

Learning OJS

3

A Visual Guide to
Open Journal Systems
Version 3.0

The Public Knowledge Project
2015

Table of Contents

Preface	1.1
Chapter 1: Introduction	1.2
Background	1.2.1
OJS Features	1.2.2
What's New in OJS 3	1.2.3
Reader Interface	1.2.4
Editorial Interface aka the Dashboard	1.2.5
Community Contributions	1.2.6
Support	1.2.7
Chapter 2: Installing and Upgrading	1.3
Installation	1.3.1
Upgrading	1.3.2
Chapter 3: User Accounts	1.4
Roles in OJS	1.4.1
Registering with a Journal	1.4.2
Viewing and Changing your Profile	1.4.3
Resetting your Password	1.4.4
Chapter 4: Site Administration	1.5
Site Management	1.5.1
Administrative Functions	1.5.2
Chapter 5: Settings	1.6
Journal Settings	1.6.1
Website Settings	1.6.2
Workflow Settings	1.6.3
Distribution Settings	1.6.4
Chapter 6: Issues	1.7
Future Issues	1.7.1
Back Issues	1.7.2
Chapter 7: Users and Roles	1.8
Users	1.8.1
Roles	1.8.2
Site Access Options	1.8.3
Chapter 8: Tools	1.9
Import/Export	1.9.1
Statistics	1.9.2
Chapter 9: Subscriptions	1.10
Subscription Policies	1.10.1
Subscription Types	1.10.2
Payment Types	1.10.3

Payments	1.10.4
Individual Subscriptions	1.10.5
Institutional Subscriptions	1.10.6
Chapter 10: Authoring	1.11
Registering with the Journal	1.11.1
Submitting an Article	1.11.2
Responding to a Review	1.11.3
Re-submitting for Review	1.11.4
Responding to a Copyediting Request	1.11.5
Responding to a Proofreading Request	1.11.6
Chapter 11: Editorial Workflow	1.12
Tasks	1.12.1
Submissions	1.12.2
Review	1.12.3
Copyediting	1.12.4
Production	1.12.5
Chapter 12: Reviewing	1.13

Learning OJS 3.1: A Visual Guide to Open Journal Systems

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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, including enhancing the reader experience, making journal policies more transparent, and improving indexing.

This book covers OJS version 3.1, released in October 2017, and features significant enhancements over the previous versions of the software. We hope you find it helpful for your publishing projects.

Background

OJS is a journal/web site management/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 one or 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 the costs of journal publishing can be reduced to the point where providing readers with "open access" to the contents of the journal becomes 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 Research > Publications on the [Public Knowledge Project](#) website.

The origins of OJS. The system was first released in 2001 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, the 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](#).

OJS Features

OJS includes the following features:

1. OJS is installed locally and controlled locally
2. Editors configure requirements, sections, review process, etc.
3. Online submission, double-blind review, and management of all content
4. Comprehensive indexing of content
5. Responsive, themable reader interface
6. Email notification for readers
7. Support for article-processing charges, subscriptions, and online payments
8. Complete context-sensitive online Help support
9. Multilingual support

What's New in OJS 3.1

OJS 3.1 builds on the changes introduced with OJS 3, and is significantly different than its predecessor, OJS 2. It includes enhancements and new features developed from community feedback, extensive usability testing, and new software design capabilities.

Reader Interface

By default, Open Journal Systems is installed with a very simple, functional user interface. This includes a top header, navigation bar, navigation blocks to the right, and a main content block in the middle of the page.

The following image is a screenshot of an OJS Demonstration Journal Table of Contents.



The screenshot displays the Open Journal Systems (OJS) interface. At the top, a dark blue header contains the journal title "Open Journal Systems Demonstration Journal" and navigation links for "Current", "Archives", and "About". A user profile menu for "pkpadmin" is visible in the top right corner, with options for "Dashboard", "View Profile", "Administration", and "Logout". The main content area is divided into two columns. The left column features a "Current Issue" section with the text "Vol 1 No 1 (2016)" and "Published: 2005-04-08". Below this, an "Articles" section lists two articles. The first article is "Understanding in the Absence of Meaning: Coming of Age Narratives of the Holocaust" by Theresa Rogers, with links for PDF and XML. The second article is "Scholarly Associations and the Economic Viability of Open Access Publishing" by John Willinsky, also with links for PDF and XML.

You can see from the screenshot that the user functions now exist from your profile menu at the top right of the screen. This takes the managerial content in OJS 3.x away from general user view. Side bar information is clearly broken out, as well as your top navigation bar with collapsible menus for the "About" functions. Like OJS 2, each article has a linked title for viewing object metadata and abstracts, and galleys are now clearly labeled below the titles with clearer logos.

Editorial Interface aka the Dashboard

OJS 3.x now has a separate interface once you log into the editorial system. This not only makes it easier to customize the reader interface, but also provides OJS users of different journals a consistent experience.

The screenshot displays the OJS Editorial Interface for the Journal of Public Knowledge. The top navigation bar includes the journal name, a tasks indicator, language selection (English), view site, and user profile (dbarnes). The main navigation bar offers options for Metadata, Editorial History, and Submission Library. The left sidebar contains a vertical menu with links for Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Genetic transformation of forest trees' by Diaga Diouf and features sub-menus for Submission, Review, Copyediting, and Production. A notification box states: 'Notification: Assign a user to create galleys using the Assign link in the Participants list.' Below this are three sections: 'Production Ready Files' (No Files), 'Production Discussions' (No Items), and 'Galleys' (No Items). On the right, a 'Schedule For Publication' button is visible above a 'Participants' table with an 'Assign' button. The participants list includes: Journal editor (Daniel Barnes), Section editor (David Buskins, Stephanie Berardo), Layout Editor (Graham Cox), and Proofreader.

The editorial interface is known as your **dashboard** and consists of the following elements:

- 1. Top Navigation Bar:** To the left, you will find the name of the journal you are currently working with (e.g., Journal of Public Knowledge). If you are enrolled in more than one journal on this OJS installation, you can use this to switch between journals. Next to that are your Tasks (items needing immediate attention). To the right, you can switch languages if the journal is multilingual, view the reader interface, or click on your username to view [your profile](#) or logout.
- 2. Left Menu Panel:** These are the major sections of the dashboard, including the submissions, issue management, subscription management (if you are running a journal using subscriptions), settings, user and role management, and tools. Users with fewer permissions (e.g., Authors, Reviewers, Copyeditors, etc.) will see fewer links here.
- 3. Blue Navigation Bar:** These menu choices are specific to the different sections of the editorial workflow. Metadata, Editorial History, and Submission Library are all part of the submission record visible below.
- 4. Main Panel:** In the main panel you will see the current work area. In the image above, you are looking at a submission record in the Production stage.
- 5. Main Panel Sub-Menus:** Within the Main Panel, you will often see tabs that allow you to view different information about the content being worked on. In this example, the submission record is broken four sections (Submission, Review, Copyediting, Production). Notice the Help tab to the right, which provides context-sensitive help for the page you are currently viewing.
- 6. Right Panel:** From here, you can see the action buttons, such as Schedule for Publication. Different pages have different action buttons. Below the action buttons is the Participants table, which lists everyone (except Reviewers) involved in the submission.

Community Contributions

The OJS team encourages contributions from the developer community. If you are interested in getting involved in making OJS even better, we welcome your participation.

Excellent examples of community contributions include the vast array of languages that OJS is available in; and third-party plugins posted to the [community forum](#) and the archived forum page.

We also welcome software testing and bug reporting contributions.

Support

A [community forum](#) and [issue reporting system](#) for technical issues can be accessed via the [PKP web site](#).

For questions about a particular journal site, such as submission requirements, contact that journal directly, using the contact information listed on the journal's **About** page.

Chapter 2: Installing and Upgrading

This chapter covers how to install OJS 3 for the first time, and how to upgrade an existing installation running OJS 2.x.

Installation

Open Journal Systems (OJS) has been developed by the Public Knowledge Project. For general information about OJS and other open research systems, visit the PKP web site at <http://pkp.sfu.ca/>.

Licensing

OJS is licensed under the GNU General Public License v2. See the file docs/COPYING for the complete terms of this license.

Third parties are welcome to modify and redistribute OJS in entirety or parts according to the terms of this license. PKP also welcomes patches for improvements or bug fixes to the software.

System Requirements

Recommended server requirements:

- PHP \geq 5.5 with MySQL or PostgreSQL support
- MySQL \geq 4.1 or PostgreSQL \geq 9.1.5
- Apache \geq 1.3.2x or \geq 2.0.4x or Microsoft IIS 6
- Operating system: Any OS that supports the above software, including Linux, BSD, Solaris, Mac OS X, Windows

As PKP does not have the resources to test every possible combination of software versions and platforms, no guarantee of correct operation or support is implied. We welcome feedback from users who have deployed OJS on systems other than those listed above.

Recommended Configuration

A secure deployment can be best achieved by using the following policies:

- **Dedicate a database to OJS; use unique credentials to access it. Configure this database to perform automated backups on a regular basis.** Perform a manual backup when upgrading or performing maintenance.
- **Configure OJS (config.inc.php) to use SHA1 hashing rather than MD5.**
- **Configure OJS (config.inc.php) to use force_ssl_login so that authenticated users communicate with the server via HTTPS.**
- **Install OJS so that the files directory is NOT a subdirectory of the OJS installation and cannot be accessed directly via the web server. Restrict file permissions as much as possible. Automated backups of this directory should be roughly synchronized with database backups. These steps are critical to maintaining a secure environment and avoiding the misuse or hacking of your journal.**

Download

OJS can be downloaded from the [Public Knowledge Project web site](#).

Installation

Please review this document and the RELEASE document prior to installing OJS. If you encounter problems, please also see the FAQ document in this directory.

To install OJS:

1. Extract the OJS archive to the desired location in your web documents directory.
2. Make the following files and directories (and their contents) writeable (i.e., by changing the owner or permissions with `chown` or `chmod`):
 - `config.inc.php` (optional -- if not writable you will be prompted to manually overwrite this file during installation)
 - `public`
 - `cache`
 - `cache/t_cache`
 - `cache/t_config`
 - `cache/t_compile`
 - `cache/_db`
3. Create a directory to store uploaded files (submission files, etc.) and make this directory writeable. It is **strongly** recommended that this directory be placed in a non-web-accessible location to ensure a secure environment (or otherwise protected from direct access, such as via `.htaccess` rules).
4. Open a web browser to <http://yourdomain.com/path/to/ojs/> and follow the on-screen installation instructions.

Alternatively, the command-line installer can be used instead by running the command "`php tools/install.php`" from your OJS directory. (Note: with the CLI installer you may need to `chown/chmod` the `public` and uploaded files directories after installation, if the Apache user is different from the user running the tool.)
5. Recommended additional steps post-installation:
 - Review `config.inc.php` for additional configuration settings
 - Review the FAQ document for frequently asked technical and server configuration questions.

Upgrading

Note: Before upgrading your installation, perform a complete backup of your data files and database. If the upgrade process fails, you will need to recover from backup before continuing.

If you are using PHP Safe Mode, please ensure that the `max_execution_time` directive in your `php.ini` configuration file is set to a high limit. If this or any other time limit (e.g. Apache's "Timeout" directive) is reached and the upgrade process is interrupted, manual intervention will be required.

Upgrading from OJS 2.0.x, 2.1.x, 2.2.x, or 2.3.x

In order to upgrade from these older branches of OJS, you will first need to upgrade to an intermediate version of OJS 2.4.x. Download the latest copy of OJS 2.4.x and follow the upgrade instructions included there, then read the `docs/UPGRADE` document included in this package to continue the upgrade from there.

Upgrading from OJS 2.4.x

OJS 3.x is a major rewrite of Open Journal Systems, introducing numerous new concepts and different approaches. The upgrade process from 2.x to 3.x does its best to adapt old content to the new structures, but we strongly recommend performing a test upgrade and exploring the new system before committing your content to the upgrade. Downgrades from 3.x to 2.x will not be supported.

Upgrading to the latest version of OJS involves two steps:

- Obtaining the latest OJS code
- Upgrading the OJS database

It is highly recommended that you also review the release notes (`docs/RELEASE`) and other documentation in the `docs` directory before performing an upgrade.

Obtaining the latest OJS code

The OJS source code is available in two forms: a complete stand-alone package, and from read-only github access.

1) Full Package

It is also possible to upgrade by downloading the complete package for the latest release of OJS:

- Download and decompress the package from the OJS web site
- Make a copy of the `config.inc.php` provided in the new package
- Move or copy the following files and directories from your current OJS installation:
 - `config.inc.php`
 - `public/`
 - Your uploaded files directory ("`files_dir`" in `config.inc.php`), if it resides within your OJS directory
- Replace the current OJS directory with the new OJS directory, moving the old one to a safe location as a backup
- Be sure to review the Configuration Changes section of the release notes in `docs/release-notes/README-(version)` for all versions between your original version and the new version. You may need to manually add new items to your `config.inc.php` file.

Updating from github is the recommended approach if you have made local modifications to the system.

2) git

If your instance of OJS was checked out from github (see docs/README-GIT), you can update the OJS code using a git client.

To update the OJS code from a git check-out, run the following command from your OJS directory:

```
$ git rebase --onto <new-release-tag> <previous-release-tag>
```

This assumes that you have made local changes and committed them on top of the old release tag. The command will take your custom changes and apply them on top of the new release. This may cause merge conflicts which have to be resolved in the usual way, e.g. using a merge tool like kdiff3.

"TAG" should be replaced with the git tag corresponding to the new release. OJS release version tags are of the form "ojs-MAJOR_MINOR_REVISION-BUILD". For example, the tag for the initial release of OJS 3.0.0 is "ojs-3_0_0-0".

Consult the README of the latest OJS package or the OJS web site for the tag corresponding to the latest available OJS release.

Note that attempting to update to an unreleased version (e.g., using the HEAD tag to obtain the bleeding-edge OJS code) is not recommended for anyone other than OJS or third-party developers; using experimental code on a production deployment is strongly discouraged and will not be supported in any way by the OJS team.

Upgrading the OJS database

After obtaining the latest OJS code, an additional script must be run to complete the upgrade process by upgrading the OJS database and potentially executing additional upgrade code.

This script can be executed from the command-line or via the OJS web interface.

1) Command-line

If you have the CLI version of PHP installed (e.g., /usr/bin/php), you can upgrade the database as follows:

```
- Edit config.inc.php and change "installed = On" to "installed = Off"
- Run the following command from the OJS directory (not including the $):
  $ php tools/upgrade.php upgrade
- Re-edit config.inc.php and change "installed = Off" back to
  "installed = On"
```

2) Web

If you do not have the PHP CLI installed, you can also upgrade by running a web-based script. To do so:

```
- Edit config.inc.php and change "installed = On" to "installed = Off"
- Open a web browser to your OJS site; you should be redirected to the
  installation and upgrade page
- Select the "Upgrade" link and follow the on-screen instructions
- Re-edit config.inc.php and change "installed = Off" back to
  "installed = On"
```

Chapter 3: User Accounts

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. For example, one person could be both an editor and author for the same journal, as well as being only an author in one journal, a reviewer in another, and an editor in a third.

When a user logs into the system, they will be taken to their Dashboard. From here, they will see all of the functions of the system to which they have access. For example, a Reviewer will only see the submission they have been assigned to review, while an Editor will see all of the submissions in the editorial workflow.

Roles in OJS

The OJS workflow revolves around different roles for different users, allowing them access to different parts of the workflow, and different permissions and responsibilities.

Major roles include Site Administrator, Journal Manager, Editor, Section Editor, Author, Reviewer, Copyeditor, Layout Editor, Proofreader, and Reader.

OJS 3 also includes additional roles such as Translator and Designer. You can also create new roles or rename existing ones. More information on configuring roles is available in Chapter 5.

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 [Chapter 4: Site Administration](#) 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.

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.

Many Journal Managers also enroll as Editors, allowing them to easily manage both the journal settings as well as submissions in the editorial workflow.

Note

Although the Journal Manager is a journal-specific 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 [Chapter 5: Setting up a Journal](#) 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 submission files and to provide metadata or indexing information (the metadata improves the search capacity for research online and for the journal). The Author can upload multiple 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 [Chapter 9: Authoring](#) 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, production, 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.

Many Editors also enroll as Journal Managers, allowing them to easily manage both the editorial workflow as well as the journal settings.

See [Chapter 10: Editorial Workflow](#) 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, production, 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 [Chapter 10: Editorial Workflow](#) for more details.

Reviewer

The Reviewer is selected by the Editor or Section Editor to review a submission. Reviewers are asked to submit reviews to the journal's website 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 Chapter 8: Reviewing 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 a Layout Editor or Production Assistant 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 [Chapter 10: Editorial Workflow](#) for more details.

Layout Editor

The Layout Editor transforms the copyedited versions of the submission into galleys in HTML, PDF, XML, etc. -- files which the journal has elected to use for online publication.

Note

OJS does not currently provide software for automatically converting word processed documents to galley formats (although a project is in development), so the Layout Editor should have access to and be able to use third-party software packages for creating galleys.

In some cases, the Editor or Section Editor will also serve as Layout Editor.

See [Chapter 10: Editorial Workflow](#) for more details.

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.

See [Chapter 10: Editorial Workflow](#) for more details.

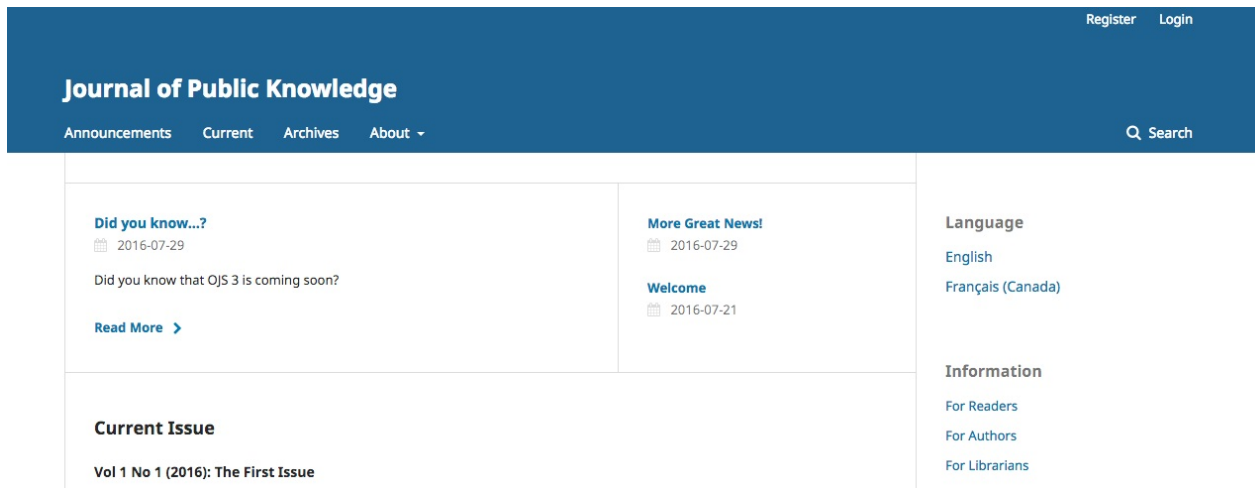
Reader

The Reader role is the simplest role in OJS, and has the fewest capabilities. Readers receive a notification email with the publication of each issue, which includes the Table of Contents for that particular issue.

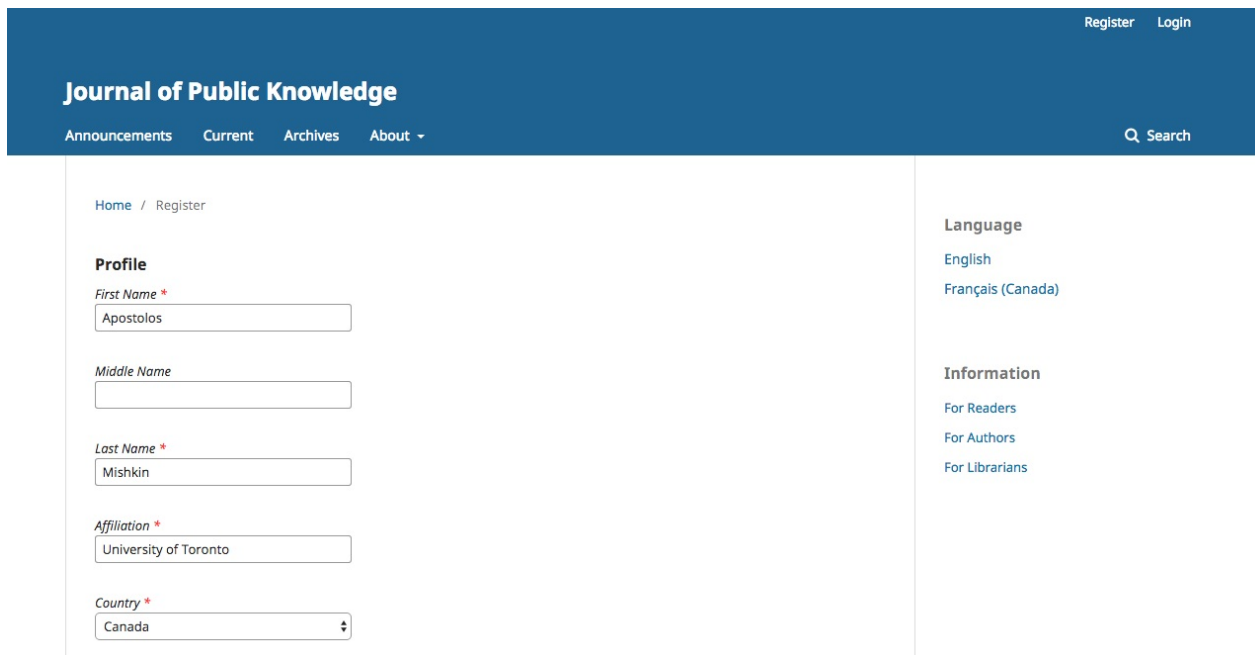
Registering with a Journal

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 Settings), but Journal Managers can always register users at any time, and for any role.

To register with a journal, click the Register link on the upper right corner.



This will open the Registration Form for you to complete with all required information.



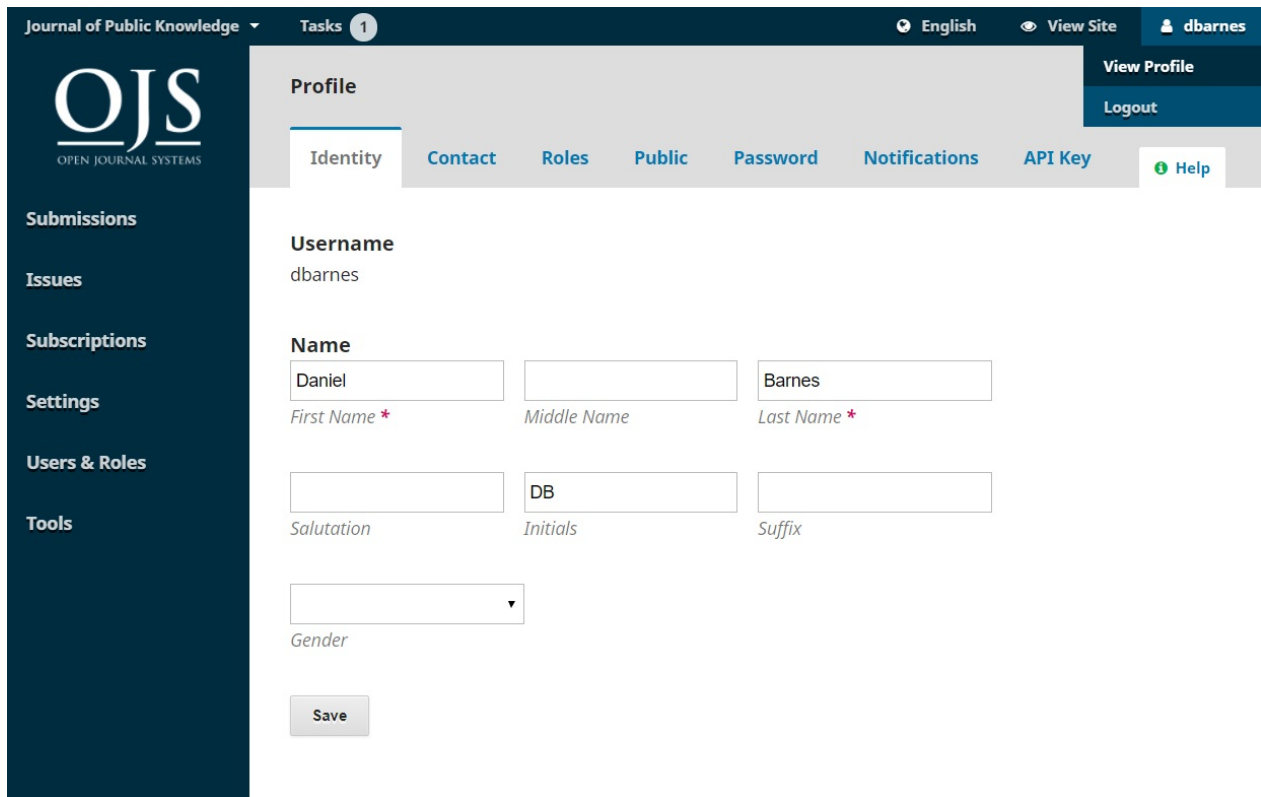
All fields with an asterisk (First Name, Last Name, Affiliation, Country, Email, Username, Password, Repeat Password) are mandatory. If the journal is multilingual, you will need to select your preferred language.

You will be automatically registered as a Reader and an Author. You will be given the option to register as a Reviewer as well.

You will not be able to self-register for an Editorial Role (e.g., Editor, Section Editor, Copyeditor, Layout Editor, Proofreader, or Journal Manager). If you need to be enrolled at that level, contact a current Journal Manager or Site Administrator.

Viewing and Changing your Profile

To view and edit your profile, log in and click your Username link from the upper right corner. Choose the View Profile link.



The screenshot shows the OJS user profile page. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and the user 'dbarnes'. The profile page has a 'Profile' header with a 'View Profile' link and a 'Logout' button. Below the header are tabs for 'Identity', 'Contact', 'Roles', 'Public', 'Password', 'Notifications', 'API Key', and 'Help'. The 'Identity' tab is active, showing the following fields:

- Username:** dbarnes
- Name:** Three input fields for 'First Name *' (containing 'Daniel'), 'Middle Name' (empty), and 'Last Name *' (containing 'Barnes').
- Salutation:** Input field (empty), **Initials:** Input field (containing 'DB'), **Suffix:** Input field (empty).
- Gender:** A dropdown menu (empty).
- Save:** A button at the bottom.

From here, by choosing the different tabs, you can update your personal details, contact information, change your roles, add a personal image (which some journals may publish along with your article or on a list of editors), determine your notification settings, or update your password.

Resetting your Password

You can reset your password by:

1. Logging into the journal
2. Selecting your username and View Profile from the upper right corner of the screen
3. Choosing the Password tab
4. Entering your current password and then your new password twice
5. Hitting Save

The screenshot shows the user profile page for 'Journal of Public Knowledge'. The user is logged in as 'dbarnes'. The 'Profile' section is active, with the 'Password' tab selected. The form prompts the user to enter their current and new passwords. The 'Current password' field is highlighted in yellow. The 'New password' field has a note: 'The password must be at least 6 characters.' Below it is a 'Repeat new password' field. At the bottom of the form are 'Save' and 'Cancel' buttons.

Your password is now changed.

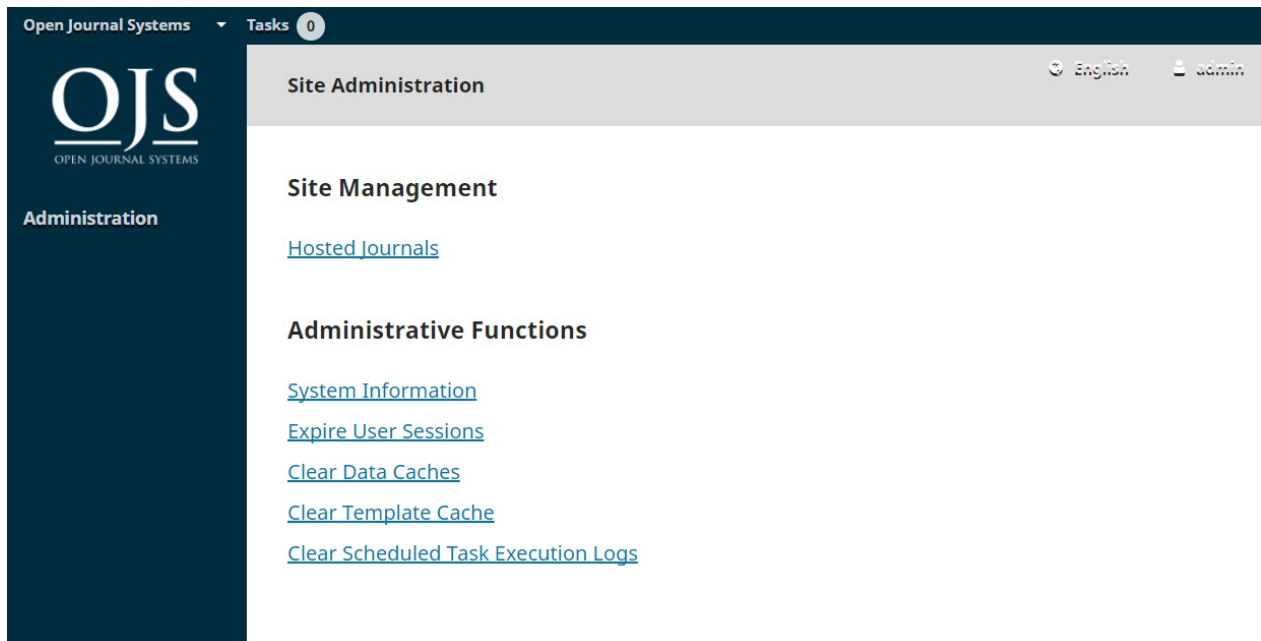
Chapter 4: Site Administration

As part of installing OJS, you will have created a Site Administrator user account. When you log into OJS with that account you will have access to Site Administrator settings from the Dashboard.

You will be able to create new hosted journal instances, manage language support across your system, and perform other administrative functions.

Site Management

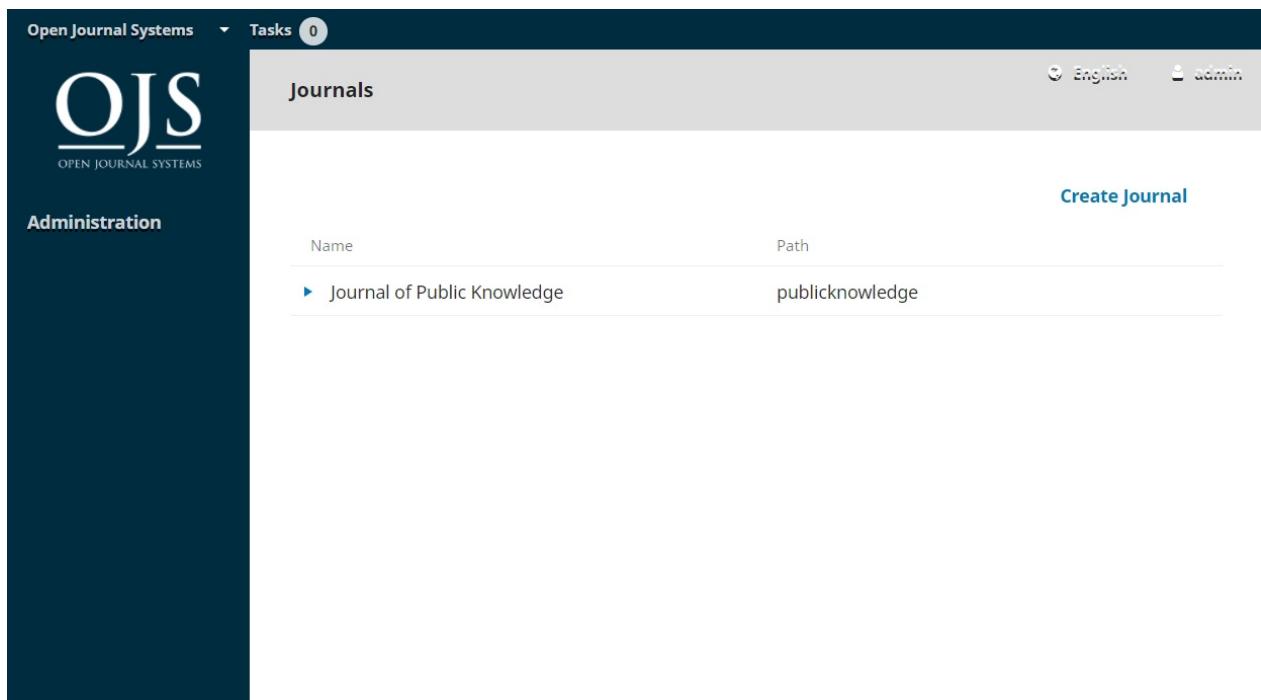
To get to Site Management, login as the Site Administrator, and choose Administration from the left menu.



The screenshot shows the Open Journal Systems (OJS) administration interface. The top navigation bar includes 'Open Journal Systems' and 'Tasks 0'. The left sidebar contains the OJS logo and the 'Administration' menu. The main content area is titled 'Site Administration' and features a 'Site Management' section with a link to 'Hosted Journals'. Below this is an 'Administrative Functions' section with links for 'System Information', 'Expire User Sessions', 'Clear Data Caches', 'Clear Template Cache', and 'Clear Scheduled Task Execution Logs'. The top right corner shows the user is logged in as 'admin' in 'English'.

Hosted Journals

From here, choose Hosted Journals. On the resulting page, you will see all of the journals in this OJS installation. In the example, below, there is only one.



The screenshot shows the 'Hosted Journals' page in the OJS administration interface. The top navigation bar is the same as in the previous screenshot. The left sidebar is also the same. The main content area is titled 'Journals' and features a 'Create Journal' button. Below the button is a table with two columns: 'Name' and 'Path'. The table contains one entry: 'Journal of Public Knowledge' with the path 'publicknowledge'.

Name	Path
▶ Journal of Public Knowledge	publicknowledge

To edit the existing journal, click on the blue arrow to the left of the journal name. You will see options to edit, remove, or update the settings.

[Create Journal](#)


Name	Path
▼ Journal of Public Knowledge	publicknowledge
Edit Remove Settings wizard Users	

Edit will let you change the title, description, or path.

Edit

Journal title *

Journal description



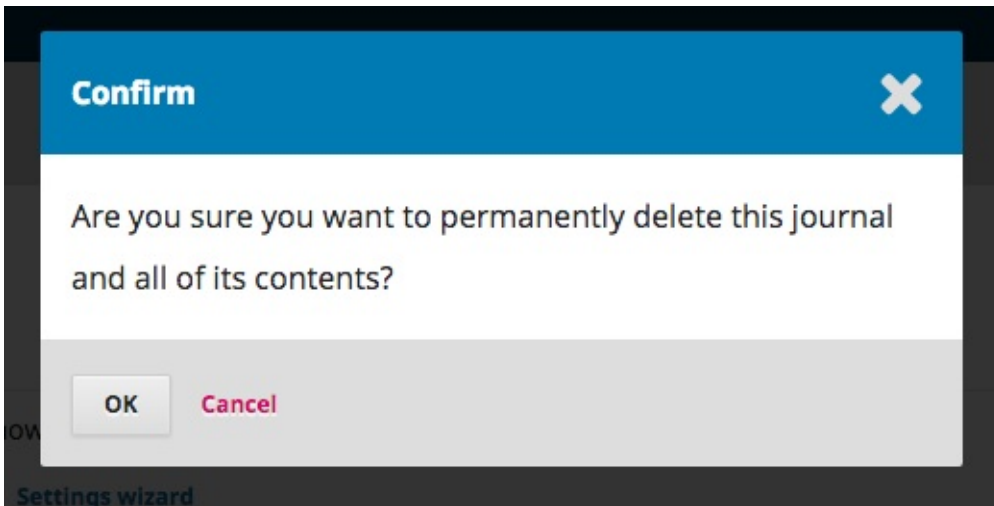
A journal for testing OJS 3.

Path *

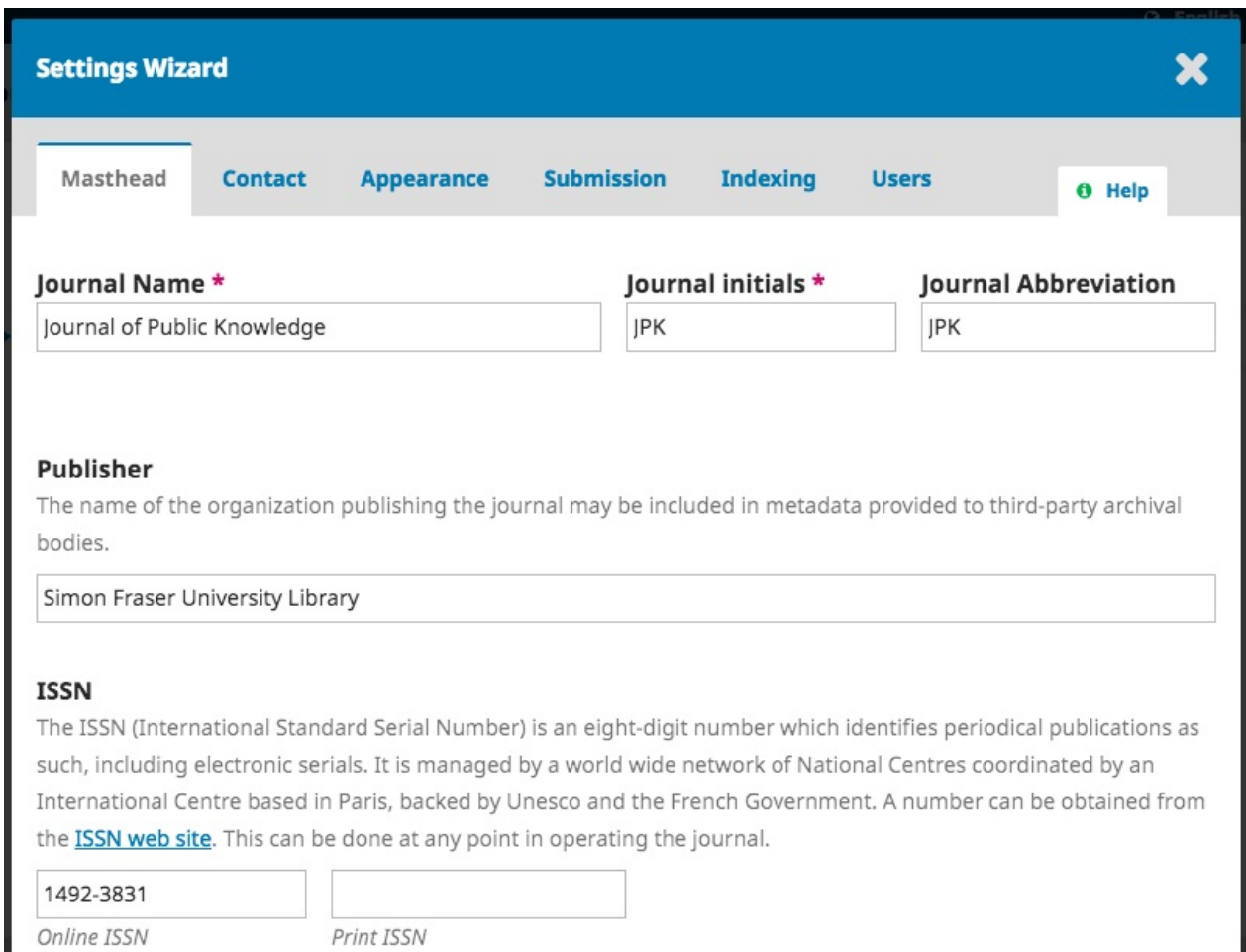
This should be a single short word or acronym that identifies the journal. The journal's URL will be `http://journals.sfu.ca/uiux/index.php/path`

Enable this journal to appear publicly on the site

Remove will let you delete the journal from the installation. You will be asked to confirm that you really do want to do this, as it is irreversible.



Settings Wizard will take you to the various settings options for that journal. We'll go over these settings in detail in Chapter 5.

The 'Settings Wizard' interface is shown with a blue header and a grey navigation bar. The navigation bar includes tabs for 'Masthead', 'Contact', 'Appearance', 'Submission', 'Indexing', 'Users', and 'Help'. The 'Masthead' tab is selected. Below the navigation bar, there are three input fields: 'Journal Name *' (containing 'Journal of Public Knowledge'), 'Journal initials *' (containing 'JPK'), and 'Journal Abbreviation' (containing 'JPK'). Below these is the 'Publisher' section, which includes a text area containing 'Simon Fraser University Library'. The 'ISSN' section follows, with a text area containing '1492-3831' and an empty text area. Below the text areas are labels for 'Online ISSN' and 'Print ISSN'.

Users will allow you to add and manage users associated with this journal.

Users



Current Users			Q Search	Add User
First Name	Last Name	Username	Email	
▶ admin		admin	pkpadmin@mailinator.com	
▶ Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com	
▶ Rana	Baiyewu	rbaiyewu	rbaiyewu@mailinator.com	
▶ Daniel	Barnes	dbarnes	dbarnes@mailinator.com	
▶ Stephanie	Berardo	sberardo	sberardo@mailinator.com	
▶ David	Buskins	dbuskins	dbuskins@mailinator.com	
▶ Leo	Christopher	lchristopher	lchristopher@mailinator.com	


Back on the Hosted Journals page, you can use the Create Journal link to add a new journal to this OJS installation. From the resulting form, fill in the fields with the new information.

Create Journal ✕

You will automatically be enrolled as the manager of this journal. After creating a new journal, you will be redirected to its settings wizard, to complete the initial journal setup.

Journal title *

Journal description



This is a test journal used for documenting OJS 3.

Path *

This should be a single short word or acronym that identifies the journal. The journal's URL will be <http://journals.sfu.ca/uiux/index.php/path>

Enable this journal to appear publicly on the site

Note: If you do not want the new journal to be visible yet, uncheck the *Enable this journal to appear publicly on the site* box.

Site Settings

This section will appear if you have two or more journals, and allow you to add information regarding your overall OJS installation, not individual journals.

Site Setup

This includes the name of your site, a site logo, an introductory statement about your site, a site footer, a redirect option (if you only plan to have one journal on this installation), contact information, a minimum password length for registered users, style sheet and theme options, and sidebar management.

You will have the opportunity to provide details about your individual journal(s) at a later stage.

Open Journal Systems | Tasks 0 | English | View Site | admin

Settings

Site Setup | Languages | Plugins | Navigation Menus

Site Name *

Site Logo

About the Site

Page Footer
 Enter any images, text or HTML code that you'd like to appear at the bottom of your website.

Languages

OJS is a multilingual system and you can add additional languages to your site here, making them available to all of the journals on your installation.

Open Journal Systems | Tasks 0 | English | View Site | admin

Settings

Site Setup | Languages | Plugins | Navigation Menus

Languages [Install Locale](#)

Enable	Locale	Primary locale
<input checked="" type="checkbox"/>	English	<input checked="" type="radio"/>
<input type="checkbox"/>	Français (Canada) *	<input type="radio"/>

Marked locales may be incomplete.

OJS 3.1 doesn't yet have as many translations as OJS 2, but we expect to have more contributed over time. Contributions are always welcome.

Plugins

From here, you can choose to enable or disable various plugins, making them available (or not) to all of the journals on this OJS installation.

Settings

Site Setup Languages **Plugins** Navigation Menus

Plugins [Search](#) [Upload A New Plugin](#)

Name	Description	Enabled
Metadata Plugins (4)		
▶ Dublin Core 1.1 meta-data	Contributes Dublin Core version 1.1 schemas and application adapters.	<input checked="" type="checkbox"/>
▶ MODS 3.4 meta-data	Contributes MODS 3.4 schemas and application adapters.	<input checked="" type="checkbox"/>
▶ OpenURL 1.0 meta-data	Contributes OpenURL 1.0 schemas and application adapters.	<input checked="" type="checkbox"/>
▶ NLM 3.0 meta-data	Contributes NLM 3.0 schemas and application adapters.	<input checked="" type="checkbox"/>
Authorization Plugins (1)		
▶ LDAP	This plugin allows for authentication and synchronization of user	<input checked="" type="checkbox"/>

Navigation Menus

Use this section to modify your site-wide menus. You can learn more about configuring menus in Chapter 5.

Settings

Site Setup Languages Plugins **Navigation Menus** [Help](#)

Navigation Menus [Add Menu](#)

- ▶ [User](#)

Navigation Menu Items [Add item](#)

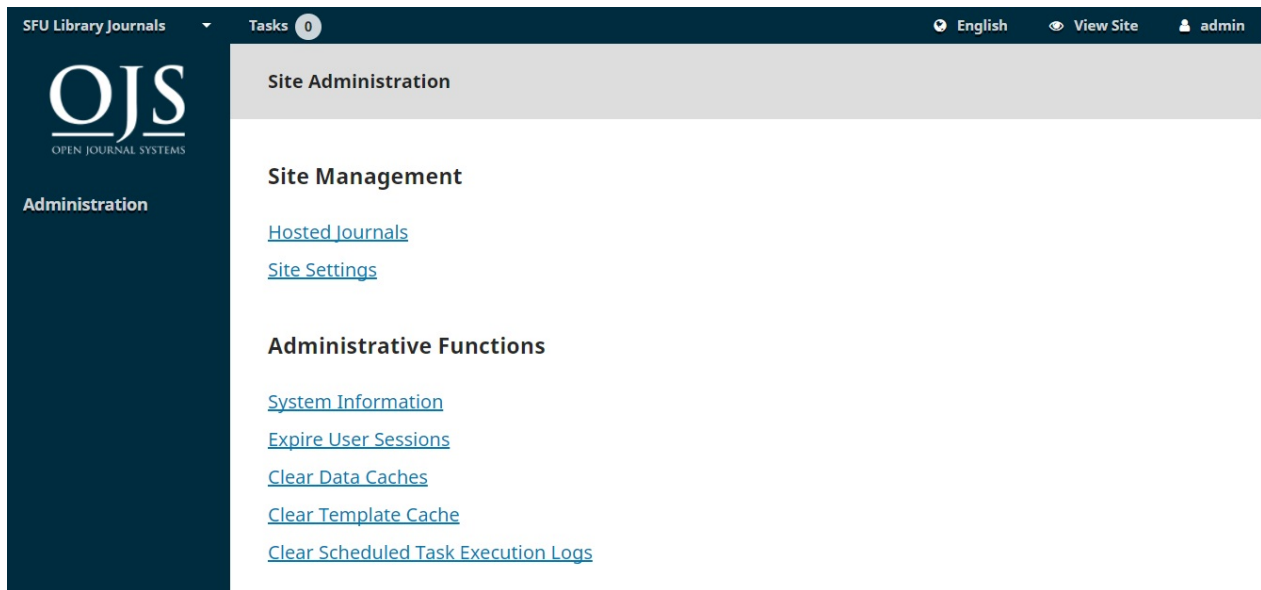
- ▶ Register
- ▶ Login
- ▶ {\$loggedInUsername}
- ▶ Dashboard
- ▶ View Profile
- ▶ Administration
- ▶ Logout

Next Steps

Once you've created a journal and configured the site settings, you may want to create a user account for the Journal Manager or Editor -- see [Chapter 7](#) for details.

Administrative Functions

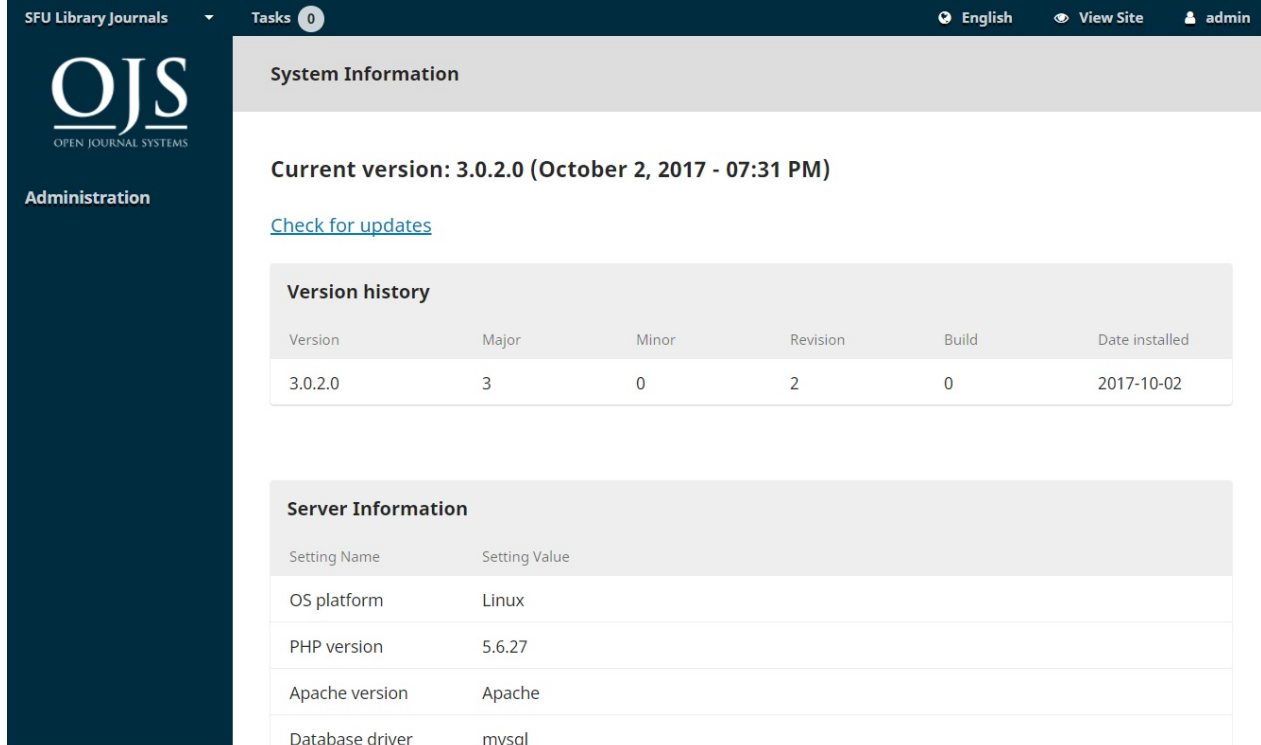
This section provides detailed information about the server on which your OJS installation is running.



The screenshot shows the OJS administrative interface. The top navigation bar includes 'SFU Library Journals', 'Tasks 0', 'English', 'View Site', and 'admin'. The left sidebar contains the OJS logo and 'Administration'. The main content area is titled 'Site Administration' and includes sections for 'Site Management' (with links for 'Hosted Journals' and 'Site Settings') and 'Administrative Functions' (with links for 'System Information', 'Expire User Sessions', 'Clear Data Caches', 'Clear Template Cache', and 'Clear Scheduled Task Execution Logs').

System Information

Use this section to find out details about the server running your installation.



The screenshot shows the 'System Information' section of the OJS administrative interface. It displays the current version as '3.0.2.0 (October 2, 2017 - 07:31 PM)' and a link to 'Check for updates'. Below this is a 'Version history' table with columns for Version, Major, Minor, Revision, Build, and Date installed. The table shows one entry for version 3.0.2.0 installed on 2017-10-02. At the bottom is a 'Server Information' table with columns for Setting Name and Setting Value, listing OS platform (Linux), PHP version (5.6.27), Apache version (Apache), and Database driver (mysql).

Version	Major	Minor	Revision	Build	Date installed
3.0.2.0	3	0	2	0	2017-10-02

Setting Name	Setting Value
OS platform	Linux
PHP version	5.6.27
Apache version	Apache
Database driver	mysql

OJS Version information shows which version is currently installed, and your version history including any upgrades. You can click the Check for updates link to see if you are using the most recent version of OJS.

The Server Information provides details about the server environment hosting your OJS installation.

The OJS Configuration section displays all of the configuration options and their values as they are in *config.inc.php*.

You can find more information about *config.inc.php* configuration parameters in the file itself.

The final section on this page displays additional server information: your operating system, PHP version, server and database information. You can also view extended PHP information by clicking the Extended PHP information link (this displays the output of `phpinfo()`).

All of this information can be useful when trying to troubleshoot a problem.

Expire User Sessions

Clicking *Expire User Sessions* immediately clears all active user sessions in the system, requiring any user that is currently logged in to sign in to the system again. This can be useful before an upgrade, to ensure all users are logged out.

Clear Data Caches

Clicking *Clear Data Caches* clears all cached data, including locale information, help cache, and search cache. This function may be useful to force data to be reloaded after customizations have been made.

Clear Template Cache

Clicking *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.

Clear Scheduled Task Execution Logs

If scheduled tasks have been enabled for your journal, clicking *Clear Scheduled Task Execution Logs* will delete the task execution log files from your server. The execution log files include dates that correspond to previously completed scheduled tasks (e.g. sending automatic email review reminders).

Chapter 5: Settings

The Settings section allows you to configure your OJS installation to best meet your publishing needs.

You can find the Settings in the left menu panel when you are logged in as a user with Journal Manager permissions.

The screenshot shows the OJS user interface. On the left is a dark blue sidebar menu with the OJS logo and the text 'OPEN JOURNAL SYSTEMS'. The menu items are: Submissions, Issues, Subscriptions, Settings (highlighted in a lighter blue), Users & Roles, and Tools. The main content area has a top navigation bar with 'Journal of Public Knowledge', 'Tasks 1', and 'English'. Below this is a 'Submissions' section with tabs for 'My Queue', 'Unassigned', 'All Active', and 'Archives'. Under 'My Assigned', there is a search bar and a list of articles. The first article is by 'Zita Woods' titled 'Finocchiaro: Arguments About Arguments'. The second article is by 'Kana Baiyewu' titled 'Yam diseases and its management in Nigeria'. Each article has a 'Copy' or 'Production' button.

It consists of Journal Settings, Website Settings, Workflow Settings, and Distribution Settings, each of which will be covered in this chapter.

Journal Settings

The Journal Settings page includes details about the journal.

Use the tabs to navigate to the different sections of Journal Settings: Masthead, Contact, Sections.

The screenshot shows the 'Journal Settings' page for 'Journal of Public Knowledge'. The page has a dark blue sidebar on the left with navigation links: Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Journal Settings' and has three tabs: 'Masthead' (selected), 'Contact', and 'Sections'. There is a 'Help' button in the top right corner of the main area. The 'Masthead' section contains the following fields:

- Journal Name ***: Journal of Public Knowledge
- Journal initials ***: publicknowledge
- Journal Abbreviation**: PK
- Publisher**: The name of the organization publishing the journal may be included in metadata provided to third-party archival bodies. (Empty text box)
- ISSN**: Two text boxes for 'Online ISSN' and 'Print ISSN'.
- Journal Summary**: A brief description of your journal that can be displayed in lists of journals. (Rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and image upload).

Masthead

Journal Name is the name of your journal. E.g., Journal of Software Documentation

Journal Initials are the initials of the journal. E.g., JSD.

Journal Abbreviation is the abbreviation of your journal name. E.g., JSoftDoc.

Publisher is the name of the organization publishing the journal.

ISSN (International Standard Serial Number) is an eight-digit number which identifies journals. It is managed by a world wide network of National Centres coordinated by an International Centre based in Paris, backed by Unesco and the French Government. A number can be obtained from the [ISSN web site](#). This can be done at any point in operating the journal.

OJS journals will typically have an online ISSN, but some may also publish a print version, which requires a different print ISSN.

Journal Summary is a brief description of your journal. If you are on an OJS installation with multiple journals, this text will appear with your journal listing.

Masthead allows you to add the names of your editorial team or anyone else you wish to mention. This will appear on the public website under About > Editorial Team.

About the Journal is a space to add any information about your journal which may be of interest to readers, authors, or reviewers.

This could include your open access policy, the focus and scope of the journal, copyright notice, sponsorship disclosure, history of the journal, a privacy statement, and inclusion in any LOCKSS or CLOCKSS archival system.

Hit the **Save** button to save your changes.

Contact

Use this section to add journal contacts.

Mailing Address: Add your journal's official mailing address here. This will appear on the journal's Contact page.

Principal Contact: Add contact information for the journal's main contact person.

Technical Support Contact: Add contact information for the journal's technical support person. This information will appear on the journal's Contact page and also in different points in the workflow to offer assistance to users.

Hit the **Save** button to save your changes.

Sections

Use this page to configure the different sections of your journal. E.g., Articles, Editorials, Reviews, Commentary, etc.

All of your existing sections will appear here. OJS requires at least one section, and creates an "Articles" section by default.

Sections	Editors	Order	Create Section
▶ Articles	Berardo, Buskins		
▶ Reviews	Inoue		

You can modify sections by clicking on the blue arrow to the left of the section name. This will reveal options to edit or delete the section.

Editing a Section

Selecting the edit link will open a new window with different configuration options.

From here, you can change the name or abbreviation of the section.

Section Policy: Use this field to add important details such as submission requirements, peer review, etc.

Word Count: Use this to limit the number of words for abstracts in this section.

Review Form: You can select specific review forms for each section. Learn more about Review Forms here.

Indexing: Each section can have different indexing settings. For example, an Editorial section will not typically be peer-reviewed.

Identify items published in this section as a(n): This used by some indexing systems. Note that it is not a required field.

Hit the **Save** button to save your changes and return to the Sections page.

Create Section

From the sections page, select the Create Section link to open a blank window, exactly the same as the window used for editing a section described above.

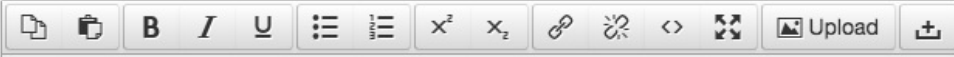
Create Section ✕

There are no section editors yet. Add this role to at least one user via Management > Settings > Users & Roles first.

Section title

Abbreviation

Section Policy



Limit abstract word counts for this section (0 for no limit)

Word Count

Review Form
None / Free Form Review ▾

Indexing

Will not be peer-reviewed

Do not require abstracts

Fill in the details and hit Save to record your work.

Ordering Sections

When you have more than one section created, you will see an Order link. Use that to reorder how those sections display on your journal website.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS
OPEN JOURNAL SYSTEMS

Submissions
Issues
Subscriptions
Settings
Users & Roles
Tools

Journal Settings

Masthead Contact **Sections**

Sections	Order	Create Section
Title	Editors	
Articles	Berardo, Buskins	
Reviews	Inoue	

Done Cancel ordering

Hit the Done button when you are finished.

Website Settings

The Website Settings allow you to configure how your journal's website looks and operates. It consists of tabs for Appearance, Information, Archiving, Languages, Plugins, Announcements, and Navigation Menus.

Appearance

Logo: Use this space to upload a journal logo to the upper left corner of your reader interface.

Page Footer: This allows you to display text at the bottom of each page of your website.

Theme: As new themes become available, you can enable them here.

Typography: Quickly choose the fonts for your journal.

Colour: Quickly change the colour of your journal's header.

Journal Style Sheet: Use this to upload a unique style sheet for your journal.

Sidebar Management: This allows you to move different blocks in or out of the sidebar in the reader interface.

Homepage Image: Uploading an image here will place it on your journal's home page.

Journal Favicon: Add a [favicon](#) to display in the reader's browser address bar.

Additional Content: Any text entered here will appear on your homepage.

Lists: Limit the number of items (for example, submissions, users, or editing assignments) to show in a list before showing subsequent items in another page. Also, limit the number of links to display to subsequent pages of the list.

Journal thumbnail: Upload a small logo or image representative of the journal that will be used in lists of journals on this OJS installation. This will only be used on OJS installations with multiple journals.

Hit **Save** to record your changes.

Information

Use these fields to modify the text in the For Readers, For Authors, For Librarians pages on the journal website.

The screenshot shows the OJS Website Settings interface. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The left sidebar lists 'Submissions', 'Issues', 'Subscriptions', 'Settings', 'Users & Roles', and 'Tools'. The main content area is titled 'Website Settings' and has tabs for 'Appearance', 'Information', 'Archiving', 'Languages', 'Plugins', 'Announcements', 'Navigation Menus', and 'Help'. The 'Information' tab is active, showing sections for 'Descriptions', 'For Readers', and 'For Authors'. Each section has a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and image upload. The 'For Readers' section contains the text: 'We encourage readers to sign up for the publishing notification service for this journal. Use the [Register](#) link at the top of the home page for the journal. This registration will result in the reader receiving the Table of Contents by email for each new issue of the journal. This list also allows the journal to claim a certain level of support or readership. See the journal's [Privacy Statement](#), which assures readers that their name and email address will not be used for other purposes.' The 'For Authors' section contains the text: 'Interested in submitting to this journal? We recommend that you review the [About the Journal](#) page for the journal's section policies, as

Remember to hit **Save** to record any changes.

Archiving

If you are a member of a LOCKSS or CLOCKSS network, use this page to activate your journal.

The screenshot shows the OJS Website Settings interface with the 'Archiving' tab selected. The top navigation bar and left sidebar are the same as in the previous screenshot. The main content area is titled 'Website Settings' and has tabs for 'Appearance', 'Information', 'Archiving', 'Languages', 'Plugins', 'Announcements', and 'Navigation Menus'. The 'Archiving' tab is active, showing sections for 'Enable Archiving', 'LOCKSS', and 'CLOCKSS'. The 'Enable Archiving' section has two checkboxes: 'Enable LOCKSS to store and distribute journal content at participating libraries via a LOCKSS [Publisher Manifest](#) page.' and 'Enable CLOCKSS to store and distribute journal content at participating libraries via a CLOCKSS [Publisher Manifest](#) page.' The 'LOCKSS' section contains the text: 'Open Journal Systems supports the [LOCKSS](#) (Lots of Copies Keep Stuff Safe) system to ensure a secure and permanent archive for the journal. LOCKSS is open source software developed at Stanford University Library that enables libraries to preserve selected web journals by regularly polling registered journal websites for newly published content and archiving it. Each archive is continually validated against other library caches, and if content is found to be corrupted or lost, the other caches or the journal is used to restore it.' Below this, it says: 'Setting up LOCKSS support for Open Journal Systems does not need to take place until after publishing is fully underway, at which point follow these two steps: Identify 6-10 libraries that will register and cache the journal. For example, turn to institutions where editors or Board members work and/or institutions already participating in LOCKSS. See [the LOCKSS community](#).' The 'CLOCKSS' section contains the text: 'Open Journal Systems also supports the [CLOCKSS](#) (Controlled Lots of Copies Keep Stuff Safe) system to ensure a secure and permanent archive for the journal. CLOCKSS is based upon the open source LOCKSS software developed at Stanford University Library that enables libraries to preserve selected web journals by regularly polling registered journal websites for newly published content and archiving it. Each archive is continually validated against other library caches, and if content is found to be corrupted or lost, the other caches or the journal is

Languages

Use this page to configure the languages used by your journal.

The screenshot shows the 'Languages' tab in the 'Website Settings' section. The interface includes a top navigation bar with 'English', 'View Site', and 'dbarnes'. A left sidebar contains navigation links for 'Submissions', 'Issues', 'Subscriptions', 'Settings', 'Users & Roles', and 'Tools'. The main content area has tabs for 'Appearance', 'Information', 'Archiving', 'Languages', 'Plugins', 'Announcements', and 'Navigation Menus'. The 'Languages' tab is active, displaying a table with columns: 'Locale', 'Primary locale', 'UI', 'Submissions', and 'Forms'.

Locale	Primary locale	UI	Submissions	Forms
English	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Français (Canada)	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Primary Locale: One language must be set as primary.

UI: This will enable all selected languages to appear on the reader interface.

Submission: This will enable all selected languages to be available to submitting authors.

Forms: This will enable all selected languages to be available when filling in online forms.

If a language is unavailable on this page, contact the Site Administrator to add it for you. See Site Administration for details in Chapter 4.

Plugins

Use this page to see all of the installed plugins and find new plugins.

Installed Plugins

All of the plugins listed here are available in your OJS installation. Use the Enable link to use them.

The screenshot shows the 'Plugins' tab in the 'Website Settings' section. The interface is similar to the previous screenshot, but the 'Plugins' tab is active. It features a search bar and two sub-tabs: 'Installed Plugins' and 'Plugin Gallery'. The 'Installed Plugins' sub-tab is selected, displaying a table with columns: 'Name', 'Description', and 'Enabled'.

Name	Description	Enabled
Metadata Plugins (4)		
Dublin Core 1.1 meta-data	Contributes Dublin Core version 1.1 schemas and application adapters.	<input checked="" type="checkbox"/>
MODS 3.4 meta-data	Contributes MODS 3.4 schemas and application adapters.	<input checked="" type="checkbox"/>
OpenURL 1.0 meta-data	Contributes OpenURL 1.0 schemas and application adapters.	<input checked="" type="checkbox"/>
NLM 3.0 meta-data	Contributes NLM 3.0 schemas and application adapters.	<input checked="" type="checkbox"/>

You will notice that some plugins are required for the system and cannot be disabled.

Plugin Gallery

The Plugin Gallery provides access to externally-created plugins, that may not be included in your OJS installation, but are available for download and activation.

The screenshot shows the OJS Website Settings interface. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The left sidebar contains navigation links for Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Website Settings' and has tabs for Appearance, Information, Archiving, Languages, Plugins, Announcements, Navigation Menus, and Help. The 'Plugins' tab is active, and the 'Plugin Gallery' sub-tab is selected. Below this, there is a table with the following data:

Name	Description	Status
Hypothes.is	This plugin integrates the Hypothes.is annotation tool into articles.	Up to date
Translator	This plugin permits translations to be updated and edited.	Up to date
COinS	This plugin embeds OpenURL COinS in OJS articles.	Up to date
QuickSubmit	The QuickSubmit plugin permits Journal Managers to quickly enter submissions through the OJS website, bypassing the editorial workflow.	Up to date

Selecting the plugin title will provide additional details, including the author, status, description, and compatibility.

The screenshot shows the details for the 'Hypothes.is' plugin. The page has a blue header with the title 'Hypothes.is' and a close button. The main content area is divided into two columns. The left column contains the author information and a description:

Alec Smecher
Public Knowledge Project

<https://github.com/asmecher/hypothesis>

This plugin integrates Hypothes.is (<http://hypothes.is>) in OJS articles, permitting annotation and commenting. (See [the README document](#) for notes on PDF support.)

The right column contains a status box and additional information:

Plugin already installed and up-to-date.

Official
This plugin is developed and maintained by the Public Knowledge Project team.

v1.0.0.0 released on 2017-02-20

Release of the Hypothes.is plugin for OJS 3.0.2.

Announcements

This section allows you to create and display news announcements on the journal's website.

The screenshot shows the 'Announcements' tab in the Website Settings interface. The left sidebar contains navigation links for Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Announcements' and includes a description: 'Announcements may be published to inform readers of journal news and events. Published announcements will appear on the Announcements page.' Below this are two checkboxes: 'Enable Journal Managers to add journal announcements.' and 'Display [dropdown] of the most recent announcements on the journal homepage.' There is a text area for 'Enter any additional information that should be displayed to readers on the Announcements page.' with a rich text editor toolbar above it. The toolbar includes icons for bold, italic, underline, link, unlink, code, and image upload. A 'Powered by TinglyCE' watermark is visible in the bottom right corner of the text area.

Announcements: Configure how announcements will appear on your journal website.

Announcement Types: You can create different types of announcements (e.g., News, New Issue Alert, etc.). Use the *Add Announcement Type* link to create them.

Announcements: Use the *Add Announcement* link to create a new announcement for your Announcements page.

Navigation Menus

This section allows you to configure your navigation menus, such as including new links.

The screenshot shows the 'Navigation Menus' tab in the Website Settings interface. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Navigation Menus' and features an 'Add Menu' button. Below this are two expandable sections: 'User' and 'Primary'. Under 'User', there are links for 'Register', 'Login', '{loggedInUsername}', 'Dashboard', and 'View Profile'. Below these is another expandable section titled 'Navigation Menu Items' with an 'Add item' button. The 'Navigation Menu Items' section currently contains no items.

Navigation Menus: Configure the User Menu (which includes Language, View Site, and Username) or the Primary Menu (on the journal home page, including Current, Archive, About, etc.).

Navigation Menu Items: These are programmed links you can add to either menu above. If you wish to add a link to the Primary Menu (e.g., "Our Society"), add it here using the *Add Item* link.

Add item



Title *

Link to any URL on another site, like <http://pkp.sfu.ca>.*Link to any URL on another site, like <http://pkp.sfu.ca>.*

URL *

It will now appear in the list of Navigation Menu Items. Next, go to the desired Navigation Menu (e.g., Primary), use the blue arrow to reveal the options, and choose Edit. You can now drag and drop it from Unassigned Menu Items to Assigned Menu Items and into the appropriate location on the menu.

Edit



Title *

Active Theme Navigation Areas

Select a navigation area

Assigned Menu Items	Unassigned Menu Items
<input type="button" value="↕"/> Our Society	<input type="button" value="↕"/> Register
<input type="button" value="↕"/> Current	<input type="button" value="↕"/> Login
<input type="button" value="↕"/> Archives	<input type="button" value="↕"/> {\$loggedInUsername}
<input type="button" value="↕"/> Announcements	<input type="button" value="↕"/> Dashboard
<input type="button" value="↕"/> About	<input type="button" value="↕"/> View Profile
<input type="button" value="↕"/> About the Journal	<input type="button" value="↕"/> Administration

Hit Save to record the change.

Workflow Settings

The Workflow Settings allow you to configure various parts of the journal's editorial workflow. Its tabs include Components, Submission, Review, Publisher Library, and Emails.

Components

When an author makes a submission, they can upload multiple files. Typically, one file will be the article text, and others can include interview transcripts, data, images, etc. Each of these files is a **component** of the submission. The components available for the author to choose from when making her submission are listed here.

The screenshot shows the 'Workflow Settings' page for 'Journal of Public Knowledge'. The 'Components' tab is active. The 'Article Components' table is as follows:

Article Components	Order	Add a Component	Restore defaults
▶ Article Text			
▶ Research Instrument			
▶ Research Materials			
▶ Research Results			
▶ Transcripts			
▶ Data Analysis			
▶ Data Set			

Using the links provided, you can change the **Order** of the components (how they will be listed to the submitting author), **Add a Component** (if something you need is not included by default -- e.g., Video), or **Restore the Defaults** (if someone has made too many modifications and you just want to reset everything).

Edit Component

You can also edit each component by selecting the blue arrow to the left of the component name. This will reveal an Edit link and a Delete link.

Edit ✕

Name *

Options

- Allow files of this type to be sorted by chapter
- Mark files of this type as dependent files (e.g. not to be listed with published content)
- Mark files of this type as supplementary files (e.g. not primary submission content)

File type grouping

* Denotes required field

Name: This is the name of the component, as presented to the author.

Options: Choose how the files associated with this component will be treated and displayed.

File Type Grouping: Determine whether this component is associated with the submission document, artwork, or is a supplementary file.

Submission

Use this section to configure the submission process.

The screenshot shows the 'Workflow Settings' page for the 'Journal of Public Knowledge'. The 'Submission' tab is selected. The 'Author Guidelines' section contains a rich text editor with a toolbar (Bold, Italic, Underline, Link, Unlink, Code, Undo, Redo, Upload) and a large text area. Below this is the 'Submission Preparation Checklist' with two items:

- ▶ The submission has not been previously published, nor is it before another journal for consideration (or an explanation has been provided in Comments to the Editor).
- ▶ The submission file is in OpenOffice, Microsoft Word, or RTF document file format.

Author Guidelines: Use this field to add guidelines for your authors. This information will be displayed on the journal website.

Submission Preparation Checklist: Authors must check off that they agree with each item on this list. Use the *Order* link to change the order of the items, use the *Add Item* link to create a new item, and use the blue arrow to the left of the item name to *Edit* an existing item.

The 'Edit Checklist Item' dialog box is shown. It has a blue header with the title 'Edit' and a close button. The main content area is titled 'Checklist Item *' and contains a text area with the text: 'Where available, URLs for the references have been provided.' Below the text area are 'Save' and 'Cancel' buttons. A legend at the bottom indicates that the asterisk denotes a required field.

Notification of Author Submission: Add an email address here to be contacted whenever there is a new submission.

Submission Metadata: This section allows you to determine which metadata fields to use for your journal.

Submission Metadata		
Name	Enabled	Submission Form
Coverage	<input type="checkbox"/>	<input type="checkbox"/>
Language	<input type="checkbox"/>	<input type="checkbox"/>
Rights	<input type="checkbox"/>	<input type="checkbox"/>
Source	<input type="checkbox"/>	<input type="checkbox"/>
Subject	<input type="checkbox"/>	<input type="checkbox"/>
Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Discipline(s)	<input type="checkbox"/>	<input type="checkbox"/>
Keyword(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supporting Agencies	<input type="checkbox"/>	<input type="checkbox"/>
References	<input type="checkbox"/>	<input type="checkbox"/>

Each entry is a different metadata type available for every article in your journal.

Some journals may want to activate all of them, but many will wish to keep it simple and just choose Keywords.

If you choose *Enabled*, that metadata type will be added to your submissions for completion by an editor.

If you choose *Submission Form*, that metadata type will also be presented to your authors for them to fill in during their submission.

Remember to hit the **Save** button to record any changes to this page.

Privacy Statement: The default privacy statement can be modified if you wish.

Review

This tab allows you to configure your journal's review process.

The screenshot shows the 'Workflow Settings' page in the OJS interface, specifically the 'Review' tab. The page has a dark blue sidebar on the left with navigation links: Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is light gray and contains the following sections:

- Default Review Deadlines:** A heading followed by the text 'Defaults can be modified for each review during the editorial process.' Below this are two input fields. The first is empty, and the second contains the number '4'. Below the first field is the label 'Weeks allowed to accept or decline a review request', and below the second is 'Weeks allowed to complete the review'.
- Automated Email Reminders:** A heading followed by a paragraph: 'To activate these options, the site administrator must enable the `scheduled_tasks` option in the OJS configuration file. Additional server configuration may be required to support this functionality (which may not be possible on all servers), as indicated in the OJS documentation.'
- Two reminder configuration sections, each with a text label and a dropdown menu:
 - 'Send a reminder if a reviewer has not responded to a review request within the following time (days) after response due date:' followed by a dropdown menu showing 'Never Remind'.
 - 'Send a reminder if a reviewer has not submitted a recommendation within the following time (days) after review's due date:' followed by a dropdown menu showing 'Never Remind'.

Default Review Deadlines: Indicate how long reviewers have to decide to accept or decline a review request from the editor, and how long they have to make a recommendation.

Automated Email Reminders: Set automatic reminder email messages to be sent to late reviewers. Note that some system settings must be configured by the Site Administrator.

Review Forms: Review forms provide reviewers with a set of questions to respond to. This can help focus their feedback in ways that is more useful to you.

Create Review Form: Use the Create Review Form link to make a new form.

Create Review Form ✕

Title *

Description and Instructions

📄 📁 **B** *I* U [🔗](#) [🔗](#) `<>` [🔄](#) 📷 Upload +

Please complete this form. All feedback for authors will be kept anonymous.

* Denotes required field

Save
Cancel

The Description and Instructions provide information about the form and when to use it for Journal Managers and Editors. This content is not included on the form that reviewers see. You can add instructions and guidelines for reviewers under Review Guidelines (below).

Back at the Review Forms page, select the blue arrow to the left of the form name to reveal the Edit link.

Review Forms				Create Review Form
Title	In Review	Completed	Active	
<div style="display: flex; align-items: center;"> ▾ Article Form </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Edit Preview Delete </div>	0	0	<input type="checkbox"/>	

Select the Edit link and complete the form.

Item *

B *I* U

 Upload

How would you assess the methodology of the submission?

Reviewers required to complete item
 Included in message to author

Radio buttons (you can only choose one) ▾

*Item type **

Response Options	Add Item
1. Very Strong	✘
2. Strong	✘
3. Satisfactory	✘
4. Somewhat Satisfactory	✘
5. Poor	✘

Items are form questions.

You can choose whether to make the question required and visible to the author.

You can then choose the type of response, including:

- a single word text box
- a single line text box
- an extended text box (for longer answers)
- checkboxes (where the reviewer can select multiple possible responses)
- radio buttons (where the reviewer can only select one possible answer)
- dropdown menu (also where reviewers can only select one possible answer)

Response Options are the selections you make available for the checkboxes, radio buttons, or dropdown menus. A good example of a checkbox response is a [Likert scale](#), where the reviewer must choose only one option: E.g., Good, Neutral, Bad.

Remember to hit the **Save** button to record your changes.

Use the **Preview** tab to test out the form.

Edit
✕

Review Form
Form Items
Preview Form

Article Form

Please complete this form. All feedback for authors will be kept anonymous.

How would you assess the methodology of the submission?

*

1. Very Strong

2. Strong

3. Satisfactory

4. Somewhat Satisfactory

5. Poor

Once you send the form to a reviewer you will no longer be able to edit it because that would change the record for existing reviews using that form. If you want to make changes to the review form at that point you can copy the existing form and create a new updated version.

Blind Review: Check this box to display a link for instructions on ensuring all submission files are anonymized.

The Journal of Software Documentation ▾
English View Site pkpadmin

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 📄

Reviewer Competing Interest statement

Request a Competing Interest statement during the peer review.

Review Guidelines

Provide external reviewers with criteria for judging a submission's suitability for publication in the press, which may include instructions for preparing an effective and helpful review. Reviewers will have an opportunity to provide comments intended for the author and editor, as well as separate comments only for the editor.

📄 📁 **B** *I* U 🔗 🔗 <> 🔄 📷 Upload 📄

Competing Interests: Add your competing interest disclosure policy statement here.

Reviewer Competing Interest statement: Add a checkbox that reviewers agree to comply with your competing interest statement.

Review Guidelines Provide your reviewers with criteria for judging a submission's suitability for publication in the press, which may include instructions for preparing an effective and helpful review.

Review Options: Select whether your journal will follow an double blind, blind, or open review process.

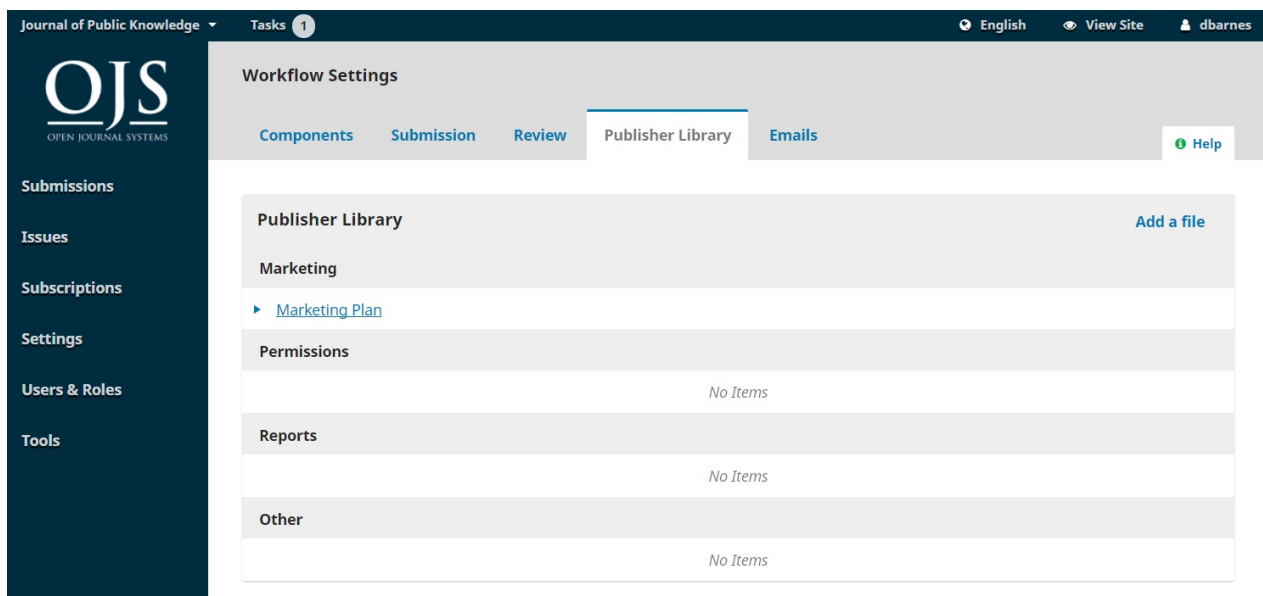
Reviewer Access: Enable the first option to provide reviewers with one-click access to the review, by-passing the need to go to the website, login, and find the submission. For security reasons with this option, editors are not able to modify email addresses or add CCs or BCCs prior to sending invitations to reviewers.

Enabling the second option will limit access to submission files until after the reviewer has agreed to do the review.

Hit the **Save** button to record your changes.

Publisher Library

Use the Publisher Library to store important documents, such as your journal's Marketing Plan, and share them with your editorial team.




The screenshot shows the OJS Workflow Settings interface. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The left sidebar contains navigation links for Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Workflow Settings' and has tabs for Components, Submission, Review, Publisher Library (selected), and Emails. A 'Help' button is visible in the top right of the main area. The 'Publisher Library' section is expanded, showing a table with the following structure:

Publisher Library	Add a file
Marketing	
▶ Marketing Plan	
Permissions	
	No Items
Reports	
	No Items
Other	
	No Items

Emails

The section allows you to configure the emails that are sent out from the system.

Journal of Public Knowledge ▾
Tasks 1
English
View Site
dbarnes



OPEN JOURNAL SYSTEMS

- Submissions
- Issues
- Subscriptions
- Settings
- Users & Roles
- Tools

Workflow Settings

Components
Submission
Review
Publisher Library
Emails
Help

Signature

The prepared emails that are sent by the system on behalf of the journal will have the following signature added to the end.

📄 📁 **B** *I* U 🔗 🔗 <> 🔄 📷 Upload +

JOURNAL OF PUBLIC KNOWLEDGE

Powered by TnyHCE

Bounce Address

Any undeliverable emails will result in an error message to this address.

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

Signature: The information in this field will be added to the bottom of every email sent out by the system.

Bounce Address: A notice will be sent to this email address of any system-sent emails that fail to deliver, such as when the targeted email address is no longer valid.

Prepared Email Templates: Pre-written emails are an important part of OJS. You see all of them here, and use the Edit link (as always, found by selecting the blue arrow to the left of the template name) to make any modifications.

Distribution Settings

The Distribution Settings focus on helping to raise the visibility of your journal. The tabs consist of Indexing, Access, Payments, and Permissions.

Indexing

This section helps you enhance your search engine optimization.

The screenshot shows the OJS Distribution Settings page with the 'Indexing' tab selected. The page title is 'Distribution Settings' and the sub-tab is 'Indexing'. The main content area is titled 'Search Engine Indexing' and includes a description: 'Provide a brief description of the journal which search engines can display when listing the journal in search results.' Below this is a text input field for the 'Description'. There is also a section for 'Custom tags' with the instruction: 'Custom HTML header tags to be inserted in the header of every page (e.g., META tags).' and a larger text area for these tags. A 'Save' button is located at the bottom of the form.

Use **Description** to provide a brief description of your journal for search engines.

Use **Custom Tags** to add custom HTML header tags to the header of every page of your journal (e.g., META tags to temporarily block search engine indexing).

Access

OJS provides a number of security-related options that can be used to restrict the journal's contents, and maintain additional information about submissions for auditing purposes.

The screenshot shows the OJS Distribution Settings page with the 'Access' tab selected. The page title is 'Distribution Settings' and the sub-tab is 'Access'. The main content area is titled 'Access to Journal Content' and includes a description: 'OJS provides a number of security-related options that can be used to restrict the journal's contents, and maintain additional information about submissions for auditing purposes.' Below this are three radio button options:

- The journal will provide open access to its contents.
- The journal will require subscriptions to access some or all of its contents.
- OJS will not be used to publish the journal's contents online.

 A 'Save' button is located at the bottom of the form.

By default, the open access option is selected. However, if you wish to only use OJS for a subscription journal, choose the second option. This will also enable the Subscription section in the left sidebar (more on Subscription Management in an upcoming chapter).

For editorial management and not for publishing, select the last option.

Payments

OJS provides the ability to collect online payments. Use this section to determine the default **Currency** type (e.g., Canadian Dollars, Euros, etc.) and **Payment Method** (e.g., Paypal).

The screenshot shows the OJS Distribution Settings interface. The left sidebar contains navigation links: Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Distribution Settings' and has four tabs: Indexing, Access, Payments (selected), and Permissions. A 'Help' button is visible in the top right of the settings area. Under the 'Payments' tab, there are two sections: 'Currency' and 'Payment Method'. The 'Currency' section has a dropdown menu set to 'Canadian Dollar'. The 'Payment Method' section has a dropdown menu with three options: 'No payment method selected', 'Paypal Fee Payment' (highlighted in blue), and 'Manual Fee Payment'. Below the dropdowns is a 'Save' button. A note at the bottom states '* Denotes required field'.

Choosing **Manual Fee Payment** will allow you to type in some instructions to your users (e.g., where to mail a cheque).

Choosing **Paypal Fee Payment** will enable some additional settings where you can add the details from your Paypal account.

Paypal Payment Settings

Account Name

Client ID

Secret

Test Mode

Permissions

This section covers copyright issues for your journal.

The screenshot shows the OJS (Open Journal Systems) interface. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The left sidebar contains a menu with 'Submissions', 'Issues', 'Subscriptions', 'Settings', 'Users & Roles', and 'Tools'. The main content area is titled 'Distribution Settings' and has tabs for 'Indexing', 'Access', 'Payments', and 'Permissions'. The 'Permissions' tab is active, showing the 'Copyright Notice' section. This section includes a rich text editor with a toolbar (bold, italic, underline, link, unlink, code, undo, redo, upload, and insert) and a large empty text area. Below the editor, there are three sections: a checkbox for 'Require authors to agree to the Copyright Notice as part of the submission process.', a section titled 'Base new article's copyright year on' with two radio button options ('Issue: default year will be drawn from the issue's publication date.' and 'Article: default year will be drawn from the article's publication date, as in "publish-as-you-go"'), and a section titled 'Copyright Holder' with two radio button options ('Author' and 'Journal'). A 'Powered by TinyMCE' watermark is visible in the bottom right corner of the text area.

Copyright Notice: Add your journal's copyright statement here. It will be visible on the journal website.

Check the box to require authors to agree to your copyright statement.

Base new article's copyright year on: Choose whether the copyright date is based on the issue (under a traditional, issue-based publishing model) or on the article (based on a continuous publishing model).

Copyright Holder: Select who holds copyright to the articles published by your journal. The trend in open access publishing is to allow authors to retain copyright of their work.

License: Select the license for your journal. CC Attribution 4.0 is a widely used license for open access journals, allowing for maximum sharing and reuse.

Reset Article Permissions: If your journal later changes its licensing policy, use this button to reset the copyright on all published content.

Chapter 6: Issues

From the left menu, select Issues to manage all of the issues for your journal.

The screenshot shows the OJS (Open Journal Systems) interface for managing journal issues. The top navigation bar includes the journal name 'Journal of Public Knowledge', a 'Tasks' menu with a notification badge '1', and user options for 'English', 'View Site', and 'dbarnes'. The left sidebar contains a menu with 'Issues' selected. The main content area is titled 'Issues' and has two tabs: 'Future Issues' (active) and 'Back Issues'. A 'Help' button is visible in the top right of the main area. Below the tabs, there is a 'Future Issues' section with a 'Create Issue' button. A table lists the current issue: 'Vol 1 No 3 (2018)' with 0 items.

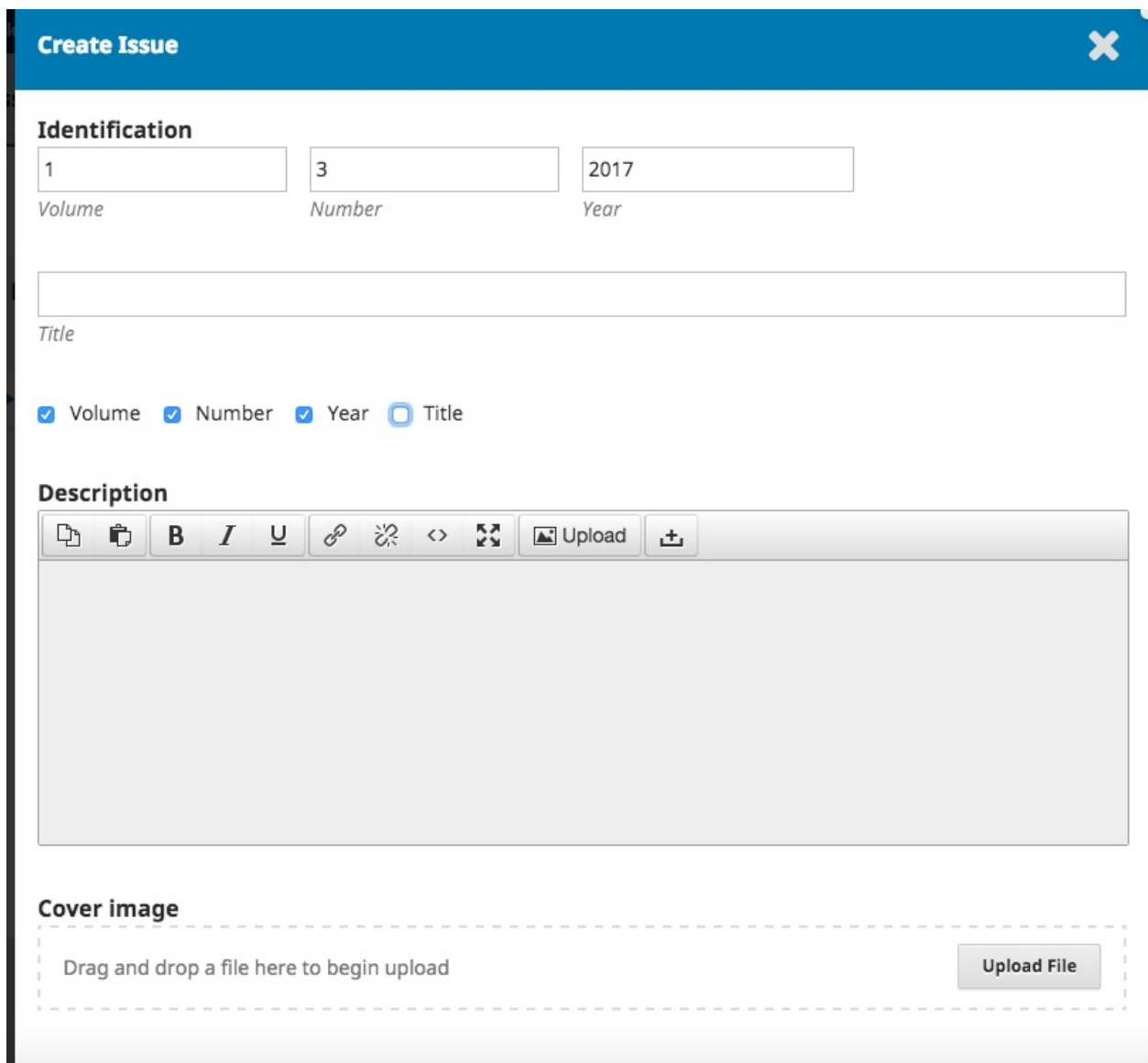
Issue	Items
Vol 1 No 3 (2018)	0

Future Issues

Future Issues are all of your unpublished issues. You can create as many of these as you wish, and schedule submissions to any of them.

Create Issue

To create a new issue, use the **Create Issue** link and fill in the form.



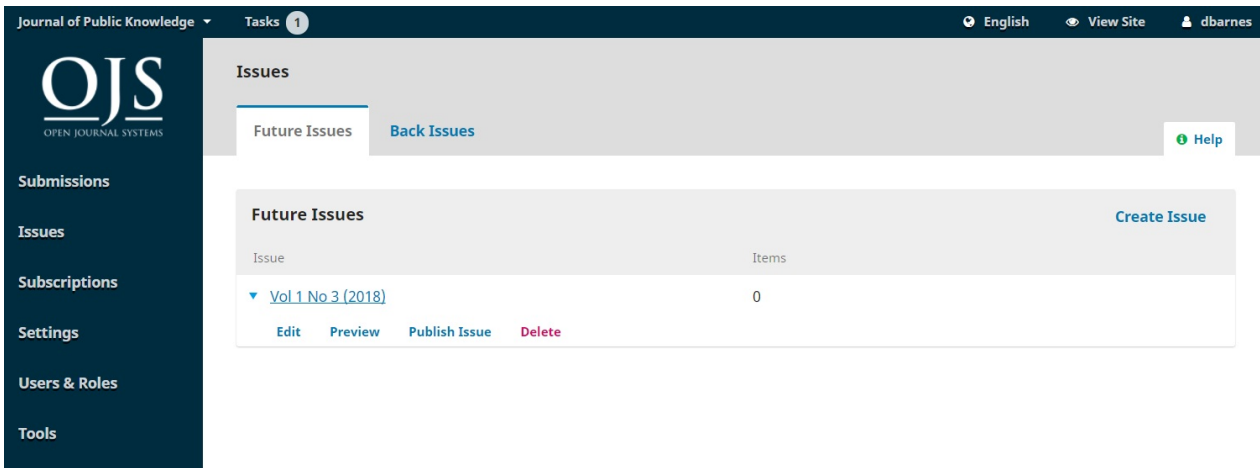
The screenshot shows a 'Create Issue' form with a blue header bar containing the title 'Create Issue' and a close button (X). The form is divided into several sections:

- Identification:** Contains three input fields. The first is labeled 'Volume' and contains the number '1'. The second is labeled 'Number' and contains the number '3'. The third is labeled 'Year' and contains the year '2017'. Below these is a larger text input field labeled 'Title'.
- Checkboxes:** A row of four checkboxes: 'Volume' (checked), 'Number' (checked), 'Year' (checked), and 'Title' (unchecked).
- Description:** A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), link, unlink, code, full screen, and an 'Upload' button. Below the toolbar is a large text area for the description.
- Cover image:** A dashed box containing the text 'Drag and drop a file here to begin upload' and an 'Upload File' button.

There are spaces to add volume, number, year, and title information (e.g., Special Issue #1), as well as a description and a cover image (if needed).

Edit Issue

You can also edit an existing future issue by selecting the blue arrow to the left of the issue entry on the Future Issues page.



This will reveal an Edit link, which will open a new window of information.

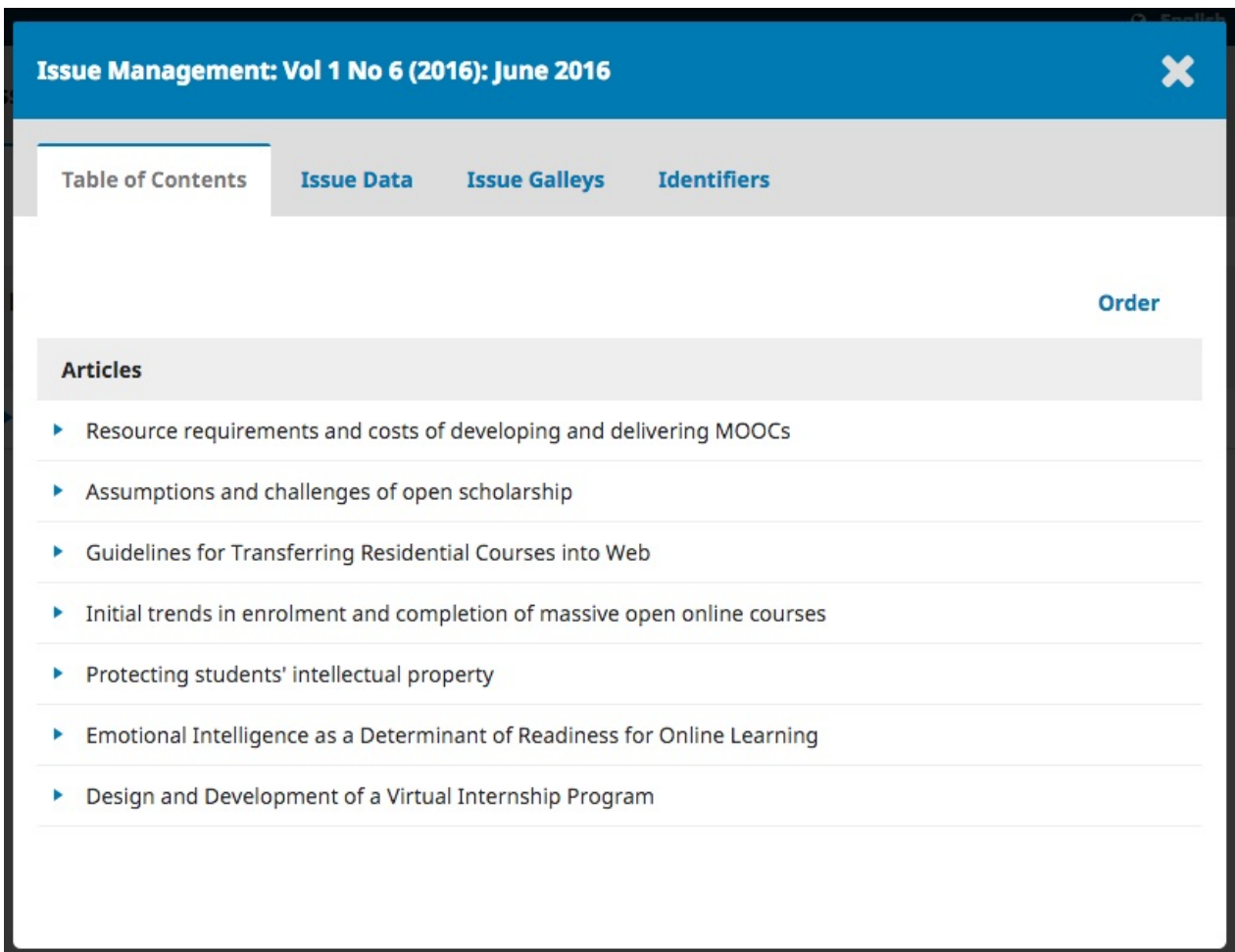


Table of Contents: For a new issue, this will be empty, but for issues that have had submissions scheduled, they will be listed here.

Use the blue arrow next to each submission to reveal links to go directly to the submission record (more about this in Chapter 10) or remove it.

You can also use the Order link to reorder the entries.

Issue Data: This provides access to the volume, issue, number data you entered when first creating the issue.

Issue Galleys: This allows you to upload galley of the complete issue -- e.g., one PDF containing all articles. This will be linked from the issue web page.

Identifiers: Use this space to add a DOI for the issue, if your journal supports issue-level identifiers.

Preview Issue

Using that same blue arrow will also reveal a Preview link, letting you get a look at the issue before publishing it.

Publish Issue

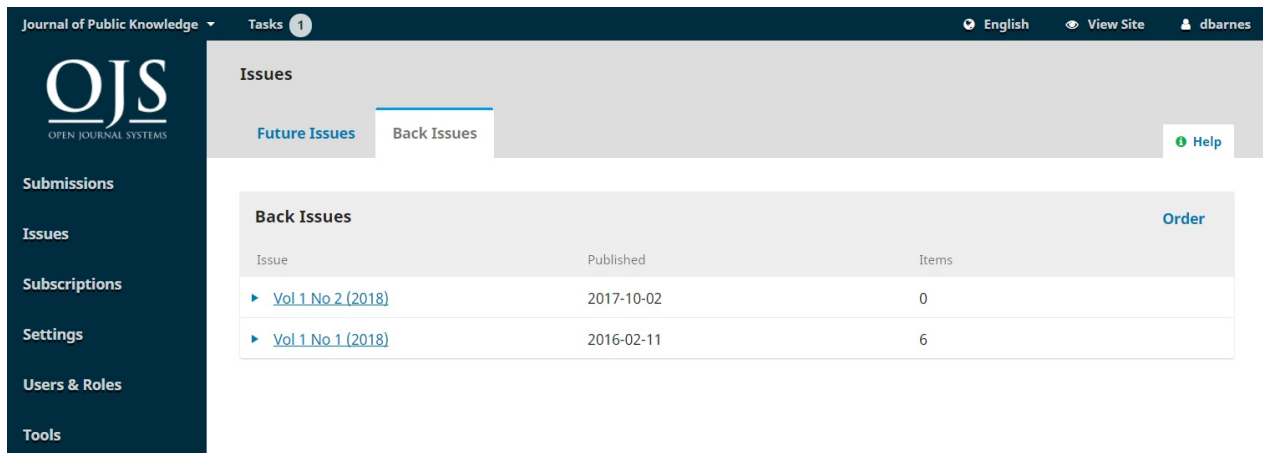
Once you are happy with the issue hit the Publish Issue link to publish it on your journal website.

Delete Issue

You can use the Delete link to remove the issue. Any assigned articles will revert to their unpublished status.

Back Issues

This tab lists all of your published issues.



The screenshot shows the OJS (Open Journal Systems) interface. At the top, there is a dark navigation bar with 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. Below this is a sidebar with the OJS logo and a menu containing 'Submissions', 'Issues', 'Subscriptions', 'Settings', 'Users & Roles', and 'Tools'. The main content area is titled 'Issues' and has two tabs: 'Future Issues' and 'Back Issues'. The 'Back Issues' tab is active, showing a table with two rows of data. Each row has a blue arrow icon to the left of the issue title. A 'Help' button is visible in the top right of the main content area, and an 'Order' link is in the top right of the table.

Issue	Published	Items
▶ Vol 1 No 2 (2018)	2017-10-02	0
▶ Vol 1 No 1 (2018)	2016-02-11	6

As with Future Issues, using the blue arrow will reveal similar options as described above (Edit, Preview, etc.).

Chapter 7: Users and Roles

This section provides access to all of the user accounts associated with your journal, as well as the opportunity to manage roles and permissions.

Users

In addition to managing the journal web site, the Journal Manager is also responsible for all of the user accounts in the system.

To view the user accounts, select Users & Roles from the left menu.

The screenshot shows the 'Users & Roles' management interface. The 'Users' tab is selected, displaying a table of current users. The table columns are First Name, Last Name, Username, and Email. The users listed are:

First Name	Last Name	Username	Email
admin		admin	pkpadmin@mailinator.com
Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com
Rana	Baiyewu	rbaiyewu	rbaiyewu@mailinator.com
Daniel	Barnes	dbarnes	dbarnes@mailinator.com
Stephanie	Berardo	sberardo	sberardo@mailinator.com
David	Buskins	dbuskins	dbuskins@mailinator.com

Users

Users are displayed in last name order.

You can edit a user account by selecting the blue arrow to the left of an entry.

Current Users				Q Search	Add User
First Name	Last Name	Username	Email		
▶ admin		admin	pkpadmin@mailinator.com		
▼ Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com		
				Email	Edit User
				Disable	Remove
				Login As	Merge User

This opens the options to Email, Edit User, Disable, Remove, Login As, Merge User.


Email opens a window allowing you to quickly send a message to that user.

Email ✕

Subject *

To Karim Al-Khafaji <kalkhafaji@mailinator.com>

Body *



** Denotes required field*

Edit User allows you to make changes to that user's account.

Edit User
✕

User Details

Name

*First Name **

Middle Name

*Last Name **

Username
kalkhafaji

Contact

*Email **

Password
Leave the password fields blank to keep the current password. The password must be at least 6 characters.

Password

Repeat password

Disable keeps the account in place, but blocks the user from accessing it.

Remove clears the user account out of your journal records and the user can no longer login, but the account remains in the system.

Login As allows you to temporarily log in as that user, for example, to complete an outstanding task.

Merge User lets you fold this user account, including any submissions or assignments, into another user account on your system.

Note: This is the only way to completely delete an account from the system.

You may want to create a dummy user account (e.g., Deleted Users), and use that to merge unwanted accounts into.

Search

When you have a large number of users, you will want to take advantage of the search feature.

Current Users
↕ Search
Add User

Search

Include users with no roles in this journal. Search

First Name	Last Name	Username	Email
▶ admin		pkpadmin	pkpadmin@mailinator.com
▶ Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com

This can help you quickly find a user by first name, last name, or email address, or to see all users in a particular role.

Note: If you leave the Search field blank, select a Role, and hit Search, you will get a list of all users in that role (e.g., all copyeditors).

Current Users				Search	Add User
Search				<input type="text"/>	Copyeditor
<input type="checkbox"/> Include users with no roles in this journal.				<input type="button" value="Search"/>	
First Name	Last Name	Username	Email		
▶ Maria	Fritz	mfritz	mfritz@mailinator.com		
▶ Sarah	Vogt	svogt	svogt@mailinator.com		
					1 - 2 of 2 items

Add User

To add a new user to your journal, select the Add User link. This will open a new window with a set of fields to fill in.

Add User ✕

Step #1: Fill in User Details

Name

*First Name **

Middle Name

*Last Name **

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

*Username **

Contact

*Email **

Password

*Password **

*Repeat password **

Once these fields are completed and you hit **Save**, you will then be asked to assign roles to the new account. Use the **Add Role** link to open the role selector.

Add User ✕

Step #2: Add User Roles to Jane Jones

Add Roles Add Role

Name	Designation
<input type="text" value="Reviewer"/>	

** Denotes required field*

Once you have added all of the roles, hit the **Save** button.

Roles

Users in the system must have one or more roles.

Roles define what a user can do within the system. An Author can make submissions and little else. An Editor can manage submissions, and a Journal Manager can configure the journal's settings.

One user can have more than one role, for example, being a Journal Manager, Editor, and Author in the same journal.

OJS 3 has multiple roles available, each with different permission levels.

The screenshot shows the 'Users & Roles' management page in OJS. The 'Roles' tab is active, displaying a table of current roles. The table has columns for Role Name, Abbreviation, Submission, Review, Copyediting, and Production. Each role has a blue arrow to its left, indicating it is clickable for editing. Checkmarks in the permission columns indicate which stages the role can access.

Role Name	Abbreviation	Submission	Review	Copyediting	Production
▶ Journal manager	JM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Journal editor	JE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Production editor	ProdE	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Section editor	SecE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Guest editor	GE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

From this page, you can see each role, and the editorial stage each role can access. A good example of this is the Copyeditor role, which can only access the copyediting stage. Copyeditors cannot jump to the Review stage to see what happened during the peer review process. See Chapter 10 for more information about the different editorial stages.

Editing Roles

Unchecking a box removes access to that stage for users with that role.

Selecting the blue arrow to the left of the role name reveals the edit link. Clicking this opens the editing window.

Edit
✕

Role details

Permission level *

Journal Manager ▾

Role Name *

Journal manager

Abbreviation *

JM

Stage Assignment

- Submission
- Review
- Copyediting
- Production

Role Options

- Show role title in contributor list
- Allow user self-registration
- This role is only allowed to recommend a review decision and will require an authorised editor to record a final decision.

Permission Level: This indicates how much a user with this role can do in any stage. The Journal Assistant level can communicate with other users and upload and revise files.

Role Name: You can use this field to easily rename any role.

Abbreviation: Each role must have a unique abbreviation.

Stage Assignment: This allows you to determine which stage users with this role can access.

Role Options: Use these checkboxes to show anyone with this role in the contributor list (e.g., the author list).

Use the second option to determine whether users can self-register in this role. Authors and Reviewers are good candidates for self-registration. You would definitely NOT want to allow users to self-register as Journal Managers or Editors!

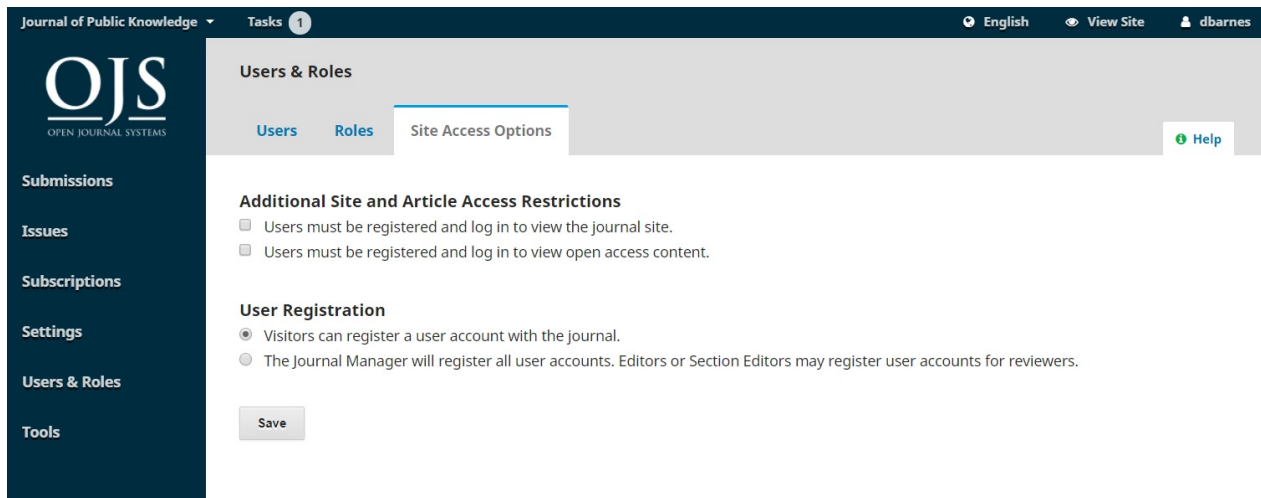
The third option is useful for guest editors or possibly section editors, depending upon your preferred workflow and authority chain.

Create New Roles

Use the *Create New Roles* link to open a window where you can create a new role for your journal, including setting which stages it can access and how much permission it should have.

Site Access Options

This page allows you to determine how readers can access your journal.



The screenshot shows the 'Site Access Options' page in the Journal of Public Knowledge administration interface. The page is titled 'Users & Roles' and has three tabs: 'Users', 'Roles', and 'Site Access Options'. The 'Site Access Options' tab is active. The page contains two sections: 'Additional Site and Article Access Restrictions' and 'User Registration'. The 'Additional Site and Article Access Restrictions' section has two checkboxes, both of which are unchecked. The 'User Registration' section has two radio buttons, with the first one selected. A 'Save' button is located at the bottom of the page.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS OPEN JOURNAL SYSTEMS

Submissions

Issues

Subscriptions

Settings

Users & Roles

Tools

Users Roles Site Access Options Help

Additional Site and Article Access Restrictions

- Users must be registered and log in to view the journal site.
- Users must be registered and log in to view open access content.

User Registration

- Visitors can register a user account with the journal.
- The Journal Manager will register all user accounts. Editors or Section Editors may register user accounts for reviewers.

Save

Additional Site and Article Access Restrictions: Choose from these options to limit access.

Keep in mind that while requiring registration to read open access content can be convenient for your tracking, it can dissuade some people from reading your content. Use with care.

User Registration: This option allows you to determine whether users can create their own accounts or must be enrolled by a Journal Manager.

Allowing users to register themselves, but only into Author, Reviewer, or Reader roles, is a good choice.

Chapter 8: Tools

The Tools section can be accessed from the left sidebar menu.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS
OPEN JOURNAL SYSTEMS

Submissions

Issues

Subscriptions

Settings

Users & Roles

Tools

Tools

Import/Export

Statistics

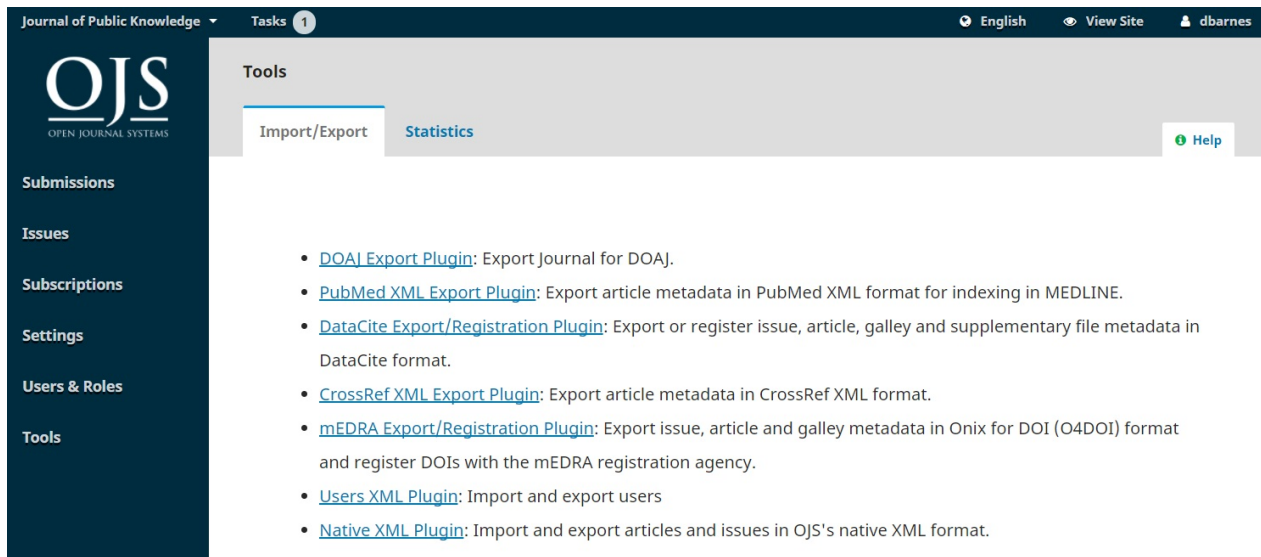
Help

- [DOAJ Export Plugin](#): Export Journal for DOAJ.
- [PubMed XML Export Plugin](#): Export article metadata in PubMed XML format for indexing in MEDLINE.
- [DataCite Export/Registration Plugin](#): Export or register issue, article, galley and supplementary file metadata in DataCite format.
- [CrossRef XML Export Plugin](#): Export article metadata in CrossRef XML format.
- [Onix for DOI \(O4DOI\) format](#): Export issue, article and galley metadata in Onix for DOI (O4DOI) format.
- [mEDRA registration agency](#): Export DOIs with the mEDRA registration agency.
- [Native XML Plugin](#): Import and export users.
- [Native XML Plugin](#): Import and export articles and issues in OJS's native XML format.

Tools consist of an Import/Export tab and a Statistics tab.

Import/Export

Import/Export allows you to easily get data out of your OJS journal and get data into it.



The screenshot shows the OJS (Open Journal Systems) interface. At the top, there is a dark blue header with the text "Journal of Public Knowledge" on the left, "Tasks 1" in the center, and "English", "View Site", and "dbarnes" on the right. Below the header is a dark blue sidebar with the OJS logo and a list of navigation items: Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area has a light gray background with a "Tools" section. Under "Tools", there are two tabs: "Import/Export" (which is active) and "Statistics". To the right of the "Tools" section is a "Help" button. The "Import/Export" tab contains a list of links to various plugins:

- [DOAJ Export Plugin](#): Export Journal for DOAJ.
- [PubMed XML Export Plugin](#): Export article metadata in PubMed XML format for indexing in MEDLINE.
- [DataCite Export/Registration Plugin](#): Export or register issue, article, galley and supplementary file metadata in DataCite format.
- [CrossRef XML Export Plugin](#): Export article metadata in CrossRef XML format.
- [mEDRA Export/Registration Plugin](#): Export issue, article and galley metadata in Onix for DOI (O4DOI) format and register DOIs with the mEDRA registration agency.
- [Users XML Plugin](#): Import and export users
- [Native XML Plugin](#): Import and export articles and issues in OJS's native XML format.

Some of the tools allow you to export to third-party systems, such as PubMed or the DOAJ.

Others allow you to import or export user or article data.

For more information on the Crossref XML Export Plugin, see the PKP Crossref Guide.

Statistics

The Statistics page provides access to a variety of reports from your journal.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS
OPEN JOURNAL SYSTEMS

Submissions
Issues
Subscriptions
Settings
Users & Roles
Tools

Tools

Import/Export Statistics Help

Report Generator

The system generates reports that track the details associated with site usage and submissions over a given period of time. Reports are generated in CSV format which requires a spreadsheet application to view.

- [View Report](#)
- [Review Report](#)
- [Subscriptions Report](#)
- [COUNTER Reports](#)
- [Articles Report](#)
- [PKP Usage statistics report](#)

Generate custom report

The system generates reports that track the details associated with site usage and submissions over a given period of time. Reports are generated in CSV format which requires a spreadsheet application to view.

View Report: Provides a report on galley and abstract views by readers (i.e., how many times a PDF for an article has been viewed).

Review Report: Provides a spreadsheet of all review activity.

Subscriptions Report: Provides a spreadsheet of subscription activity.

COUNTER Reports: Provides COUNTER data.

Articles Report: Provides a spreadsheet of all published articles.

PKP Usage Statistics Report: Provides basic usage statistics for your journal.

Generate Custom Report

Use this feature to build your own reports.

Journal of Public Knowledge ▾ Tasks **1** English View Site dbarnes

OJS
OPEN JOURNAL SYSTEMS

Submissions

Issues

Subscriptions

Settings

Users & Roles

Tools

Report Generator

Default report templates

Issue table of contents page views ▾

Aggregate stats by:

Items in italic and marked with * represents data that is optional to the current way of counting statistics in the system (metric type). You might have that data or not, depending on your statistics plugin configuration.

- Country
- Region **
- City **
- Month
- Day

Select report range

- Yesterday
- Current month

Or select range by:

- Day
- Month

Chapter 9: Subscriptions

OJS 3.1 allows you to restrict some or all of your content to subscribers. To enable Subscriptions, first go to [Settings > Distribution > Access](#).

Subscription Policies

Fill in details about your subscription policies on this page.

The screenshot shows the OJS (Open Journal Systems) interface for managing subscription policies. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks' (with a notification icon), 'English', 'View Site', and the user 'dbarnes'. The left sidebar contains a menu with 'Submissions', 'Issues', 'Subscriptions', 'Settings', 'Users & Roles', and 'Tools'. The main content area is titled 'Subscriptions' and has a sub-menu with 'Individual Subscriptions', 'Institutional Subscriptions', 'Subscription Types', 'Subscription Policies' (highlighted), 'Payment Types', and 'Payments'. The 'Subscription Manager' section contains a form with the following fields: 'Name' (filled with 'Jane Brown'), 'Email' (filled with 'jbrown@mail.com'), and 'Phone' (filled with '1234 Main Street, Vancouver, BC, V6A 1S6'). Below the form is a section for 'Subscription Information'.

Subscription Manager: Add personal details for the responsible person.

Subscription Information: Add policy details to display on the journal website.

Subscription Expiry: Determine whether past subscribers should continue to have access to older content.

Subscription Expiry Reminder: Configure automated renewal reminders.

Online Payment Notifications: Keep the Subscription Manager informed of payment activities.

Open Access Options for Subscription Journals: If appropriate select the number of current months for restricting access. Older content will be automatically made open.

Subscription Types

The next step in setting up subscription management is to designate the types of subscriptions the journal offers.

The screenshot shows the OJS administration interface. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The left sidebar contains navigation links for Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Subscriptions' and has tabs for 'Individual Subscriptions', 'Institutional Subscriptions', 'Subscription Types', and 'Subscription Policies'. Below these tabs are 'Payment Types' and 'Payments'. The 'Subscription Types' tab is active, showing a table with columns for Name, Subscriptions, Duration, and Cost. The table is currently empty, displaying 'No Items' and '0 - 0 of 0 items'. A 'Create New Subscription Type' button is visible in the top right corner of the table area.

Journals typically offer individual subscription and institutional subscription rates. Some journals may have special offers for members of an organization or students. OJS will support the management of print and/or online subscriptions. More than one type of subscription can be created to cover longer periods of time (12 months, 36 months).

Select **Create New Subscription Type** to add a new one.

The screenshot shows the 'Create New Subscription Type' form. The form has a blue header with the title and a close button. The fields are as follows:

- Name of Type:** A text input field containing 'Student'.
- Description:** A rich text editor with a toolbar containing icons for copy, paste, bold, italic, underline, link, unlink, code, fullscreen, and image upload. The description text reads: 'This subscription type is for students registered in a formal educational program.' A 'Powered by TinyMCE' watermark is visible in the bottom right corner of the editor.
- Cost:** A dropdown menu for 'Currency' set to 'Canadian Dollar (CAD)' and a text input field for 'Cost' set to '25.00'. Both fields have a red asterisk indicating they are required.
- Format:** A dropdown menu set to 'Online'.

Name of Type: Give this new subscription type a unique name (e.g., Student).

Description: Provide a brief description that will appear on the website.

Cost: Select the currency type and amount.

Format: Choose the appropriate format (e.g., Online)

Duration: Enter the number of months this type of subscription will cover (e.g., 12).

Subscriptions: Indicate whether this type covers individuals or institutions.

Options: Select the appropriate options (if any).

Payment Types

If you haven't already done so, go to [Settings > Distribution > Payments](#) and set the appropriate currency and payment method (e.g., Paypal).

Use this page to set the amounts charged for various types of fees.

The screenshot shows the 'Payments' settings page in OJS. The page is titled 'Subscriptions' and has a sub-tab 'Payments'. The 'General Options' section has a checkbox for 'Payments will be enabled for this journal. Note that users will be required to log in to make payments.' The 'Author Fees' section has a text input field for 'Article Publication Fee'. The 'Reader Fees' section has two text input fields for 'Purchase Issue' and 'Purchase Article'.

General Options: Check this to allow for payments to be collected.

Author Fees: Set the amount to charge for an article processing charge (APC).

Reader Fees: Use this to charge reader fees distinct from subscriptions.

General Fees: Use this to charge other fees, such as memberships.

Payments

As various payments are received, they will be listed under this tab.

Individual Subscriptions

All types of individual subscriptions will appear here.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS OPEN JOURNAL SYSTEMS

Submissions

Issues

Subscriptions

Settings

Users & Roles

Tools

Subscriptions

Individual Subscriptions Institutional Subscriptions Subscription Types Subscription Policies

Payment Types Payments

Individual Subscriptions Search Create New Subscription

Name	Email	Subscription Type	Status	Start	End
No Items					
0 - 0 of 0 items					

You can create a new individual subscription by using the Create New Subscription link. First, however, you will need to create a new account for that person under Users & Roles (see Chapter 7). Once that is done, you can search for the account here, and apply the different configurations.

Create New Subscription

Locate a User

Search

All Roles

Search

Name
<input type="radio"/> admin
<input type="radio"/> Karim Al-Khafaji
<input type="radio"/> Rana Baiyewu
<input type="radio"/> Daniel Barnes
<input type="radio"/> Stephanie Berardo

Load more 5 of 35 items

Subscription type

Student - 1 year - 25.00 CAD Active

Subscription type * Status *

Date

Subscription Type: Select the appropriate type for this new subscriber (e.g., Student) and its status (e.g., Active).

Subscription Types were configured earlier in this chapter.

Date: Set the start and end dates for this subscription.

Membership: If the subscriber is associated with any relevant memberships, add that information here (optional).

Reference Number: If the subscriber is associated with any relevant reference number (such as an invoice number for payment), add that information here (optional).

Notes: If you have any relevant notes to add, record that information here (optional).

Institutional Subscriptions

All types of institutional subscriptions will appear here.

The screenshot shows the OJS (Open Journal Systems) interface for managing institutional subscriptions. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks' (with a notification icon), 'English', 'View Site', and the user 'dbarnes'. A left sidebar contains navigation links for Submissions, Issues, Subscriptions, Settings, Users & Roles, and Tools. The main content area is titled 'Subscriptions' and features tabs for 'Individual Subscriptions', 'Institutional Subscriptions' (which is selected), 'Subscription Types', and 'Subscription Policies'. Below these are tabs for 'Payment Types' and 'Payments'. The 'Institutional Subscriptions' section contains a table with columns for Name, Subscription Type, Status, Start, and End. The table is currently empty, displaying 'No Items' and '0 - 0 of 0 items'. A search icon and a 'Create New Subscription' link are located at the top right of the table area.

Institutional subscriptions are managed similarly to individual subscriptions, but are used for libraries, research institutes, and other organizations that subscribe to your journal.

You can create a new individual subscription by using the Create New Subscription link. First, however, you will need to create a new account for the institution's contact person under Users & Roles (see Chapter 7). Once that is done, you can search for the account here, and apply the different configurations.

Create New Subscription ✕

Locate a User

Search

All Roles
▼

	Name
<input type="radio"/>	admin
<input type="radio"/>	Karim Al-Khafaji
<input type="radio"/>	Rana Baiyewu
<input type="radio"/>	Daniel Barnes
<input type="radio"/>	Stephanie Berardo

Load more
5 of 35 items

Subscription type

Library - 1 year - 50.00 CAD
▼

Active
▼

*Subscription type **
*Status **

Subscription Type: Select the appropriate type for this new subscriber (e.g., Library) and its status (e.g., Active).

Subscription Types were configured earlier in this chapter.

Date: Set the start and end dates for this subscription.

Institution: Add the name of the institution for this subscription (e.g., Simon Fraser University Library).

Mailing Address: Add the address of the institution.

Domain: Readers coming from a computer with this domain will automatically receive access (e.g., sfu.ca). This will apply to on-campus users.

IP Ranges: The institution may provide you with IP ranges. Readers coming from a computer from this IP range will automatically receive access.

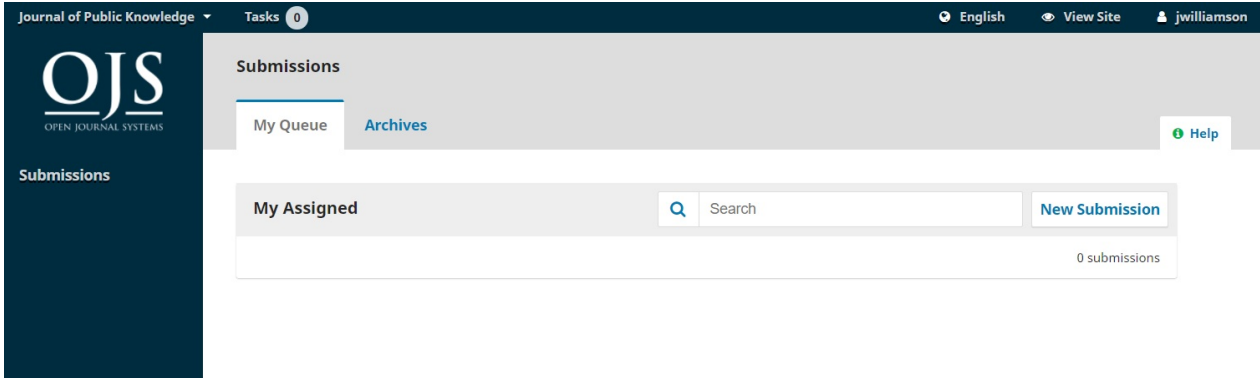
Notes: If you have any relevant notes to add, record that information here (optional).

Chapter 10: Authoring

In this chapter, you will learn about how an author works in OJS 3.1 from registration through to proofreading the final galley.

Registering with the Journal

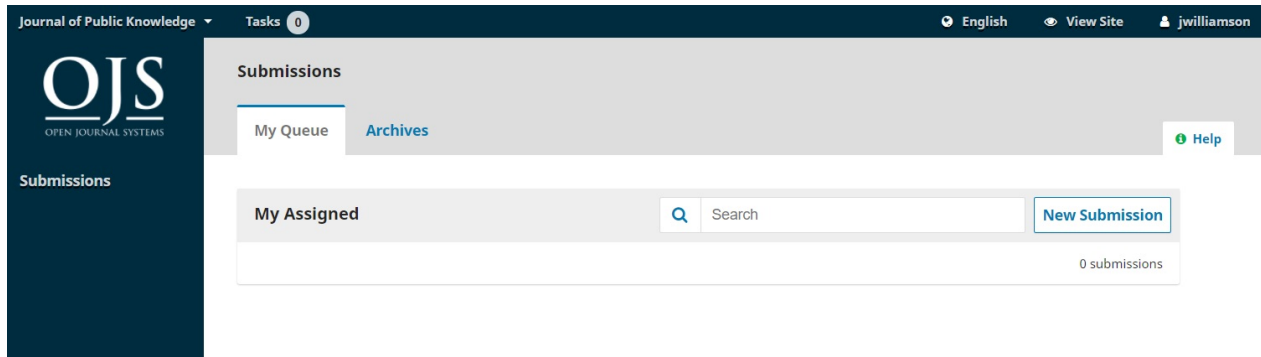
To make a submission to an OJS 3.1 journal, you will first need to register as an Author (see [Registering with a Journal](#)). After that, when you login, you will be taken to your Dashboard.



It is currently empty as you have made no submissions.

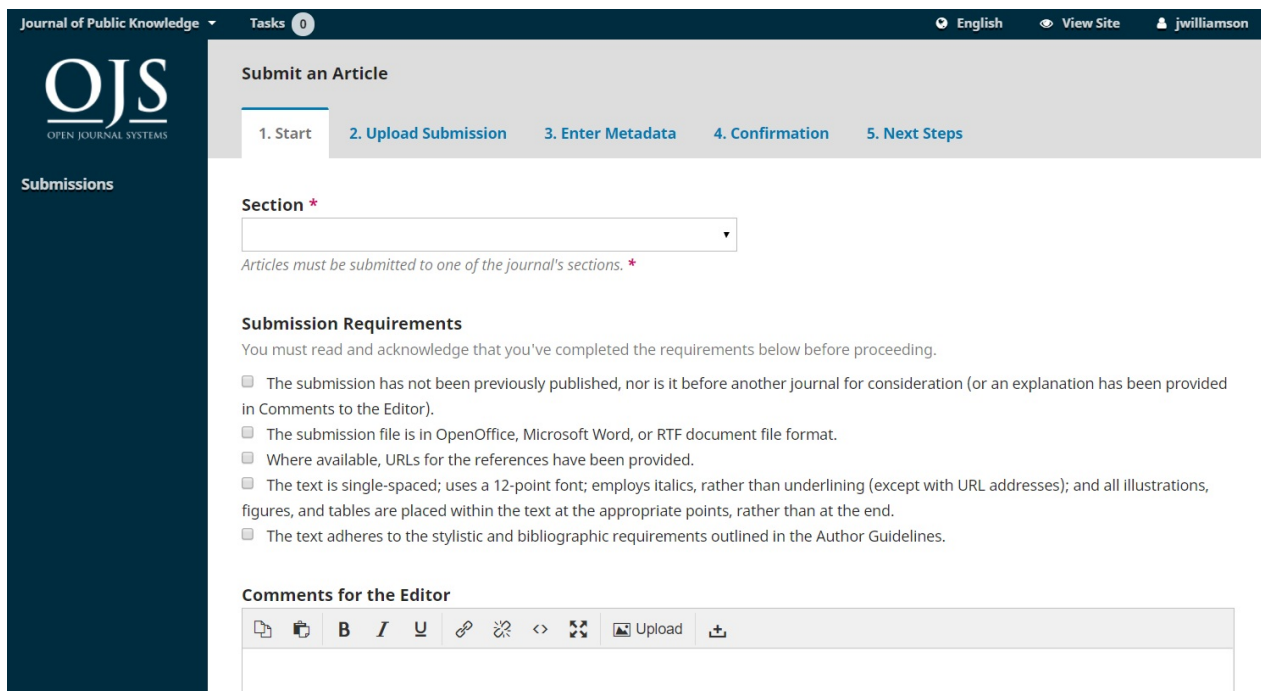
Submitting an Article

Start a new submission by clicking the **New Submission** button on the right side of the screen. You will be taken to Step 1 of a 5-Step process to upload and describe your submission.



Step 1

In **Step 1** you will provide preliminary information about your submission.

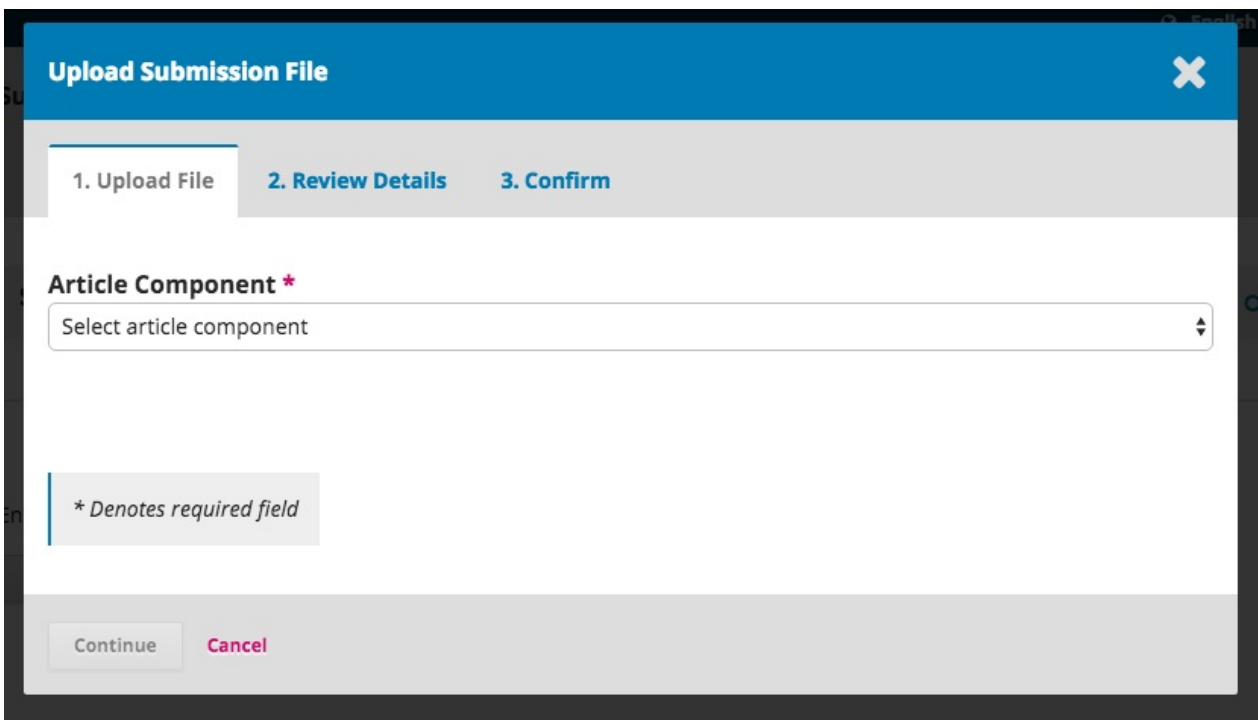


To begin select the appropriate section for your submission (e.g., article, review, etc.). If you aren't sure which section is appropriate, make your best guess.

Read and agree to the statements in the submission checklist by checking each box. Include any comments for the editor, read the journal's privacy statement, and then click the **Save and Continue** button to move to **Step 2**.

Step 2

On **Step 2**, a window will open allowing you to upload your submission file.



Upload Submission File [X]

1. Upload File 2. Review Details 3. Confirm

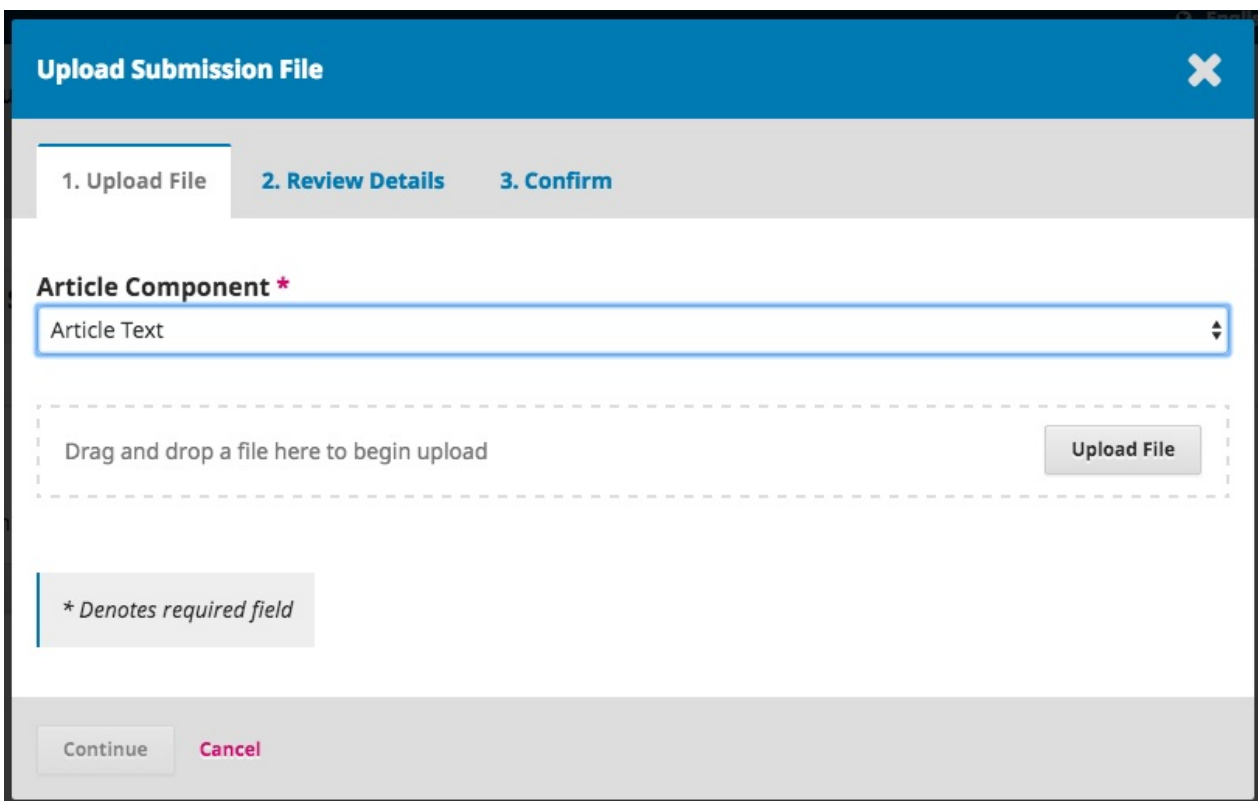
Article Component *

Select article component

* Denotes required field

Continue Cancel

First, you **MUST** select an Article Component. This lets the system know whether the file is the body of the manuscript, an image, a data set, etc. **This must be selected before your file will upload.**



Upload Submission File [X]

1. Upload File 2. Review Details 3. Confirm

Article Component *

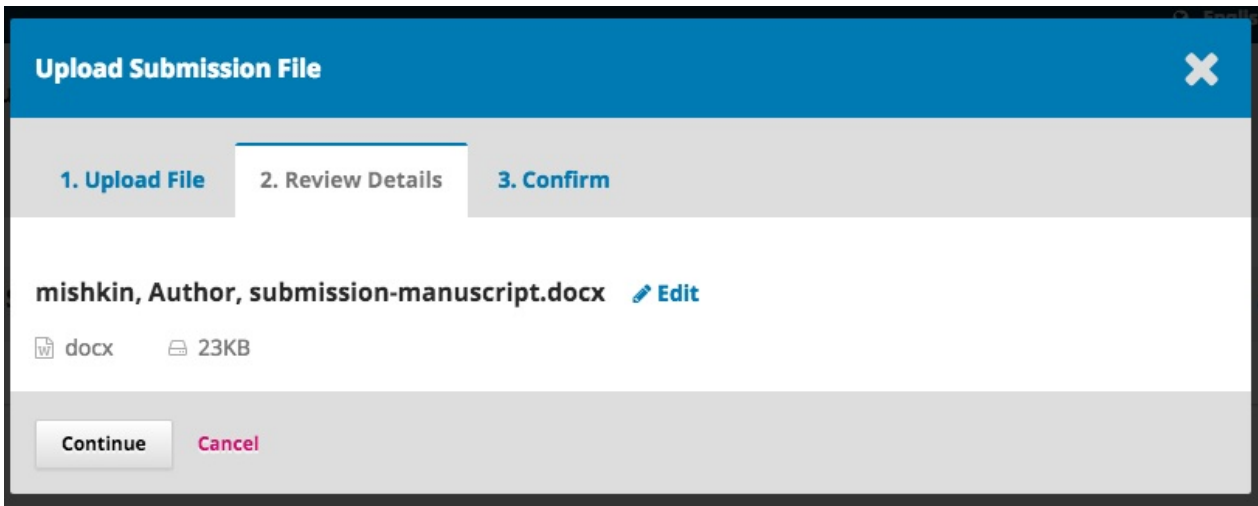
Article Text

Drag and drop a file here to begin upload Upload File

* Denotes required field

Continue Cancel

Once you've made that selection, you can then upload your first file. It is important to note that you can only upload **one** file at a time. Additional files can be uploaded later in the process. Typically, this first file will be the body of your manuscript. Hit the **Continue** button once the file uploads.

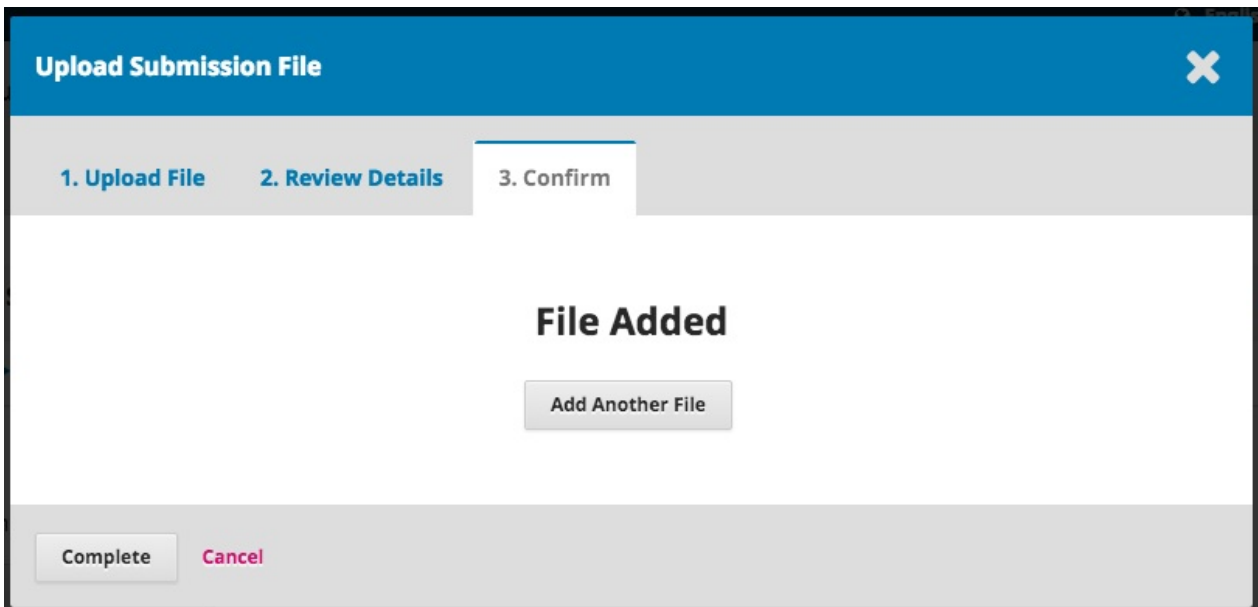


After uploading the file, you will be asked to review the name of the file. Use the Edit link to make any changes.

Click the **Continue** button.

Next, you have the option to repeat the process to upload additional files (e.g., a data set or an image).

Once you have finished uploading all of your files, click **Complete**; this will close the upload window.



You will be brought back to the *Submit an Article* screen where you will see the files you've uploaded. If you need to make changes, expand the blue arrow to the left of your file and make any changes using the *Edit* link.

Click 'Save and Continue' to move to Step 3.

Step 3

On **Step 3**, you will be asked to add more information about the submission, including the title of the submission (broken down into prefix, title, and subtitle), the abstract, and scrolling down...

Journal of Public Knowledge Tasks 0 English View Site jwilliamson

Submit an Article

1. Start 2. Upload Submission 3. Enter Metadata 4. Confirmation 5. Next Steps

Prefix

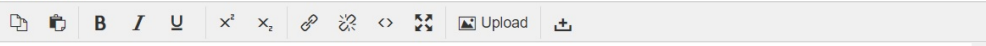
Examples: A, The

Title *

Subtitle

The optional subtitle will appear after a colon (:), following the main title.

Abstract *



Nongovernmental organizations, particularly those related to development work (local development-oriented nongovernmental organizations; LDNGO), and their agents have been assuming, in Portugal, an important role in the field of adult education. These organizations develop with the State, at the national level, and with supranational institutions and programs different types of relationships and arrangements, as a result of the activity in such educational arena. This article intends to question, on the basis of an ethnographic study of an adult education team of an LDNGO and using the pedagogical discourse model of Bernstein, the relationship that these agents establish with the official knowledge (pedagogical discourse) emerging from State-dependent intervention bodies. The results of the study shows that, even in strongly prescriptive working contexts, it is possible to develop an active relationship with the

...any additional contributors.

List of Contributors					Add Contributor
Name	E-mail	Role	Primary Contact	In Browse Lists	
▶ Joe Williamson	jwilliamson@mail.com	Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

You can add more contributors (e.g., co-authors), by clicking the **Add Contributors** link. This will open a new window with fields to enter their information.

Add Contributor ✕

Name

*First Name ** *Middle Name* *Last Name **

Contact

*Email **

Country

*Country **

Hit **Save**, and the new contributor will appear on the screen.

List of Contributors			Order	Add Contributor
Name	E-mail	Role	Primary Contact	In Browse Lists
▶ Joe Williamson	jwilliamson@mail.com	Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Frederic Serletis	serletis@mail.com	Author		<input checked="" type="checkbox"/>

Depending on the journal you are submitting to, you may see additional fields to complete, such as keywords.

Additional Refinements

Keywords

To enter keyword, simply type the word or phrase and hit your Enter key. The word or phrase will be formatted as a keyword.

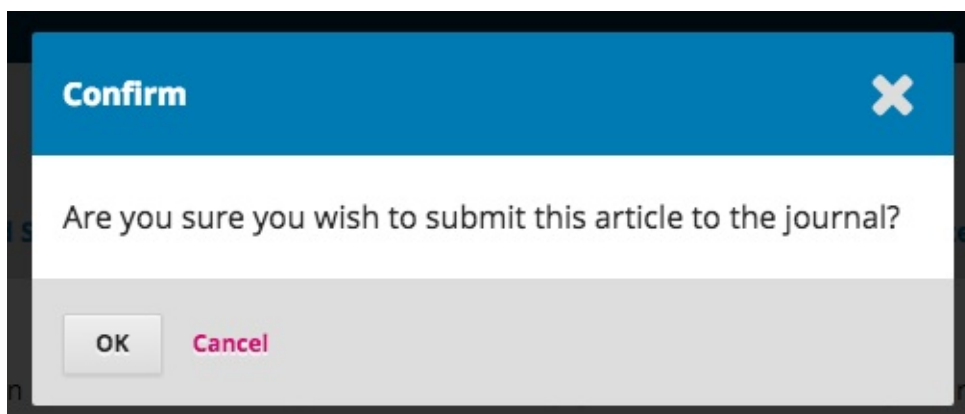
Click **Save and Continue** to move forward.

Step 4

On Step 4, you will be asked to confirm that you are happy with your submission.

Click **Finish Submission**.

A box will pop up asking you to confirm you are finished. Click **OK**.



Step 5

Journal of Public Knowledge Tasks 0 English View Site jwilliamson

OJS
OPEN JOURNAL SYSTEMS

Submissions

Submit an Article

1. Start 2. Upload Submission 3. Enter Metadata 4. Confirmation 5. Next Steps

Submission complete

Thank you for your interest in publishing with Journal of Public Knowledge.

What Happens Next?

The journal has been notified of your submission, and you've been emailed a confirmation for your records. Once the editor has reviewed the submission, they will contact you.

For now, you can:

- [Review this submission](#)
- [Create a new submission](#)
- [Return to your dashboard](#)

Your submission is now complete! The editor has been notified of your submission. At this point, you can follow the links to:

- Review this submission
- Create a new submission
- Return to your dashboard

Dashboard

And here is your submission in your Dashboard. You can see that it is currently in the *Submission* stage.

Journal of Public Knowledge Tasks 0 English View Site jwilliamson

OJS
OPEN JOURNAL SYSTEMS

Submissions

Submissions

My Queue Archives Help

My Assigned Search New Submission

26	Joe Williamson, Frederic Serletis The Official Knowledge and Adult Education Agents: An Ethnographic Study of the ...	Submission	▼
----	--	------------	---

1 of 1 submissions

Over the coming days, it will move into the Review stage, and if accepted, into the Copyediting and Production stages before being published.

Responding to a Review

Once the review process has completed, you will be notified via email by the editor of their decision.

After receiving the email, login to your dashboard.

The screenshot shows the OJS Submissions dashboard. The top navigation bar includes 'Journal of Public Knowledge', 'English', 'View Site', and the user 'mishkin'. The left sidebar has 'Tasks 1' and 'Submissions'. The main content area is titled 'Submissions' and includes a 'My Queue' tab, a 'New Submission' button, and two sections: 'My Assigned' (empty) and 'My Authored'. The 'My Authored' section contains one submission with ID 52, titled 'Mishkin et al.; approach for externalization of expert tacit knowledge', and a 'Review' link. The submission count is '1 of 1 items'.

Select the *Review* link next to your submission to view the decision.

The screenshot shows the submission details page for 'approach for externalization of expert tacit knowledge' by Apostolos Mishkin and Frederic Serletis. The 'Review' tab is selected. Below the title, there are tabs for 'Submission', 'Review', 'Copyediting', and 'Production'. A 'Round 1' tab is also visible. The 'Round 1 Status' section indicates 'Revisions have been requested.' The 'Notifications' section shows a message from '[JPK] Editor Decision' dated 2016-08-30 08:32 PM. The 'Reviewer's Attachments' section is empty, showing 'No Files'.

From here, you can see the decision (revisions requested) and a link to the editor's notification.

Notifications ✕

[JPK] Editor Decision

2016-08-30 08:32 PM

Apostolos Mishkin, Frederic Serletis:

We have reached a decision regarding your submission to Journal of Public Knowledge, "approach for externalization of expert tacit knowledge".

Our decision is: Revisions Required

Stephanie Berardo
University of Toronto
sberardo@mailinator.com

Reviewer A:
This is a very good article.

Based on the information in the editor's message, you must now prepare your revisions.

Uploading the Revised File

By scrolling down the page, you will find a panel for **Revisions**.

Round 1 Status
Revisions have been requested.

Notifications

[\[JPK\] Editor Decision](#) 2016-08-30 08:32 PM

Reviewer's Attachments Q Search
No Files

Revisions Q Search Upload File
No Files

Review Discussions Add discussion

Name	From	Last Reply	Replies	Closed
No Items				

Use the *Upload a File* link to upload your revised manuscript.

Upload Review File ✕

1. Upload File
2. Review Details
3. Confirm

If you are uploading a revision of an existing file, please indicate which file.

Author, submission-manuscript.docx

Article Component *

Article Text

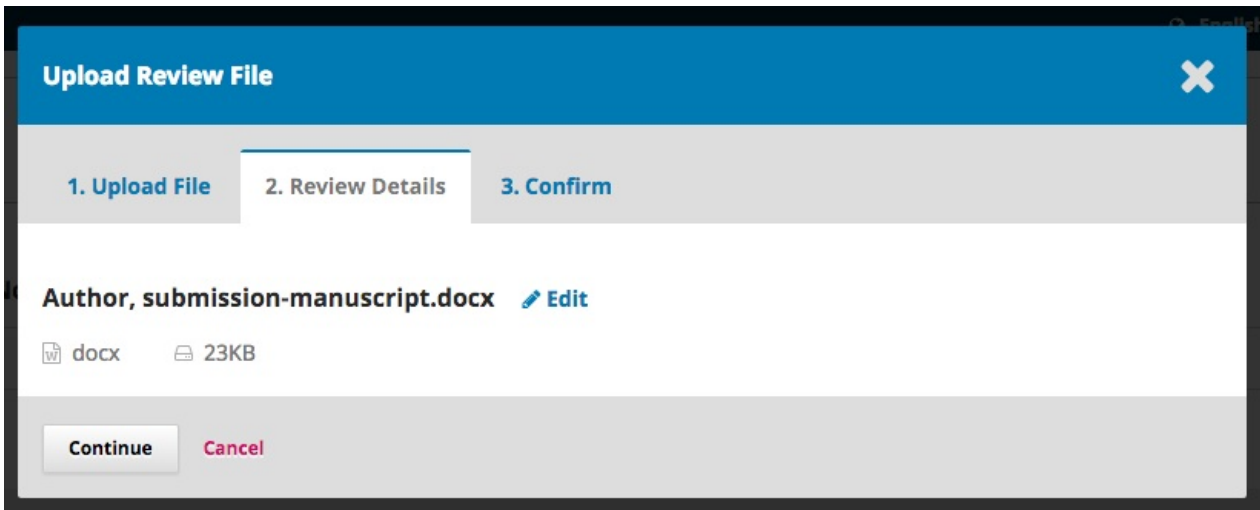
Drag and drop a file here to begin upload
 Upload File

* Denotes required field

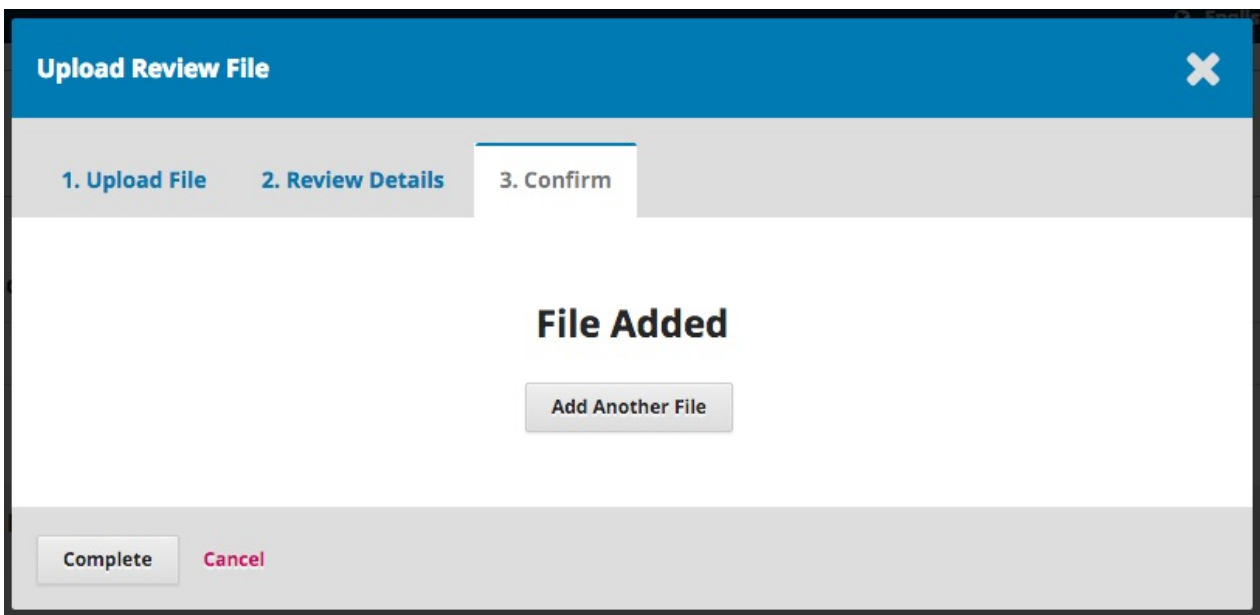
Continue
Cancel

Use the dropdown menu to choose that you are uploading a revision of an existing file.

Then upload the revised file and hit **Continue**.



Check the file details and hit **Continue** again.



If you have any additional files to upload, do so now. Otherwise, hit **Complete**.

Your revised file is now visible in the Revisions panel.

Revisions		Search	Upload File
▶	164-1 Author, submission-manuscript.docx	Article Text	

Inform the Editor

Your next step is to inform the editor that the revised file is now available. To do so, go to the Review Discussion panel.

Review Discussions				Add discussion
Name	From	Last Reply	Replies	Closed
No Items				

From there, select the *Add Discussion* link.

Add discussion
✕

Participants [Add User](#)

Apostolos Mishkin <mishkin@mailinator.com>	✕
Stephanie Berardo <sberardo@mailinator.com>	✕

Subject *

Revision uploaded

Message *

📄 📧 **B** *I* U [🔗](#) [🗑️](#) [<>](#) [🔄](#) 📷 Upload ⬆️

Dear Stephanie,

I have now uploaded my revised file.

Thank you,

Apostolos

Use the *Add User* link to add the editor.

Add a subject line and a message.

Hit **OK** to send the message.

An email has now been sent to the editor and you (and the editor) can see the message in the Review Discussions panel.

Review Discussions			Add discussion
Name	From	Last Reply	Replies Closed
▶ Revision uploaded	mishkin Aug/30	-	0 <input type="checkbox"/>

At this point, the author needs to wait to hear back from the editor as to whether the revisions are acceptable.

Revisions Accepted

You will receive an email that your revisions have been accepted.

In addition, notifications will appear on your dashboard.

Submission Review **Copyediting** Production

Round 1

Round 1 Status
Submission accepted.

Notifications

[JPK] Editor Decision	2016-08-30 08:32 PM
[JPK] Editor Decision	2016-08-31 09:26 AM

The later notification is the current one. Click on it to open the message (which is the same as the email you would have also received).

Notifications ✕

[JPK] Editor Decision
2016-08-31 09:26 AM

Apostolos Mishkin, Frederic Serletis:

We have reached a decision regarding your submission to Journal of Public Knowledge, "approach for externalization of expert tacit knowledge".

Our decision is to: Accept Submission

Daniel Barnes
University of Melbourne
dbarnes@mailinator.com

[Journal of Public Knowledge](#)

Use the **X** in the upper right corner to close the window.

Further down your dashboard, you will also see a discussion reply from the editor.

Revisions
Q Search
Upload File

▶ 164-1 [Author, submission-manuscript.docx](#) Article Text

Review Discussions
Add discussion

Name	From	Last Reply	Replies	Closed
▶ Revision uploaded	mishkin Aug/30	dbarnes Aug/31	1	<input type="checkbox"/>

Clicking the discussion title will open it up.

Revision uploaded
✕

Participants [Edit](#)

Stephanie Berardo (sberardo)

Apostolos Mishkin (mishkin)

Messages

Note	From
I've uploaded the file.	mishkin Aug 30
The revisions look great. We're ready to move to the next stage.	dbarnes Aug 31

Add Message

Congratulations! You've been accepted and your submission file is moving on to the Copyright stage.

Resubmitting for Review

If the editor's decision is to resubmit for review, you will need to log in and select the article in your submissions page. The resubmission is done in the review stage, there is no need to start a new submission.

At the review stage you will need to do two things to resubmit once you have revised your document:

Upload the new file in the revisions section. To upload a new file click on 'Upload file.' A new window will open allowing you to upload your file(s). Select the appropriate option from the dropdown menu to indicate you not submitting a revision of an existing file.

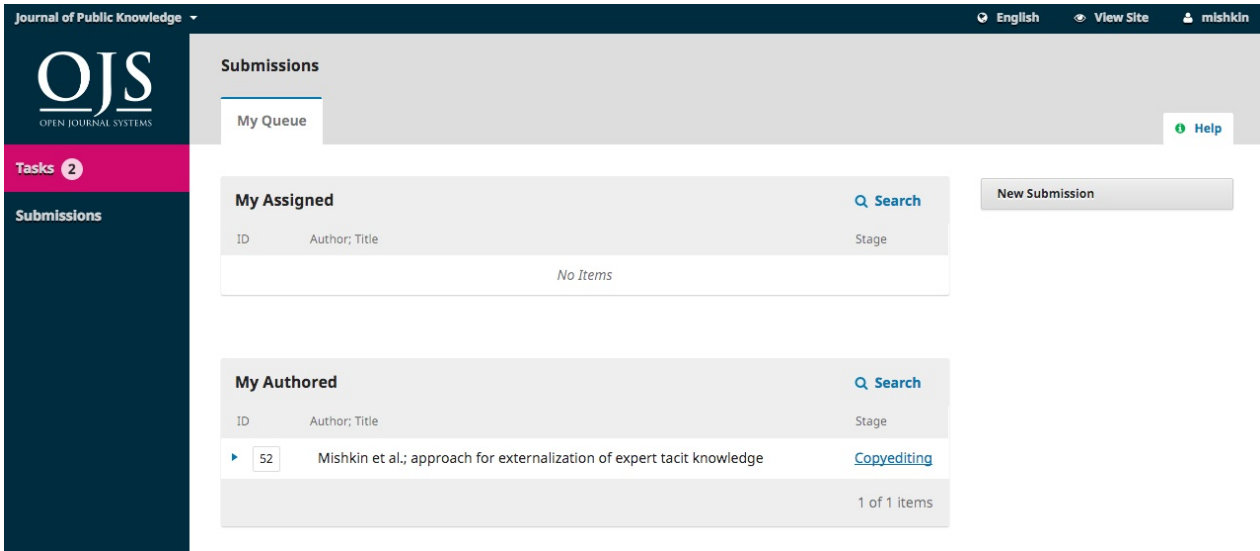
Add a discussion to notify the editor that you have re-submitted.

The peer review process will be repeated, and you will likely receive additional revisions to make. Once these are completed and accepted, you will then be moved to the next stage.

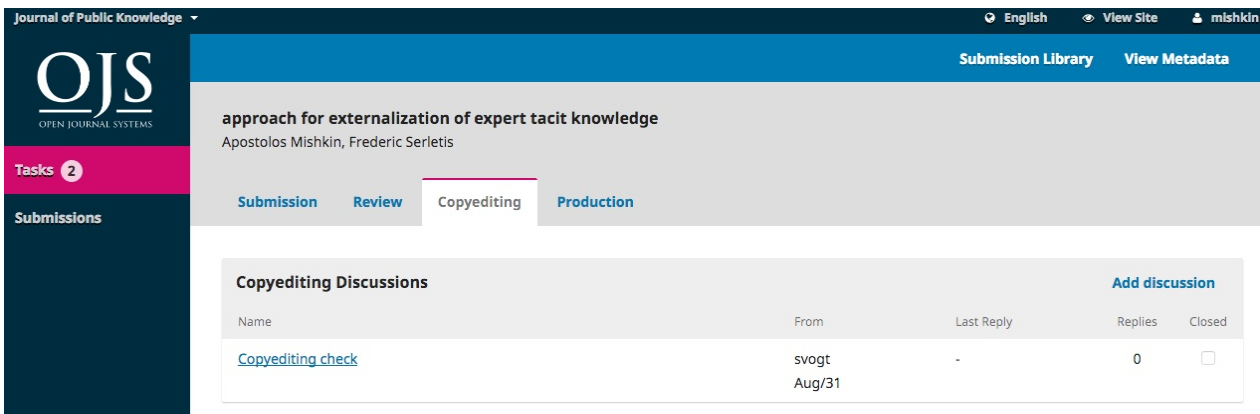
Responding to a Copyediting Request

The next step in the workflow is to inspect your submission files that have been copyedited.

You will receive an email indicating that files are available. To see them, login to the journal and go to your dashboard.



You can see your entry in the My Authored panel. Select the Copyediting link to go to the full submission record, including the notification in the Copyediting Discussions panel.




Click on the linked discussion to open it, read the message, and open the attached file.

Copyediting check ✕

Participants

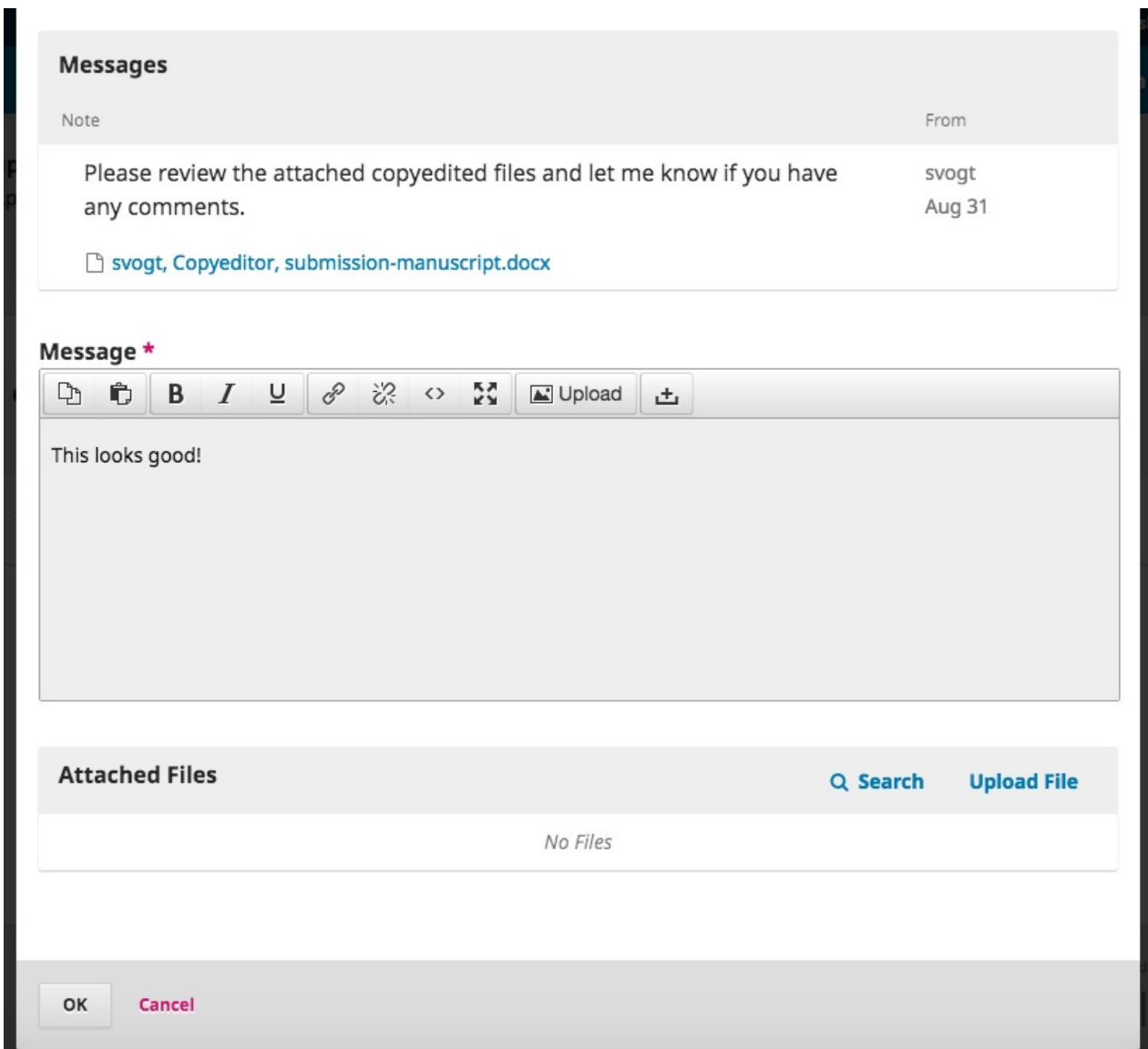
Sarah Vogt (svogt)
Apostolos Mishkin (mishkin)

Messages

Note	From
Please review the attached copyedited files and let me know if you have any comments.	svogt Aug 31
 svogt, Copyeditor, submission-manuscript.docx	

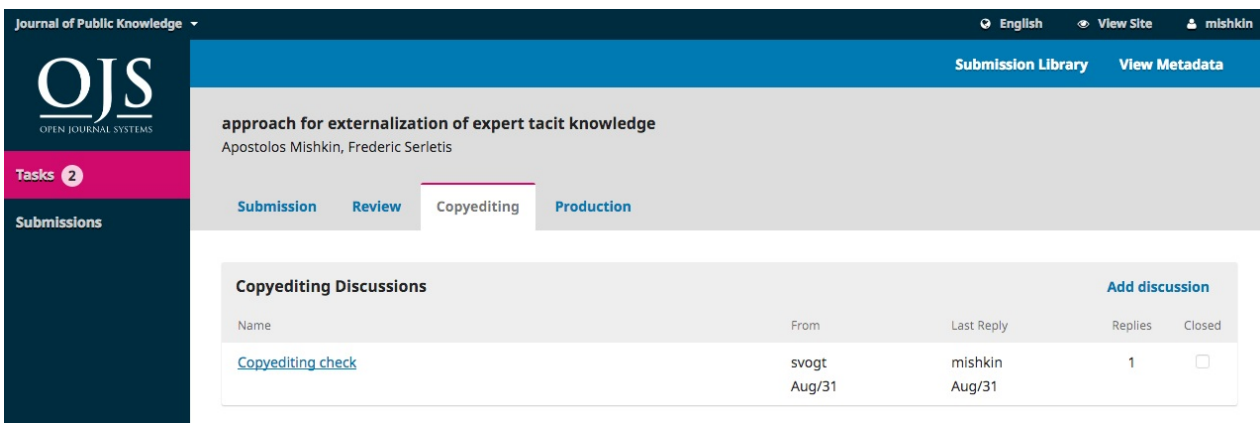
[Add Message](#)

Once you have read the attached file, you can respond to the copyeditor indicating an required changes or your approval.



If needed, you could attach a revision, but for this example we will simply approve the changes and hit **OK**.

On your dashboard, you can see that you were the last person to reply to the message.



Your role in the copyediting process is now complete and you can wait for the request to proofread the final galley (e.g., PDFs, HTML, etc.) before publication.

Responding to a Proofreading Request

The next step in the workflow is to inspect your submission files that have been converted into galleys (e.g., PDF, HTML, etc.).

You will receive an email indicating that files are available. To see them, login to the journal and go to your dashboard.

The screenshot shows the OJS Submissions dashboard. The top navigation bar includes 'Journal of Public Knowledge', 'English', 'View Site', and the user 'mishkin'. The main content area is titled 'Submissions' and has a 'My Queue' tab selected. Below this, there are two panels: 'My Assigned' (empty) and 'My Authored' (containing one item). The 'My Authored' panel has a search icon and a 'Production' link for the item.

ID	Author; Title	Stage
52	Mishkin et al.; approach for externalization of expert tacit knowledge	Production

You can see your entry in the My Authored panel. Select the Production link to go to the full submission record, including the notification in the Production Discussions panel.

The screenshot shows the 'Submission Library' for the submission 'approach for externalization of expert tacit knowledge' by Apostolos Mishkin and Frederic Serletis. The 'Production' tab is selected, showing a 'Production Discussions' table with one entry: 'Galley ready for proofreading'.

Name	From	Last Reply	Replies	Closed
Galley ready for proofreading	gcox Aug/31	-	0	<input type="checkbox"/>

Click on the linked discussion to open it, read the message, and open the attached file.

Galley ready for proofreading
✕

Participants

Graham Cox (gcox)

Apostolos Mishkin (mishkin)

Messages

Note	From
Please take a look at the attached galley and let me know if it is ready to publish. 📎 gcox, Layout Editor, submission-manuscript.pdf	gcox Aug 31

Add Message

Once you have read the attached file, you can respond to the Layout Editor indicating any required changes or your approval.

Galley ready for proofreading
✕

Participants

Graham Cox (gcox)

Apostolos Mishkin (mishkin)

Messages

Note	From
Please take a look at the attached galley and let me know if it is ready to publish. 📎 gcox, Layout Editor, submission-manuscript.pdf	gcox Aug 31

Message *

📎
📧
B
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🔗
🗑️
<>
🔄
📷 Upload
📁

This looks perfect. Thank you!

That's it! Your role in the editorial workflow is now completed.

Chapter 11: Editorial Workflow

In this chapter, you will follow as submission throughout the workflow, from first submission to final publication.

The workflow is divided into 4 stages:

Submission: This is where new submissions land while being assigned to Section Editors and considered for moving into the Review stage.

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

Review: This is where the peer review happens, as well as any revisions required by the author.

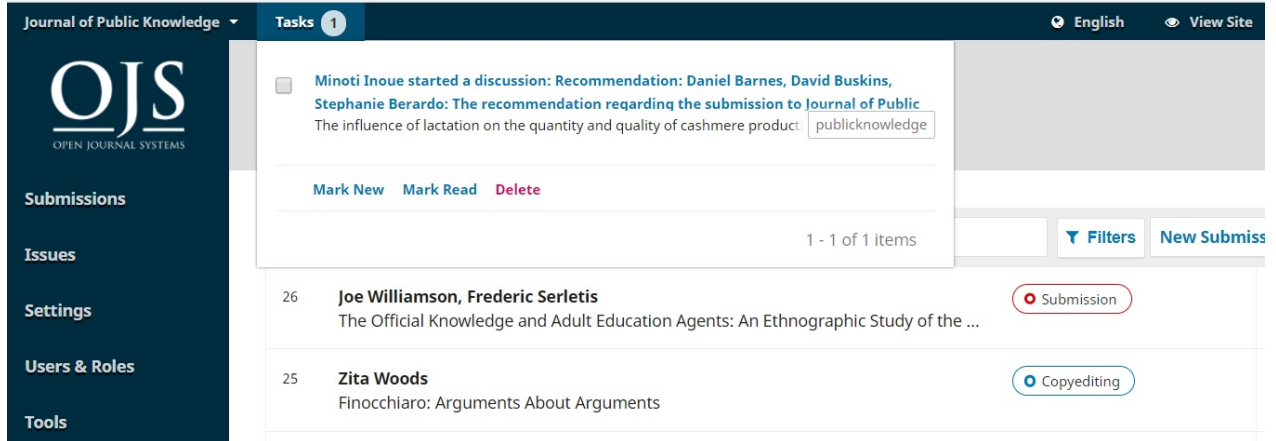
Some submission will not pass review and end here. Those that are accepted move to the next stage.

Copyediting: Accepted articles move to this stage, where they are improved by the work of a copyeditor. Authors can be given the opportunity to review the copyedits.

Production: Once the copyedits are completed and approved, the submission moves to this stage. In Production, the copyedited files are converted to galleys -- HTML, XML, PDF, etc. Again the author has the opportunity to proofread the galleys. Once everyone is satisfied, the submission is scheduled for publication in a future issue.

Tasks

Your Tasks are available from the top left menu of your Dashboard. Note the number "1" in the image below. This indicates that there is currently 1 task in your list.



The screenshot shows the 'Journal of Public Knowledge' dashboard. The top left menu includes 'Submissions', 'Issues', 'Settings', 'Users & Roles', and 'Tools'. The 'Tasks' section is active, showing a list of tasks. The top left of the Tasks section displays 'Tasks 1'. The first task is a discussion by Minoti Inoue, which is bolded. Below it are links for 'Mark New', 'Mark Read', and 'Delete'. The second task is a submission by Joe Williamson and Frederic Serletis, which is unbolded. The third task is a copyediting task by Zita Woods, which is unbolded. The page also includes a 'Filters' button and a 'New Submissions' button.

Tasks provide a quick look at items that need your attention. Bold entries are unread, and unbold entries have been read.

Use the checkbox to mark tasks for deletion (the delete link is available at the bottom of the list).

Submissions

When an author makes a new submission to your journal, the editor is automatically emailed. When you log into your Dashboard, you can find it either from your Tasks, or from one of the queues (My Queue, Unassigned, All Active, and Archives).

The screenshot shows the OJS Submissions dashboard. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The main header is 'Submissions' with tabs for 'My Queue', 'Unassigned', 'All Active', and 'Archives'. A 'Help' button is visible. The 'My Assigned' queue is active, displaying a table of submissions with columns for ID, author, title, status, and actions.

My Assigned		Search	Filters	New Submission
26	Joe Williamson, Frederic Serletis The Official Knowledge and Adult Education Agents: An Ethnographic Study of the ...		Submission	▼
25	Zita Woods Finocchiaro: Arguments About Arguments		Copyediting	▼
23	Vajiheh Karbasizaed Antimicrobial, heavy metal resistance and plasmid profile of coliforms isolated fro...		Production 1	▼
22	Rosanna Rossi Influence of long-term nutrition with different dietary fats on fatty acid composio...		Submission	▼
21	Rana Baiyewu Yam diseases and its management in Nigeria		Production	▼
20	Patricia Daniel Towards Designing an Intercultural Curriculum: A Case Study from the Atlantic Co...		Submission	▼

My Queue

My Assigned: This panel includes submissions added to sections where you are a section editor or to your own submissions if you are also an author with this journal.

The **Search** tool for each queue can sometimes be helpful in tracking down submissions.

The **Filter** tool allows you to limit your browsing to specific status (e.g., incomplete, overdue) stages (submission, review, copyediting, production), or sections (e.g., articles, reviews) for faster searching.

My Assigned		Search	Filters	New Submission
Filters Overdue Incomplete Stages Submission Review Copyediting Production Sections Articles Reviews	26	Joe Williamson, Frederic Serletis The Official Knowledge and Adult Education Agents: An ...	Submission	▼
	25	Zita Woods Finocchiaro: Arguments About Arguments	Copyediting	▼
	23	Vajiheh Karbasizaed Antimicrobial, heavy metal resistance and plasmid profil...	Production 1	▼
	22	Rosanna Rossi Influence of long-term nutrition with different dietary fa...	Submission	▼
	21	Rana Baiyewu Yam diseases and its management in Nigeria	Production	▼
	20	Patricia Daniel Towards Designing an Intercultural Curriculum: A Case S...	Submission	▼

Note that you can use the blue arrows to the right of each submission to reveal more details, including how many reviews are outstanding, new discussions, and more. It also reveals buttons to take you to the submission record, view the activity log and notes, and to delete the submission.

My Assigned		Search	Filters	New Submission							
Filters Overdue Incomplete Stages Submission Review Copyediting Production Sections Articles Reviews	26	Joe Williamson, Frederic Serletis The Official Knowledge and Adult Education Agents: An ...	Submission	▼							
	25	Zita Woods Finocchiaro: Arguments About Arguments	Copyediting	▼							
	23	Vajiheh Karbasizaed Antimicrobial, heavy metal resistance and plasmid profil...	Production 1	▲							
	<table border="1"> <tr> <td>1</td> <td>Production galleys created</td> </tr> <tr> <td>0</td> <td>Open discussions</td> </tr> </table>		1	Production galleys created	0	Open discussions	<table border="1"> <tr> <td>View Submission</td> <td>Activity Log & Notes</td> <td>Delete</td> </tr> </table>		View Submission	Activity Log & Notes	Delete
	1	Production galleys created									
	0	Open discussions									
View Submission	Activity Log & Notes	Delete									
22	Rosanna Rossi Influence of long-term nutrition with different dietary fa...	Submission	▼								

Unassigned

This panel includes submissions added to sections without section editors.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS OPEN JOURNAL SYSTEMS

Submissions

Issues

Settings

Users & Roles

Tools

Submissions

My Queue Unassigned All Active Archives Help

Unassigned Search Filters New Submission

0 submissions

In the above example, there are no unassigned submissions, so the panel is empty.

All Active

This section includes a list of all submissions, without being organized into queues.

Journal of Public Knowledge Tasks 1 English View Site dbarnes

OJS OPEN JOURNAL SYSTEMS

Submissions

Issues

Settings

Users & Roles

Tools

Submissions

My Queue Unassigned All Active Archives Help

All Active Search Filters New Submission

26	Joe Williamson, Frederic Serletis The Official Knowledge and Adult Education Agents: An Ethnographic Study of the ...	Submission	▼
25	Zita Woods Finocchiaro: Arguments About Arguments	Copyediting	▼
23	Vajiheh Karbasizaed Antimicrobial, heavy metal resistance and plasmid profile of coliforms isolated fro... 1	Production	▼
22	Rosanna Rossi Influence of long-term nutrition with different dietary fats on fatty acid compositio...	Submission	▼
21	Rana Baiyewu Yam diseases and its management in Nigeria	Production	▼

Archived

This section includes a list of all submissions either rejected or already published by the journal.

Journal of Public Knowledge | Tasks 1 | English | View Site | dbarnes

OJS
OPEN JOURNAL SYSTEMS

Submissions

Submissions Queue: My Queue | Unassigned | All Active | Archives | Help

Archived Submissions

ID	Author	Title	Status	Actions
24	Valerie Williamson	Self-Organization in Multi-Level Institutions in Networked Environments	Declined	▼
9	June Forcht	Cyclomatic Complexity: theme and variations ⚠ No editor has been assigned to this submission.	Published	▼
10	Brian Vemer	A Review of Information Systems and Corporate Memory: design for staff turn-over ⚠ No editor has been assigned to this submission.	Published	▼
11	Karen Bauman	Data Modelling and Conceptual Modelling: a comparative analysis of functionality ... ⚠ No editor has been assigned to this submission.	Published	▼

Demonstration Submission

For this demonstration, we are looking for the Williamson and Serletis submission, entitled *The Official Knowledge and Adult Education Agents*. It can be found at the top of the **My Assigned** queue, as well as in the **All Active** queue.

Journal of Public Knowledge | Tasks 1 | English | View Site | dbarnes

OJS
OPEN JOURNAL SYSTEMS

Submissions

Submissions Queue: My Queue | Unassigned | All Active | Archives | Help

My Assigned

ID	Author	Title	Status	Actions
26	Joe Williamson, Frederic Serletis	The Official Knowledge and Adult Education Agents: An Ethnographic Study of the ...	Submission	▼
25	Zita Woods	Finocchiaro: Arguments About Arguments	Copyediting	▼
23	Vajiheh Karbasizaed	Antimicrobial, heavy metal resistance and plasmid profile of coliforms isolated fro... 1	Production	▼
22	Rosanna Rossi	Influence of long-term nutrition with different dietary fats on fatty acid compositio...	Submission	▼
21	Rana Baiyewu	Yam diseases and its management in Nigeria	Production	▼
20	Patricia Daniel	Towards Designing an Intercultural Curriculum: A Case Study from the Atlantic Co...	Submission	▼

Once you find the submission, you can use the blue arrow to reveal options to see if there are any open discussion (there are none), as well as to view the submission, view the activity logs and note, or to delete the submission.

26

Joe Williamson, Frederic Serletis

Submission

The Official Knowledge and Adult Education Agents: An ...

0

Open discussions

[View Submission](#)[Activity Log & Notes](#)[Delete](#)

Delete will move the submission to the Archives and **Activity Log & Notes** will bring up the submission's history.

undefined ✕

History
Notes
Help

Date	User	Event
▶ 2017-10-26	Joe Williamson	An email has been sent: [publicknowledge] Submission Acknowledgement
2017-10-26	Daniel Barnes	Initial submission completed.
▶ 2017-10-26	Joe Williamson	An email has been sent: [publicknowledge] Submission Acknowledgement
▶ 2017-10-26	Daniel Barnes	A file "submission.docx" was uploaded for submission 26 by jwilliamson.

Submission Record

To view the submission in more detail, select **View Submission** button. This will take you to the submission record.

The screenshot shows the OJS submission interface. At the top, there is a navigation bar with 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. Below this is a blue bar with 'Metadata', 'Editorial History', and 'Submission Library'. The main header area displays the title 'The Official Knowledge and Adult Education Agents' and the author 'Joe Williamson, Frederic Serletis'. A navigation bar below the header has 'Submission', 'Review', 'Copyediting', and 'Production' tabs, with 'Submission' selected. A 'Help' button is visible in the top right of this bar. The 'Submission Files' panel shows a search bar, an 'Upload File' button, and a table with one entry: '47-1 | jwilliamson, Author, submission.docx | Article Text'. A 'Download All Files' button is at the bottom of this panel. The 'Pre-Review Discussions' panel has an 'Add discussion' button and a table with columns 'Name', 'From', 'Last Reply', 'Replies', and 'Closed', currently showing 'No Items'. On the right side, there are three action buttons: 'Send to Review' (blue), 'Accept and Skip Review' (grey), and 'Decline Submission' (pink). Below these is a 'Participants' panel with an 'Assign' button and a list of participants: 'Journal editor' (Daniel Barnes), 'Section editor' (David Buskins, Stephanie Berardo), and 'Author'.

From here, you can see:

Submission Files: This panel lists the files that have been submitted. In this view, there is just one file, but multiple files could have been submitted.

Pre-Review Discussions: This panel allows the editor to communicate with the author, or with others on the editorial team. For example, to ask the author for some additional information, or to ask a section editor to take responsibility for this submission.

Action Buttons: These include Send to Review, Accept and Skip Review, and Decline Submission.

Note: If you don't see these buttons, you likely have not yet assigned the submission to an editor.

Participants: This panel is where you will see the list of participants involved in the submission, including the editor, section editors, and author. Other names (copyeditors, layout editors, etc.) will appear here as they are added in subsequent steps.

In addition, in the blue bar along the top, you can see:

Metadata: Where you can view and revise the submission metadata.

Submission and Publication Metadata ✕

Submission
Identifiers

Section *

Articles ▼

*Articles must be submitted to one of the journal's sections. **

Prefix **Title ***

The

Official Knowledge and Adult Education Agents

Examples: A, The

Subtitle

An Ethnographic Study of the Adult Education Team of a Local Development-Oriented Nongovernmental Organization in th

The optional subtitle will appear after a colon (:), following the main title.

Abstract *

📄 📁 **B** *I* U x^2 x_2 [🔗](#) 📷 Upload +

Nongovernmental organizations, particularly those related to development work (local development-oriented nongovernmental organizations; LDNGO), and their agents have been assuming, in Portugal, an important role in the field of adult education. These organizations develop with the State, at the national level, and with

Use the Identifiers tab to also view or add a unique identifier.

Submission and Publication Metadata ✕

Submission
Identifiers

Public URL identifier

Save

Cancel

Editorial History: Where you can view the history and any notes about the submission.

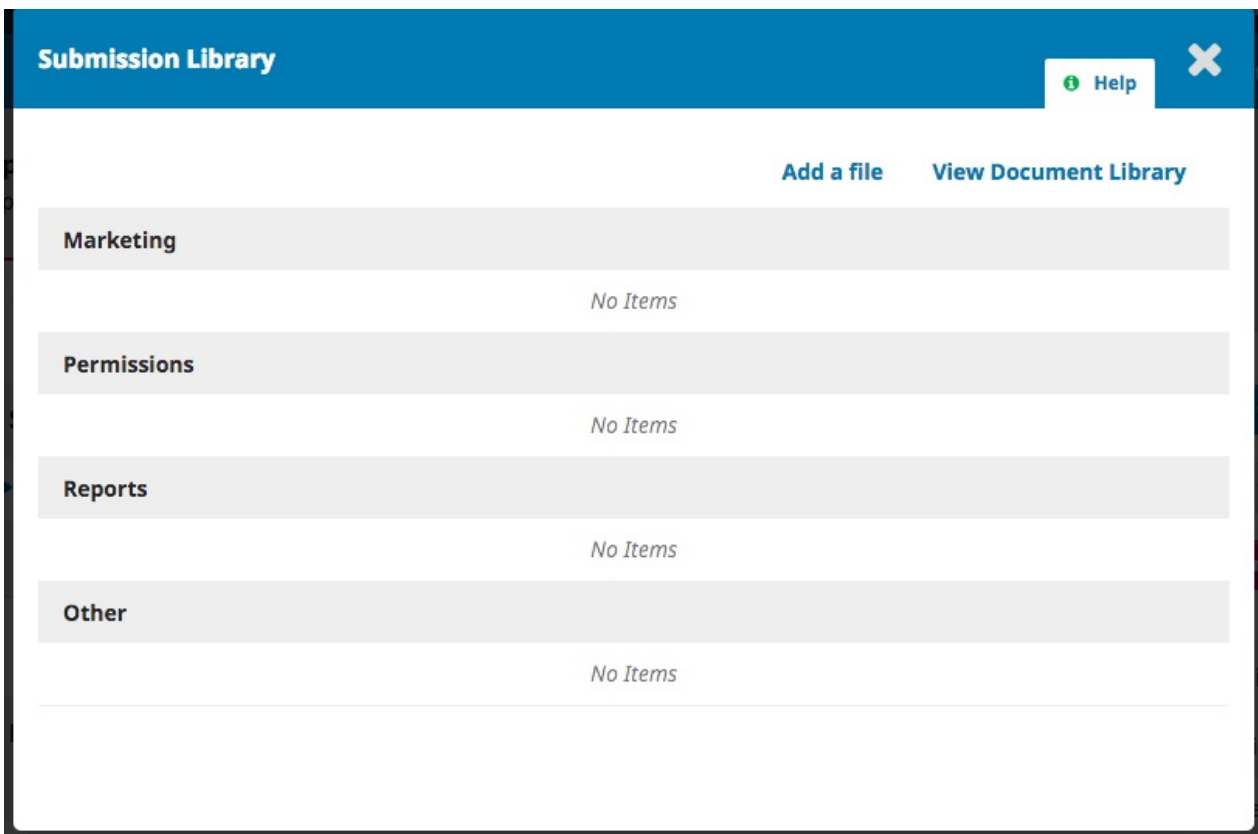
The screenshot shows a window titled "undefined" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "History" and "Notes". A "Help" button is located in the top right of the content area. The main content is a table with three columns: "Date", "User", and "Event".

Date	User	Event
▶ 2017-10-26	Joe Williamson	An email has been sent: [publicknowledge] Submission Acknowledgement
2017-10-26	Daniel Barnes	Initial submission completed.
▶ 2017-10-26	Joe Williamson	An email has been sent: [publicknowledge] Submission Acknowledgement
▶ 2017-10-26	Daniel Barnes	A file "submission.docx" was uploaded for submission 26 by jwilliamson.

Use the Notes tab to also view or add any editorial notes.

The screenshot shows a window titled "Mishkin, approach for externalization of expert tacit knowledge" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "History" and "Notes". The "Notes" tab is active. The main content area displays the text "There are no notes to display." Below this, there is a section titled "Add Note" with a large text input field. At the bottom left, there is a button labeled "Add Note".

Submission Library: Where you can add any relevant documents to the submission's library.



The screenshot displays the 'Submission Library' interface. At the top, there is a blue header with the title 'Submission Library' on the left, a 'Help' button with an information icon in the center, and a close button (X) on the right. Below the header, there are two buttons: 'Add a file' and 'View Document Library'. The main content area is divided into four horizontal sections, each representing a category: 'Marketing', 'Permissions', 'Reports', and 'Other'. Each section is highlighted in a light gray color and contains the text 'No Items' centered below the category name.

Assigning the Submission

Depending on how you have your sections configured, some new submissions may come in unassigned. If this is the case, the next step is to assign an editor or section editor. To do so, select the *Assign* link in the **Participants** panel.

Add Participant

Help✕

Locate a User

Section editor

Search User By Name








Search

Name	
<input type="radio"/>	David Buskins
<input checked="" type="radio"/>	Stephanie Berardo
<input type="radio"/>	Minoti Inoue
<input type="radio"/>	Demo Editor

4 of 4 items

Choose a predefined message to use, or fill out the form below.

Message

  **B** *I* U   <>   Upload 

You will have the option to locate a user by role, choose an individual, and send them a message requesting their assistance.

Note: If you aren't sure of the names of the section editors, simply choose that role from the dropdown menu and then hit the Search button. All Section Editors will be displayed and available for selection.

Hit the **OK** button to make the assignment and send the message.

The screenshot shows the OJS submission interface. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The main header features 'OJS OPEN JOURNAL SYSTEMS' and 'The Official Knowledge and Adult Education Agents' by Joe Williamson and Frederic Serletis. The submission stage is 'Submission', with tabs for 'Review', 'Copyediting', and 'Production'. A 'Help' button is visible.

Submission Files

File Name	Type
47-1 jwilliamson, Author, submission.docx	Article Text

Pre-Review Discussions

Name	From	Last Reply	Replies	Closed
[publicknowledge] Editorial Assignment	dbarnes	-	0	<input type="checkbox"/>

Participants

- Journal editor: Daniel Barnes
- Section editor: David Buskins, Stephanie Berardo

Note the new Pre-Review Discussion that was automatically created as part of the assignment.

You can now see that the Section Editor is listed under Participants, and the Action buttons are available:

Send to Review: Moves the submission on to the next stage.

Accept and Skip Review: Skips the Review Stage and moves the submission directly into Copyediting.

Decline Submission: Rejects the submission before going through the review process. The submission would then be archived.

Although in this example, the editor assigned a section editor, it would also be possible for the editor to assign herself to the submission.

Section Editor

Now that the Section Editor has been assigned, she can login and view her dashboard. The submission can be found at the top of the My Assigned queue.

The screenshot shows the 'My Assigned' section of the OJS interface. It features a search bar, a 'Filters' button, and a 'New Submission' button. Below these are four rows of submission records:

ID	Author(s)	Title	Status	Comments
26	Joe Williamson, Frederic Serletis	The Official Knowledge and Adult Education Agents: An Ethnographic Study of the ...	Submission	1
25	Zita Woods	Finocchiaro: Arguments About Arguments	Copyediting	
8	Fabio Paglieri	Hansen & Pinto: Reason Reclaimed	Production	
1	Carlo Corino	The influence of lactation on the quantity and quality of cashmere production	Review	0/0

At the bottom right of the list, it indicates '4 of 4 submissions'.

Clicking on the article title opens the full submission record.

The screenshot shows the full submission record for the article 'The Official Knowledge and Adult Education Agents' by Joe Williamson and Frederic Serletis. The page has tabs for 'Submission', 'Review', 'Copyediting', and 'Production', with 'Submission' selected. The 'Submission Files' section shows a file named 'jwilliamson, Author, submission.docx' (Article Text) with a 'Download All Files' button. The 'Pre-Review Discussions' section shows a discussion from 'dbarnes' on 'Oct/26' with 0 replies. On the right side, there are buttons for 'Send to Review', 'Accept and Skip Review', and 'Decline Submission', along with a 'Participants' list including 'Journal editor' (Daniel Barnes) and 'Section editor' (David Buskins, Stephanie Berardo, Minoti Inoue).

Accepting the Assignment

It is not required, but the Section Editor could reply to the Pre-Review Discussion to inform the editor that she will be proceeding with the assignment.

Communicating with the Author

If the Section Editor has any questions for the author, she can use the Pre-Review Discussions.


Sending to Review

Once the Section Editor is satisfied that the submission is appropriate for the journal, she can select the **Send to Review** button to move the submission to the next stage.

Send to Review ✕

Select files below to send them to the review stage.

Submission Files 🔍 Search 📄 Upload File

<input checked="" type="checkbox"/>	 47-1	jwilliamson, Author, submission.docx	Article Text
-------------------------------------	--	--------------------------------------	--------------

Keep the files that are to be reviewed checked off.

Review

When the submission enters the Review Stage, a notification indicates that Reviewers need to be assigned.

The screenshot shows the OJS (Open Journal Systems) interface for a submission in the Review stage. The submission title is "The Official Knowledge and Adult Education Agents" by Joe Williamson and Frederic Serletis. The interface includes a navigation bar with "Submission", "Review", "Copyediting", and "Production" tabs, and a "Help" button. The "Review" tab is active, showing a "Round 1" status box that says "Waiting for reviewers to be assigned." Below this, there is a "Review Files" section with a search bar and an "Upload/Select Files" button. A file named "Author, submission.docx" (48-1) is listed with the type "Article Text". To the right, there is a "Make Recommendation" button and a "Participants" section with an "Assign" button. The "Participants" section lists "Journal editor" and "Section editor" roles, with "Daniel Barnes" listed under "Section editor". At the bottom, there is a "Reviewers" section with an "Add Reviewer" button and a "No Items" message.

Note: In the screenshot above, we see the Section Editor's view. Notice the limited Action buttons (only Make Recommendation is available). If we were logged in as an Editor, we would see more Action buttons (Request Revisions, Resubmit for Review, Send to Copyediting, Decline Submission).

From the Reviewers panel, you can select Add Reviewer to assign a new Reviewer.

This opens a new window, where Reviewers are listed and can be selected one at a time.

✕
Add Reviewer

Locate a Reviewer

Search Reviewers By Name

+
More search options

	Name	Done	Average Days	Latest	Active	Reviewing interests
<input type="radio"/>	Mohsan Amin	0	0	--	0	
<input type="radio"/>	Demo Author	0	0	--	0	
<input type="radio"/>	Bozana Bokan	1	0	Jun 6	0	spirituality
<input type="radio"/>	valeria brancolini	0	0	--	0	
<input type="radio"/>	Peter Čerče	0	0	--	0	
<input checked="" type="radio"/>	Adela Gallego	4	0	Jul 21	6	
<input type="radio"/>	Paul Hudson	1	0	Jul 29	6	

Note the details visible about the Reviewers, including their interests, past assignments, etc.

At the bottom of this form, you will see options to:

Select Reviewer: Use this to confirm your selection once you have picked a Reviewer from the list.

Create New Reviewer: If none of the Reviewers are suitable, you can use this button to create a new Reviewer. This is a new account in the system.

Enroll Existing User: If none of the Reviewers are suitable, you can enroll an existing user as a Reviewer.

<input type="radio"/>	Lucas Mello	0	0	--	0	educação, ensino, didática
<input type="radio"/>	Peter Rabbit	0	0	--	0	
<input type="radio"/>	Alec K Smecher	1	0	Jun 6	0	
<input type="radio"/>	tom tiddler	0	0	--	0	

17 of 17 items

Select Reviewer

Create New Reviewer

Enroll Existing User

For this demonstration, we will pick Adela as our Reviewer and hit the **Select Reviewer** button.

This initiates a new window with a message for the Reviewer.

Add Reviewer ✕

Selected Reviewer
Adela Gallego [Change](#)

Email to be sent to reviewer

NAME :

I believe that you would serve as an excellent reviewer of the manuscript, "The Official Knowledge and Adult Education Agents," which has been submitted to Journal of Public Knowledge. The submission's abstract is inserted below, and I hope that you will consider undertaking this important task for us.

Please log into the journal web site by RESPONSE DUE DATE to indicate whether you will undertake the review or not, as well as to access the submission and to record your review and recommendation. The web site is <http://vpstest2.lib.sfu.ca/index.php/publicknowledge>

You can revise any of the prepared text.

If you are using a Blind Review method, ensure that the files you send to the Reviewer are stripped of any identifying information about the Author.

Further down the form, you will see the additional details that are sent to the Reviewer including title, abstract, important dates, and a link to the files to be reviewed.

the most conversant people as experts on a particular topic to retrieve valuable knowledge. To address this problem, we propose an approach that externalizes the tacit knowledge of a subject expert by creating a dynamic query handling system that automatically transfers a user query to the best subject expert.

Do not send email to Reviewer.

Important Dates

Response Due Date

Review Due Date

+
Close File Selection

Files To Be Reviewed
🔍 Search

▶	<input checked="" type="checkbox"/>	163-1	Author, submission-manuscript.docx	Article Text
---	-------------------------------------	-------	------------------------------------	--------------

Review Type

- Double-blind
- Blind
- Open

By default, Reviewers will be provided with an extended text box to type in their comments. However, the Journal Manager can create Review Forms in [Workflow Settings > Review](#) to ask more focused questions. If you would like the Reviewer to fill out a review form, select it under **Review Form**.

Hit the **Add Reviewer** button to send the message and assign the Reviewer.

Back on the Review Stage, we can see the Reviewer is now listed.

Reviewers
Add Reviewer

▶ Adela Gallego	Request Sent Response due: 2016-09-20
-----------------	---

You can make additional changes using the blue arrow toggle next to the Reviewer's name.

Reviewers		Add Reviewer				
▼ Adela Gallego	Request Sent Response due: 2016-09-20	Review Details	Email Reviewer	Edit	Unassign Reviewer	History

Review Details: Provides details on the review.

Review Details: approach for externalization of expert tacit knowledge ✕

Adela Gallego

Once this review has been read, press "Confirm" to indicate that the review process may proceed. If the reviewer has submitted their review elsewhere, you may upload the file below and then press "Confirm" to proceed.

Notified: 2016-08-30 07:27 PM

Reviewer Files

[🔍 Search](#) [Upload File](#)

No Files

Recommendation

Set or adjust the reviewer recommendation.

Choose One

[Confirm](#) [Cancel](#)

Email Reviewer: Allows you to send a message to the Reviewer.

Email Reviewer ✕

To

Subject *

Body *

📄 📁 **B** *I* U [🔗](#) 🚫 <> 🔄 📷 Upload 📤

* Denotes required field

Send Email
Cancel

Edit Review: Allows you to change the review dates and files.

Edit Review ✕

Important Dates

Response Due Date

Review Due Date

Files To Be Reviewed

Files To Be Reviewed 🔍 Search

▶	<input checked="" type="checkbox"/>	163-1	Author, submission-manuscript.docx	Article Text
---	-------------------------------------	-------	--	--------------

OK
Cancel

Unassign Reviewer: Allows you to unassign the Reviewer.

History: Provides a brief history of the review.

The screenshot shows a blue header with the word 'History' and a close button (X). Below the header, there is a white box containing two lines of text: '2016-08-30 07:27 PM Assigned' and '2016-08-30 07:27 PM Notified'.

At this point, we could add additional Reviewers, and then wait for their recommendations to come in.

Responding to Reviews

Once the Reviewers have completed their work, the Section Editor can see the results in their dashboard. Here they will see notifications that new reviews have been submitted and whether all reviews are in.

The screenshot displays a dashboard with a top navigation bar containing 'Submission', 'Review', 'Copyediting', 'Production', and 'Help'. The 'Review' tab is selected. Below the navigation bar, there are two tabs: 'Round 1' and 'New Review Round'. The main content area is divided into several sections:

- Round 1 Status:** A blue-bordered box containing the text 'New reviews have been submitted.'
- Notification:** A pink-bordered box containing the text 'All reviews are in and a decision is needed in Review.'
- Review Files:** A section with a search icon and 'Upload/Select Files' button. It shows a file named '163-1 Author, submission-manuscript.docx' with the type 'Article Text'.
- Reviewers:** A table with one entry for 'Adela Gallego'. The status is 'Review Submitted' with a sub-note 'Recommendation: Revisions Required' and a 'Read Review' link.
- Participants:** A section with 'Section editor' and an 'Add' link.
- Action Buttons:** A vertical stack of buttons on the right side: 'Request Revisions', 'Resubmit for Review', 'Send to Copyediting', and 'Decline Submission'.

Use the *Read Review* link in the Reviewers panel to read the comments from the Reviewers, including those for both the Author and Editor as well as for the Editor only.

Review: approach for externalization of expert tacit knowledge ✕

Adela Gallego

Once this review has been read, press "Confirm" to indicate that the review process may proceed. If the reviewer has submitted their review elsewhere, you may upload the file below and then press "Confirm" to proceed.

Completed: 2016-08-30 08:07 PM

Recommendation: Revisions Required

Reviewer Comments

For author and editor

This is a very good article.

For editor only

This is good, but not the best.

Select the *Confirm* link at the bottom of the screen.

Reviewers	Add Reviewer
▶ Adela Gallego	Review Confirmed Recommendation: Revisions Required Thank Reviewer

In the Reviewers panel, you can now see a *Thank Reviewer* link. Choose that to thank the Reviewer.

Thank Reviewer ✕

Reviewer
Adela Gallego <agallego@mailinator.com>

Email to be sent to reviewer

📄 📁 **B** *I* U [🔗](#) [🗑️](#) `<>` [🔄](#) [📷 Upload](#) [+](#)

Adela Gallego:

Thank you for completing the review of the submission, "approach for externalization of expert tacit knowledge," for Journal of Public Knowledge. We appreciate your contribution to the quality of the work that we publish.

Stephanie Berardo
University of Toronto
sberardo@mailinator.com

Do not send email to Reviewer.

Thank Reviewer
Cancel

Hit the **Thank Reviewer** button to send the message.

Making the Decision

Based on the Reviewer recommendations, you can use the action buttons to make a decision.

<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>Review Files 🔍 Search Upload/Select Files</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;">▶</td> <td style="width: 20px;">📄</td> <td style="width: 20px;">163-1</td> <td style="width: 40%;">Author, submission-manuscript.docx</td> <td style="width: 20%;">Article Text</td> </tr> </table> </div>	▶	📄	163-1	Author, submission-manuscript.docx	Article Text	<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;">Request Revisions</div> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;">Resubmit for Review</div> <div style="background-color: #0070C0; color: white; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;">Send to Copyediting</div> <div style="background-color: #E91E63; color: white; padding: 5px; border: 1px solid #ccc; margin-bottom: 5px;">Decline Submission</div>
▶	📄	163-1	Author, submission-manuscript.docx	Article Text		
<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>Reviewers Add Reviewer</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px;">▶</td> <td style="width: 40%;">Adela Gallego</td> <td style="width: 20%; text-align: center;">Complete <small>Recommendation: Revisions Required</small></td> <td style="width: 20%; text-align: right;">Revert Decision</td> </tr> </table> </div>	▶	Adela Gallego	Complete <small>Recommendation: Revisions Required</small>	Revert Decision	<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>Participants Add</p> <p>Section editor</p> <p>▶ Stephanie Berardo</p> <p>Author</p> <p>▶ Apostolos Mishkin</p> </div>	
▶	Adela Gallego	Complete <small>Recommendation: Revisions Required</small>	Revert Decision			
<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>Revisions 🔍 Search Upload File</p> <p style="text-align: center; color: #ccc;">No Files</p> </div>						

Options include:

Request Revisions: This will require the Author to make minor changes, but no further peer review is required.

Resubmit for Review: This will require the Author to make major changes and another round of review will need to take place.

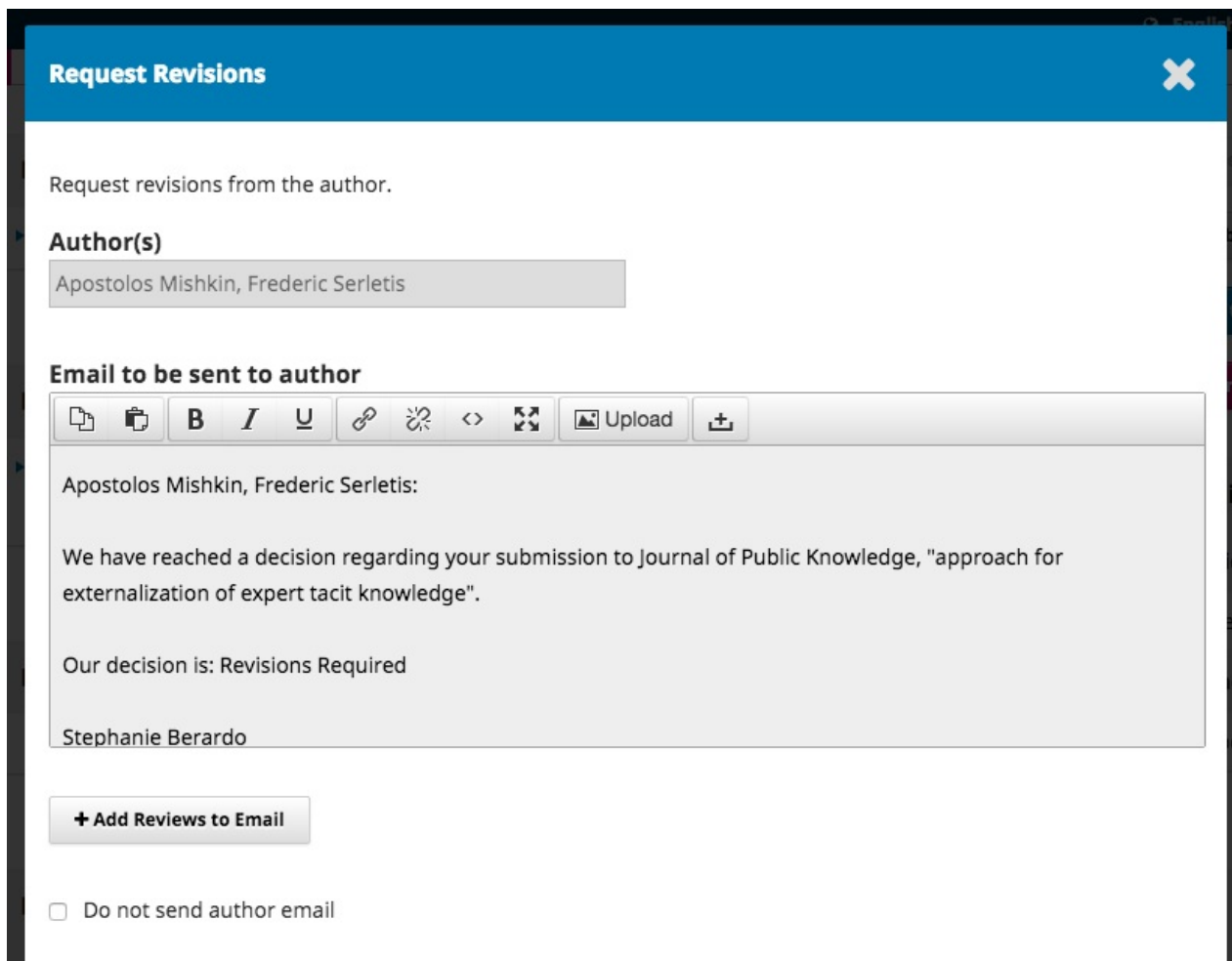
Send to Copyediting: This means the submission is accepted without revisions and can proceed to the Copyediting stage.

Decline Submission: This means that the submission has not passed peer review and is unsuitable for further consideration. The submission would then move to the Archives.

Request Revisions

In this demonstration, we are going to request that the Author make some minor revisions before acceptance.

To do so, select the **Request Revisions** button. This results in a new message window.



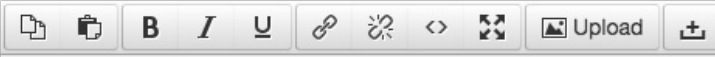
The screenshot shows a window titled "Request Revisions" with a close button (X) in the top right corner. The window contains the following elements:

- A header bar with the title "Request Revisions" and a close button (X).
- Text: "Request revisions from the author."
- Section: "Author(s)" with a text input field containing "Apostolos Mishkin, Frederic Serletis".
- Section: "Email to be sent to author" with a rich text editor toolbar containing icons for copy, paste, bold (B), italic (I), underline (U), link, unlink, code (<>), undo, redo, and an "Upload" button.
- Text area containing:
 - Apostolos Mishkin, Frederic Serletis:
 - We have reached a decision regarding your submission to Journal of Public Knowledge, "approach for externalization of expert tacit knowledge".
 - Our decision is: Revisions Required
 - Stephanie Berardo
- Button: "+ Add Reviews to Email"
- Checkbox: Do not send author email

You can modify any of the text before sending the message.

Use the **Add Reviews** button to import the Reviewer's comments from the Editor and Author field. Comments in the Editor only field will not be displayed.

Email to be sent to author



Reviewer A:
This is a very good article.

+ Add Reviews to Email

Do not send author email

Reviewer's Attachments

[Q Search](#)

No Files

Record Editorial Decision **Cancel**

If there are any attachments, such as marked up file created by a Reviewer, you can attach it here (as long as it has been anonymized).

Hit the **Record Editorial Decision** button to send the message.

You must now wait for the Author to respond with her revisions.

Author Responds

Once the Author has made the revisions, you should receive a message (via email and the Review Discussions panel).

Review Files Q Search Upload/Select Files

▶ 163-1 Author, submission-manuscript.docx Article Text

Reviewers Add Reviewer

▶ Adela Gallego **Complete** Revert Decision

Recommendation: Revisions Required

Revisions Q Search Upload File

▶ 164-1 Author, submission-manuscript.docx Article Text

Request Revisions

Resubmit for Review

Send to Copyediting

Decline Submission

Participants Add

Section editor

▶ Stephanie Berardo

Author

▶ Apostolos Mishkin

Review Discussions Add discussion

Name	From	Last Reply	Replies	Closed
▶ Revision uploaded	mishkin Aug/30	-	0	<input type="checkbox"/>

You will also see the revised file in the Revisions panel.

At this point, you can download the revised file, check to make sure it is ready, and communicate with the Author using the Review Discussions panel.

In this case, we're going to inform the Author that we are accepting the revisions. To do so, click on the linked title of the discussion. This will open the discussion box.

Revision uploaded
✕

Participants [Edit](#)

Stephanie Berardo (sberardo)

Apostolos Mishkin (mishkin)

Messages

Note	From
I've uploaded the file.	mishkin Aug 30

Add Message

Use the **Add Message** button to reply.

Revision uploaded ✕

Participants [Edit](#)

Stephanie Berardo (sberardo)

Apostolos Mishkin (mishkin)

Messages

Note	From
I've uploaded the file.	mishkin Aug 30

Message *

📄 📁 **B** *I* U [🔗](#) [🗑️](#) [↔](#) [🖼️ Upload](#) [+](#)

The revisions look great. We're ready to move to the next stage.

Another option would be to ask for further revisions, but at this point, we're ready to move on.

Moving to Copyediting

The submission is now ready to be moved to copyediting. To do so, use the blue **Send to Copyediting** button.

Review Files

[🔍 Search](#) [Upload/Select Files](#)

▶	163-1	Author, submission-manuscript.docx	Article Text
---	-------	------------------------------------	--------------

Reviewers

[Add Reviewer](#)

▶	Adela Gallego	Complete <small>Recommendation: Revisions Required</small>	Revert Decision
---	---------------	--	---------------------------------

Revisions

[🔍 Search](#) [Upload File](#)

▶	164-1	Author, submission-manuscript.docx	Article Text
---	-------	------------------------------------	--------------

Request Revisions

Resubmit for Review

Send to Copyediting

Decline Submission

Participants [Add](#)

Section editor

▶ Stephanie Berardo

Author

▶ Apostolos Mishkin

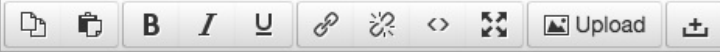
This will open a new window.

Send to Copyediting ✕

Notify the author that their submission has been accepted.

Author(s)
Apostolos Mishkin, Frederic Serletis

Email to be sent to author



Apostolos Mishkin, Frederic Serletis:

We have reached a decision regarding your submission to Journal of Public Knowledge, "approach for externalization of expert tacit knowledge".

Our decision is to: Accept Submission

Daniel Barnes

+ Add Reviews to Email

Do not send author email

Hit the **Record Editorial Decision** button at the bottom of the window.

The submission is automatically moved to the Copyediting stage.

Copyediting

When a submission is approved in the Review Stage, it will automatically move to the Copyediting stage.

The screenshot shows the OJS interface for a submission in the Copyediting stage. The submission title is "approach for externalization of expert tacit knowledge" by Apostolos Mishkin and Frederic Serletis. The interface includes a navigation menu with "Submission", "Review", "Copyediting" (selected), and "Production". A notification box states: "Notification: Assign a copyeditor using the Add link in the Participants list." Below this, the "Draft Files" section shows a file named "Author, submission-manuscript.docx" with a search icon and an "Upload/Select Files" button. To the right is a "Send To Production" button. The "Participants" panel on the right lists "Stephanie Berardo" as the Section editor and "Apostolos Mishkin" as the Author, with an "Add" link. The "Copyediting Discussions" section is currently empty, showing "No Items".

Adding a Copyeditor

When the submission enters the Copyediting Stage, a notification indicates that a Copyeditor needs to be assigned. Copyeditors can be assigned using the *Add* link on the Participants panel.

This will open a new window.

Add Participant Help ✕

Locate a User

Copyeditor *Search User By Name*

Search

Name	
<input type="radio"/>	Maria Fritz
<input checked="" type="radio"/>	Sarah Vogt

2 of 2 items

Choose a predefined message to use, or fill out the form below.

[JPK] Copyediting Request

Message

NAME :

I would ask that you undertake the copyediting of "approach for externalization of expert tacit knowledge" for

You can use the role dropdown to choose Copyeditor and hit the **Search** button. This will bring up all Copyeditors.

Select one of the Copyeditors for this submission.

Choose a prepared message.

Make any changes needed to the message.

Hit **Send**.

You can now see the new notification that the submission is awaiting copyedits, the Copyeditor is now included in the Participants list, and the request is visible in the Copyediting Discussions.

approach for externalization of expert tacit knowledge
Apostolos Mishkin, Frederic Serletis

[Submission](#) [Review](#) [Copyediting](#) [Production](#) [Help](#)

Notification
Awaiting Copyedits.

Draft Files [Search](#) [Upload/Select Files](#)

▶ 165-1 Author, submission-manuscript.docx Article Text

Copyediting Discussions [Add discussion](#)

Name	From	Last Reply	Replies	Closed
▶ [JPK] Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>

Send To Production

Participants [Add](#)

Section editor

▶ Stephanie Berardo

Copyeditor

▶ Sarah Vogt

Author

▶ Apostolos Mishkin

Copyedited [Search](#) [Upload/Select Files](#)

No Files

You can now wait for the Copyeditor to do her work.

Copyeditor

The Copyeditor will receive an email message from the Section Editor requesting her to take on the submission.

To get started, she must login and find the submission from her dashboard.

Journal of Public Knowledge [English](#) [View Site](#) [svogt](#)

OJS
OPEN JOURNAL SYSTEMS

Tasks 3

Submissions

Submissions [My Queue](#) [Archives](#) [Help](#)

My Assigned [Search](#)

ID	Author; Title	Stage
▶ 15	Mwandenga; Signalling Theory Dividends: A Review Of The Literature And Empirical Evidence	Production
▶ 21	Baiyewu; Yam diseases and its management in Nigeria	Production
▶ 25	Woods; Finocchiaro: Arguments About Arguments	Copyediting
▶ 28	tiddler; Gentle Art of Improving Software	Production
▶ 52	Mishkin et al.; approach for externalization of expert tacit knowledge	Copyediting

7 of 7 items

Then, she can click the Copyediting link next to the submission name. This will take her directly to the Copyediting stage for this submission.

Journal of Public Knowledge

English View Site svogt

Editorial History Submission Library

approach for externalization of expert tacit knowledge
Apostolos Mishkin, Frederic Serletis

Submission Review **Copyediting** Production Help

Draft Files Search Upload/Select Files

165-1 Author, submission-manuscript.docx Article Text

Copyediting Discussions Add discussion

Name	From	Last Reply	Replies	Closed
IJPKI Copyediting Request	sberardo	-	0	<input type="checkbox"/>
	Aug/31			

Copyedited Search Upload/Select Files

No Files

Participants

Section editor

- Stephanie Berardo

Copyeditor

- Sarah Vogt

Author

- Apostolos Mishkin

From here, she can see the Draft Files. These are the files that require copyediting. Clicking on the linked title will download the file to her desktop.

Outside of OJS, she will do her copyediting work.

To check the submission metadata, use the Metadata link in the blue bar at the top.

Journal of Public Knowledge

English View Site sberardo

Metadata Editorial History Submission Library

approach for externalization of expert tacit knowledge
Apostolos Mishkin, Frederic Serletis

Submission Review Copyediting **Production** Help

Draft Files Search Upload/Select Files

165-1 Author, submission-manuscript.docx Article Text

Send To Production

Participants Add

This would include checking the article title, abstract, author names, keywords, etc.

Submission and Publication Metadata ✕

Submission
Identifiers

Select the appropriate section for this submission (see Sections and Policies in [About](#) the Journal).

Articles ▾

Prefix

An

Examples: A, The

Title *

approach for externalization of expert tacit knowledge

Subtitle

Using a query management system in an e-learning environment

The optional subtitle will appear after a colon (:), following the main title.

Abstract *

📄 📁 **B** *I* U ☰ ☰ x² x₂ 🔗 🌀 <> ↕ 📷 Upload 📤

E-learning or electronic learning platforms facilitate delivery of the knowledge spectrum to the learning community through information and communication technologies. The transfer of knowledge takes place from experts to learners, and externalization of the knowledge transfer is significant. In the e-learning environment, the

If any changes are made, hit the **Save** button before exiting this window.

Consult with the Author

Once she has finished copyediting, she will run the changes past the Author by adding a new discussion, using the Copyediting Discussions panel's *Add discussion* link.

From the Add Discussion window, she must choose the Author and add a subject line and message.

Add discussion ✕

Participants Add User









Sarah Vogt <svogt@mailinator.com> ✕

Apostolos Mishkin <mishkin@mailinator.com> ✕

Subject *

Copyediting check

Message *

  **B** *I* U      Upload 

Please review the attached copyedited files and let me know if you have any comments.

Attached Files Search Upload File Select Files

No Files

Further down that same window, she must upload a copy of her copyedited file.

Subject *

Copyediting check

Message *

Please review the attached copyedited files and let me know if you have any comments.

Attached Files [Search](#) [Upload File](#) [Select Files](#)

No Files

* Denotes required field

OK Cancel

To do so, use the *Upload File* link. This will open a new window where you must choose the *Article Component* (e.g., article text) and upload the file.

Upload a Discussion File ✕

1. Upload File 2. Review Details 3. Confirm

Article Component *

Article Text

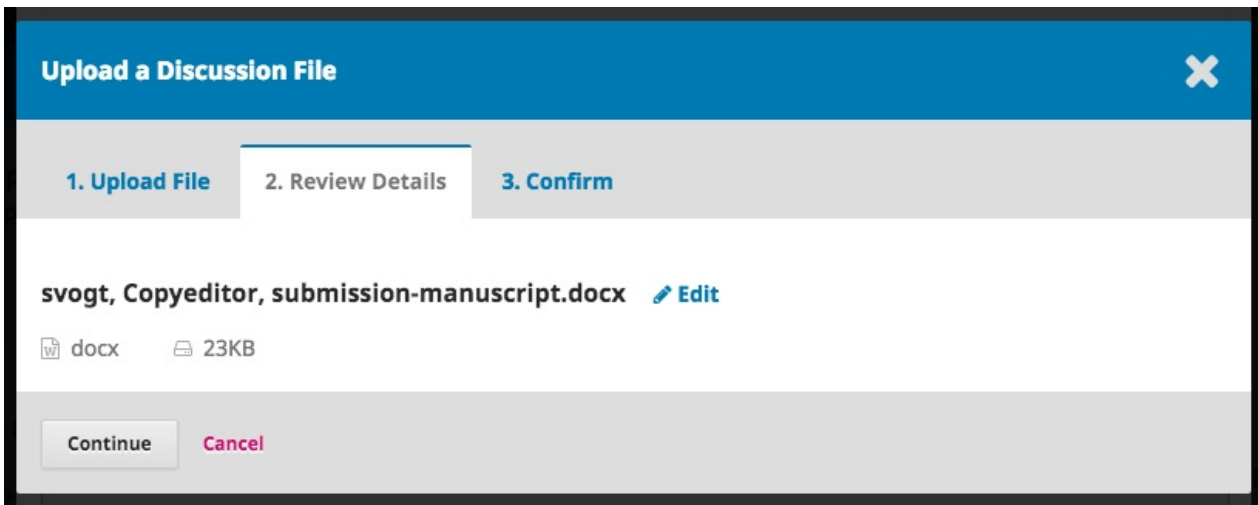
✓ svogt, Copyeditor, submission-manuscript.docx Change File

* Denotes required field

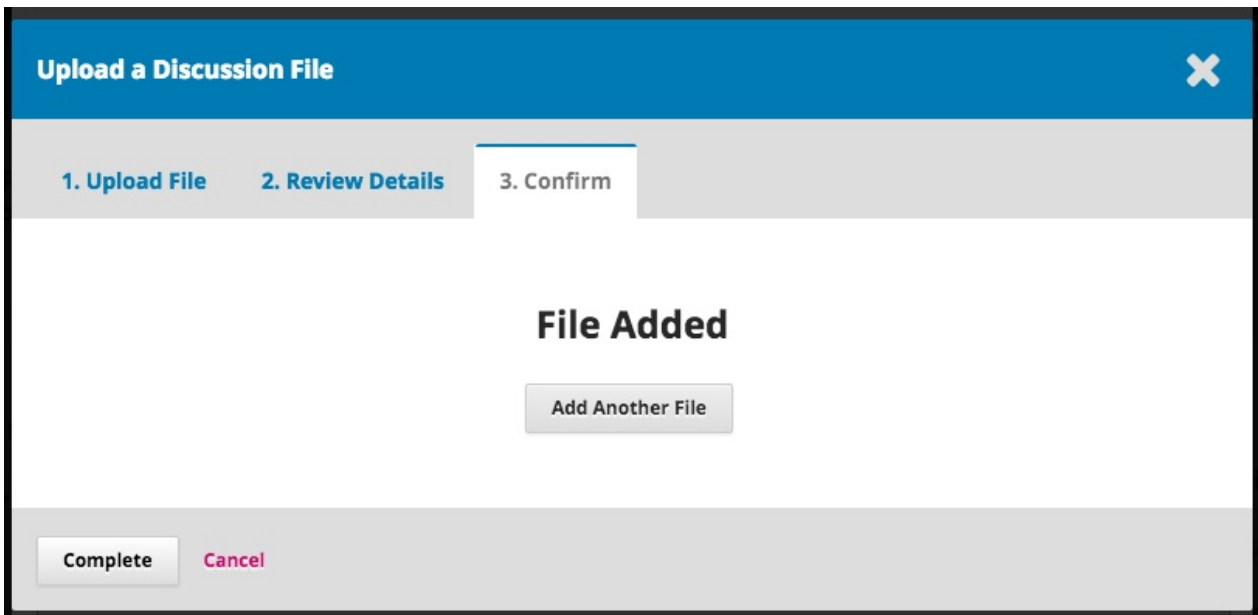
Continue Cancel

Hit **Continue** to proceed.

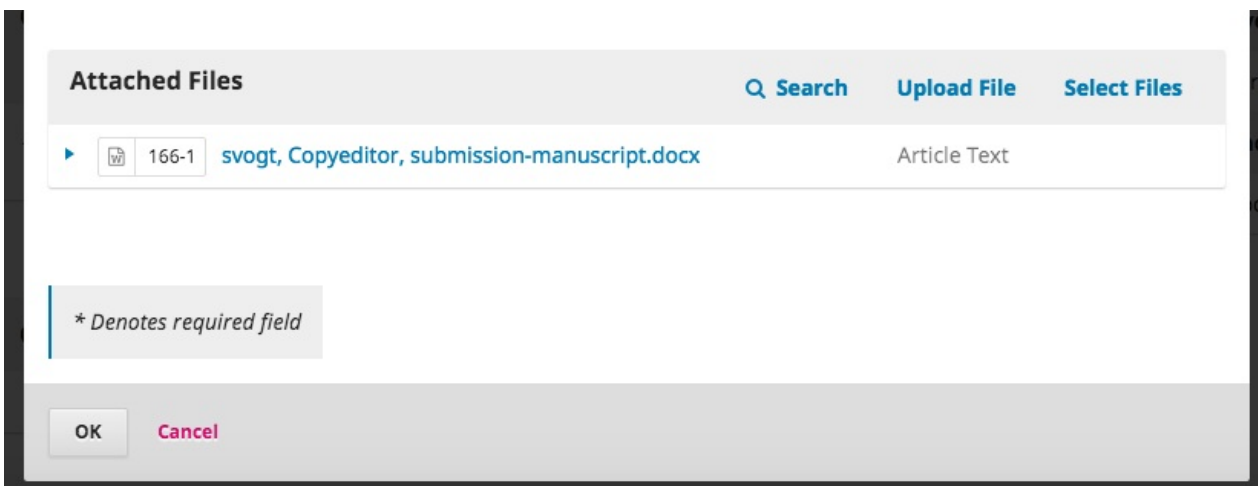
This will open the next step, where you can edit the filename if needed.



Next, you can upload more files if necessary, or hit **Complete**.



Back on the Add window, you can now see the attached file.




Hit **OK** to send the message to the author.

It is now visible in the Copyediting Discussions.

approach for externalization of expert tacit knowledge
Apostolos Mishkin, Frederic Serletis

[Submission](#) [Review](#) [Copyediting](#) [Production](#)

Draft Files

▶  165-1 [Author, submission-manuscript.docx](#) Article Text

🔍 Search [Upload/Select Files](#)

Copyediting Discussions

Name	From	Last Reply	Replies	Closed
[JPK] Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Copyediting check	svogt Aug/31	-	0	<input type="checkbox"/>

[Add discussion](#)

Partic

Section

▶ Step

Copye

▶ Sara

Autho

▶ Apo:

You can now wait for the author's response.

Author Responds

Once you hear back from the author, you can review his feedback by checking the discussion reply.

Copyediting Discussions		Add discussion		
Name	From	Last Reply	Replies	Closed
[JPK] Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Copyediting check	svogt Aug/31	mishkin Aug/31	1	<input type="checkbox"/>

From here, you can see no further changes are required.

Copyediting check ✕

Participants [Edit](#)

Sarah Vogt (svogt)

Apostolos Mishkin (mishkin)

Messages

Note	From
Please review the attached copyedited files and let me know if you have any comments.	svogt Aug 31
<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">📎</div> svogt, Copyeditor, submission-manuscript.docx </div>	
▶ This looks good!	mishkin Aug 31

Add Message

The Final Copyedited File

Now you can go ahead and upload the final copyedited version to the Copyedited panel, near the bottom of the screen.

Journal of Public Knowledge
English
View Site
svogt

Tasks **4**

Submissions

approach for externalization of expert tacit knowledge
Apostolos Mishkin, Frederic Serletis

Submission
Review
Copyediting
Production

[Help](#)

Draft Files [Search](#) [Upload/Select Files](#)

▶ 📎 165-1 Author, submission-manuscript.docx	Article Text
---	--------------

Copyediting Discussions [Add discussion](#)

Name	From	Last Reply	Replies	Closed
JPKI Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Copyediting check	svogt Aug/31	mishkin Aug/31	1	<input type="checkbox"/>

Copyedited [Search](#) [Upload/Select Files](#)

No Files

Participants

Section editor

▶ Stephanie Berardo

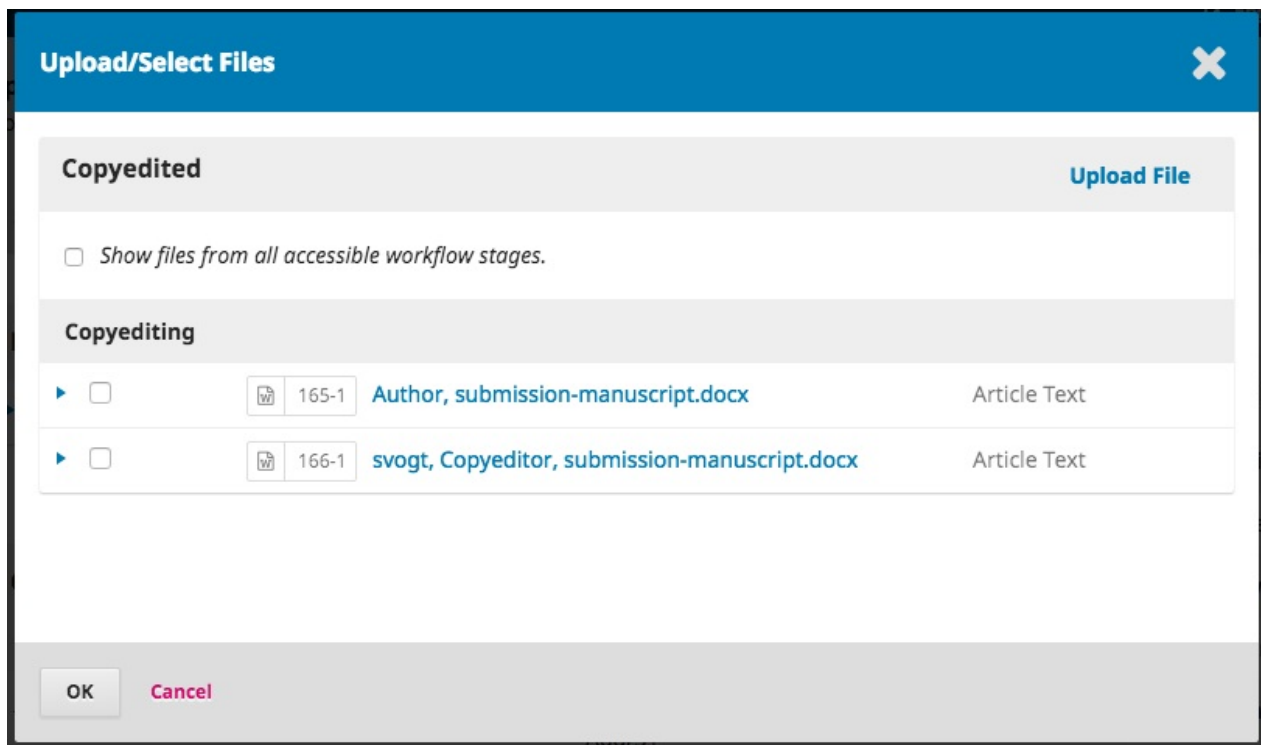
Copyeditor

▶ Sarah Vogt

Author

▶ Apostolos Mishkin

Use the Upload/Select Files link to upload the final copyedited version.




It is important to note here that you have a few choices.

1. You can use the Upload File link to upload a new file (e.g., a file with some recent changes since you showed it to the author).
2. You can select the Author's original version (unlikely).
3. You can select the Copyeditor version, which is the version you sent to the author (if you made no further changes, choose this one).

For this demonstration, we will select the Copyeditor version **by checking the box** to the left of that file.

Hit **OK**.

The file is now visible in the *Copyedited* panel (near the bottom of the screen), indicating to the editor that this is the final version, which is ready for the Production stage.

Draft Files		Q Search	Upload/Select Files
▶  165-1	Author, submission-manuscript.docx		Article Text

Copyediting Discussions				Add discussion
Name	From	Last Reply	Replies	Closed
[[PK] Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Copyediting check	svogt Aug/31	mishkin Aug/31	1	<input type="checkbox"/>

Copyedited		Q Search	Upload/Select Files
▶  167-1	svogt, Copyeditor, submission-manuscript.docx		Article Text

Inform the Section Editor

The final step is for you to inform the Section Editor that the copyediting is complete.

To do so, start a new Copyediting Discussion by using the *Add Discussion* link.

Copyediting Discussions				Add discussion
Name	From	Last Reply	Replies	Closed
[[PK] Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Copyediting check	svogt Aug/31	mishkin Aug/31	1	<input type="checkbox"/>

In the discussion window, add the Section Editor, a subject line, and a message.

Add discussion ✕

Participants Add User

Sarah Vogt <svogt@mailinator.com> ✕

Stephanie Berardo <sberardo@mailinator.com> ✕

Subject *

Copyediting complete

Message *

📄 📁 **B** *I* U [🔗](#) [🌐](#) [<>](#) [🔄](#) 📷 Upload 📤

The copyediting is now complete.

Hit **OK** to send the message.

Returning to the Copyediting stage, you can see the message is posted.

Copyediting Discussions			Add discussion	
Name	From	Last Reply	Replies	Closed
[JPK] Copyediting Request	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Copyediting check	svogt Aug/31	mishkin Aug/31	1	<input type="checkbox"/>
▶ Copyediting complete	svogt Aug/31	-	0	<input type="checkbox"/>

You work as the Copyeditor is now complete!

Moving to Production

The Section Editor will receive an email that the copyediting is complete, and see a notification in the discussions.

You can download and review the final copyedited version from the Copyedited panel.

At this point you could communicate further with the Copyeditor, or, if you are satisfied, move the submission to the Production stage.

To do so, select the blue **Send to Production** button.

This will generate an official notice to the Authors that the submission is moving to the next stage.

Send To Production ✕

Author(s)

Apostolos Mishkin, Frederic Serletis

Email to be sent to author

📄 📧 **B** *I* U 🔗 🌐 <> 🔄 📷 Upload +

Apostolos Mishkin, Frederic Serletis:

The editing of your submission, "approach for externalization of expert tacit knowledge," is complete. We are now sending it to production.

Submission URL: <http://journals.sfu.ca/uiux/index.php/jpk/authorDashboard/submission/52>

Stephanie Berardo

Do not send author email

Copiedited 🔍 Search

▶	<input checked="" type="checkbox"/>	167-1	svogt, Copyeditor, submission-manuscript.docx	Article Text
---	-------------------------------------	-------	---	--------------

Record Editorial Decision
Cancel

Notice that the appropriate file, from the Copiedited panel, is included and will be automatically transferred to Production.

Hit **Record Editorial Decision** to proceed.

The Copyediting stage is now complete.

Production

With the completion of the Copyediting stage, the submission now moves to Production. From here, the copyedit files (often Microsoft Word files) will be converted to publishable formats (e.g., PDF, HTML) and proofread before publishing.

To start working in Production, the Section Editor must login to the system and choose the submission from her dashboard.

Submissions

My Queue

Archives

My Assigned

[Q Search](#)

ID	Author; Title	Stage
▶ 27	Bokan; BB Article Test 1	Published
▶ 28	tiddler; Gentle Art of Imporving Software	Production
▶ 32	Kuehle et al.; Study of Open Source Publishing Software	Submission
▶ 33	Jones et al.; System Dynamics in Distance Education and a Call to Develop a Standard Model	Published
▶ 34	Al-Khafaji; test	Submission
▶ 52	Mishkin et al.; approach for externalization of expert tacit knowledge	Production

21 of 21 items

Choosing the Production link will open the submission record.

Journal of Public Knowledge
English View Site sberardo

Metadata Editorial History Submission Library

approach for externalization of expert tacit knowledge

Apostolos Mishkin, Frederic Serletis

Submission

Review

Copyediting

Production

Help

Notification

Assign a user to create galleys using the Add link in the Participants list.

Production Ready Files Q Search Upload File

▶ 168-1 svogt, Copyeditor, submission-manuscript.docx Article Text

Schedule For Publication

Participants Add

Section editor

▶ Stephanie Berardo

Author

▶ Apostolos Mishkin

Production Discussions Add discussion

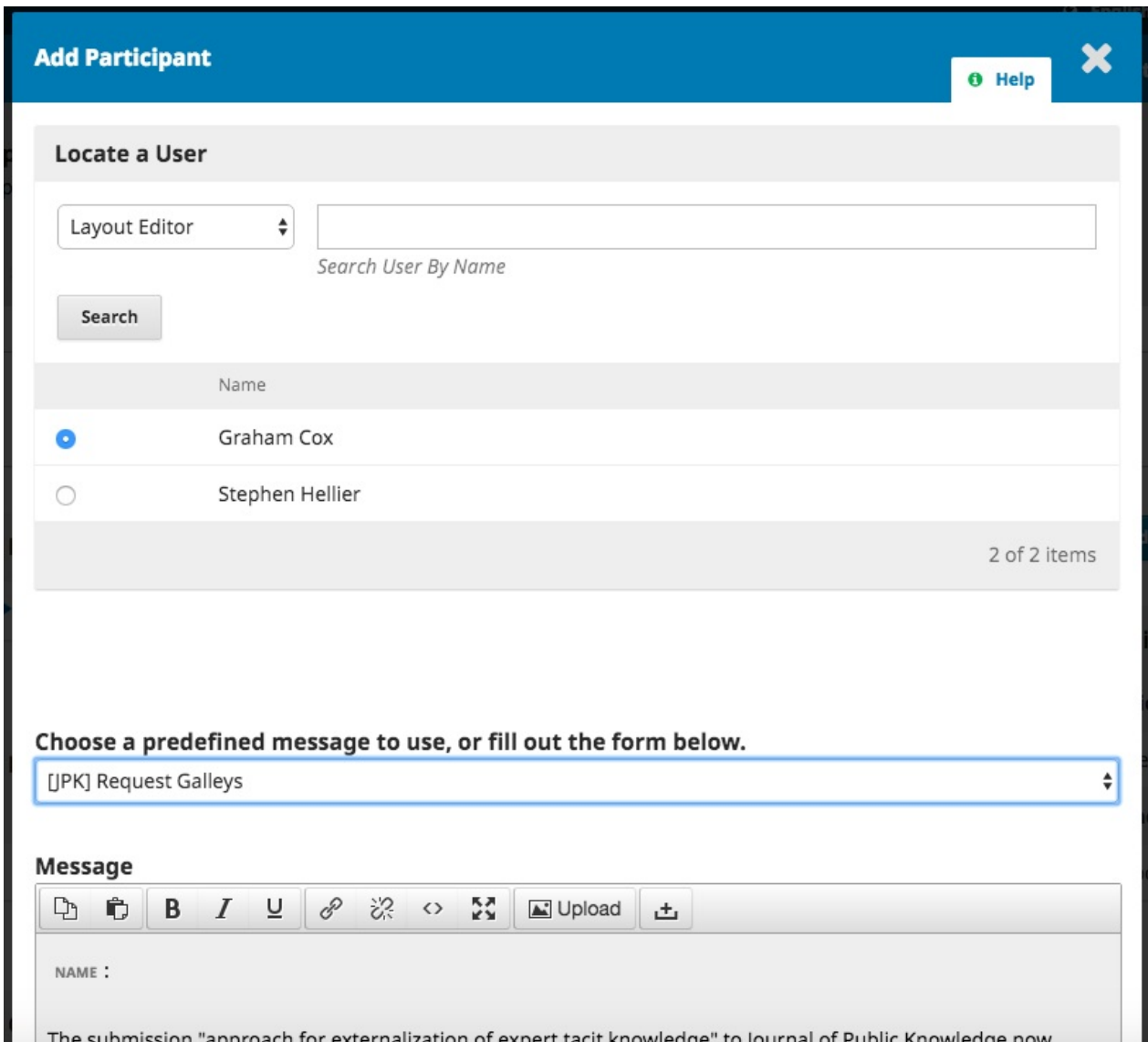
Name	From	Last Reply	Replies	Closed
No Items				

You will see the copyedited files are now available in the *Production Ready Files* panel.

A notification banner also indicates that you must assign someone to create the galley files (e.g., the PDFs, HTML, etc.) from those production ready files.

This can vary from journal to journal -- you may have layout editors or production assistants to do this work.

To make the assignment, use the *Add* link in the Participants list. This will open a new window.



The screenshot shows a window titled "Add Participant" with a blue header bar. In the top right corner of the header, there is a "Help" button with an information icon and a close button (X). The main content area is divided into sections:

- Locate a User:** This section contains a dropdown menu currently set to "Layout Editor", a search input field with the placeholder text "Search User By Name", and a "Search" button.
- User List:** Below the search area is a table with a "Name" header. It lists two users: "Graham Cox" (selected with a blue radio button) and "Stephen Hellier" (unselected with a white radio button). A footer for this section indicates "2 of 2 items".
- Choose a predefined message to use, or fill out the form below:** This section features a dropdown menu with the selected option "[JPK] Request Galleys".
- Message:** This section includes a rich text editor toolbar with icons for copy, paste, bold (B), italic (I), underline (U), link, unlink, code, and full screen, along with an "Upload" button. Below the toolbar is a text input field labeled "NAME :" containing the text "The submission 'approach for externalization of expert tacit knowledge' to Journal of Public Knowledge now".

Use the role selector and search button to find appropriate users, select one, choose a predefined message, and hit **OK** to send.

The user has now been notified via email and in his dashboard.

approach for externalization of expert tacit knowledge
 Apostolos Mishkin, Frederic Serletis

Submission Review Copyediting **Production** Help

Notification
 Awaiting Galleys.

Production Ready Files Search Upload File **Schedule For Publication**

▶ 168-1 svogt, Copyeditor, submission-manuscript.docx Article Text

Production Discussions Add discussion

Name	From	Last Reply	Replies	Closed
▶ [JPK] Request Galleys	sberardo	-	0	<input type="checkbox"/>
	Aug/31			

Participants Add

Section editor

- ▶ Stephanie Berardo

Layout Editor

- ▶ Graham Cox

Author

- ▶ Apostolos Mishkin

Notice that the notification now indicates the submission is "Awaiting Galleys". You can see the layout editor in the Participants list, and you can see the request notice in the Production Discussions panel.

You can now wait for the Layout Editor to complete his tasks.

Layout Editing

As the Layout Editor, you will have received a message inviting you to create the galleys for the submission.

To get started, login to the system and go to your dashboard.

Journal of Public Knowledge ▾

OJS
 OPEN JOURNAL SYSTEMS

Tasks 26

Submissions

Submissions

My Queue Archives

My Assigned Search

ID	Author; Title	Stage
▶ 44	Rossi; Initial trends in enrolment and completion of massive open online courses	Production
▶ 46	Rossi; Protecting students' intellectual property	Production
▶ 47	Rossi; Emotional Intelligence as a Determinant of Readiness for Online Learning	Production
▶ 48	Rossi; Design and Development of a Virtual Internship Program	Production
▶ 52	Mishkin et al.; approach for externalization of expert tacit knowledge	Production

14 of 14 items

From here, find the submission and select the Production link.

This will take you to the submission record.

The screenshot shows the OJS interface for a submission record in the Production stage. The article title is "approach for externalization of expert tacit knowledge" by Apostolos Mishkin and Frederic Serletis. The interface includes a navigation menu with "Submission", "Review", "Copyediting", and "Production" (selected). A "Help" button is visible in the top right. The main content area is divided into three panels:

- Production Ready Files:** Contains a table with one entry: "168-1 svogt, Copyeditor, submission-manuscript.docx" with a file icon and "Article Text" label. Buttons for "Search" and "Upload File" are present.
- Production Discussions:** Contains a table with one entry: "[IPK] Request Galleys" from "sberardo" on "Aug/31". Columns include Name, From, Last Reply, Replies (0), and Closed (checkbox). A button for "Add discussion" is present.
- Galleys:** Shows "No Items" and a button for "Add galley".

On the right side, there is a "Participants" panel with roles and names:

- Section editor:** Stephanie Berardo
- Layout Editor:** Graham Cox
- Author:** Apostolos Mishkin

From the Production Ready Files panel, download the files to your desktop and work outside of OJS to convert them to the formats appropriate for your journal (e.g., HTML, PDF, etc.).

Note: PKP is currently working on a project to automate the conversion of Microsoft Word documents into other formats, including XML, HTML, PDF, EPUB, etc. Keep an eye on our blog for updates.

Deciding on Article File Formats

Online journals today publish their articles in a variety of file types. Most common are the PDF and HTML, but increasingly additional formats are being used, such as ePub, MP3, and XML.

The majority of author submissions come in as Microsoft Word documents (.doc or .docx), and typically move through the OJS workflow (review, revision, copyediting) in that format. Other formats sometimes include text (.txt), rich text format (.rtf), or Open Office (.odt). These aren't suitable for final publication, so will need to eventually be converted into a more reader-friendly format.

Working from Templates

Requiring all submissions to use a template that is pre-formatted with your journal's publication styles (e.g., the font face, font size, boldness, placement, etc. of the header, body, footers, etc.) will make your document conversion much easier.

Microsoft provides a brief overview for creating templates [here](#).

Once you've created a template that matches your journal style, you should link it from your Author Guidelines, along with a brief explanation of the need to use the template. This means that all of your submissions will come in already formatted, saving your layout editor a significant amount of work.

Here's an example of an OJS journal that requires authors to download and use a template file: [Paideusis](#).

Ideally, your template should be created using styles rather than direct formatting. This not only ensures consistency throughout your documents, but will also aid in any conversions to other formats (e.g., HTML). Here's an [explanation of the difference between styles and direct formatting in Word](#).

Creating PDF files

A PDF is the easiest type of file to create from a Word document. Current versions of Microsoft Word (and other word processors) let you simply "Save As" a PDF. The majority of OJS journals publish their articles as PDFs.

PDFs are also popular with many readers, as they most closely recreate the printed page. However, PDFs are often less flexible on mobile devices and do not always handle links or embedded media (such as sound or video files) particularly well. With the growing importance of mobile computing, ensuring your audience can easily read your articles on their phones or tablets is increasingly important.

Example (see PDF link at bottom of page): [Irish Journal of Technology Enhanced Learning](#)

Creating HTML Files

HTML files have the advantage of flexibility. They handle linking and multimedia very well, and can fit on just about any screen - including phones and tablets. They do, however, look different than a printed page, so some readers continue to prefer a PDF. The ideal situation is to provide both PDF and HTML files to best meet the needs of your different users.

We saw in the previous section that creating a PDF from a submitted Word file is easy. Unfortunately, creating HTML files is a little more time consuming. Word processors do not have effective tools for doing a "Save As" to HTML. Microsoft Word tries to do this, but the results are not useful for uploading to OJS. Instead, try following this workflow:

1. Convert the Word document. You can use this [free online tool](#) to do an initial conversion.
2. Open the resulting HTML files in a text editor (e.g., NotePad in Windows) or HTML editor (e.g., Adobe Dreamweaver). From here, you will need to make any final clean up or formatting. Understanding the basics of HTML is required. It's not hard and there are many [free tutorials](#), but it does take some time.
3. Keep the HTML formatting basic. Just focus on paragraphs, line breaks, headings, and links. Don't worry about fonts, colours, or other design elements - OJS will take care of all of that automatically as part of the overall journal design.
4. Upload to OJS as an HTML galley file

Example (see HTML link at bottom of the page): [Forum Qualitative Sozialforschung](#)

Creating ePUB Files

Similar to HTML files, ePub files are ideal for mobile devices, but require specialized coding to create. Conversion tools are available, such as [Calibre](#). More detailed HOW TO instructions for creating ePub files are [available here](#).

Like HTML files, some additional cleanup may be required after conversion and [require some knowledge](#) of the format.

Example (see EPUB link at bottom of the page): [International Review of Research in Open and Distance Learning](#)

Creating Audio Files

Although not common, some journals also create audio files of their articles, to allow for users to listen to the content. This is particularly helpful to the visually impaired, but many people enjoy podcasts and audio books while traveling or doing other activities.

Creating audio files can either be done manually, by having someone read the article into a voice recorder, or automatically using Text to Speech software.

Example (see MP3 link at bottom of the page): [International Review of Research in Open and Distance Learning](#)

Creating XML Files

Creating XML files is a very efficient way to publish in multiple formats. When you create an XML file, you can then automatically generate PDFs, HTML, ePub, and other formats. PKP is developing an XML conversion tool called the [Open Typesetting Stack](#), which is currently available in beta. You can also learn how to create XML files yourself. [Excellent tutorials](#) are available online, but will require a significant time investment to become proficient.

Example (see XML link on top right of the page): [Journal of Medical Research and Innovation](#)

Contact the Author

Next, you will want to share the PDF with the author for a final look and sign-off.

To so, use the *Add Discussion* link in the Production Discussion panel. This will open a new window.

Add discussion ✕

Participants Add User

Graham Cox <gcox@mailinator.com>	✕
Apostolos Mishkin <mishkin@mailinator.com>	✕

Subject *

Galley ready for proofreading

Message *

Please take a look at the attached galley and let me know if it is ready to publish.

Attached Files Search Upload File Select Files

No Files

Remember to add the author at the top of the window, and then add a subject and a message.

Before sending, however, attach a copy of the PDF file using the *Upload File* link. This will make it available to the author.

The screenshot shows a dialog box titled "Upload a Discussion File" with a close button (X) in the top right corner. Below the title bar is a progress indicator with three steps: "1. Upload File" (highlighted), "2. Review Details", and "3. Confirm". The main content area features a dropdown menu labeled "Article Component *" with "Article Text" selected. Below this is a file upload area showing a green checkmark, the filename "gcox, Layout Editor, submission-manuscript.pdf", and a "Change File" button. A note below the file area states "* Denotes required field". At the bottom, there are "Continue" and "Cancel" buttons.

Remember to select the correct Article Component, and then upload the PDF.

Hit **Continue**.

Next, make any changes to the file name (usually you don't need to do anything here).

The screenshot shows the same dialog box, now in Step 2: "Review Details". The progress indicator shows "1. Upload File", "2. Review Details" (highlighted), and "3. Confirm". The file name "gcox, Layout Editor, submission-manuscript.pdf" is displayed with an "Edit" button (pencil icon) to its right. Below the filename, the file type "pdf" and size "23KB" are shown. At the bottom, there are "Continue" and "Cancel" buttons.

And then, you can upload additional files, if necessary.

Upload a Discussion File ✕

1. Upload File 2. Review Details 3. Confirm

File Added

Add Another File


Complete Cancel

Once you are done, hit **Complete**.

The file is now attached and you can send the message using the **OK** button.


Subject *
Galley ready for proofreading

Message *

 Upload

Please take a look at the attached galley and let me know if it is ready to publish.

Attached Files [Search](#) [Upload File](#) [Select Files](#)

 169-1	gcox, Layout Editor, submission-manuscript.pdf	Article Text
---	--	--------------

** Denotes required field*

OK Cancel

The Author has now been notified and you can await his response.

Author Response

Once the author has had a chance to review the galleys and respond, you will receive an email notification and will see a reply in the Production Discussions.

Production Discussions		Order	Add discussion	
Name	From	Last Reply	Replies	Closed
▶ [JPKI] Request Galleys	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Galley ready for proofreading	gcox Aug/31	mishkin Aug/31	1	<input type="checkbox"/>

Add Galleys

Now that the Author has proofread the galleys, you can make any final changes, and then upload them to the Galleys panel.

Galleys	Add galley
<i>No Items</i>	

To do so, use the *Add Galley* link, which will open a new window.

Create New Galley ✕

Galley Label

Typically used to identify the file format (e.g. PDF, HTML, etc.).

English ▾

Language

This galley will be available at a separate website.

Save
Cancel

Add an appropriate label (e.g., PDF, HTML, etc.) and Hit **Save**.

Upload a File Ready for Publication ✕

1. Upload File 2. Review Details 3. Confirm

Article Component *

Article Text

✓ sberardo, Section editor, submission-manuscript.pdf Change File

* Denotes required field

Continue Cancel

From this window, choose the appropriate article component (e.g., article text) and upload the galley file. Hit **Continue**.

Upload a File Ready for Publication ✕

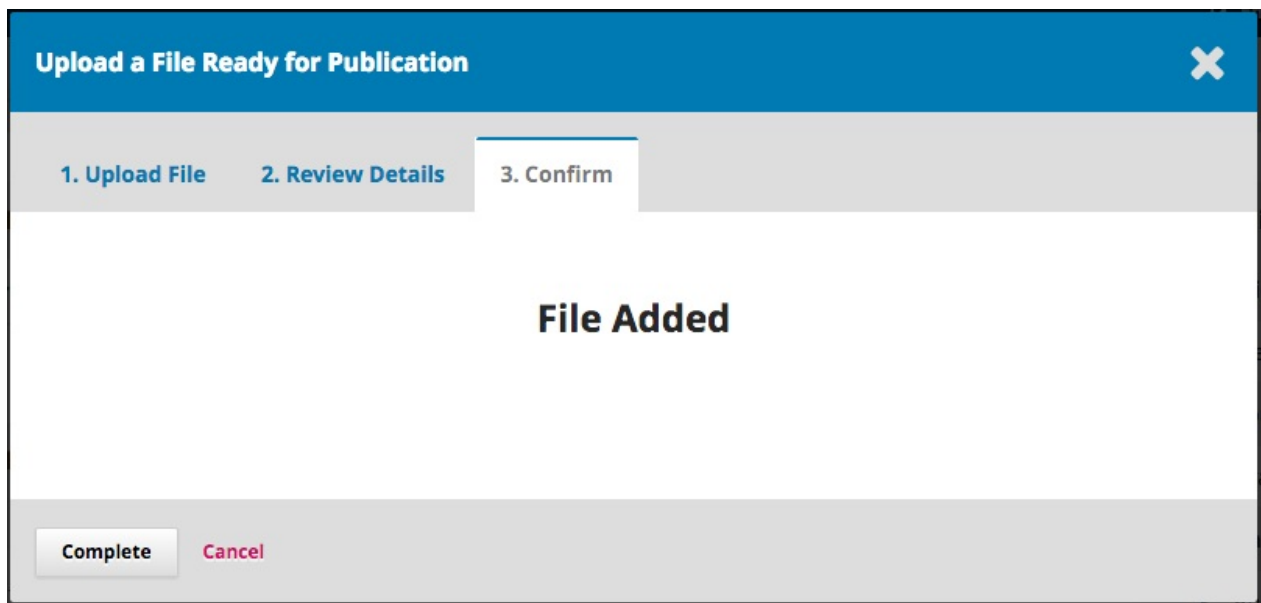
1. Upload File 2. Review Details 3. Confirm

gcox, Layout Editor, submission-manuscript.pdf Edit

pdf 23KB

Continue Cancel

If necessary, change the filename. Hit **Continue**.



If you have more files, upload them now. Otherwise hit **Complete**.

You can now see the galleys in the Galley panel.



You can make changes to the upload by selecting the blue arrow to the left of the galley label, which reveals options to edit, change the file, or delete.

Inform the Section Editor

Finally, you will need to inform the Section Editor that the galleys have been completed. To do so, use the Production Discussion panel and choose the *Add Discussion* link.

Add discussion ✕

Participants Add User

Graham Cox <gcox@mailinator.com> ✕

Stephanie Berardo <sberardo@mailinator.com> ✕

Subject *

galley is ready

Message *

📎 📁 **B** *I* U [🔗](#) [🗑️](#) [<>](#) [🔄](#) 📷 Upload 📄

The galley file is now completed and uploaded.

Add the Section Editor to the top of the page, and then include a subject line and message. Hit **OK** to send the message.

You can now see the final discussion.

Production Discussions			Add discussion	
Name	From	Last Reply	Replies	Closed
[JPK] Request Galleys	sberardo Aug/31	-	0	<input type="checkbox"/>
▶ Galley ready for proofreading	gcox Aug/31	mishkin Aug/31	1	<input type="checkbox"/>
▶ galley is ready	gcox Aug/31	-	0	<input type="checkbox"/>

Section Editor Informs Editor

At this point, the Section Editor receives the notification from the Layout Editor and reviews the galley files.

She can either ask the Layout Editor to make additional changes (using the Production Discussions) or inform the Editor that the galleys are ready for publication.

To inform the Editor, use the Production Discussion panel's *Add Discussion* link.

Scheduling for Publication

Upon receiving notification of the completed galleys, the editor logs into the submission record, and checks the uploaded galley files.

If the galley proofs look ready, the editor can hit the blue **Schedule for Publication** action button.

approach for externalization of expert tacit knowledge
Apostolos Mishkin, Frederic Serletis

Submission Review Copyediting **Production** Help

Production Ready Files Search Upload File **Schedule For Publication**

168-1 svogt, Copyeditor, submission-manuscript.docx Article Text

Participants Add

Selecting this button opens a Publication window.

Publication X

Schedule for publication in
----- Future Issues -----

*To Be Assigned **

Pages
Pages

Permissions
 Attach the following permissions to the submission:

License URL

Journal of Public Knowledge 2016
Copyright Holder *Copyright Year*

Save Cancel

Use this to add the submission to a future or back issue of the journal.

You also have the option to add page numbers, permission, and licensing information.

Hitting **Save** will publish the submission to the selected issue. If the issue is already published, the submission will be immediately available to readers.

Congratulations! You have now come to the end of the editorial workflow.

Chapter 12: Reviewing

As a reviewer, you will learn of the review request via email or by checking your dashboard:

The screenshot shows the 'Journal of Public Knowledge' dashboard. The user is logged in as 'agallego'. The 'Submissions' section is active, with 'My Queue' selected. The 'My Assigned' list contains the following items:

ID	Author; Title	Stage
	Management Systems	
▶ 19	Hydrologic Connectivity in the Edwards Aquifer between San Marcos Springs and Barton Springs during 2009 Drought Conditions	Review
▶ 33	System Dynamics in Distance Education and a Call to Develop a Standard Model	Published
▶ 36	KFS Computer Science Journal	Production
▶ 52	approach for externalization of expert tacit knowledge	Review

11 of 11 items

From the My Assigned list, find the title and Review link. Notice the lack of any author information in this double-blind peer review process.

Selecting the Review link will take you to the first review step in the submission record, which is much more limited than the editor's view, and contains no author information.

The screenshot shows the review process progress bar with four steps: 1. Request, 2. Guidelines, 3. Download & Review, and 4. Completion. The current step is 1. Request.

Request for Review

You have been selected as a potential reviewer of the following submission. Below is an overview of the submission, as well as the timeline for this review. We hope that you are able to participate.

Article Title

approach for externalization of expert tacit knowledge

Abstract

E-learning or electronic learning platforms facilitate delivery of the knowledge spectrum to the learning community through information and communication technologies. The transfer of knowledge takes place from experts to learners, and externalization of the knowledge transfer is significant. In the e-learning environment, the learners seek subject expertise to clarify their subject queries, and a learner query can be routed to an expert for externalization of expert knowledge provided the learner knows the subject expert or the expertise group. However, learners new to e-learning systems are not aware of the expertise group to which the query should be sent, which results in time delays, non-response, inaccurate solutions and loss of knowledge capture. Several models have been proposed to resolve this task, but thus far, these efforts have focused completely on returning the most conversant people as experts on a particular topic to retrieve valuable knowledge. To address this problem, we propose an approach that externalizes the tacit knowledge of a subject expert by creating a dynamic query handling system that automatically transfers a user query to the best subject expert.

This first step consists of the following sections:

Request for Review: provides some text inviting you to act as a reviewer.

Article Title: provides the title of the article.

Abstract: provides the abstract text.

Further down the screen, you will find additional information.

[View All Submission Details](#)

Review Schedule

2016-08-30	2016-09-20	2016-09-27
<i>Editor's Request</i>	<i>Response Due Date</i>	<i>Review Due Date</i>

[About Due Dates](#)

Accept Review, Continue to Step #2

Decline Review Request

The **View All Submission Details** link will open a window with additional information, including all of the non-author metadata:

View All Submission Details ✕

Articles ▾

Prefix **Title ***

Examples: A, The

Subtitle

The optional subtitle will appear after a colon (:), following the main title.

Abstract *

<p>E-learning or electronic learning platforms facilitate delivery of the knowledge spectrum to the learning community through information and communication technologies. The transfer of knowledge takes place from experts to learners, and externalization of the knowledge transfer is significant. In the e-learning environment, the learners seek subject expertise to clarify their subject queries, and a learner query can be routed to an expert for externalization of expert knowledge provided the learner knows the subject expert or the expertise group. However, learners new to e-learning systems are not aware of the expertise group to which the query should be

Note that none of these fields are editable by the reviewer, and are only provided to help you conduct a thorough review.

Close this window and move further down the screen. From here you can see the Review Schedule, including all of the relevant due dates.

From here, you can decline or accept the review. If you decline, you will be dropped from the process. If you accept, you will move to review step 2, where you would be able to read any reviewer guidelines provided by the journal.

Review: approach for externalization of expert tacit knowledge**1. Request****2. Guidelines****3. Download & Review****4. Completion****Reviewer Guidelines**

Please complete the review with a constructive perspective.

Continue to Step #3

Go Back

Hit **Continue** to move to step 3. From here you can download a copy of the review files and enter your review comments. The first window is for comments to the editor and the author; the second window is just for the editor.

Review: approach for externalization of expert tacit knowledge**1. Request****2. Guidelines****3. Download & Review****4. Completion****Review Files**

Q Search



163-1

Author, submission-manuscript.docx

Article Text

Reviewer Guidelines[Review Guidelines](#)**Review**

Enter (or paste) your review of this submission into the form below.

		B	<i>I</i>	<u>U</u>			<>			
This is a very good article.										

Once you have read the paper and added your comments, scroll down the page to optionally upload a marked up copy of the review file (remember to strip any personal identification from the file before uploading it).

Upload

Upload files you would like the editor and/or author to consult, including revised versions of the original review file(s).

Reviewer Files	Q Search	Upload File
No Files		

Recommendation

Select a recommendation and submit the review to complete the process. You must enter a review or upload a file before selecting a recommendation.

* Denotes required field

Next, you must then make your recommendation using the dropdown menu.

Your choices include:

Accept Submission: it is ready to go to Copyediting as is.

Revisions Required: it requires minor changes that can be reviewed and accepted by the editor.

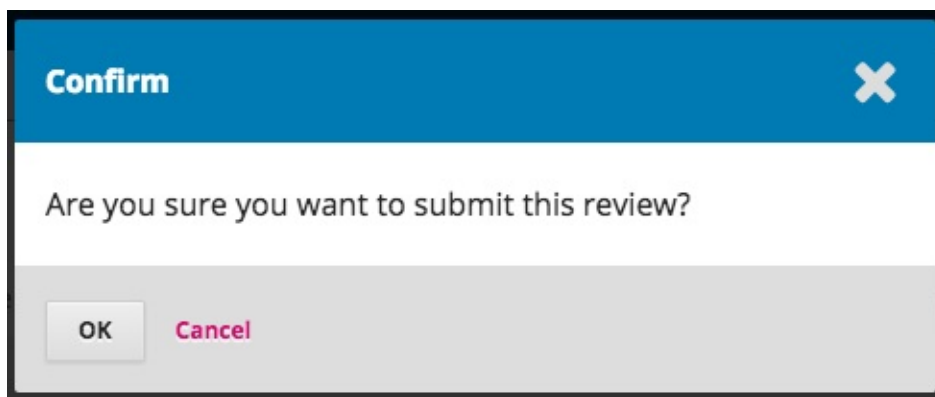
Resubmit for Review: it requires major changes and another round of peer review.

Resubmit Elsewhere: it doesn't seem like a good fit for the focus and scope of this journal.

Decline Submission: it has too many weakness to ever be accepted.

See Comments: if none of the above recommendations make sense, you can leave a comment for the editor detailing your concerns.

Finally, hit the Submit Review button to complete your task. You'll be asked to confirm.



Hit OK. You will be taken the final confirmation screen thanking you for your work.

Review: *approach for externalization of expert tacit knowledge*

- [1. Request](#) [2. Guidelines](#) [3. Download & Review](#) [4. Completion](#)

Review Submitted

Thank you for completing the review of this submission. Your review has been submitted successfully. We appreciate your contribution to the quality of the work that we publish; the editor may contact you again for more information if needed.

That's it! The review is now complete.