



Publication workflow in OJS 3

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Some sections of this guide have been adapted from "Learning OJS 3.1: A Visual Guide to Open Journal Systems", which was produced by the Public Knowledge Project at Simon Fraser University and is licensed under a CC BY 4.0 licence.



Overview of the publication process

In OJS, articles can only be published as part of an issue. The most common approach is as follows:

1. Create an **issue**
2. **Add articles** to the issue
 - a. Create a **submission record** for every article (if applicable)
 - b. Upload the **final full-text PDFs** and/or other article files
 - c. **Assign** each article to the new issue
3. **Publish**
 - a. **Preview** and **edit** the issue as needed
 - b. **Publish** the issue

It is also possible to assign an article to an issue that is **already published** (Back Issue). In this case, the article will be made available online immediately after it is added to the issue.

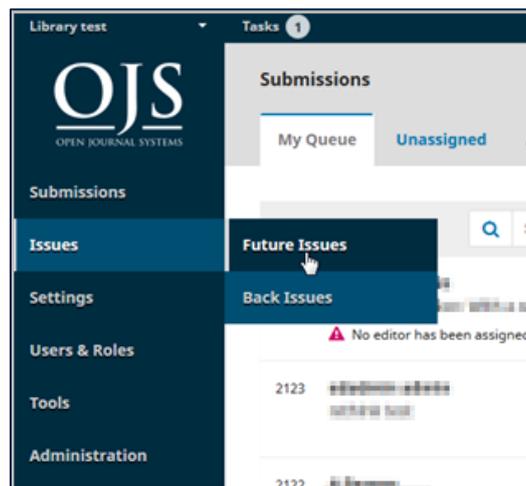
Creating an issue

Below you can see how to create an unpublished issue (Future Issue) in OJS 3. You can create as many Future Issues as you wish, and add articles to any of them at any time.

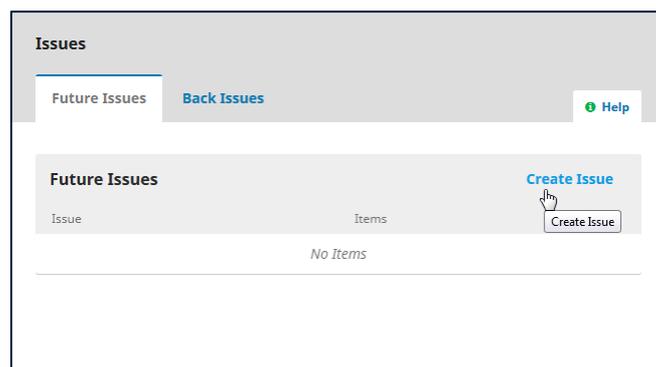
Create issue

You can create an unpublished issue by going to the **Issues** module and filling in a short form.

1. Go to the **OJS admin dashboard**
2. Select **Issues** from the left menu panel, then **Future Issues**



3. Click on the **Create Issue** link



4. **Fill in the form** that will open up and **save**
*There are fields to add **issue-level metadata**, such as volume, issue number, year, and title, and also a description and a cover image (if needed). If there is no issue number or title, **untick** the corresponding checkboxes before saving.*

The Title field is for adding an issue title (e.g. Special Issue on Testing), **not the title of the journal**.

Adding articles to an issue

Once an issue has been created, you can start adding articles for publication to it. If **authors have not submitted their articles via OJS, you will need to create a submission record for every article manually** (See 'Create submission record' section below). Before you can publish, you will need to upload the full-text galley(s) of each article and assign the articles to the issue you have created. Alternatively, you may do the issue assignment first, and upload the full-text galley(s) later.

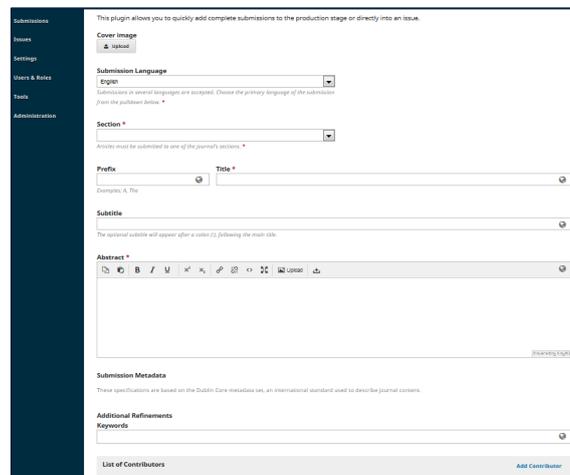
Create submission record

The quickest way to create a submission record for an article that has been submitted, peer-reviewed, etc. externally is via the QuickSubmit plugin.

1. Go to the **OJS admin dashboard**
2. Select **Tools** from the left menu panel, then **Import/Export**
3. On the Import/Export tab, click on the **QuickSubmit Plugin** link
4. **Fill in the short form** that will open up: select section, add title, abstract, author details, and keywords, references and article image if applicable

To add author details, got to the **List of Contributors** section of the form and click **Add Contributor**.

You can **amend** the article and author details at any time after the submission record is created.



5. Ensure the **Unpublished** radio button is selected and **save**

If your journal uses DOIs that are generated automatically in OJS, **do not upload a galley file** at this stage. You will first need to **check the DOI** after the submission record is created, and then **add it to the final PDF galley** and any other full-text versions of the article **before** you upload them to OJS.

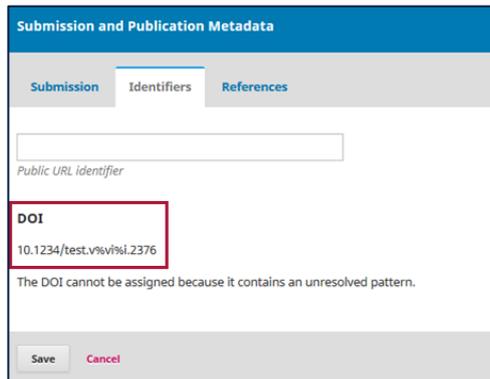
If your journal **does not** use DOIs and does not have article-level Creative Commons licences, you can select the Published radio button, upload your galley file(s) and assign the article to an issue at this stage. Articles that are assigned to published issues (Back Issues) will be published online immediately.

Checking the DOI of an article before publication

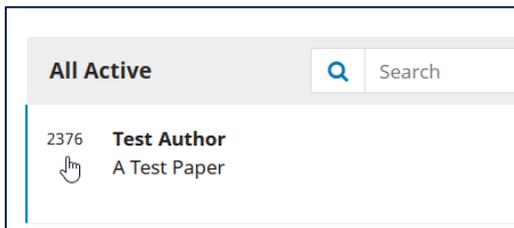
You will need to know the DOI of an article **before you prepare the final full-text PDF** and/or other galleys. This is because the DOI **must be displayed** in all full-text versions of the article, according to the [revised Crossref guidelines](#). There are different ways to obtain the DOI of an article before the article is published. With options 3 and 4 below you will **obtain the actual DOI**, while options 1 and 2 show you how to **construct it manually**.

Note that the **correct format for the DOI** is “<https://doi.org/10.xxxx/xxxxx>”. What you will see in OJS if you follow options 1, 2 or 3 is a DOI in the format “10.xxxx/xxxxx”. When you add the DOI to the full-text galley(s), ensure it is preceded by “<https://doi.org/>” and it is an active link.

Option 1: To check the article DOI before you assign the article to an issue, go to the submission record, click the **Metadata** link, and then go to the **Identifiers** tab of the window that will open up. What you will see there is the **pattern of the DOI**. The pattern may include placeholders for the volume number (%v), issue number (%i) or year (%y). When you add the DOI to the full-text galleys, replace the placeholders with the correct values for volume, issue or year.



Option 2: If you already know the structure of the DOI pattern, you can **construct the DOI** without having to open the Metadata window. The only thing you will need to look up in OJS is the OJS-generated **article code** that typically is part of the DOI suffix. You can see it on the **Submissions tab**, next to the article title. It is also in the URL of the submission record, and in the **Articles** report that you can export from the **Tools** module.



All Active	
2376	Test Author A Test Paper

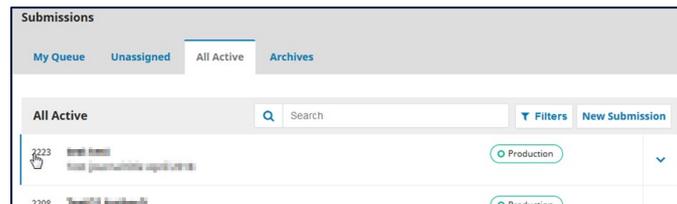
Option 3: It is also possible to check the DOI after the article has been [assigned to an issue](#). One way to do this is to go to the submission record > Metadata link > **Identifiers** tab, as described above. What you will see there is the **actual DOI** of the article, not just a pattern with placeholders.

Option 4: Another way to check the DOI after you have assigned the article to an issue, is to [preview the issue](#), and then go to each **article page**, where the assigned DOI will be displayed.

Upload galley

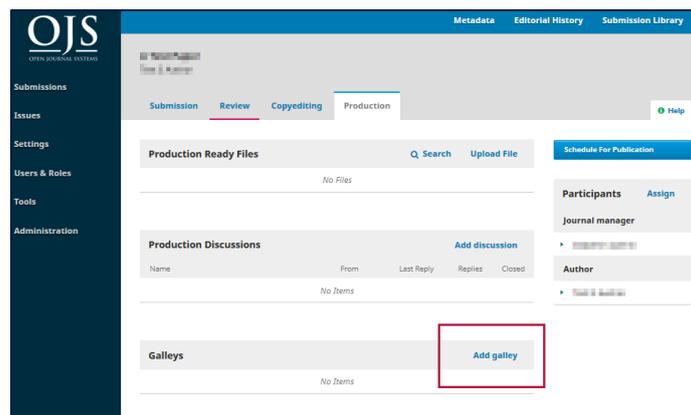
The full-text PDF galley and any other article files can be uploaded at any time, before or after the article is assigned to an unpublished issue.

1. Go to the **OJS admin dashboard**
2. Select **Submissions** from the left menu panel
3. Go to the **All Active** tab
4. **Find and click on the article** to go to its submission record

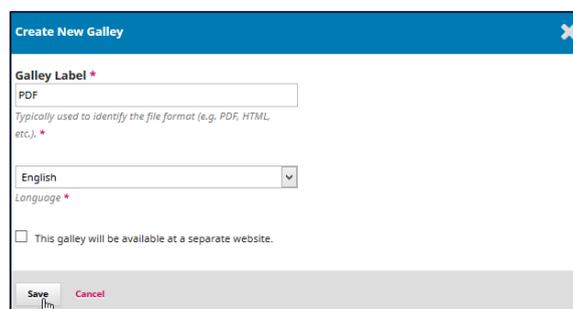


Alternatively, you can go directly to the submission record by clicking on the **Go to Submission link** on page that opens when you create a submission record via **QuickSubmit**.

5. On the submission record, go to the **Production tab**, then the **Galleys** section
6. Click on the **Add galley** link



7. Follow the prompts to **add the galley file**, e.g. full-text PDF



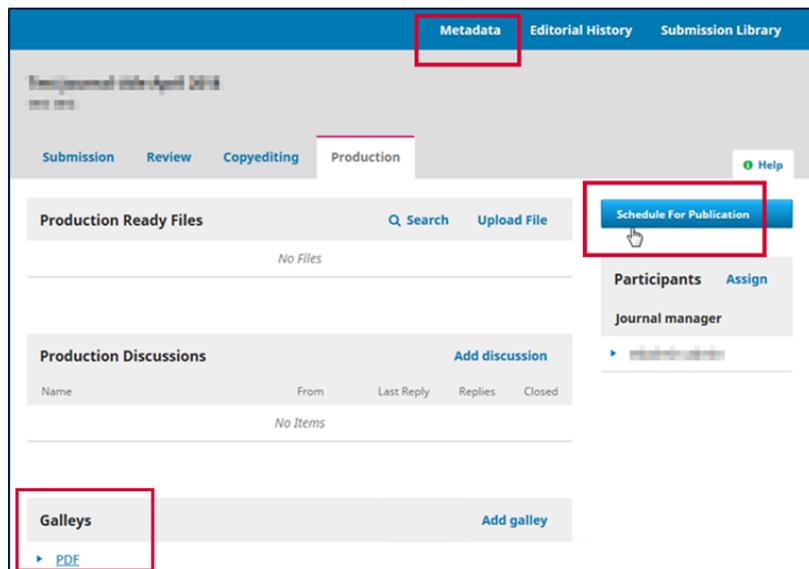
8. **Repeat** to add more galleys if needed

You can **edit**, replace or delete your galleys at any time. Simply find the galley in the Galleys section of the Production tab, and click on the **blue arrow** next to it to reveal your options.

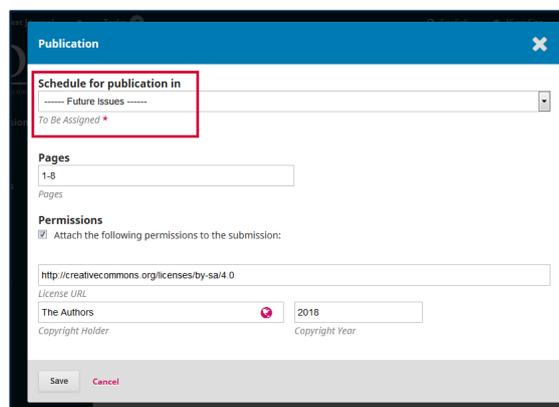
Assign article to issue

You can assign an article to an unpublished issue at any time after the submission record has been created. If you are ready to publish, it is recommended that you check the article metadata and the full-text galley(s) for errors.

1. Go to the **Production tab** of the submission record



2. Click on the **Metadata** link on the blue navigation bar to open up the Metadata window.
3. Check that the article metadata are complete and correct, e.g. article title, abstract, author details, keywords, references.
4. Make any changes, save, and close the Metadata window
5. On the Production tab, go to the **Galley** section, and click on the link(s) to open the full-text galley(s) and any other files
6. Check all is okay and make changes if needed
7. Go back to the Production tab and click on the blue **Schedule for Publication** button to open the Publication window
8. Select the appropriate **issue** from the dropdown menu, add the article's **page range** (optional), check the **Permissions** details and tick the checkbox (optional), and **save**



9. If the journal uses DOIs, a confirmation window will appear **showing the article DOI**. Ensure the checkbox is ticked and click OK



If the article is added to a Future Issue, it will be published when the issue is published. If it is added to a **Back Issue**, it will be published **as soon as** the confirmation window closes.

Publishing an issue

Once an unpublished issue has been populated, you can preview it, make changes to it if needed, and publish it.

1. Go to the **OJS admin dashboard**
2. Select **Issues** from the left menu panel, then Future Issues
3. **Find the issue** and click on the **blue arrow** next to it to reveal the Preview, Edit, Publish, and Delete options

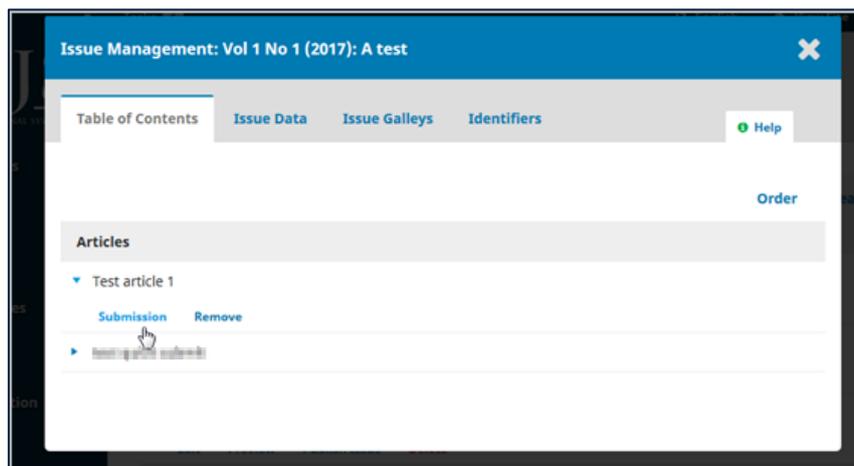


Preview issue

The Preview link will take you to a page showing the online table of contents of the issue in the reader interface. This is exactly **how the issue will display when it is published**. You can click on individual articles to view the abstract page, and view/download the galleys.

Edit issue

The Edit link will open the **Issue Management window**:



This window comprises the following tabs:

Table of Contents: For issues that have had submissions scheduled, they will be listed here. For a new issue, the table of contents will be empty. Use the blue arrow next to each submission to reveal links to go directly to the submission record or remove the submission from the issue. You can also use the **Order** link to reorder the entries.

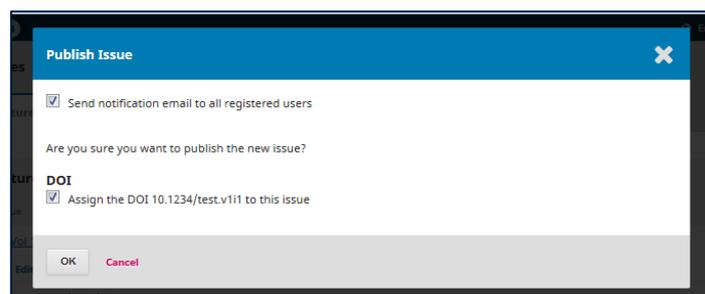
Issue Data: This provides access to the volume, issue, number data you entered when first creating the issue.

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 online table of contents.

Identifiers: Here you can add issue-level identifiers. If the journal supports issue-level DOIs, a DOI will be assigned to the issue automatically on publication.

Publish issue

Once you are happy with the issue, click on the Publish Issue link. A **confirmation window** will appear before the issue is published. Untick the ‘Send notification...’ checkbox if you do not wish to send out an alert – alerts go out to every user who is registered with the journal and has notifications enabled. If the journal uses issue-level DOIs, you will also be prompted to confirm the issue DOI.



Once an issue is published, it **moves** from the Future Issues tab to the **Back Issues tab**. Submissions also move, from the All Active tab of the Submissions module to the **Archives tab**.

You can still **edit a published issue**, if you have to, [using the Edit link](#). If you need to **amend the details of an article**, go to its submission record and then click:

- the Metadata link on the blue navigation bar, to edit the title, abstract, author details, etc.
- the Schedule for Publication button, to edit the page range, licence and publication date

Delete or unpublish issue

You can use the Delete link to remove an unpublished issue. Any assigned articles will revert to their unpublished status. If an issue has been published early by mistake, you can unpublish it by clicking on the Unpublish Issue link that appears alongside Edit, Delete, etc. once an issue is published. The issue will move back to the Future Issues tab and all articles will revert to their unpublished status.