



Upgrading to OJS 3.1

Tips and lessons learned





PKP resources

- [step-by-step guide to upgrading](#)
- [OJS 3 admin guide](#) and further [technical guidance on upgrading](#)
- [Web Application Library](#) on GitHub and [Community Forum](#)
 - *check for known bugs and upcoming features, search for workarounds, ask questions*
 - *there may be an upcoming release with fixes to issues you are having*
- Overview of [OJS 3 features](#)
- [Demo](#) journals
- [Test drive](#) journal (username: admin – password: testdrive)
- Examples of [live journals](#)

Recommended to upgrade to **latest version** (currently OJS 3.1.1-4)

- *fixes for security issues and GDPR-related improvements*



Pre-upgrade considerations 1/3

- Try to identify **potential issues** and things to check post-upgrade
 - *plugins, especially those that are not yet available in OJS 3.x*
 - *custom pages*
 - *workarounds put in place in OJS 2*
 - *sidebar blocks and navigation menus*
 - *full-text HTML, multimedia files, other galley types, supplementary material*
 - *multiple languages and potential issues with character encoding*
 - *discrepancies in the database, e.g. null publication dates, missing file IDs*
- **Quick workarounds** for missing functionality
 - *create static pages for ‘**Book for Reviews**’, ‘Ensuring a Blind Peer Review’, etc.*
 - *use ‘Additional Content’ text box to customise the **journal homepage** (edit CSS to move to top of page)*
 - *Disqus plugin can replace the **deprecated comments plugin** (can migrate old comments)*
 - **Search across** all journals: need to go to [OJS platform URL]/search



Pre-upgrade considerations 2/3

- Journal content, policies and static pages will be migrated automatically, but it's helpful to have something to **check against** post-upgrade
 - *archived copy of OJS 2 site, and/or*
 - *spreadsheet with policies, journal info, details of issues, etc.*
- More limited **search** functionality than in OJS 2
- **Editorial Policies** and **Masthead** entries
 - *replaced by free-text HTML text box in the new admin dashboard*
 - *displayed on 'About' page and 'Editorial Team' page respectively*
 - *text (e.g. Masthead entries) automatically concatenated during upgrade to OJS 3.1*
 - *potential formatting issues*
 - *pop-up windows with Editor bio statements no longer available*
 - *links to Policies page: URL paths may change – update links or set up redirects*
- **Copyright Notice** displays on Submissions page, Submission form *and* on every single article page



Pre-upgrade considerations 3/3

- There are various **themes** to choose from, for example:
 - *default theme* – see [demo](#)
 - [Manuscript theme](#) – see [demo](#)
 - [Health Sciences theme](#) – see [demo](#)
 - [Bootstrap 3 themes](#) – see [Default demo](#), [Paper demo](#), [Yeti demo](#), [Journal demo](#)
 - [Classic theme](#) – see [demo](#)
 - [Immersion theme](#) – see [demo](#)
 - [Old Gregg theme](#) – see [demo](#)
 - [UFRN theme](#) (*platform homepage*)– see [live site](#)
- More information on theming can be found in the [**PKP Theming Guide**](#)



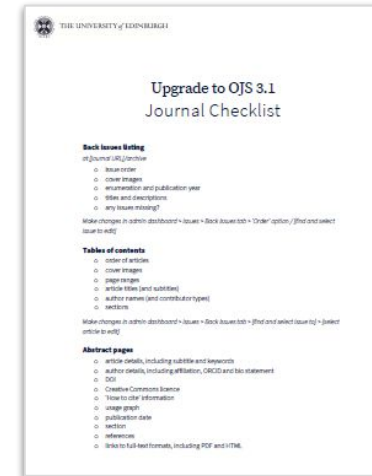
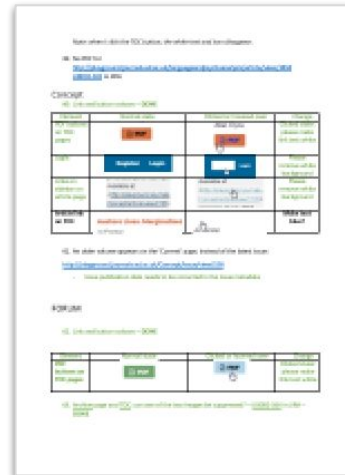
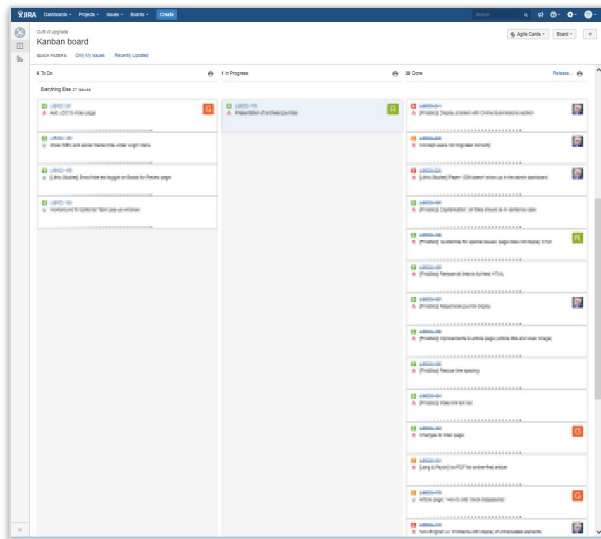
Communication with Editors

- Keep journal Editors **updated**
 - *explain benefits of upgrade and how OJS 3 differs from OJS 2*
- **Test site** for Editors
 - *give access to test site well in advance of live upgrade*
 - *ask Editors to check test site and send feedback*
- Support and **guides** for editors, authors and reviewers
 - *PKP visual guide to OJS 3*
 - *PKP School courses*
 - *contextual Help in admin dashboard*
- **Meetings** with Editors to answer questions (in person or online)
- Opportunity to **update journal policies**
 - *take down policy, privacy policy, copyright and permissions information, Creative Commons licences, etc.*



Test upgrade

- Journal checklist
- Snag list: bugs, CSS changes, Editor requests
 - *document with screenshots and/or spreadsheet*
 - *issue management system (Jira)*





Live upgrade

- **Change freeze** before upgrade
 - *no new publications, no text changes, no user registrations*
- Back up **statistics**
- **Announcement** on journal homepage
- Post-upgrade journal **checklist**
- Snag list
 - *are there things that need to be **fixed again** in live?*