

Open Journal Systems: Authors guide

**John Willinsky
Kevin Stranack
Alec Smecher
James MacGregor**

Open Journal Systems: Authors guide

by John Willinsky, Kevin Stranack, Alec Smecher, and James MacGregor

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Chapter 1. Authors overview

OJS exists to serve Authors as well as journals. Not only does OJS provide an easy-to-use submission process, it can collect and disseminate key information about Authors and their work across important research and citation databases, including [Google Scholar](#), [PubMed](#), the [Directory of Open Access Journals](#), and others.

As an Author, your tasks include submission; submitting revised copy; copyediting; and proofreading.

To make a submission, you must have a user account and be enrolled as an Author. User accounts can either be created by the [Journal Manager](#) or, if [journal policies allow](#), you can [register yourself](#).

Once you have an account, log in to the journal site and select the role of Author.

Figure 1.1. Selecting the Author's role



Chapter 2. The Author User Home Page

After clicking on the Author link on your User Home page, you will be directed to your Author's User Home page, which includes information on [Active Submissions](#); a link to [start a new submission](#); and information on any [Refbacks](#) you may have.

Active Submissions

This page will list any of your submissions to the journal that are still in process (e.g., awaiting assignment to an editor, undergoing review, being edited) or incomplete (in which case you can return and finish the submission at any point).

Each completed submission will fall into one of the following categories:

- **Awaiting Assignment:** the submission has been completed by you; you cannot now delete the submission from the system yourself. The Editor can now see the submission, and must assign an Editor or Section Editor to it.
- **Queued for Review:** the submission has been vetted and is now in the review process. You should receive notice shortly on the review decision.
- **Queued for Editing:** the submission has completed the review process and has been accepted for publication; it will now make its way through the system's copyediting, layout editing and proofreading processes.

In the example below, the journal is charging a submission fee to authors, and you must pay this (using the Pay Submission Fee link) before the submission can be considered. If a journal does not charge submission fees, this link would not appear. Similarly, this example journal is also configured to require a publication fee. The author must use the Pay to Publish link to make the payment and allow for publication to proceed. Again, if a journal has not activated this fee option, authors will not have to go through this process.

Figure 2.1. Active Submissions

Home > User > Author > Active Submissions

Active Submissions

ACTIVE ARCHIVE

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
4	—	ART	Chan	UNTITLED	Incomplete DELETE
1	12-28	ART	Chan	A STUDY OF ELECTRONIC PUBLISHING	Awaiting assignment PAY SUBMISSION FEE
2	12-28	ART	Chan	LEARNING TO PUBLISH	IN REVIEW PAY SUBMISSION FEE
3	12-28	ART	Chan	OPEN SOURCE SOFTWARE AND SCHOLARLY PUBLISHING	IN EDITING PAY TO PUBLISH

1 - 4 of 4 Items

Start a New Submission

[CLICK HERE](#) to go to step one of the five-step submission process.

Refbacks

ALL NEW PUBLISHED IGNORED

DATE ADDED	HITS	URL	TITLE	STATUS	ACTION
<i>There are currently no refbacks.</i>					

As the author, you can click on the hyperlinked title of any listed submission and review it. Clicking a submission title will bring you to your submission's Summary page. From here, you could revise the title or abstract (by clicking the Edit Metadata link). If the editor asks for revisions, you will upload the changes this way too (in the Review section of your submission).

Figure 2.2. Submission Summary

Home > User > Author > Submissions > #1 > Summary

#1 Summary

SUMMARY REVIEW EDITING

Submission

Authors	Fred Chan
Title	A study of electronic publishing
Original file	1-1-1-SM.DOCX 2009-12-28
Supp. files	None ADD A SUPPLEMENTARY FILE
Submitter	Fred Chan
Date submitted	December 28, 2009 - 07:21 AM
Section	Articles
Editor	None assigned
Author comments	test

Author Fees

Article Submission	100.00 CAD	PAY NOW
Fast-Track Review:	100.00 CAD	PAY NOW
Article Publication	100.00 CAD	PAY NOW

Status

Status	Awaiting assignment
Initiated	2009-12-28
Last modified	2009-12-28

Submission Metadata

[EDIT METADATA](#)

Authors

RefBacks

The RefBacks section displays any incoming links from external web sites such as blogs, news sites, or other articles that link directly to your articles. Each RefBack can be edited: it can be ignored, deleted, or published, in which case it appears publicly at the end of your published article on the web site.

Archive

Your Archive page will list all declined submissions, as well as any published submissions along with information on which issue they appear in.

Chapter 3. Submitting an Article

To make a submission, select the Click Here link (under Start a New Submission) to proceed to the [first step](#) of the submission process.

Figure 3.1. Starting a Submission

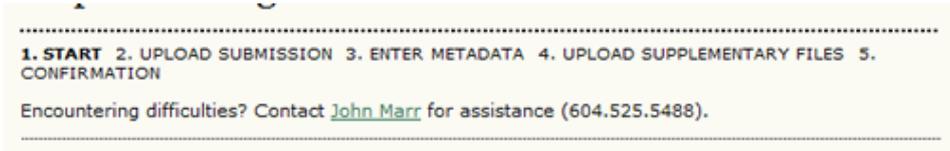


Start a New Submission
[CLICK HERE](#) to go to step one of the five-step submission process.

Submission Step One: Starting the Submission

Step 1 ensures that the Author understands the journal's submission rules. The Author will have to pick the appropriate section to submit to, and will be provided with information on the journal's privacy statement, copyright notice, competing interest statement and/or author fees, if applicable. If you need any help the journal's technical support contact is provided at the top of this page.

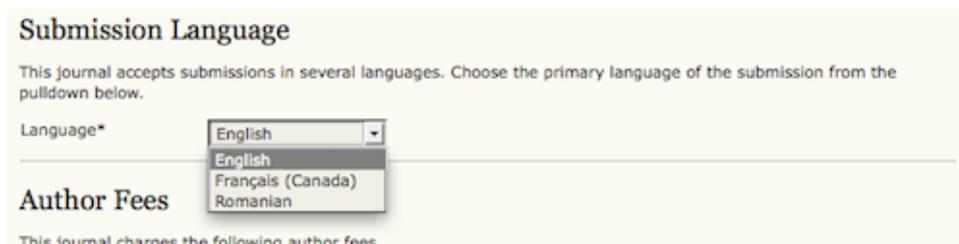
Figure 3.2. Submission Steps Technical Support



.....
1. START 2. UPLOAD SUBMISSION 3. ENTER METADATA 4. UPLOAD SUPPLEMENTARY FILES 5.
 CONFIRMATION
 Encountering difficulties? Contact [John Marr](#) for assistance (604.525.5488).

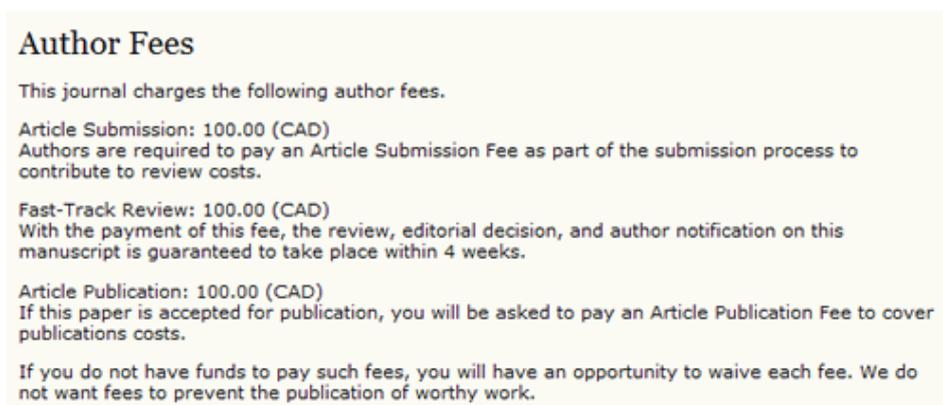
If the journal allows content to be submitted in more than one language, you will be able to choose a specific language to complete the submission in. You must complete all required fields for the submission language you choose; you can also optionally fill out required and optional fields for the other languages supported by the journal. For example, if you choose French as your submission language, you must provide an article and title in French; but you may also provide that information in English (or whichever other language(s) supported by your journal), as well as any other metadata -- indexing keywords, etc.

Figure 3.3. Submission Language



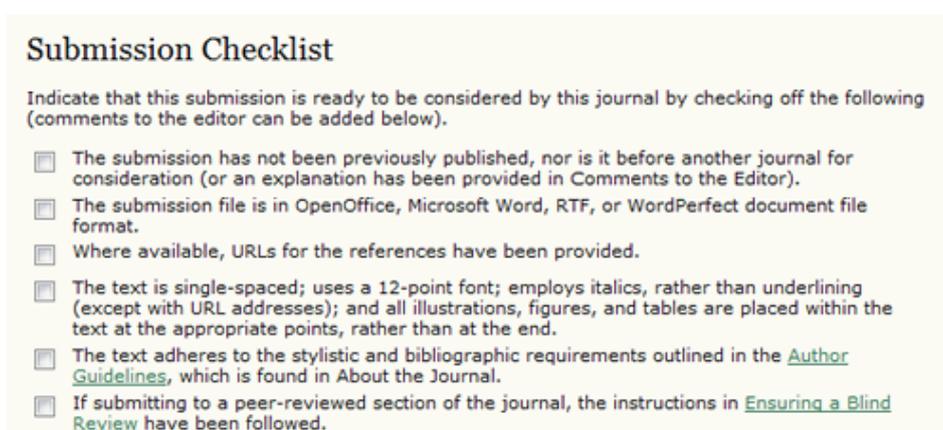
If the journal charges [submission fees](#), these will be presented to the author. If the journal does not charge submission fees, this section will not appear.

Figure 3.4. Author Fees



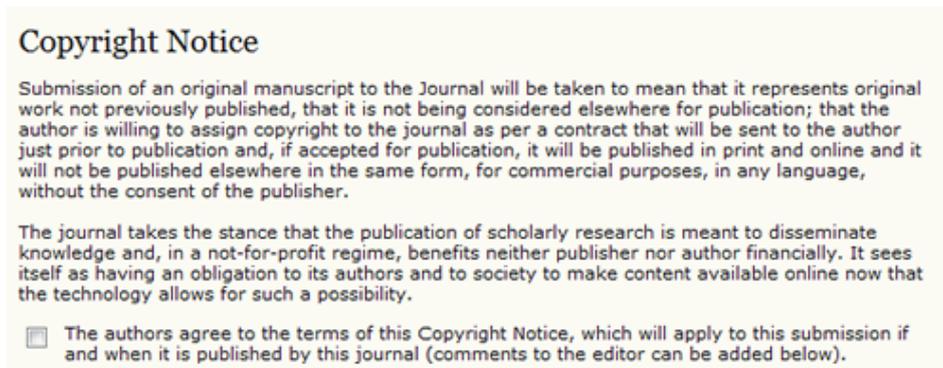
Next, the author must check each of the items from the submission checklist. These items were established in [Journal Setup Step 3.1](#).

Figure 3.5. Submission Checklist



The journal's copyright policy will appear next, and, if configured as a requirement, the author will need to agree to this policy. If the journal has not [added a Copyright Notice](#), this section will not appear.

Figure 3.6. Copyright Notice



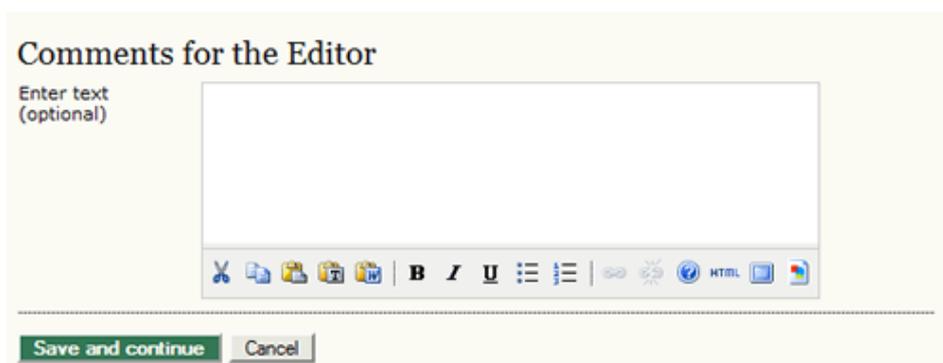
Authors can then review the Privacy Statement. If the journal has not [added a Privacy Statement](#), this section will not appear.

Figure 3.7. Journal's Privacy Statement



Finally, the author can add any comments, which will be visible to the editor. Move to the next step by hitting the Save and Continue button.

Figure 3.8. Comments for the Editor



Submission Step Two: Uploading the Submission

Submission Step Two allows you to upload the submission file, typically a word-processing document.

- Click Browse to open a Choose File window for locating the file on the hard drive of your computer.

- Locate the file you wish to submit and highlight it.
- Click Open on the Choose File window, which places the name of the file on this page.
- Click Upload on this page, which uploads the file from the computer to the journal's web site and renames it following the journal's conventions.
- Once the submission is uploaded, click Save and continue.

Figure 3.9. Uploading the Submission



Submission Step Three: Entering the Submission's Metadata

The third step of the submission process serves to collect all relevant metadata from the author. The first section of metadata covers the authors. The submitting author will have their personal information automatically appear. Any additional information, such as Competing Interests should also be added at this time, if required.

Figure 3.10. Authors

The screenshot shows a web form titled "Authors" with the following fields and content:

- First name***: Fred
- Middle name**: (empty)
- Last name***: Chan
- Email***: fc@mailinator.com
- URL**: (empty)
- Affiliation**: (empty text area)
- Country**: (empty dropdown menu)
- Competing interests**: I have no competing interests. (with a link to [CI POLICY](#))
- Bio statement (E.g., department and rank)**: Department of Health Studies, University of Anywhere

At the bottom left of the form is an "Add Author" button. Both the "Competing interests" and "Bio statement" text areas include a rich text editor toolbar with icons for cut, copy, paste, bold, italic, underline, list, link, unlink, HTML, and print.

If there are multiple authors for the submission, their information can be added using the Add Author button. You can also re-order the list of authors, make one of the authors the principal contact with the editor, and delete any authors added in error.

Figure 3.11. Biographical Statement

Bio statement (E.g., department and rank)

Department of Health Studies
University of Anywhere

✂️ 📄 📁 📧 📧 | **B** *I* U ☰ ☰ | 🔗 🌐 🌐 HTML 🖨️

↑ ↓ Reorder authors to appear in the order they will be listed on publication.

Principal contact for editorial correspondence.

First name*

Middle name

Last name*

Email*

URL

Affiliation

Next, enter the submission title and abstract.

Figure 3.12. Title and Abstract

Title and Abstract

Title*

Abstract*

You will then add indexing information. This will help others find your article. The suggested indexing options were determined by the Journal Manager in [Setup Step 3.4](#).

Figure 3.13. Indexing

Indexing

Provide terms for indexing the submission; separate terms with a semi-colon (term1; term2; term3).

Academic discipline and sub-disciplines:
 Publishing; Communications; Library Studies; Education

Subject classification:
[Library of Congress Classification](#)

Keywords:
 Scholarly Communication; Libraries; Publishing; Open Source

Language:
 English=en; French=fr; Spanish=es. [Additional codes.](#)

The next section allows you to enter the name of any organization that may have supported your research.

Figure 3.14. Supporting Agencies

Supporting Agencies

Identify agencies that provided funding or support for the work presented in this submission.

Agencies:

Depending on how the journal is configured, you may find an option to provide your list of references separately. This will allow the journal's Editors and Copyeditors to check your references using a Citation Markup Assistant. You should provide your list with each reference on a separate line.

Figure 3.15. References



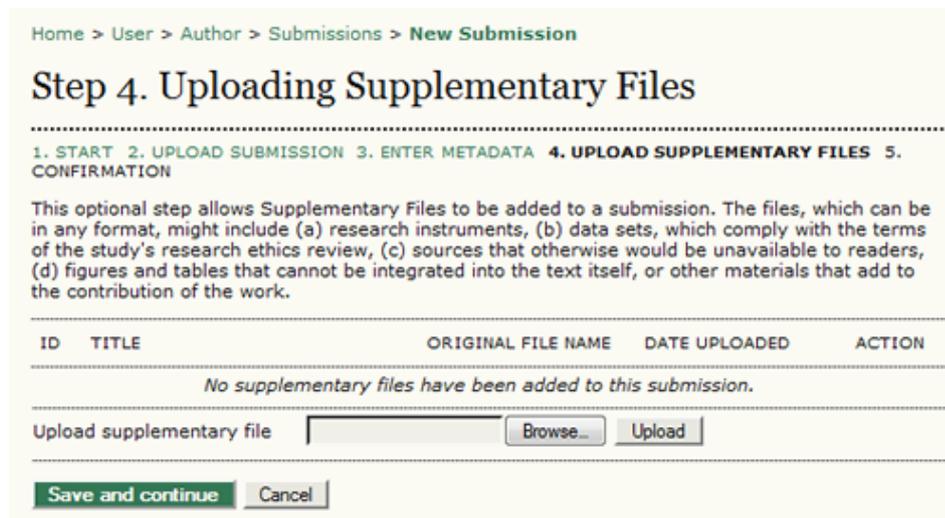
Hit the Save and Continue button to move on to Step 4.

Submission Step Four: Uploading Supplementary Files

This step is optional. If you have any supplementary files, such as research instruments, data sets, etc., you may add them here. These files are also indexed by the author, identifying their relation to the submission, as well as their ownership. Supplementary Files can be uploaded in any file format and will be made available to readers in their original format.

- Locate the file you wish to submit and highlight it.
- Click Open on the Choose File window, which places the name of the file on this page.
- Click Upload on this page, which uploads the file from the computer to the journal's web site and renames it following the journal's conventions.
- Once the submission is uploaded, click Save and Continue.

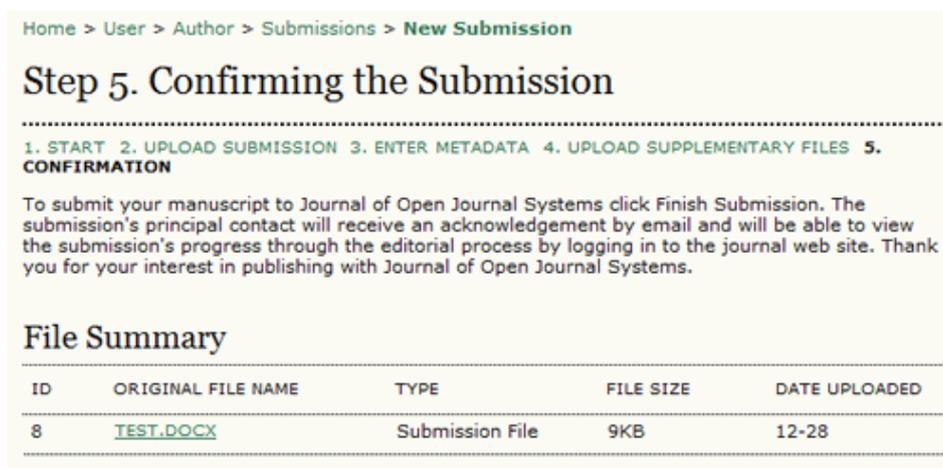
Figure 3.16. Uploading Supplementary Files



Submission Step Five: Confirming the Submission

This final step provides a summary of your submission.

Figure 3.17. Confirming the Submission



If the journal charges submission, fast-track review, or publication fees, your required payment will also be detailed here. If you paid previously, use the checkbox to indicate that you have. If you require a fee waiver to be considered, check that box and provide an explanation (required).

Figure 3.18. Author Fees

Author Fees

This journal charges the following author fees.

Article Submission: 100.00 (CAD) [PAY NOW](#)
 Authors are required to pay an Article Submission Fee as part of the submission process to contribute to review costs.

Fast-Track Review: 100.00 (CAD) [PAY NOW](#)
 With the payment of this fee, the review, editorial decision, and author notification on this manuscript is guaranteed to take place within 4 weeks.

Article Publication: 100.00 (CAD)
 If this paper is accepted for publication, you will be asked to pay an Article Publication Fee to cover publications costs.

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

Already Paid

Payment has already been sent

Select this box if you've already sent your payment to the journal in order to finish the submission process. The submission will not be reviewed until the payment arrives. Click [PAY NOW](#) above to see the payment instructions.

Request Waiver

Please consider waiving the Article Submission Fee for this article

Please use the comments box below to indicate why fees should be waived.

Click Finish Submission to submit your manuscript. You will receive an acknowledgement by email and will be able to view your submission's progress through the review and editorial process by returning to the [Active Submissions](#) section of your Author page.

Authors and Submission Review and Editing Process

To track your submission's progress through the review and editorial process, you will need to log into the journal web site, and choose your role as Author. Click on the linked title to go to the submission record.

Figure 3.19. Active Submissions

Home > User > Author > Active Submissions

Active Submissions

ACTIVE ARCHIVE

ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS
1	12-28	ART	Chan	A STUDY OF ELECTRONIC PUBLISHING	Awaiting assignment PAY SUBMISSION FEE
2	12-28	ART	Chan	LEARNING TO PUBLISH	IN REVIEW PAY SUBMISSION FEE
6	12-28	ART	Chan, MacIntosh	LIBRARIES AND PUBLISHING: NEW OPTIONS FOR RESEARCH...	Awaiting assignment PAY SUBMISSION FEE
3	12-28	ART	Chan	OPEN SOURCE SOFTWARE AND SCHOLARLY PUBLISHING	IN EDITING PAY TO PUBLISH

1 - 4 of 4 Items

Summary

From the resulting 'Summary' page, you will see links to Summary, Review, and Editing pages. Each of these pages will provide details about your submission.

Figure 3.20. Selecting Submission Summary

Home > User > Author > Submissions > #6 > Summary

#6 Summary

SUMMARY REVIEW EDITING

Submission

Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services

The Summary section contains several sections, including Submission, which displays the author names, submission title, original submission file, any supplementary files, the ability to add a supplementary file, the name of the submitter, the date submitted, the section the article is assigned to, the editor responsible for the submission, and the comments to editor you made as part of your submission (see above).

Figure 3.21. Submission Summary

Submission	
Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services
Original file	6-8-2-SM.DOCX 2009-12-28
Supp. files	None ADD A SUPPLEMENTARY FILE
Submitter	Fred Chan
Date submitted	December 28, 2009 - 05:59 PM
Section	Articles
Editor	None assigned
Author comments	please consider.

The next section outlines any required author fees. If the journal does not charge author fees, this section will not appear.

Figure 3.22. Author Fees

Author Fees	
Article Submission	100.00 CAD PAY NOW
Fast-Track Review:	100.00 CAD PAY NOW
Article Publication	100.00 CAD PAY NOW

The Status section lets you know where your submission is in the publishing process (see above for status possibilities). It also lets you know when you made your submission and the date of the most recent status change.

Figure 3.23. Status

Status	
Status	Awaiting assignment
Initiated	2009-12-28
Last modified	2009-12-28

The final section outlines the submission metadata, including author details, title, abstract, indexing, and supporting agency. You can modify any of this information by selecting Edit Metadata.

Figure 3.24. Submission Metadata

Submission Metadata

[EDIT METADATA](#)

Authors

Name	Fred Chan 
Affiliation	—
Country	—
Competing interests	I have no competing interests. CI POLICY
Bio statement	Department of Health Studies University of Anywhere

Principal contact for editorial correspondence.

Name	Jillian MacIntosh 
Affiliation	—
Country	—
Competing interests	I have no competing interests. CI POLICY
Bio statement	—

Title and Abstract

Title	Libraries and Publishing: New Options for Research Support Services
Abstract	Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Indexing

Academic discipline and sub-disciplines	Library Studies
Subject	Libraries - Public Services

Review

If your submission is In Review, you can view its details in the Review section (linked from the top of your page).

Figure 3.25. Selecting Submission Review

[Home](#) > [User](#) > [Author](#) > [Submissions](#) > #6 > **Summary**

#6 Summary

[SUMMARY](#) [REVIEW](#) [EDITING](#)

Submission

Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services

First, you will see the basic submission information again.

Figure 3.26. Submission Information

Submission

Authors	Fred Chan, Jillian MacIntosh
Title	Libraries and Publishing: New Options for Research Support Services
Section	Articles
Editor	Jane Smith

Below that is the Peer Review section. You will see information about each round of review (there may be one or more) and any revised files (e.g., a version of your original submission file with changes marked in) uploaded by each reviewer (Reviewer A, Reviewer B, etc.).

Figure 3.27. Peer Review

Peer Review

Round 1

Review Version	6-9-1-RV.DOCX 2009-12-28
Initiated	2009-12-28
Last modified	2009-12-28
Uploaded file	Reviewer A 6-10-1-RV.DOCX 2009-12-28

Last on this page is the Editor Decision section. From this section you can notify the editor once you have submitted your revised submission file, view the reviewer comments (click on the cloud icon), and upload your revised submission file (if revisions were required).

Figure 3.28. Editor Decision

Editor Decision

Decision	Revisions Required 2009-12-28
Notify Editor	Editor/Author Email Record 2009-12-28
Editor Version	None
Author Version	None
Upload Author Version	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>

Possible decisions include:

- Accept: Your submission has been accepted as is.
- Revisions Required: Your submission requires minor changes and will be accepted once those have been completed.
- Resubmit for Review: Your submission needs significant re-working. A new file must be submitted and another round of review will take place.

- **Reject:** Your submission was not accepted for publication with this journal, either because it was not seen to be of high enough quality, or its subject did not match the journal.

Editing

Your submission is considered "In Editing" once it has been approved for publication. It will then need to go through copyediting to correct any grammatical or stylistic errors, layout editing to create the published galleys (e.g., HTML or PDF), and proofreading to take one final look at the article before it is made publicly available.

If your submission is In Editing, you can view its details in the Editing section (linked from the top of your page). The first section again includes basic submission information.

Figure 3.29. Selecting Submission Editing



Copyediting

In the next section, you can follow the copyediting process.

Figure 3.30. Copyediting



- **Step 1:** The journal's Copyeditor has made changes to the reviewed submission file. You can download a revised copy here (e.g., 6-11-1-ED.DOCX).

- Step 2: You will review the Copyeditor's changes, and make any final changes of your own. You then upload your revised submission file here. Be sure to use the email icon to notify the Copyeditor that you have submitted your file.
- Step 3: The Copyeditor takes a last look at your changes before passing the submission over to the Layout Editor. No action is required by the author.

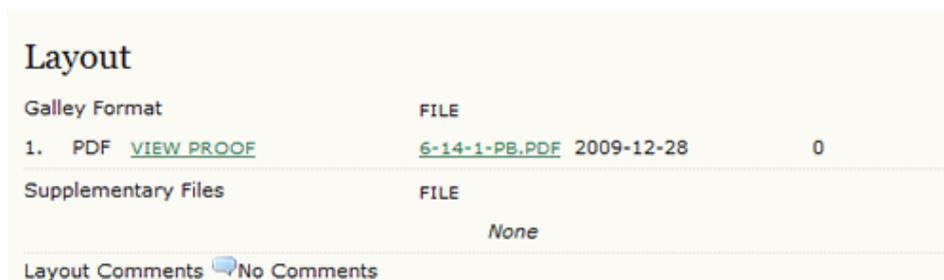
Note

Copyedit comments can be added using the icon near the bottom of this section. There is also a link to "Copyedit Instructions".

Layout Editing

The next stage in the editorial process is layout editing. The Layout Editor takes the final copyedited version of the submission and converts it into a format suitable for publishing on the journal web site (e.g., typically HTML or PDF). These are known as the "galleys".

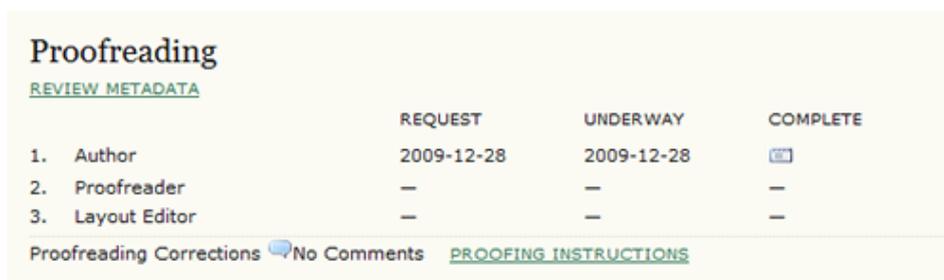
Figure 3.31. Layout



Proofreading

The final editing stage is proofreading. It is also broken down into 3 steps.

Figure 3.32. Proofreading



1. Once the galleys have been uploaded by the Layout Editor, you will receive an email from the editor asking that you review them and note any errors in the Proofreading Corrections comments. Proofing

Instructions are also available. To view these, you will need to login to the journal and select the appropriate submission link:

Figure 3.33. Active Submissions

Active Submissions						
ACTIVE		ARCHIVE				
ID	MM-DD SUBMIT	SEC	AUTHORS	TITLE	STATUS	
1	12-28	ART	Chan	A STUDY OF ELECTRONIC PUBLISHING	IN EDITING COPYEDIT REQUESTED Publication Fee Paid	

On the resulting screen, you can use the View Proof links to display the files. You can click the linked file names (e.g, 1-95-1-PB.HTML) to download a copy.

Figure 3.34. Layout

Layout			
Galley Format			FILE
1. HTML	VIEW PROOF		1-95-1-PB.HTML 2010-01-15 0
2. PDF	VIEW PROOF		1-96-1-PB.PDF 2010-01-15 0
Supplementary Files		FILE	
<i>None</i>			
Layout Comments  No Comments			

Review the files and make any comments using the Layout Comments icon.

Figure 3.35. Corrections

Once you have completed your review and noted any necessary changes, hit the Complete button.

Figure 3.36. Proofreading

		REQUEST	UNDERWAY	COMPLETE
1.	Author	2010-01-15	2010-01-15	<input checked="" type="checkbox"/>
2.	Proofreader	—	—	—
3.	Layout Editor	—	—	—

Proofreading Corrections No Comments [PROOFING INSTRUCTIONS](#)

This will generate an email informing the Proofreader and Section Editor that you are satisfied with the galley.

Figure 3.37. Sending Email

Send Email

To: Jimmy Jazz <jjazz@mailinator.com>

CC: Sally Jones <sj@mailinator.com>

BCC:

Send a copy of this message to my address (fc@mailinator.com)

Attachments:

From: "Fred Chan" <fc@mailinator.com>

Subject: [JOJS] Proofreading Completed (Author)

Body: Jimmy Jazz:
 I have completed proofreading the galleys for my manuscript, "Clinical Research and Application," for Journal of Open Journal Systems. The galleys are now ready to have any final corrections made by the Proofreader and Layout Editor.
 Fred Chan

2. The journal's own Proofreader will also check for errors and make their own notes and inform the Layout Editor when all proofreading is complete. No action is required by the Author.
3. The Layout Editor takes all of the notes and incorporates all of the changes into revised galleys. These are then ready to publish. No action is required by the Author.

You have now completed all of the steps involved in submitting to the journal and participating in the review and editing of your submission.

Chapter 4. OJS - Overview

Open Journal Systems (OJS) is an open source solution to managing and publishing scholarly journals online. It is a highly flexible editor-operated journal management and publishing system that can be downloaded for free and installed on a local web server. It has been designed to reduce the time and energy devoted to the clerical and managerial tasks associated with editing a journal, while improving the record-keeping and efficiency of editorial processes. It seeks to improve the scholarly and public quality of journal publishing through a number of innovations, from making journal policies more transparent to improving indexing.

OJS includes the following features:

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

Chapter 5. Navigating OJS

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

Figure 5.1. Example Multi-Journal Site Page

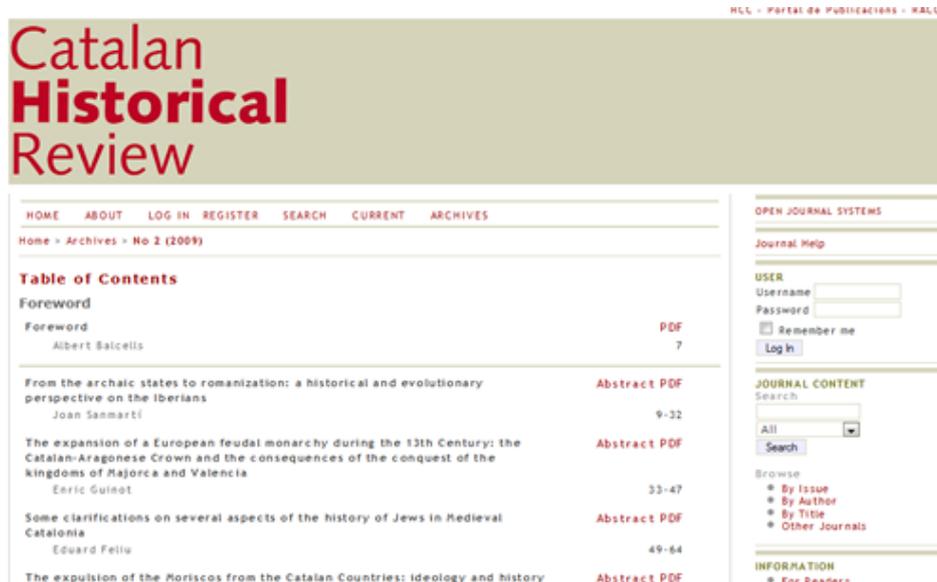


Note

The system can also be set up to [redirect visitors to a single journal](#), which is helpful if the site is only hosting one journal.

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

Figure 5.2. Example Journal Page



To navigate back to the Site level, you can click the Other Journals link on the right navigation bar (in the Journal Content section, under Browse).

Common Interface Elements

You will find a number of common interface elements at the Site and Journal levels of any default OJS system.

The Top Navigation Bar

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

Figure 5.3. Top Navigation Bar, Site-level and Not Logged In

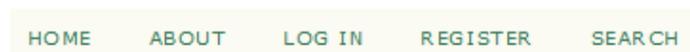
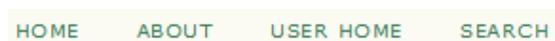


Figure 5.4. Top Navigation Bar, Site-level and Logged In



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

- If you are browsing at the site level, the About link takes you to the site's About page, which may include a description of the site as a whole, and also includes links to the About pages for every journal on the system. If you are browsing at the journal level, clicking the About link will take you to that journal's About page only.
- If you click the Login link you will be taken to a login page, where you will be asked to provide your username and password. You will also be prompted to register with the site if you are not a user. If you have forgotten your password, you can click [Forgot Your Password?](#) to begin the retrieval process. If you log in from the site level, you will be taken to your site-wide User Home page, which provides information on which journals you are registered with, and in which role. If you log in from the journal level, you will be taken to your journal-specific User Home page, which lists only role information regarding that journal.
- If you click the Register link while browsing at the site level, you will be asked to choose a journal to register with. If you click the Register link while browsing at the journal level, you will be presented with a registration form, or a message stating that registrations are not being accepted at this time if registration has been disabled.
- Clicking the Search link will bring you to a comprehensive search page. If you are currently browsing at the site level, you will be able to choose whether to search across all journals on the site, or only against a particular journal. If you are browsing at the journal level, your search will only be performed against that journal's contents.
- If you have already logged in, you will see a User Home link rather than the Login and Register links. Clicking this will take you to your site- or journal-specific User Home page.

The Breadcrumb

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

Figure 5.5. The Breadcrumb

Home > User > Editor > Submissions > #3 > **Editing**

In this example, the Editor is viewing the Editing page for Submission #3. You can return to any of these pages by clicking the relevant breadcrumb link.

The Sidebar

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

Note

By default, these sidebar blocks are placed on the right. However, a Journal Manager can move any of these blocks to the left to create a new sidebar, and can also prevent any block from displaying entirely. The Journal Manager can also reorder the vertical position of these blocks. For more information on arranging blocks, see the section on Journal Setup [Step 5.6](#). Journal Managers can also create their own blocks, enter any content they wish, and add them to the sidebar. For more information, see the section on [System Plugins](#).

Figure 5.6. The Sidebar



- The "Developed By" block at the very top of the navigation bar provides a link to the Public Knowledge Project [website](#).

- The "Journal Help" block provides a link to the system's context-sensitive help. No matter where you are in the system, you can click this link to access help specific to the matter at hand.
- The "User" block provides useful user-specific information and options. If you have not logged in, you can enter your username and password information to log in. If you have logged in, it displays your username, and provides links to journals you have registered with; to your profile; and to log out.
- The "Language" block only appears if there is more than one language installed on the system or for the particular journal you are browsing. You can toggle between these languages by choosing from the dropdown menu.
- The "Journal Content" block allows you to search journal content. You can search all fields, or you can pick a particular field (for example, authors) to search against. If you are browsing at the site level, you can search against all journals; if you are browsing a specific journal, you will only be able to search against that particular journal.
- The "Font Size" block allows you to increase or decrease the entire website's font size.

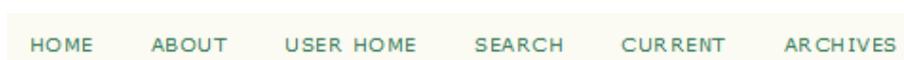
Journal-Specific Interface Elements

There are a number of interface elements that are only seen when you are browsing at the journal level.

Journal-Specific Top Navigation Bar Elements

When browsing at the journal level, the topmost navigation bar includes two extra links by default:

Figure 5.7. A Journal Navigation Bar



- The Current link takes you to the table of contents of the most-recently published issue. If the journal has no current material published, the page you see when clicking the link will say so.

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

Note

Sometimes you may see even more links in the topmost navigation bar. For example, you may see an Announcements link, which will take you to a page containing journal-specific announcements. The Journal Manager may also have created custom links to appear here, taking you to specific pages within the system, or even to other websites (see Journal Setup for more information). Neither the Announcements link nor the custom links are on by default.

Journal-Specific Sidebar Elements

You will notice some new sidebar blocks when browsing at the journal level:

Figure 5.8. A Journal's Sidebar



- The "Notifications" block allows you to manage and view your journal-specific notifications.
- The "Subscription" block will only appear for subscription journals, and display information about the user's account.
- The "Browse" block allows you to browse lists of journal content. You can browse by Issue, Author and Title. Additionally, if you click the Other Journals link, you will be brought to the site-level journal list.

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

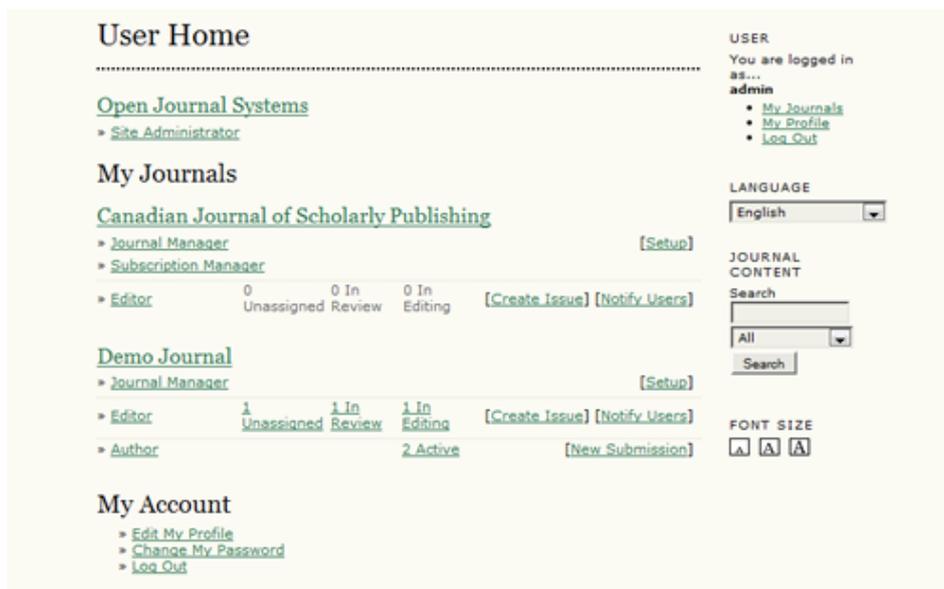
Chapter 6. User Roles

About User Roles

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

When a user logs into the system, they will be taken to their User Home page. From here, they will see a list of the roles they belong to for each journal in the system (along with user-specific links to edit their profile, change their password, etc.). In the example below, the user has been enrolled a Site Administrator; as a Journal Manager, Subscription Manager and Editor for the Canadian Journal of Scholarly Publishing; and as a Journal Manager, Editor and Author for Demo Journal. A user might be an Editor in one journal (with all of the accompanying permissions), but only an Author on another (and limited to only performing Author tasks for that journal).

Figure 6.1. Site-Wide User Home



Users can subsequently return to this listing by clicking either the My Journals link in the User block in the sidebar, or the User Home link in the topmost navbar; either link will return them to their site-wide User Home.

Journals can be configured to allow users to self-enroll as Readers, Authors, and/or Reviewers, or self-registration can be disabled completely.

Access to journal content, or even to the journal itself, can be limited to registered users, and subscription support can also be enabled. See [Journal Management Step 4.1](#) for more information on access control.

Available Roles within OJS

Site Administrator

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

See the [Site Administrator](#) role section for more details.

Journal Manager

The Journal Manager is responsible for [setting up](#) the journal web site, configuring the system options, and managing the user accounts. This does not involve any advanced technical skills, but entails filling out web-based forms and uploading files. The Journal Manager also [enrolls](#) the Editors, Section Editors, Copyeditors, Layout Editors, Proofreaders, Authors, and Reviewers. Alternately, if the names and email addresses of potential users already exist in another database (e.g., a spreadsheet), they can be [imported](#) into the system. The Journal Manager also has access to the journal's other management features, and can create new [Sections](#) for the journal, set up [Review Forms](#), edit the [default Emails](#), manage the [Reading Tools](#), view [Statistics and Reports](#), and more.

Note

Although the Journal Manager is 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.

See the [Journal Manager](#) role section for more details.

Reader

The Reader role is the simplest role in OJS, and has the fewest capabilities. Readers include both subscribers for journals for which access is subscription-based, and readers who choose to register for open access

journals (whether immediately open access or open after a period of time). Registered Readers receive a notification email with the publication of each issue, which includes the Table of Contents for that particular issue.

See the [Reader](#) role section for more details.

Author

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

See the [Author](#) role section for more details.

Editor

The Editor oversees the entire [review](#), [editing](#) and [publishing](#) process. The Editor, working with the Journal Manager, typically establishes the [policies and procedures](#) for the journal. In the [editorial process](#), the Editor assigns submissions to the Section Editors to see through [Submission Review](#) and [Submission Editing](#). The Editor keeps an eye on the submission's progress and assists with any difficulties. Once review is completed, the Editor typically sees the submission through the Editing process (including [copyediting](#), [layout editing](#), and [proofreading](#)) although in some journals this remains the responsibility of the Section Editor in charge of the submission's review process. The Editor also creates the journal issues, [schedules submissions for publication](#), arranges the Table of Contents, and publishes the issue as part of the [Publishing Process](#). The Editor can restore archived submissions to the active In Review or In Editing lists.

See the [Editor](#) role section for more details.

Section Editor

The Section Editor manages the [review](#) and [editing](#) of submissions to which they have been assigned. In some cases, a Section Editor who is assigned to see submissions through the Review Process will also be responsible for seeing the submissions that are accepted through the Editing process (that

is, through [copyediting](#), [layout editing](#), and [proofreading](#)). Often, however, Section Editors only work with the review process, and an Editor, acting in the role of Section Editor, sees the submissions through the Editing process. The journal will have a policy on how the tasks are divided.

See the [Section Editor](#) role section for more details.

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.

See the [Reviewer](#) role section for more details.

Subscription Manager

The Subscription Manager manages the journal's Subscriptions and Subscription Types, and can also configure where and how payments are handled within the system.

The Subscription Manager does not have pages of their own in this guide; since they only see a small subset of the Journal Manager's pages, namely the [Subscriptions](#) and [Payment](#) pages, you can see them for more details.

Copyeditor

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

See the [Copyeditor](#) role section for more details.

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 galley presentations of 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). In some cases, the Editor or Section Editor will also [serve as Layout Editor](#).

See the [Layout Editor](#) role section for more details.

Proofreader

The Proofreader carefully [reads over the galley](#)s 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](#).

See the [Proofreader](#) role section for more details.

Registering with a Journal

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

To register with a journal, click the Register link on the topmost navigation bar, select the journal you want to register with if asked, and fill out the ensuing form. You will not be able to self-register for an Editorial Role (Editor; Section Editor; Copyeditor; Layout Editor; Proofreader; Subscription Manager; or Journal Manager); if you need to be enrolled at that level, ask a current Journal Manager or Site Administrator.

All fields with an asterisk beside them (Username; Password; Repeat Password; First Name; Last Name; Email; Confirm Email) are mandatory. If the journal is multilingual, you will need to select your preferred language.

Figure 6.2. Filling out the Registration Form

Register

Fill in this form to register with this journal.
[Click here](#) if you are already registered with this or another journal on this site.

Profile

Username*
The username must contain only lowercase letters, numbers, and hyphens/underscores.

Password*
The password must be at least 6 characters.

Repeat password*

Salutation

First name*

Middle name

Last name*

Initials Joan Alice Smith = JAS

Gender

Affiliation

Signature
(Your institution, e.g. "Simon Fraser University")

Email* [PRIVACY STATEMENT](#)

Confirm Email*

URL

Phone

Fax

Mailing Address

Your username and your email address must be unique; furthermore, while you can change your email address at a later date, you will be unable to change your username.

You may be able to register as a Reader, an Author and/or a Reviewer, depending on how the journal has been configured. All you have to do is check the box next to each role available to you. If you register as a Reviewer, you can also supply your reviewing interests.

Figure 6.3. Selecting Roles

The screenshot shows a registration form with the following sections:

- (E.g., department and rank)**: A text input field.
- Confirmation**: Send me a confirmation email including my username and password
- Working languages**: English, Español (España)
- Register as**:
 - Reader: Notified by email on publication of an issue of the journal.
 - Author: Able to submit items to the journal.
 - Reviewer: Willing to conduct peer review of submissions to the journal. Identify reviewing interests (substantive areas and research methods). libraries, scholarly publi
- Buttons**: Register (green), Cancel (grey)
- * Denotes required field**
- Privacy Statement**: The names and email addresses entered in this journal site will be used exclusively for the stated purposes of this journal and will not be made available for any other purpose or to any other party.

In some cases, the journal you are trying to register with may not be allowing registrations; if that is so, you will see a note to that effect.

If you want to register in another role within the same journal (for example, if you are already a Reader, but also want to become an Author) you can log in; go to Edit My Profile (under My Account on your User Home page); and check off the checkboxes next to any available roles, near the bottom of the page.

If you want to unenroll yourself from a journal completely, all you have to do is visit your profile and uncheck all role checkboxes. If you are enrolled at an editorial level, you will have to ask the Journal Manager to unenroll you.

Note

Please be aware that you can't completely delete your account from the system yourself. If you would like to delete your account you should contact the Journal Manager or take a look at the section on [merging accounts](#).

Viewing and Changing your Profile

To view and edit your profile, log in and click the Edit My Profile link from your User Home page. Alternatively, once logged in you can always click the My Profile link from the User Navigation block on the sidebar,

if available. From here, you can update your email address, change your personal information, or change your password.

Resetting your Password

Resetting your password is a simple process if you remember it and just want to change it to something else: log in, and from your User Home page click the Change Password link. You will have to enter your current password, and then your new password twice.

Resetting your password if you have forgotten it is still a simple process, but it takes a few more steps:

1. Click the Log In link on the topmost navigation bar.
2. Click the Forgot Your Password? link.
3. Enter your email address in the box provided, and click the Reset Password link. This will send a confirmation email to your email address (if you do not see an email in your Inbox, check your spam folder).
4. The email will include a link to reset your password: click it, and you should return to the journal web site.
5. On returning to the journal web site, you should be notified that an email containing a new password has been sent to your email address. Check for that second email, and use your new credentials to log into the site.
6. After successfully logging in, you will be asked to immediately change your password. Enter the emailed password first (Current Password), and then a new, secret password twice (New Password, Repeat New Password).

Figure 6.4. Change Password

The screenshot shows the 'Change Password' page in the 'Demo Journal' system. The page has a green header with the site name and a navigation menu with links for HOME, ABOUT, LOG IN, REGISTER, SEARCH, and CURRENT. On the right side, there are links for OPEN JOURNAL SYSTEMS, Journal Help, and a USER section with fields for Username and Password, a 'Remember me' checkbox, and a 'Log in' button. Below the navigation is a breadcrumb trail 'Home > Change Password' and the main heading 'Change Password'. The main content area contains instructions: 'You must choose a new password before you can log in to this site. Please enter your username and your current and new passwords below to change the password for your account.' There are four input fields: 'Username*' (containing 'stranack'), 'Current password*' (masked with dots), 'New password*' (masked with dots), and 'Repeat new password*' (masked with dots). A note states 'The password must be at least 6 characters.' At the bottom of the form are 'Save' and 'Cancel' buttons. A footer note says '* Denotes required field'. On the right side, there is a LANGUAGE dropdown menu set to 'English', a NOTIFICATIONS section with links for 'View', 'Subscribe / Unsubscribe', and a SUBSCRIPTION section with the text 'Login to verify subscription'. At the very bottom, there is a 'JOURNAL CONTENT' section.