OJS
Open Journal Systems
http://penerbit.uthm.edu.my/ojs

Manual for Editors
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Editors

The Editor oversees entire editorial and publishing process. The Editor, working with the Journal Manager, typically establishes the policies and procedures for the journal, which are used in setting up the journal in Setup.

In the Editorial Process, the Editor assigns submissions to the Section Editors to see through Submission Review and Submission Editing, while, keeping an eye on the submission's progress and assisting with any difficulties in the process.

The Editor can also play the role of Section Editor in the Editing process, seeing accepted submissions through copyediting, layout, and proofreading.

The Editor also schedules submissions for publication, arranges the Table of Contents and publishes the issue, as part of the Publishing Process.

Getting Started

- Log in to your OJS account.
- Select your role as ‘Editor’.
Submissions

Under “Submissions”, you will see articles which are “unassigned”, “in review”, “in editing”, or in the “archives”. Clicking any of these links will provide additional details on each article in these categories:

Assigning Articles

Select “unassigned” and then click the article title link.
On the “Summary” page, go to the “Submission” section:

**Figure 137: Selecting an unassigned article**

**Figure 138: Unassigned article summary page**
From here, you have the option to:

- Send an email message to the author (click on the envelope icon next to the author’s name)

- Read the original file by clicking on the submission file name.

- Add any supplementary files by clicking on the “Add Supplementary File” link.

- Change the section you want the article to appear in, using the drop down menu.

- Report author fee payments as paid, or optionally, waive those payments, if the Payments module has been enabled.

- Assign an editor or section editor. This will take you to a list of your editors or section editors. Select the “Assign” link to give the submission to that person:

```
Home > User > Editor > Submissions > $141 > Summary > Section Editors

Section Editors

Select Section Editor

<table>
<thead>
<tr>
<th>First name</th>
<th>contains</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>REBECCA ERIKSEN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUGH GRANTHAM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

REBECCA ERIKSEN — 0 0 ASSIGN
HUGH GRANTHAM — 0 0 ASSIGN

1 - 2 of 2 Items

Figure 139: Assigning a section editor
• Once the “Assign” link next to a Section Editor is clicked, an email will be generated to the selected Section Editor informing them of your decision:

In the “Submission Metadata” section of the article Summary page, you may use the “Edit Metadata” link to make any changes to the submission’s metadata fields:

Figure 140: E-mail to the section editor
For example, you may wish to review the abstract provided by the author.

You can also use the “Review”, “Editing”, and “History” links at the top of the Summary page to follow the progress of the submission:
Issues

Return to the Editor Home page:

Figure 143: Editor’s Menu

Under “Issues”, you have the option to:

Create a New Issue

Select “Create Issue”. From the Create Issue screen, choose whether it will be a “Back Issue”, a “Current Issue”, or a “Future Issue”:
Enter the Volume, Issue, and Year information. You may also wish to select an issue identification format (Year only, Volume/Year, Issue/Volume/Year, etc.). This will depend upon the frequency of publication as previously determined by the Journal Manager.

You also have the opportunity to add a special title and description for the new issue. A custom cover and caption is also available. Use the “Save” button when you have made your choices.

If the Journal Manager has enabled subscriptions, you will be able to set an Open Access date at this point for the issue as a whole as well.
The new issue will now be available when you schedule submissions.

![Figure 145: Specify New Issue](image)

**Notify Users**

Allows you to send an email to users associated with your journal:
Figure 146: Notifying users

Send Email

Recipients
- Send this message to the users associated with this journal who have indicated that they wish to receive updates (0 users)
- Send this message to all users associated with this journal (11 users)

Issue
- Include the table of contents from this issue: Vol. 1, No. 1 (2009)

From
"Richard Elliott" <elliobrichard@gmail.com>

Subject
[] New Issue Published

Body
Readers:

New OJS Journal has just published its latest issue at http://skp.sfu.ca/jss/checkout2/index.php/newojs. We invite you to review the Table of Contents here and then visit our web site to review articles and items of interest.

Thanks for the continuing interest in our work,
Richard Elliott
elliobrichard@gmail.com

Send  Cancel
View Future Issues

Selecting Future Issues results in a list of all issues you have so far created, that have not been published:

Figure 147: Future Issues

Select the issue you wish to publish by clicking on the issue title:

Figure 148: Table of Contents

You can review each issue article by clicking its linked title:
Use the Summary, Review, Editing, and History links to reveal every aspect of the submissions lifecycle, who was involved with it, etc.

When there are multiple articles for an issue, you can use the up and down arrows to reorder how they will appear in the table of contents. You can also use the Remove check box to take an article out of that issue and allow it to be reassigned.

When you are satisfied with the content for an issue, use the Publish Issue button to build the new issue and make it available to your readers.
Back Issues

Lets you see all issues which have been published. Issues can also be deleted from the journal:

![Figure 150: Viewing back issues](image)

Select the issue link to see the Table of Contents for that issue:

![Figure 151: Issue Table of Contents](image)
It is possible to reorder the articles using the “Order” arrows, to delete articles using the “Remove” checkboxes, or to edit the articles by clicking on the linked titles.
Section Editors

The Section Editor manages the Review and Editing of submissions in those Sections (e.g., Articles, Book Reviews, etc.) for which they have been assigned responsibility. If the article is accepted for publication, the Section Editor may also oversee the editing process; but more often than not, this workflow falls to the Editor. The journal will have a policy on how the tasks are divided.

Getting Started

- Log in to your OJS account.
- Select your role as ‘Section Editor’:

![User Home](image)

**Figure 152:** Signing in as a section editor
Submissions

Under “Submissions in Review”, you will see any articles which are “in review”, “in editing”, or in the “archives”:

![Submissions in Review](image)

**Notes**

1. Highlighted items indicate action is required by editor.
2. “Due” is filled in when reviewer accepts request to review; it displays number of weeks to review’s due date or (-) weeks that it is overdue.

**Figure 153: Submissions in review**

Clicking any of these links will provide additional details on individual articles in these categories.
Assigning Reviewers

Click on the article title:

![Figure 154: Review details](image)

You have the option to:

- Send an email message to the author (click on the envelope icon next to the author’s name) or the editor.

- View the original submission file by clicking the link or upload a new version of the document for review.
Select a reviewer for the first round of review. Click the “Select Reviewer” link. From the list of names, assign a reviewer:

Figure 155: Selecting reviewers

If you wish to assign further reviewers, repeat this process.

When you have finished assigning reviews, you should be returned to the “Review” Section. Click on “Select Review Form”, and on Review Forms page assign an appropriate review form.

Figure 156: Selecting Review Form
Click the “Request” icon to generate an email message to each reviewer:

This email message includes a one-click access URL that will allow the reviewer immediate access into the OJS system.

Note that after sending the message, the “Request” icon now includes a message sent date:
Working with Reviewers

You can use this section to cancel a review request (click Cancel Request), change the due date (click the due date link), send a reminder to the reviewer (use the Send Reminder link), and to read the reviewers comments (click the “Review Form” icon). Any uploaded files from the reviewer will also be available here.

The reviewer’s recommendation will also appear in this section once their decision has been made.

Some journals are also configured to allow you to rate the reviewer on a scale of 1 – 5, based on the quality of their review, their timeliness, etc.

You will receive a message once the reviewer has completed their review. At this point, you can use the “Acknowledge” icon to thank them for their efforts:

<table>
<thead>
<tr>
<th>Peer Review</th>
<th>Round 1</th>
<th>SELECT REVIEWER</th>
<th>VIEW REQUESTS, CANCELS, PREVIOUS ROUNDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewer A</td>
<td>Rhona Macdonald</td>
<td>Research Articles Review Form</td>
<td>REQUEST</td>
</tr>
<tr>
<td>Review Form</td>
<td></td>
<td></td>
<td>2008-07-06</td>
</tr>
<tr>
<td>Recommendation</td>
<td>Accept Submission</td>
<td>2008-07-06</td>
<td></td>
</tr>
<tr>
<td>Review Form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Response</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uploaded files</td>
<td>None</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 160: Acknowledging the reviewer
Making a Decision on an Article

You must now decide the next step for the submission. In the “Editor Decision” section, you must select whether to accept, ask for revisions, resubmit for another reviewer, or decline the submission. Select your choice from the dropdown menu and click “Record Decision”:

![Editor Decision](image)

**Figure 161**: Making your decision

Once press “Record Decision”, a window pops up to ask for confirming the director decision.

![Confirming Message](image)

**Figure 162**: Confirming Message

Next, you will need to notify the author of your decision, using the Notify Author email icon. You must upload an edited version to the copyeditor:
Finally, you can use the Send button to select the copy of the article for the copyeditor:

![Editor Decision](image)

**Figure 164: Selecting file for the Copyeditor**
Copyediting

You will then be taken directly to the editing section for the article. If your journal employs people as copyeditors, you will be asked to select one now. You will request and acknowledge their participation as with the reviewers:

![Figure 163: Assigning a copyeditor](image)

The following screen will allow you to pick from your list of copyeditors:
Once the copyeditor has been assigned, you can use the Request icon to send an email asking him or her to undertake the assignment:

The copyeditor will then review the document and correspond with the author. You will be notified when they are both satisfied with the article.
Be sure to use the Acknowledge email messages to thank everyone involved for their participation.

For journals where the section editor acts as the copyeditor, you can begin the copyediting process by selecting the “Initiate” link. The section editor reviews the copyedit version of the article by selecting the file link. He or she then makes any changes and uploads the edited version using the file upload tool. When the copyediting is completed, select the “Complete” link. This will activate the “Request” icon allowing you to send a message to the author asking for them to now review your copyedits and make any changes.

When the author responds, send an acknowledgement message. Review any changes they have made. You may now use the file upload tool to add any final changes you wish to make.

**Layout Editing**

Once the copyediting has been completed, you may now begin the layout editing process by using the file upload tool to enter the latest version of the article and selecting a layout editor. If the section editor is also acting as the layout editor, you will initiate the process and upload the galley formats yourself.

If you have people to act as Layout Editors, you may select one using the “Assign Layout Editor” link:
Figure 169: Assigning the layout editor

Choose a layout editor from the list:

Figure 170: Assigning the Layout Editor

Use the Assign link to assign them to the article. Request their participation using the “Request” email icon:
You can review any layout comments from the Layout Editor using the Layout Comments icon.

When the HTML and PDF documents are delivered by the Layout Editor, you can view, edit, or delete them. You also have the option of uploading additional files. Send the Layout Editor an acknowledgment message when you are satisfied with the galley files:

![Figure 171: Request Layout Editing](image)

**Figure 171: Request Layout Editing**

OJS in an Hour 142

<table>
<thead>
<tr>
<th>Layout</th>
<th>Theresa Ball</th>
<th>ASSIGN LAYOUT EDITOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layout Editor</td>
<td>Theresa Ball</td>
<td>ASSIGN LAYOUT EDITOR</td>
</tr>
<tr>
<td>Layout Version</td>
<td>141-322-1-PL-DECK</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>File:</td>
<td>141-322-1-PL-DECK</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>Galley Format</td>
<td>HTML</td>
<td>141-322-1-PL-DECK</td>
</tr>
<tr>
<td>File:</td>
<td>141-322-1-PL-DECK</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>Supplementary Files</td>
<td>PDF</td>
<td>141-322-1-PL-DECK</td>
</tr>
<tr>
<td>File:</td>
<td>141-322-1-PL-DECK</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>Upload file to</td>
<td>Layout Version, Galley, Supp. files</td>
<td>Browse, Upload</td>
</tr>
</tbody>
</table>

![Figure 172: Final layout editing](image)

**Figure 172: Final layout editing**

OJS in an Hour 142
Proofreading

You may now begin the proofreading process by sending a request to the author for a final review of the article before publication. Use the “Request” icon to send the message:

![Proofreading request to the author](image)

If your journal employs people as proofreaders, you will be asked to select one now. You will request and acknowledge their participation as with the reviewers. Use the Assign Proofreader link for a list of possible proofreaders:

![Assign Proofreader](image)

If the section editor acts as the proofreader, you can begin the process by selecting the “Initiate” link.
Throughout the proofreading process, you will be able to examine the revisions and communicate with the author and/or proofreaders. Acknowledgement messages can also be sent as each task is completed.

Once the author and proofreader/section editor are satisfied with the galleys and have recorded any necessary changes in the “proofreading corrections” section, send acknowledgement messages thanking all involved for their efforts:

Finally, scroll down to the Scheduling section, and using the dropdown menu, select the issue in which this article will appear. Notice that the article can be placed in a current issue, a future issue, or even a back issue:
Reviewers

The Reviewer is selected by the Section Editor to review a submission. Reviewers are asked to submit reviews to the journal's web site (although some journals opt for an email review policy – see Journal Setup section 2.2) 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.

Getting Started

- Log in to your OJS account.
- Select your role as ‘Reviewer’.

Figure 177: Selecting role as Reviewer
Reviewing Articles

In the “Active Submissions” section, select the article title (note the due date of the review):

![Active Submissions](image)

**Figure 178:** Active submissions for review

From the “Review” page, you can see some brief information about the submission and the review schedule (including the due date of the review):

![Review](image)

**Figure 179:** Review page
Further down the Review page, you will see the 5 review steps which need to be followed:

**Review Steps**

1. Notify the submission's editor as to whether you will undertake the review.
   - Response: Will do the review ✅ Unable to do the review ❌

2. Click on file names to download and review (on screen or by printing) the files associated with this submission.
   - Submission Manuscript: 141-217-1-RV.DOCX 2008-07-06
   - Supplementary File(s): None

3. Click on icon to fill in the review form.
   - Review Form

4. In addition, you can upload files for the editor and/or author to consult.
   - Uploaded files: None

5. Select a recommendation and submit the review to complete the process. You must enter a review or upload a file before selecting a recommendation.
   - Recommendation: Choose One

**Figure 180: Review Steps**

**Step 1:** To accept the request, click the “Will do the review” icon and send the email message that is generated:
To decline the request, click the “Unable to do the review” icon and send the email message that is generated.

**Step 2:** Click the file name to read the submitted article (as well as any supplementary files). Depending on the settings of your journal, the reviewer may not be able to see the file until they have accepted the review request. Once the acceptance email is sent, the link to the file will appear.
Step 3: Click the "Review Form" icon to record your review. You need to enter text, check boxes, make selections of all required fields:

![Review Form](image-url)

If no review forms are created or the created review forms are deactivated, a “Review” icon appears, and the default form for the reviewer looks like below:
Save your reviews. You may return to this form and add additional information at anytime until your review is complete. When you have finished your review, select “Done”.

**Step 4:** If you wish to upload files for the author and/or the editor to consult, use the “Upload files” tool.

**Important**: Please read the linked information on ensuring a blind review.

**Step 5:** Select a recommendation and submit the review to complete the process. You must enter a review or upload a file before selecting a recommendation:
Once you have submitted a review to the editor, you will no longer be able to make changes to your review. Be sure you have completed your review before clicking the submit button:

At this point, an email message will also be provided, informing the Section Editor of the completion of your review:
Send Email

To: Rebecca Ericksen <Rebecca.Ericksen@hnte

CC:

BCC:

Add Recipient | Add CC | Add BCC

Send a copy of this message to my address
(Rhona.Macdonald@medimonaish.edu.au)

Attachments

Browse | Upload

From: "Rhona Macdonald" <Rhona.Macdonald@medimonaish.edu.au>

Subject: [ ] Article Review Completed

Body:

I have now completed my review of "Journal Publishing in North America" for New OJS Journal, and submitted my recommendation, "Accept Submission."

Rhona Macdonald

Figure 186: Completed Review Message
Copyeditors

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

Getting Started

- Log in to your OJS account.
- Select your role as ‘Copyeditor’.

Figure 187: Signing in as a copyeditor
Copyediting

Choose the title link for the article to begin the copyediting process:

![Active Submissions Table](image1)

**Figure 188:** Selecting an article for copyediting

From the Copyedit section, you can view a copy of the submission:

![Submission and Copyedit](image2)

**Figure 189:** Downloading an article for copyediting
Make any necessary changes and upload the revised document using the upload tool. Select the “Complete” icon to send a message to the author, as well as a revised copy of the submission.

When the author has finished with their copyediting, they will notify you and submit a revised document. You may then review this document for final copyediting.

When finished, you may or may not upload a revised version, and select the “Complete” icon informing the Section Editor and Author that you have finished with the submission:

![Copyedit](image)

**Figure 190**: Completing the copyediting

The article is now ready for layout editing. Remember to read the copyedit instructions and review any copyedit comments.
Layout Editors

The Layout Editor transforms the copyedited versions of the submission into galley files in HTML, PDF, PS, etc., depending on which formats the journal has elected to use for electronic publication.

This system does not provide software for converting word processing documents to galley formats, so the Layout Editor should have access to and be able to use third-party software packages for creating galleys (Adobe Acrobat, PDF Creator [open source] or Open Office [open source] for PDFs; or Dreamweaver or Nvu [open source] for HTML), which present the articles on the screen with a well-formatted and readable layout, in the manner of scholarly journals, and with an eye to this new publishing medium (by consulting the layout used by other online publishers, such as Highwire Press, for example, in the life sciences or Project Muse in the humanities).

Getting Started

- Log in to your OJS account.
- Select your role as ‘Layout Editor’:

![Figure 191: Signing in as a Layout Editor](image-url)
Layout Editing

From the “Active Submission” page, select the title of the article:

![Figure 192: Selecting an article for editing](image)

In the “Layout” section, you must download a copy of the submission and create HTML and PDF versions of the article (galley formats). It is important to review the standards for these documents before uploading them by reading the Layout Instructions. Any comments can be recorded using the “Layout Comments’ icon.

Use the upload galley format tool to submit these documents:

![Figure 193: Uploading galley files](image)
For HTML documents, you will add a label (e.g., HTML; OJS may already have guessed the correct label, so you may not have to change this):

![Figure 194: Adding the HTML galley](image)

Any image or style sheet files associated with the HTML document should also be uploaded at this point.

For PDF documents, you will add a label (e.g., PDF):
When the HTML and PDF documents have been uploaded, you may then change the order in which they will appear, using the up and down “Order” arrow links.

You may also view the proofs, edit them, or delete them:
When you have finished, select the “Complete” email icon, notifying the section editor that the documents are ready for proofreading.

Once the author and proofreader have finished with the HTML and PDF versions, you may review any proofreading corrections using the “Proofreading Corrections” link near the bottom of the section. When you are finished making all changes to the documents, use the “Complete” icon to notify the Section Editor:

The article is now ready to be published.
Proofreaders

The Proofreader carefully reads over the galleys in the various formats in which the journal publishes (as does the author), checking for typographic and formatting errors, which the Layout Editor will fix. In the case of some journals, the Editor and Section Editors play this role.

Getting Started

- Log in to your OJS account.
- Select your role as ‘Proofreader’:

![Figure 198: Signing in as a proofreader](image)

Proofreading

Select the article title from your list of submissions to proofread.

The HTML and PDF versions are available in the “Layout” section. Proofreading instructions are linked at the bottom of the section. You may also submit corrections using the “Proofreading Corrections” icon.
When you are finished, use the “Complete” icon to notify the Layout Editor:

<table>
<thead>
<tr>
<th>Layout</th>
<th>Theresa Ball</th>
<th>FILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Galley Format</td>
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</tr>
<tr>
<td>1. HTML</td>
<td>VIEW PROOF</td>
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<tr>
<td>2. PDF</td>
<td>VIEW PROOF</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>Supplementary Files</td>
<td>FILE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>None</td>
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</tr>
<tr>
<td>Layout Comments</td>
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</tbody>
</table>

<table>
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<th>Lily Little</th>
<th>REVIEW</th>
<th>METADATA</th>
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<tbody>
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<tr>
<td>1. Author Comments</td>
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<td>2008-07-06</td>
</tr>
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<td>2. Proofreader Comments</td>
<td></td>
<td>2008-07-06</td>
<td>2008-07-06</td>
</tr>
<tr>
<td>3. Layout Editor Final</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proofreading Corrections</td>
<td>PROOFING INSTRUCTIONS</td>
<td></td>
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</tbody>
</table>

**Figure 199: Proofreading**