

Journal Publishing Guide: Editorial workflow

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In OJS 3, the editorial workflow consists of the following 4 stages:

Submission--Review--Copyediting--Production

In [Dashboard>Submissions>All Active](#) , you'll see all submissions in progress. The progress status is marked by the workflow stage they are at.

Submission

In [Dashboard>Submissions](#) , a click on the article title or author names will lead you to the detailed submission record (as shown below).

The screenshot displays the 'Test2' submission page for Cordelia Tang. The interface includes a top navigation bar with 'Metadata', 'Editorial History', and 'Submission Library'. Below the submission title, there are tabs for 'Submission', 'Review' (which is active), 'Copyediting', and 'Production'. A 'Help' button is located in the top right corner.

The 'Submission Files' section shows a file named 'test.pdf' (ID: 67899-1) with the description 'Article Text'. There are buttons for 'Search', 'Upload File', and 'Download All Files'. To the right of this section are three action buttons: 'Send to Review' (blue), 'Accept and Skip Review' (grey), and 'Decline Submission' (pink).

The 'Pre-Review Discussions' section features an 'Add discussion' button and a table with the following data:

Name	From	Last Reply	Replies	Closed
test discussion	ctang	-	0	<input type="checkbox"/>
	Aug/16			

Below the discussions is a 'Participants' section with an 'Assign' button. It lists 'Journal editor' and 'Cordelia Tang'.

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

Tip! The Role setting determines the list of Participants you can assign tasks to (see Assign your team to their roles (<https://jps.library.utoronto.ca/index.php/pubguide/setting#roles>)). Click on Help in the upper right corner to read more about how to invite participants to the workflow.

To see how to respond to submission and delegate a task, watch the PKP video tutorial here: [Editorial Workflow in OJS 3: Module 4 \(https://pkpschool.sfu.ca/courses/editorial-workflow-in-ojs-3/\)](https://pkpschool.sfu.ca/courses/editorial-workflow-in-ojs-3/) (free course with a WordPress account) or on YouTube: [Module 4 \(https://www.youtube.com/watch?v=CIZmk65QQHM&index=4&list=PLg358gdRUrDX6lCgW1IVdUUPQBqRrFFBs\)](https://www.youtube.com/watch?v=CIZmk65QQHM&index=4&list=PLg358gdRUrDX6lCgW1IVdUUPQBqRrFFBs).

More Resources

- Becoming an editor (<https://pkpschool.sfu.ca/courses/becoming-an-editor/>) by PKP School

Review

1. Types of review

- Editorial review

Editorial review is an assessment of an article undertaken by members of the editorial staff. For some sections of the journal, such as book reviews and commentaries, an editorial review may be the only assessment for an article.

Editorial review can also be a part of the peer-review process. The purpose is to evaluate if the article is within the journal's publishing scope and of sufficient quality to send out for peer review.

- Peer review

Peer review is the process of obtaining advice on individual manuscripts from experts in the field who are NOT part of the journal's editorial staff.

Peer review is the widely accepted method for validating the quality of a research article. It is a crucial step for

- journal content quality assurance,
- managing competition for publication space, and
- meeting the precondition to be indexed by major databases, such as PubMed, Scopus, DOAJ, etc.

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

Adapted from

- Scholarly Journal Publishing Guide (<http://libraryguides.mcgill.ca/journalpublishing/typesofreview>) by McGill Library
- Principles of Transparency and Best Practice in Scholarly Publishing (<https://doaj.org/bestpractice>) by DOAJ
- Quality and value: Models of quality control for scientific research (<https://www.nature.com/nature/peerreview/debate/nature05031.html>) by Tom Jefferson

2. Basics of peer review

• Guidelines

Journals will typically provide guidelines for reviewers. This helps the reviewers know how they should frame their assessment. Some journals will also provide forms or rubrics for their peer reviewers to fill out.

Here are the general guidelines for peer reviewers

(<http://publicationethics.org/files/u7140/Peer%20review%20guidelines.pdf>) suggested by Committee on Publication Ethics, and following is a list of peer review guidelines practised by scholarly journals:

- Elsevier's guidelines for reviewers (<https://www.elsevier.com/reviewers/how-to-review#youve-been-asked-to-review>)
- Ethical guidelines for reviewers (<http://www.sciencemag.org/authors/peer-review-science-publications>)for *Science Magazine*
- Guidelines for reviewers (<http://journals.asm.org/site/misc/reviewguide.xhtml>) by ASM Journals
- Peer review guidelines (<http://mhc.cnpn.org/page/reviewerguides?code=cnpn-site>)for *The Mental Health Clinician*
- Reviewers Guidelines (<http://www.jscholaronline.org/reviewer-guidelines.php>) by JScholar

For setting up your journal's review guidelines, see Set up review in OJS 3

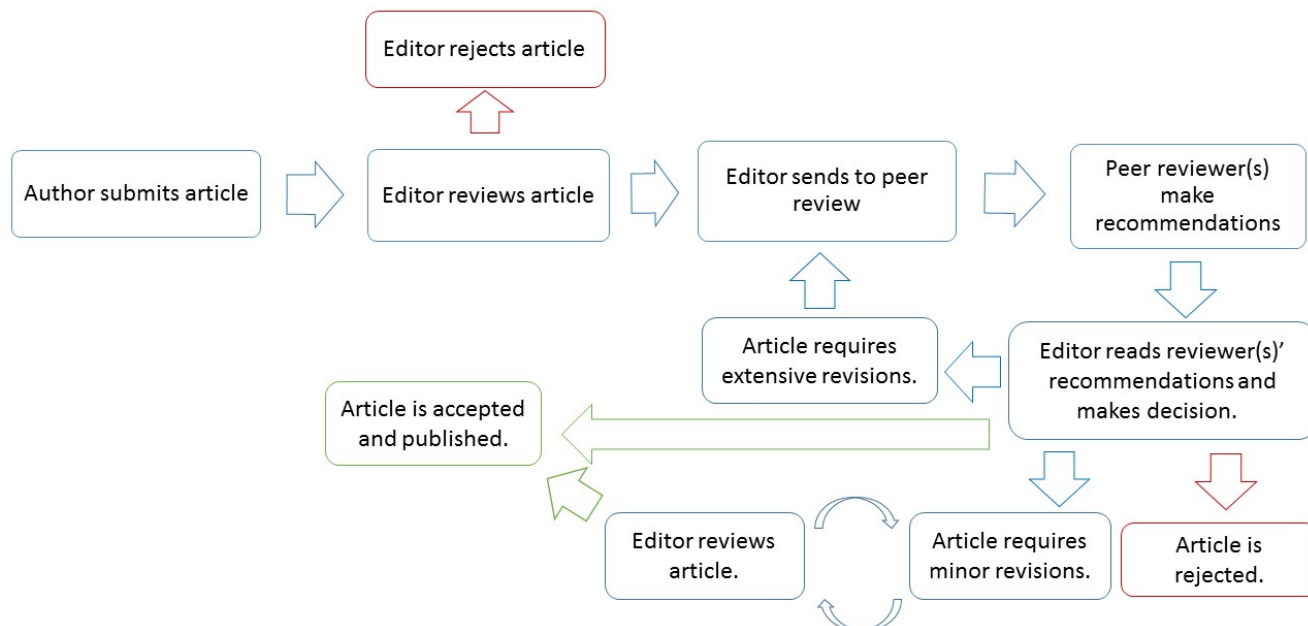
([https://docs.google.com/document/d/1yuRujbVBZayKWm74Kvx7D-](https://docs.google.com/document/d/1yuRujbVBZayKWm74Kvx7D-V2urWD7LT3jyqAah2YeGA/edit#heading=h.r780udxl4i25)

[V2urWD7LT3jyqAah2YeGA/edit#heading=h.r780udxl4i25](https://docs.google.com/document/d/1yuRujbVBZayKWm74Kvx7D-V2urWD7LT3jyqAah2YeGA/edit#heading=h.r780udxl4i25)).

More Resources

- Becoming a reviewer (<https://pkpschool.sfu.ca/courses/becoming-a-reviewer/>), video tutorials by PKP School
- Peer review (<http://libraryguides.mcgill.ca/journalpublishing/typesofreview>) by McGill University
- Resources for Editors of Scholarly Journals: Peer-Review (https://guides.lib.ku.edu/journal_editors/peer_review) by the University of Kansas
- Peer review policy, process, guidelines, and literature (https://www.nature.com/authors/policies/peer_review.html) by nature.com
- Becoming an Editor: Module 3 Unit 5 Developing Peer Review Guidelines (<https://pkpschool.sfu.ca/courses/becoming-an-editor/lessons/module-3-the-editorial-board-and-editorial-policies/topic/unit-5-developing-peer-review-guidelines/>) by PKP School

• Process



(Image credit: Scholarly Journal Publishing Guide (<http://libraryguides.mcgill.ca/journalpublishing/typesofreview>) by McGill University)

• Types of peer review

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

Open review	Names of both the author and reviewers are available, and the review may be made publicly available.	Encourage honest, accountable reviewing and persuade reviewers to do a thorough job.	Reviewers' concerns about the consequences of being identified as the source of a negative review and the potential inclination of refusing to review in an open system.
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(Modified from Scholarly Journal Publishing Guide (<http://libraryguides.mcgill.ca/journalpublishing/typesofreview>) by McGill University)

More resources



- Overview of different types of review (<http://libraryguides.mcgill.ca/journalpublishing/typesofreview>) by McGill Library
- Becoming an editor, Module 7 Managing the Peer Review Process (<https://pkpschool.sfu.ca/courses/becoming-an-editor/lessons/module-7-managing-the-peer-review-process/>) by PKP School
- Peer review (<https://www.elsevier.com/reviewers/what-is-peer-review>) by Elsevier
- Peer review process (<https://authorservices.wiley.com/Reviewers/journal-reviewers/what-is-peer-review/the-peer-review-process.html>) and How to perform a peer review (<https://authorservices.wiley.com/Reviewers/journal-reviewers/how-to-perform-a-peer-review/index.html>) by Wiley
- Peer review policy (<https://bmcbiol.biomedcentral.com/submission-guidelines/peer-review-policy>) by BMC Biology

3. Set up review

In the Dashboard of your OJS account, hover over the Navigation panel and choose

Settings>Workflow>Review . You can set up:

- reviewing deadlines
- automated email reminders for reviewers
- peer review type
- feedback form for reviewers

Watch the PKP video tutorial here:  Setting up your journal in OJS 3: Module 9 Unit 3 (<https://pkpschool.sfu.ca/courses/setting-up-a-journal-in-ojs-3/lessons/module-9-workflow-settings/>) or on YouTube:  Module 9 Unit 3 (<https://www.youtube.com/watch?v=uoz1yhFeKBQ>).

4. Implement reviews

For a demonstration of reviewer assignment, watch the PKP video tutorial here: [▶ Editorial Workflow in OJS 3: Module 5 Assigning a Reviewer \(https://pkpschool.sfu.ca/courses/editorial-workflow-in-ojs-3/\)](#) or on YouTube: [▶ Module 5 \(https://www.youtube.com/watch?v=iW-ji_ylCKI&list=PLg358gdRUrDX6lCgW1IVdUUPQBqRrFFBs&index=5\)](#).

To see how to respond to a review, watch the PKP video tutorial here: [▶ Editorial Workflow in OJS 3: Module 7 Responding to the Reviews \(https://pkpschool.sfu.ca/courses/editorial-workflow-in-ojs-3/\)](#) or on YouTube: [▶ Module 7 \(https://www.youtube.com/watch?v=X_E7A3q7mQU&index=7&list=PLg358gdRUrDX6lCgW1IVdUUPQBqRrFFBs\)](#).

⚠ Tip! If you have reviewers who are new to OJS, you can send them this 6-minute PKP video tutorial link: [▶ Editorial Workflow in OJS 3: Module 6 The Reviewer's Steps \(https://pkpschool.sfu.ca/courses/editorial-workflow-in-ojs-3/\)](#) or the YouTube link: [▶ Module 6 \(https://www.youtube.com/watch?v=NgVxnLror8s&list=PLg358gdRUrDX6lCgW1IVdUUPQBqRrFFBs&index=6\)](#).

5. Ensure blind peer review

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

The screenshot displays the OJS submission record interface. At the top, there are tabs for **Submission**, **Review**, **Copyediting**, and **Production**, with a **Help** icon on the right. Below these, there are sub-tabs for **Round 1**, **Round 2**, and **New Review Round**. The **Round 1 Status** section indicates "Waiting for reviewers to be assigned." The **Review Files** section shows a file named "67905-1 Article Text, test.pdf" with a search icon and an "Upload/Select Files" button. The **Participants** section lists "Journal editor" and "Cordelia Tang" with an "Assign" button. The **Reviewers** section is currently empty, showing "No Items", and features a red circle around the **Add Reviewer** button.

Choose Double-blind, Blind, or Open in the bottom of the pop-up window.

Abstract

This is a test article

Powered by TinyMCE

Do not send email to Reviewer.

Important Dates

<input type="text" value="2018-09-26"/>	<input type="text" value="2018-10-03"/>
<i>Response Due Date</i>	<i>Review Due Date</i>

No Files Selected

You have not selected any files for the reviewer to review.

+	Files To Be Reviewed
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Review Type

Double-blind

Blind

Open

If you have decided on blind or double-blind peer review type for your journal content, you need to customize the review setting before you proceed to the editorial workflow.

In [Settings > Workflow > Review](#) , check “Present a link to “Ensuring a Blind Review” during upload” as shown below:

Review Forms		
Title	In Review	Completed
<i>No Items</i>		

Blind Review

[Present a link to "Ensuring a Blind Review" during upload](#)

Competing Interests

Reviewers will be asked to comply with the competing interests disclosure policy you specify below.

📄 📁 **B** *I* U 🔗 🚫 <> 🔄 📷 Upload +

With this option chosen, your authors will see an “Ensuring a Blind Review” link when they are making a new submission:

Upload Submission File
✕

1. Upload File
2. Review Details
3. Confirm

Article Component *

Select article component
▼

[Ensuring a Blind Review](#)

Continue
Cancel

Clicking on the link will bring out a checklist for removing the identities of the authors and/or the reviewers. Here is the checklist for your reference.

- The authors'/reviewers' names are removed from the manuscript text

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

More Resources

- How to facilitate double-blind peer review (<https://www.elsevier.com/reviewers/what-is-peer-review/peer-review-guidelines>) by Elsevier

Copyediting

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

Copyeditors will:

1. Polish the language, including checking spelling, grammar, terminology, and making improvements for the manuscript wherever necessary. Society for Editors and Proofreaders has posted a comprehensive description of copyeditors’ responsibilities (<https://www.sfep.org.uk/about/faqs/what-is-copy-editing>). It is a good practice for journal editors who are new to this job position to learn about the general rules.
2. Check style and formatting

Each journal should have a style manual of its own. You can find an off-the-shelf manual that works for your journal content, such as *The Chicago Manual of Style* (<https://search.library.utoronto.ca/details?6662347>) (ebook of the most updated version available in UTL), *Publication Manual of the American Psychological Association* (<https://search.library.utoronto.ca/details?6784923>)(print copies available at various UTL locations), etc. Or you could put together your own guide based on the specialty of your content. Typically, copyeditors will check the references against the reference style the journal adopts.

More Resources

- Become an Editor: Module 4 The Editorial Role and Responsibilities (<https://pkpschool.sfu.ca/courses/becoming-an-editor/lessons/module-4-the-editorial-role-and-responsibilities/>) by PKP School
- Free course: Becoming an Editor, Module 6, Unit 2 Copyediting (<https://pkpschool.sfu.ca/courses/becoming-an-editor/lessons/module-6-the-production-processes/topic/unit-2-copyediting/>) by PKP School

Production

When the edited manuscript is ready for publishing, you need to apply page layout to the content. You can outsource the task to a typesetting service provider or choose to use typesetting software and carry out the work in-house.

For a formatted manuscript, upload is a straightforward procedure. In [Dashboard>Submissions](#), click on the article title to get into the editorial status. In Production tab, click on Add Galley (as shown in the following screenshot) and upload your ready-to-publish file, which is usually a PDF but could be in XML, HTML, or an external link as well.

The screenshot displays the 'Production' tab of a journal submission system. At the top, there is a navigation bar with tabs for 'Submission', 'Review', 'Copyediting', and 'Production'. Below this, the main content area is divided into several sections. On the left, there are three panels: 'Production Ready Files' with a search and upload button, 'Production Discussions' with an 'Add discussion' button, and 'Galleys' with an 'Add galley' button circled in red. On the right, there is a 'Schedule For Publication' button and a 'Participants' section with an 'Assign' button and a list of participants including 'JPS tech support'.

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

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

To create a new journal issue, click on [Issues>Future Issues>Create Issue](#), fill out the volume, issue number, year, and title information, and add a brief description and cover image if they are available.

Now that you have created a new journal issue when you Schedule for Publication for an article, the issue will appear in the pull-down menu for you to choose.

Publication ✕

Schedule for publication in

Vol 1 No 1 (2018): test new issue ▼

*Be Assigned **

Pages

Pages

Published

2018-10-01

*Published **

Permissions

Attach the following permissions to the submission:

When the new issue is ready for publication, after the new issue has accumulated enough submissions, you can click Publish Issue in Issues>Future Issues.

Issues

Future Issues [Back Issues](#) Help

Future Issues Create Issue



Issue	Items
▼ Vol 1 No 1 (2018): test new issue	1
Edit Preview Publish Issue Delete	

If you want to send a notification to all registered users about the release of the new issue, tick the notification checkbox as shown in the screenshot below.

Publish Issue ✕

Send notification email to all registered users

Are you sure you want to publish the new issue?

Watch the PKP video tutorial here:  Editorial Workflow in OJS 3: Module 9 Production (<https://pkpschool.sfu.ca/courses/editorial-workflow-in-ojs-3/>) or on YouTube:  Module 9 (<https://www.youtube.com/watch?v=4jwpwV3boKk&list=PLg358gdRUrDX6lCgW1IVdUUPQBqRrFFBs&index=9>).

If you are planning to publish your articles in HTML, ePub, XML, or audio files, refer to the Production Section (<https://jps.library.utoronto.ca/index.php/pubguide/libraryFiles/downloadPublic/29>) in the PKP's tutorial booklet: Learning OJS 3. In this tutorial, you will find not only the steps to follow, but links to the recommended tools.

[UTL's Journal Production Services \(https://jps.library.utoronto.ca/index.php/pubguide/hosting\)](https://jps.library.utoronto.ca/index.php/pubguide/hosting)

[Starting a journal \(https://jps.library.utoronto.ca/index.php/pubguide/starting\)](https://jps.library.utoronto.ca/index.php/pubguide/starting)

[Setting up your journal \(https://jps.library.utoronto.ca/index.php/pubguide/setting\)](https://jps.library.utoronto.ca/index.php/pubguide/setting)

[Editorial workflow \(https://jps.library.utoronto.ca/index.php/pubguide/editorial\)](https://jps.library.utoronto.ca/index.php/pubguide/editorial)

[Copyright and licensing \(https://jps.library.utoronto.ca/index.php/pubguide/copyright\)](https://jps.library.utoronto.ca/index.php/pubguide/copyright)

[Impact and discoverability \(https://jps.library.utoronto.ca/index.php/pubguide/impact\)](https://jps.library.utoronto.ca/index.php/pubguide/impact)

[DOI instructions \(https://jps.library.utoronto.ca/index.php/pubguide/DOI\)](https://jps.library.utoronto.ca/index.php/pubguide/DOI)

[Learning OJS 3 \(https://jps.library.utoronto.ca/index.php/pubguide/learning\)](https://jps.library.utoronto.ca/index.php/pubguide/learning)

[Web accessibility \(https://jps.library.utoronto.ca/index.php/pubguide/accessibility\)](https://jps.library.utoronto.ca/index.php/pubguide/accessibility)

[Student Journal Toolkit \(https://jps.library.utoronto.ca/index.php/pubguide/studentjournaltoolkit\)](https://jps.library.utoronto.ca/index.php/pubguide/studentjournaltoolkit)

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(<https://jps.library.utoronto.ca/index.php/pubguide/about/aboutThisPublishingSystem>)