving at a final decision, the Author is able to upload a revised version of the submission on this page, as well as revised or additional Supplementary Files (reflecting data sets, research instruments, source documents, etc.). The Section Editor is also able to upload and present versions of the submission or other documents for the Author to consult. (To consult uploaded files, the Author clicks on the file name, and opens the file or saves the file to the computer and then opens it.)

If a submission is accepted, it will then proceed to the Editing stage of the editorial process.

Resubmit for Review.

If the Section Editor's decision is that the submission should be revised and then resubmitted for peer review, the Author should first indicate their willingness to undertake the revisions, using the Editor/Author Correspondence. Then, when the revisions have been completed, the Author uploads the version for a second round of reviews. The Section Editor will submit it to the same Reviewers or to one or more new Reviewers, and notify the Author when a decision has been reached in a similar manner to the initial review.

Editing

The Author contributes to both the Copyediting and Proofreading of the submission in the Editing stage, as the submission is prepared for electronic and/or print publication.

Copyediting

The Copyeditor initially copyedits the submission by working directly on the submission's electronic file, with suggestions to improve the flow of language and communication of meaning, and with changes to ensure the submission adheres to the journal's style and format (especially its bibliographic format). The Copyeditor uploads the copyedited submission in Step 1 and sends an email to the Author and Section Editor indicating that the initial copyedit is complete. The Author can access this version in Step 1 of Copyediting by clicking on the file name, saving the file to the computer and then opening it.

Author's review of copyedits.

The Author reviews all of the Copyeditor's proposed changes and can make further suggestions or changes to the submission by adhering to the Copyediting Instructions followed by this journal. (This is the last chance to make such changes, for in the Proofreading, only typographical and formatting errors can be fixed.) The Author should also respond to any Author Queries (e.g., missing page numbers, etc.) from the Copyeditor; these can be found by clicking the icon next to Copyedit Comments. When finished, the Author saves the file to the computer and then uploads it in Step 2 of the Copyediting, which makes it available to the Copyeditor.

Review Metadata.

The Author should, as well, review the submission's Metadata for errors and omissions. The metadata is used to index the submission on publication and will assist, depending on how it is indexed, readers' ability to locate the item.

Finally, the Author clicks on the email icon under Complete to notify the Copyeditor and Section Editor that Step is now complete.

Proofreading

The Author proofreads the galleys for the submission, which are the versions in HTML, PDF and/or Postscript that will appear in the online edition of the journal. To view these files, the Author clicks on each of the Proof Formats (and not the file names) to see the submission in each of the formats in which it will be published. In the Proofreading stage, only typographical and formatting corrections are made, and can only be made by the Layout Editor.

Obviously, if more than one file format is used, the Author only checks one for spelling errors but all of them for possible formatting problems. The Author should follow the Proofreading Instructions when recording the corrections in the Corrections text-box. The Author should also review any Supplementary Files that are to accompany the published submission. These files are presented in their original format, and thus can be modified and uploaded again, as well as having their titles altered using the Edit function. Any changes made to these files should be noted in the Corrections text-box.

Copyeditor's Role

The Copyeditor receives an email request from the Section Editor to copyedit a submission, which will then appear in the Copyeditor's Submissions queue. A Copyeditor who is unable to do the copyediting simply responds by email to the Section Editor.

Submissions

Once the Copyeditor logs in, clicking on the Copyeditor link in the User Home page leads to the Submissions queue. This queue lists those works which they have been asked to copyedit. Access is also provided to those submissions which they have completed in the past, via the Archive link.

To access the Copyediting page for a particular submission, the Copyeditor clicks on the work's title appearing in the Active Submission list.

Copyediting

The copyediting process is divided into three steps, and involves the Copyeditor and the Author. Additionally, the Copyeditor can edit the article metadata at any time, by clicking on Review Metadata.

Step 1

In the first step, the Copyeditor clicks on the file name to download the submission document and open it. The Copyeditor then directly copyedits the document text, following the agreed upon copyediting standards for the journal. (These can be customized by the Journal Manager in Setup Step 4.5.)

Additionally, the Copyeditor can keep track of any suggested changes and corrections, as well as questions for the Author and/or Section Editor, by clicking on the Copyedit Comments icon. When finished the initial copyedit, the Copyeditor saves the file to the computer and uploads it for the next step, which is the Author copyedit.

Once the copyedited file is uploaded, the Copyeditor clicks the email icon under Complete for Step 1. This leads to an email to the Author and the Editor, informing them that Step 1 is complete. The Copyeditor should note in the email if there are any Author and/or Editor Queries for the Section Editor to consider.

Step 2

The author can now log in and access the article from the Submission Queue (found under User Home). The Author downloads and opens the copyedited version from Step 1 and reviews the copyediting, responding to any Author Queries directly on the file. The Author saves the file and uploads it in Step 2, which makes the file available to the Copyeditor for the final copyedit. The Section Editor will respond to any Editor Queries by email to ensure that Author and Section Editor do not upload versions of the file on top of one another. The Author sends a completed email to the Copyeditor and Section Editor, initiating, in effect, the third step. For further information on the Author's Copyediting process, see Author's Role: Copyediting.

Step 3

The Copyeditor downloads and opens the copyedited file in Step 2 and creates a clean version (with all traces of the copyediting process removed) based on the responses of the Author and Section Editor, which is ready for the Layout Editor to turn into the published version of the submission. The Copyeditor uploads the clean copy in Step 3, which then becomes the Layout Version. The Copyeditor then uses the email icon under Complete to notify the Layout Editor and Section Editor that copyediting for the submission is now complete.

Layout Editor's Role

The Layout Editor receives an email request from the Copyeditor or the Section Editor requesting the layout of a submission that has completed the copyedit stage. A Layout Editor who is unable to do the Layout simply responds by email to the Section Editor.

Submissions

On Logging in, the Layout Editor will have access to their User Home Page. This page includes a link to the Layout Editor's Active Submissions page, as well as one to previously completed submissions via an Archives link, and a link to view the Table of Contents for upcoming issues, if available.

Active Submissions

Clicking on the Active link from the User Home page will take the Layout Editor to the Active Submissions page. This queue lists those works for which they have been asked to do the layout. The layout process can be initiated by clicking on a listed submission title.

Archive

Clicking on the Archive link from the User Home page will take the Layout Editor to the Archive page. This queue lists those works that have completed the layout process and have been published.

Issues

Clicking on the Future Issues link from the User Home Page will take the Layout Editor to a list of future issues that have not yet been published. This allows the Layout Editor to proof an issue as a whole.

Layout

The Layout Version of the submission has been prepared by the copyeditor to the journal's standards. The Layout Editor will lay out the submission in the appropriate file formats and layout style for the journal. The Layout Editor will need to use third party-software to prepare the HTML, PDF, Postscript, etc. files (e.g., Dreamweaver, Front Page, Acrobat). The Journal Manager is able to make a set of Layout Instructions available to Layout Editors to assist them in properly formatting the files for publication.

Uploading galleys.

When the Layout Editor uploads a file to Galley Format, the system will typically identify the file type based on its suffix (e.g., PDF, HTML), as well as provide information on the file size and its original name. This label, which will appear on the journal's Table of Contents in association with the item published, will tell readers what kind of file format the published item is available in. The Layout Editor also has the option of manually labelling the file. The Layout Editor can upload more than one Galley Format file, delete files that have been uploaded, and edit information such as the file name. In uploading HTML files, the images and style sheet must also be uploaded with the .htm or .html file.

Supplementary files.

If the Author has uploaded any Supplementary Files, they will already be in place. They are to be published in the journal in their original file format, unless the journal has a special policy with regard to their preparation (as with Figures or illustrations). Even if the policy is to publish them in their original format, the Layout Editor may still wish to consult the files to ensure that they are legible and to see whether they can be readily made to further conform to journal style and standards. Supplementary Files can be created, modified, overwritten, and deleted by the Layout Editor (as well as by the Author, if required because of aspects of the file format).

Proofreading

The Author and Proofreader will proof the files in their various formats for typographical and formatting errors. They will record the corrections needed in the Corrections text-box, following the Proofreading Instructions. Once the Proofreader emails the Layout Editor that the proofing is complete, the Layout Editor returns to the Proof Formats in Layout and makes the necessary changes, deleting the files that are corrected and uploading the corrected versions. On completing this task, the Layout Editor may wish to add comments to the Corrections text-box (e.g. explaining a change), before clicking on the email icon under Complete which will lead to an email for notifying the Section Editor that the submission is ready to be scheduled for publication.

Proofreader's Role

The Proofreader will receive an email from the Section Editor requesting that the Proofreader complete a round, or rounds, of proofreading. It is then the Proofreader's duty to accept or deny the responsibility; if accepted, the Proofreader can then log in and begin the proofreading process from their User Home.

Submissions

Once the Proofreader logs in, clicking on the Proofreader link on the User Home page leads to the Submissions queue. This queue lists works for which they have been asked to proofread. Access is also provided to submissions they have completed in the past by clicking the Archive link. To access the article's proofreading page, the Proofreader must click on the article title.

Proofreading

After clicking on an article title in the Submission queue, the Proofreader will have access to layout galleys and proofreading instructions. The Proofreader will also be able to correspond with the article Primary Contact, the Editor and Layout Editor. At this stage, only typographical and formatting errors are identified. Proofreading can be completed by following these steps:

Review Proofing Instructions.

The Proofreader should review the journal's proofing standards by clicking on "Proofing Instructions" at the bottom of the Proofreading panel.

View Proof Formats.

The Proofreader can access article galleys by clicking on "View Proof" beside each Galley format under the Layout section, and can access supplementary files, if any, by clicking the corresponding link provided under "Supplementary Files". Article galleys are commonly available (and subsequently published) in PDF or HTML, and so cannot be directly edited. Supplementary files are published in their original format, and in some cases can be edited.

Consider Author's Proofreading Corrections.

The Proofreader has expertise in the journal's standards, and should review the Author's proofreading corrections in order to provide the Layout Editor with advice (e.g., ignore identified errors that are not errors according to this journal's standards). By clicking on "Proofreading Corrections" the Proofreader will be able to see corrections suggested by the Author.

Provide Proofreading Corrections.

The Proofreader should now click the "Proofreading Corrections" icon and enter their detailed corrections, as instructed by the Proofreading Instructions. Once saved, these will be available to the Layout Editor.

Notify Proofreading as Completed.

Upon completion of the proofreading, the Proofreader clicks on the email icon under "Complete", and sends the following email to the Section Editor. Once the email has been sent (or, alternately, skipped instead of canceled) the article will be moved from the Proofreader's active list in the Submission Queue to the archive, and the Proofreader will not be able to return and make further corrections.

Chapter 6: The Publishing Process

The Editor sees through the publishing process by creating issues and/or volumes for the journal, scheduling submissions to those issues, organizing their Table of Contents, and then finally publishing the issue. The journal can be published in a number of formats. The typical pattern is to gather submissions into an issue which is published quarterly (or monthly or twice a year). However, some electronic journals prefer to publish submissions as soon as they are ready, as part of an annual volume, which begins with the first submission of the year and closes at the end of year, when another volume begins. For the purposes of this Help text, the term issue is used, although an issue consists of a Table of Contents that may be identified by (a) issue, volume, year; (b) volume, year; (c) year; or (d) title. How issues are to be identified is part of the Setup for the journal which the Journal Manager will have configured.

Create Issue

Before using the Editor's Scheduling page (see the submission's Editing page) to schedule submissions in an issue for publication, the Editor needs to use Create Issue to ensure that there is an issue in which to place the submissions. The issue needs to be identified with the appropriate numbers and/or title, depending on the option chosen in Setup (e.g., Vol 2, No 5, 2008). While the system will prompt the Editor in Create Issue with the next issue each time an issue is created, the Editor can override these settings and enter a new set of numbers or a different year. Issues also have the option of having a title added, which will appear above the Table of Contents, and can be used, for example, for special issues of the journal.

Subscription Control.

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.

Creating a cover page.

There is also the option of uploading a cover illustration for the journal, in the form of a .jpg, .png or .gif file. This file will be accessible through the Table of Contents where it will be listed as Cover Page. It will appear on the journal's homepage while the journal issue is Current, and can be clicked on to reach the Table of Contents for that issue. Once the issue is archived, the cover will remain available with the issue through the Table of Contents.

Current, Future and Back Issues.

The Current Issue is the is the most recently published issue. The Future Issues are where the Editor schedules submissions that are to be published next and into the future. The Editor may wish to ensure that there are always a series of two or three live, unpublished issues, which enables submissions to be scheduled over a couple of issues for reasons of balance, for example. The Back Issues are issues, no longer Current, that have already been published.

Schedule Submissions

At any point in the Editing process, the Section Editor can schedule a submission for publication in a particular issue. Typically, the Editor will place the submission into the first available issue, but it may happen that an issue is "full" prior to its publication, or that an Editor wishes to place a submission in a later issue to ensure a range of topics in each issue or, on the other hand, to cluster a series of submissions on a single topic.

Continuous publishing of submissions.

If submissions are being published continuously, as soon as they are ready, then the Editor schedules the submission in what is, in effect, the Current issue, and it will be published immediately. At the end of a Volume year, the next submission will be scheduled to appear in the new Volume, for which the Table of Contents will be published or made Current with this initial submission.

Once a submission has been scheduled in a particular issue, the issue's name and a link to its table of contents will be presented to Layout Editors and Proofreaders.

Table of Contents

Once a submission is scheduled, it will appear in that issue's Table of Contents under its Section heading. If there are no submissions in a Section, that Section will not appear in the Table of Contents. The Editor can re-order Sections, and submissions can be reordered within a Section.

Additionally, if the Journal Manager has enabled subscription control, the Editor can switch access rules (either subscription or open access) on a per-article level.

Publish

When it is time to publish an issue, the Editor clicks "##editor.issues.publishIssue##" on the Live Issue page for the issue to be published, that is, the page with the issue's Table of Contents. Publishing an issue causes its Table of Contents to appear when Current is clicked by readers, and its cover, if there is one, to be appear on the journal's homepage. The issue that was previously Current goes to the Archives. If there is no cover, the Table of Contents will appear on the homepage, unless the homepage is occupied by an image or text that has been loaded in Setup by the Journal Manager to appear there. Publishing an issue also sends out an email notification to all registered Readers that includes the issue's Table of Contents and a link back to the journal's web site.

Chapter 7: Journal Web Site

This journal offers users a number of features designed to improve their reading experience with research and scholarship. These features are commonly used by online journals and familiarity with them in the case of this journal will facilitate getting the full value out of other online journals. These features are generally available to all readers.

Home

There are two main "Home" pages: one for the Open Journal System as a whole, or Main Site Home Page; and a journal-level Home Page. Both home pages contain much of the same information, but differ in certain respects.

Main Site Home Page

Upon accessing the Main Site Home Page you will be provided with a description of the site as a whole, and a list of journals residing on the site. From here you can access a journal's Home Page, access any available current issues, and also register with the journal. The Main Site navigation features break down as follows:

Top Navigation Bar

Home and About provide information about the site (as opposed to an individual journal).

Log In allows you to create a user profile if you have not already done so. See Register and Profile. The Log In link will be replaced with a User Home link once you register and log in. See User Home.

Register allows you to add a journal to your User Home Page.

Search allows you to search the entire site or just an individual journal. See Search and Browse.

Right Navigation Bar

The Open Journal Systems link will take you to the Public Knowledge Project website, which provides resources for Open Journals Systems and other related software.

The Journal Help link provides context sensitive help.

The form under the User heading allows you to log in if you have a username and password. After logging in you will be taken to your User Home page. Once logged in, there will be links under User to a list of journals you have registered to; to your profile; and to log out.

Language allows you to choose a language supported by OJS.

The search field under Journal Content allows you to search the site in a basic variety of ways. For a more comprehensive search, click the Search link on the top navigation bar.

Font Size allows you to make the site font size smaller or bigger.

Journal Home Page

The home page for a journal is the one which is seen when View Journal or Current Issue under the journal's name on the site home page is clicked, or when a journal's name is clicked from User Home.The Journal Home Page breaks down as follows:

Top Navigation Bar

Home and About provide information about the specific journal.

Log In and Register act as above, but redirect to the journal's home page rather than the site home page.

User Home appears once you have logged in, and displays the user home page. This page provides links to manage your journal roles, and to manage your account.

Search provides extensive search options, but is used to search only the journal currently being viewed.

Current displays the table of contents of the current issue of the journal, if available.

Archives displays the names of previously published issues, if available. Clicking on the name of a previously published issue will display its table of contents.

An Announcements link appears on the top navigation bar if the Journal Manager has enabled announcements. Clicking on this link will access the announcements page.

Right Navigation Bar

The Open Journal Systems link will take you to the Public Knowledge Project website, which provides resources for Open Journals Systems and other related software.

The Journal Help link provides context sensitive help.

The form under User will allow you to log in if you have a username and password. After logging in you will be taken to your User Home page. Once logged in, there will be links under User to a list of journals you have registered to; to your profile; and to log out.

Language allows you to choose a language supported by OJS.

The search field under Journal Content allows you to search the journal's content in a basic variety of ways. For a more comprehensive search, click the Search link on the top navigation bar.

Font Size allows you to make the site font size smaller or bigger.

There is also information for Authors, Readers and Librarians listed in the right navigation bar.

About

In About the Journal, the journal presents its policies, procedures and other relevant material, with the intention of making the workings of the journal as transparent as possible. This is the material that is typically referred to as the front matter in journals. It is where potential authors for this journal can learn about the scope and focus of the journal, its Peer Review Policy, and how to format and prepare a submission, as well as how to submit an article to the journal.

User Home

Once a user has logged in, a User Home link appears in the top navigation bar. Clicking this link will display different information depending on whether the user is browsing a specific journal or the site as a whole.

Main Site-Level User Home Information

If the user is logged in and is browsing the main site, the following information is displayed:

My Journals. The user will find a list of all journals for which they have registered, along with links to all available roles (Author, Editor, etc.) on a per-journal basis. If the user is also the Site Administrator, there will also be links to site-wide administration pages.

My Account. The user will find links to perform account modifications, including registering with other journals; editing the user's profile; changing the user's password; and logging out.

Journal-Level User Home Information

If the user is logged in and is browsing a specific journal, only information particular to that journal is displayed. Additionally, under My Account the link to register with other journals is replaced with a link to "Show My Journals" (taking the user back to the Main Site User Home page).

Register & Profile

The journal uses a registration system for all users involved in the editorial and publishing process. The journal's Privacy Policy applies to all registered users. Each registered user has a Profile, which can be edited or added after the user is logged in to the journal. The link for the Profile is found in the right-hand margin under User and on the User Home page.

For all users, there is an email update option, which results in the user being notified by email of each new issue's Table of Contents. For journals operating in more than one language, Reviewers can indicate in their Profile the languages in which they are comfortable reviewing submissions.

Why Register?

When you register the system creates a "User Home" page for you which make it easier to access your journals. You must register if you wish to submit a paper to any journal or if you will be a member of the editorial team (eg, editor, reviewer, proofreader) of any journal.

Some journals restrict access to some portions of their site unless you are registered.

Privacy Policy

The journal's privacy policy applies to all registered users. You can find more information on the journal's privacy policy in About the Journal.

How do I register?

You can register by clicking on "Log In" or "Register" on the site home page or on any journal's home page. Alternatively, you can ask a Journal Manager to register you. Contact information can be found in About the Journal.

Profile

You create a profile (including a username and password) when you register. You can edit your profile any time you are logged in. In the right navigation bar under the title "User", the link "My Profile" appears; click on that link and you are taken to your profile. Here you can change your contact information, reviewing interests, roles, and can manage email notifications for journals you have registered with.

Current & Archives

The issues of the journal are made available as a current issue or edition, and a set of archives of previous issues. The Journal Manager is able to bring into this journal website earlier issues of the journal that were published prior to the use of this system so that they form part of the Archives that are made available to readers on the journal's website.

Search & Browse

The journal's contents can be searched by author, title, abstract, and index terms. The full text of the contents can be searched both in HTML and PDF file formats. Alternatively, using the Browse link in the right-hand margin of the page, readers can browse the contents of the journal by issue, author, and title. Other journals published through this installation of Open Journal Systems may also be browsed.

Reading Tools

Journals using this system are able to provide a series of Reading Tools to accompany items published in the various Sections of the Journal. The Reading Tools are intended to assist both expert and novice readers of the journal in building a context for interpreting, evaluating and utilizing the research they are reading. Sets of Reading Tools have been developed for a wide range of academic disciplines, and from which the Journal Manager can select, as well as update and edit, in supporting the reading environment for the journal. The Reading Tools also enable Readers to join relevant forums, as well as contact the author or share the item with another Reader.

How the Reading Tools work.

The Reading Tools are designed to provide a context for the specific article or item they accompany. The Tools open in a frame in the user's browser to the right of the article or item being read. First, the Tools provide Readers with access to the item's indexing information, print version, and author biographical statement. The Tools enable Readers to look up words in the item (by double clicking on any word in the HTML version of the item) and to email the author or another Reader. The Tools are also designed to take the item's keywords and feed them into the search engines of open access databases and other resources grouped into categories such as Research Studies, Author's Other Works, Press and Media, Government Websites, etc., depending on the set of Tools selected. Readers are also able to access background information on each of the selected resources. In each category, whether Studies, Media, or Instruction, the Tools provide multiple choices or databases to consult, while allowing the Reader to learn more about each database by providing a link to an About page for the resource. (The Journal Manager is able to edit or delete existing resources and add new ones as well.)