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“Help, We Started a Journal!”: Adventures in Supporting Open Access Publishing Using Open Journal Systems

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Abstract

The University Libraries at The University of North Carolina at Greensboro (UNCG) have an active and growing implementation of Open Journal Systems (OJS), a free, open source scholarly publishing platform. But even a free software system is not without its costs, both to the hosting institution and to the creators and staff of individual journals. Institutions that wish to host OJS must be able to install, maintain, and support the product. And while faculty members and other academics are often experts in their content areas, not all of them are prepared to handle other needs associated with creating and publishing an online journal—including decisions that might involve article layout, copyright policies, graphic design, web design, and other technical issues. This article provides an overview of UNCG’s support for OJS, as well as challenges, lessons learned, and future directions related to this service.

Introduction

The open access movement continues to grow, change, and offer exciting opportunities for researchers and content creators to share their work. One such opportunity is Open Journal Systems (OJS), a journal management and publishing system that is freely available via the Public Knowledge Project. In 2010, the University Libraries at The University of North Carolina at Greensboro (UNCG) adopted OJS as a platform to support scholarly publishing on campus. The Libraries offer journal hosting to members of the UNCG community—primarily faculty—in an effort to further open access content creation and sharing at UNCG and beyond. This article provides an overview of the OJS service and its support structure within the Libraries, particularly in relation to staffing, as well as questions and issues that have arisen through the development of this service. Challenges, lessons learned, and future directions are also addressed.

Selection and Implementation of OJS at UNCG

The University Libraries at The University of North Carolina at Greensboro (UNCG) have a strong

history of supporting and promoting open access initiatives. The Libraries created and continue to develop, host, and maintain an active open access institutional repository (NC DOCKS¹); they also offer an open access publishing fund to campus faculty, and are active in supporting Open Educational Resources, among other initiatives. In 2010, after requests from campus faculty members for support in the area of open access scholarly publishing, the Libraries adopted OJS as a journal publishing platform. OJS, developed by the Public Knowledge Project (PKP), is a free, open source system designed to aid faculty and researchers in creating and publishing open access journals.² The software is available for free download on the PKP website.³ PKP also offers hosting options for institutions that do not have their own servers, or that are not able or do not wish to maintain local systems.

Five years after adopting OJS, the Libraries’ server hosts ten active open access journals, with others in development, and one journal that uses the OJS system only to track and review submissions—not as a public interface. Content areas range across the academic spectrum, including journals focused on archives, mathematics, and service learning.⁴ These journals all exist within the same

¹ NC DOCKS, digital online collection of knowledge and scholarship: <http://libres.uncg.edu/ir/uncg/>

² Publish Knowledge Project’s (PKP) OJS: <https://pkp.sfu.ca/ojs/>

³ To download OJS, visit: https://pkp.sfu.ca/ojs/ojs_download/

⁴ A complete list of journals is available on the Libraries’s website: <http://libjournal.uncg.edu/>

OJS implementation. The use of a multi-journal site means that some design and layout options are enforced at the top level, affecting all journals. There are, however, some customizations that can be made at the individual journal level. This issue will be discussed further in the “Roles for journal personnel” section.

Supporting OJS

Roles for Library Personnel

Within the Libraries, three main support roles have developed to facilitate and deliver OJS services on campus. These positions work individually and collaboratively to provide OJS services and to set local policies in the Libraries. They focus efforts in three areas: user support and training, system development and maintenance, and outreach.

The metadata librarian in the technical services department takes the primary role of providing OJS support and training for personnel at the individual journals. Technical and teaching skills are important in this role, which works primarily with managing editors and other journal staff. When new journals are proposed, the Metadata Librarian meets with interested constituencies to discuss journal support services and to demonstrate the use of OJS. At the inception of a new journal, the metadata librarian provides initial in-person training to journal staff. Additional training and other support is provided on an as-needed basis, and might take the form of e-mails, phone calls, or in-person meetings.

The time commitment for support in this area can vary wildly. Most journals are run by faculty members who juggle many commitments during the academic year and who may focus on OJS during the summer or on other breaks from the course calendar. As such, requests for support sometimes spike during summer months. The metadata librarian averages about five hours per week on support and training requests, though there is no way to predict the type and number of support requests in a given time period. But as the number of journals hosted by the University Libraries grows, the number of support requests grows with it.

The second support position, the digital technology consultant, is based in the Libraries’s electronic resources and information technology department and serves as the main administrator for the Libraries’ OJS implementation. This position spends approximately four hours a week on tasks related to OJS, which might include troubleshooting issues with the software, making changes to top-level site options and stylesheets, and setting up new journals. Strong technology and web development skills are critical in this role.

The third member of the team, the assistant dean for collection management and scholarly communications, is based in the Libraries’ administration and provides outreach, publicity, and faculty relations services, particularly to faculty members who may be interested in creating journals. The assistant dean for collection management and scholarly communications also provides general outreach about open access on campus, and as such is well-placed to educate faculty members about the Libraries’ offerings, including OJS. On average, this position spends about thirty minutes a week on tasks related to OJS. This role benefits from a strong background in scholarly communications topics and issues, as well as a desire to work with and educate a variety of campus constituencies.

Roles for Journal Personnel

Journal creators come prepared to focus on their content areas and associated tasks, such as identification of article reviewers. But editorial roles are not the only ones that journal managers must be prepared to fill. OJS provides options for use of the following roles within the system:

- Journal managers
- Editors
- Section editors
- Layout editors
- Copyeditors
- Proofreaders
- Reviewers
- Authors

- Readers
- Subscription managers

Journal personnel may have multiple roles assigned to them, such as journal manager and editor. All roles on this list are the responsibility of the individual journals—Libraries’ personnel do not handle content, copy editing, layout, or other tasks on this list. While these role assignments are available to all journals, not all of these roles are required. For example, if a journal does not require subscriptions, then there is no need for a subscription manager. And if a journal does not require logins for access to articles, then there is no need for the reader role.

But the roles on the list do not fully describe the skill sets that journal managers may need or want in order to make their journals meet desired standards of consistency and professionalism. Technical and design-related skills are particular areas that potential journal creators should consider.

By selecting OJS as a journal platform, journal creators are committing to working in a powerful but complex online system that has a steep learning curve. Journal managers must be prepared to learn to use this system, or to hire personnel (such as graduate students) to use it for them. Individual journal customization options are limited in a shared OJS system, as many elements of the look-and-feel are controlled at the top; but there are still some options for personalization through graphic and web design. And if a journal wants to explore these types of customization, then they will need staff with skills in these areas, or they will need to outsource this work. If a journal has personnel with skills in the customization of stylesheets, then they will have more options in setting up the look and feel they want for their journal. Similarly, graphic design skills are useful for the creation of banners, logos, and other graphic elements.

One journal at UNCG uses the OJS system only for submission and tracking of manuscripts—not as a public access interface. For a journal with a strong online team in place, this option allows journal personnel to track and assign submissions in the specially designed OJS system, while also allowing

them the freedom to personalize the look and feel of the journal to their specifications.

In addition to design and technical aspects of the online system, journals must also consider the layout for their individual articles and other content. Some journals want the traditional two-column layout for their articles, which means they need to have someone on staff who can set up and implement such a template. Further, journal managers must also be prepared to consider policy issues, which could relate to things like open access, copyright, and much more.

Support Requests

Support requests from journal personnel may be directed at any member of the Libraries’s OJS support teams. Team members work collaboratively to make sure that requests reach the appropriate person or people on the team. Some support requests are technical in nature, often having to do with the inner workings of the OJS system. These questions might relate to logging in, submitting an article, determining the status of a submission, or ascertaining permissions on a particular user account. Libraries staff can provide guidance and assistance in troubleshooting these topics, and many requests of this type can be solved via e-mail, often with a screen capture included to show a user where to go or what to look for within the OJS interface.

Other technical requests might relate to the look and feel of a journal’s public interface within OJS. When requests are made that will affect all journals, the Libraries must consider the time commitment required for the task, along with the potential value for and impact on all hosted journals. While the Libraries’s OJS team endeavors to meet the needs of all hosted journals, not all requests can be accommodated.

Despite not providing explicit support in the areas of content, design, layout, and journal policies, the Libraries do still get questions related to many of these topics. Libraries’s OJS staff can sometimes provide advice or further information based on previous experiences, perhaps by sharing an example layout template or by providing information about copyright policies at

other journals; but ultimately decisions on these topics must be made by managing personnel at the individual journals. Journals have also requested assistance in obtaining International Standard Serial Numbers (ISSNs), an area where the Libraries have been able to provide guidance.

Challenges

The main challenges the Libraries have faced with their OJS services relate to the complexity of the OJS system, turnover of staff, and issues relating to the multi-journal OJS implementation.

OJS was built to support publication of open access journals, and gives journal personnel many options for tracking submissions and sharing them among relevant personnel. The system is very powerful, but it is also very complicated, and for most users it is not an immediately intuitive system. Journal staff need to be comfortable working in a complex online system that enforces processes—for example, a journal editor cannot simply upload a preapproved article and go straight to posting it. Articles must be submitted from users in the author role, and must go through multiple steps before they can be posted. The system allows editors to track and monitor submissions closely and can also send automated e-mails to relevant personnel, if desired. But if a step is missed, it is easy to get stuck or lost in the process, especially for new users and those who are not accustomed to working in online systems.

The learning curve associated with the software, especially combined with journal staff turnover, is one of the biggest challenges the Libraries have faced with this service. Turnover issues exacerbate the learning curve problem. Some journals have made a practice of employing graduate students to do much of the behind-the-scenes legwork of journal creation—working in the OJS system, copy editing, and designing layout for articles. This practice can cause headaches when students graduate—particularly if there is no succession plan in place.

Turnover can affect not only the work of journal creation, but also the continuity of journal existence. In the online environment, it is generally not necessary for journal staff members

to be located in the same geographic area. But what happens when a primary journal manager who was based at UNCG leaves the institution? What is the appropriate role of the Libraries in supporting a journal that no longer carries a faculty connection to the institution? Providing support services to distant users is certainly possible, but can be very time-consuming for a support team that has many tasks to handle above and beyond their OJS roles. The Libraries's solution to this issue will be covered in "Lessons learned."

The multi-journal implementation of OJS has also created challenges for the support team. In a single-journal implementation, customizations can be made to fit the exact specifications of the journal. But in a multi-journal site, individualized customizations are not always possible—often a change to the display or design of one journal will affect all other journals. For this reason, the support team has been unable to fill some requests from journal managers.

Lessons Learned

Support for open access publishing through the creation of scholarly journals was a new endeavor for the UNCG University Libraries in 2010. The Libraries have learned several lessons through the implementation and development of the OJS service, particularly related to costs, sustainability, and proactive education models.

This project has reinforced the idea that even though the open source OJS software is free to download and use, it still has costs related to time and expertise. Libraries and other institutions that wish to provide and support OJS services must have staff with skills to handle the technical aspects of the system, both in relation to the server and the user interface. There is no one-size-fits-all support model, and it is difficult to predict the needs of individual journals in advance. A library or other institution that hosts this type of service has the latitude to determine the level of support that they will make available for end users. When planning this type of service, libraries should consider their available staff time and other resources before making commitments to journals.

Sustainability planning for journals is critical, and should particularly be stressed to journal managers. The UNCG University Libraries require that each hosted journal have a primary on-campus contact—this is generally a managing editor or other faculty member with an oversight role in the journal. If this person leaves UNCG and wants the journal to remain active on the Libraries’s server, he or she must designate another faculty member at UNCG to be the on-campus contact. Following this policy, the Libraries have facilitated the transfer of one journal that began at UNCG to another institution after changes in the journal’s editorial board resulted in no UNCG personnel on staff.

The Libraries’s OJS team is also trying to be proactive in educating journal managers—particularly those who are new to OJS—about the tasks that will be part of their work. Discussions with new journal managers touch on the importance of technical, graphic design, and web design skill sets, while noting that the Libraries’s OJS team is not able to provide support in these areas unless special arrangements are made.

Through the process of sharing the OJS service with campus, the Libraries have found it

strengthens relationships between the Libraries, faculty, and scholarly communities. This service has met the needs of campus faculty who requested support in this area, while facilitating the creation and sharing of new scholarly content on campus and beyond. It also demonstrates and reinforces the Libraries’s commitment to open access and new publishing models.

Future Directions

To date, OJS services at the UNCG University Libraries have grown informally, driven by requests from campus faculty. As the number of hosted journals grows, demands for library support grow as well. In a continuing climate of limited resources, project scalability is critical, and the Libraries must consider this when new journals are proposed. To aid in this process, the Libraries would like to create in-house policies to ensure sustainability, as well as local best practices to share with journal managers. The Libraries would also like to continue to raise awareness of the OJS service, for potential new journals as well as for potential readers and scholars who could use the materials. Explorations of impact and readership of the hosted journals are also areas of interest.