Using OJS 3
Updated October 2020

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Contents

*The sections 'Overview of the OJS 3 dashboard' has 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.*

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Official OJS 3 resources

The Public Knowledge Project team (PKP), who manage and develop OJS, have produced a user guide and two online courses on OJS 3, which you can access by clicking on the headings below. Links to sections of the guide and videos from the courses are provided where appropriate in the rest of this document.

Online guide to OJS 3

Comprehensive online guide to OJS 3. Use the left-hand menu to navigate to specific sections.

Setting up a journal in OJS 3 (online course)

Video-based online course that walks you through the new reader interface and most sections of the administration dashboard (editorial interface), e.g. how to configure the journal's editorial workflow, how to change the way the site looks and operates, how to view and update journal details, editorial team information, sections, etc.

Editorial Workflow in OJS 3 (online course)

Video-based online course that presents how OJS can be used to manage the full editorial process, from submission to online publication.

Please note

— Some of the material used in these resources is based on **earlier releases of OJS 3** and does not cover some features that are available now.

— The two online courses are self-paced and free of charge. To access them, you will need to **register with PKP School**.

Overview of the OJS 3 dashboard

OJS 3 has a dashboard, a separate interface for users who are logged into the editorial system. The dashboard can be accessed from the login/user menu that appears in the top right corner of every page.
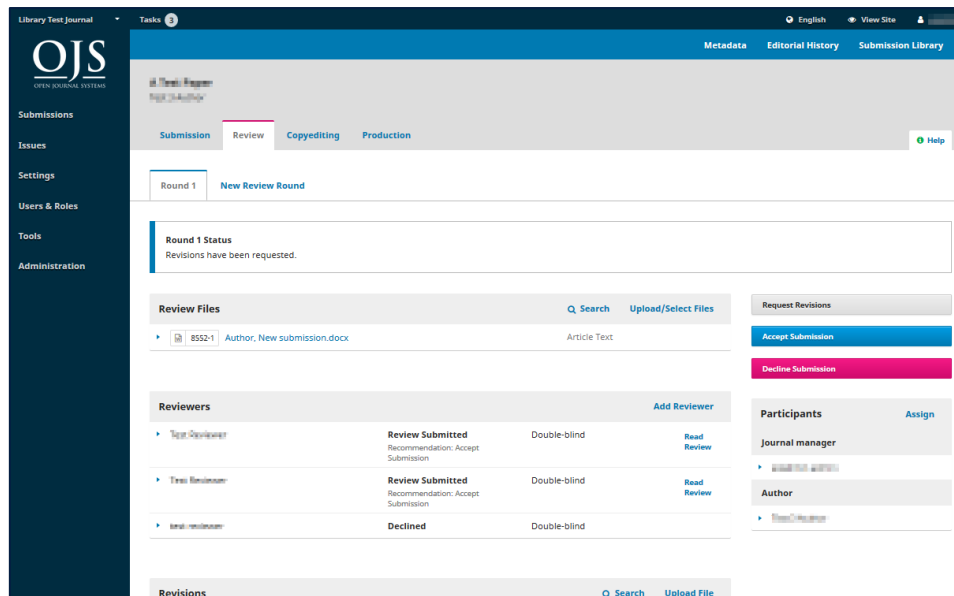

The dashboard consists of the following elements:

1. **Top navigation bar**: To the left, you will find the name of the journal you are currently working with. If you are enrolled in more than one journal, 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 **submissions**, **issue** management, **settings, user and role** management, and **tools**. *Note: Users with fewer permissions (e.g. Authors, Reviewers, Copyeditors, etc.) will see fewer links here.*

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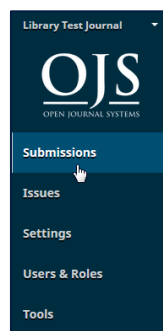
3. **Main panel**: In the main panel you will see the current work area. In the image below, you can see a submission record in the Submission stage.
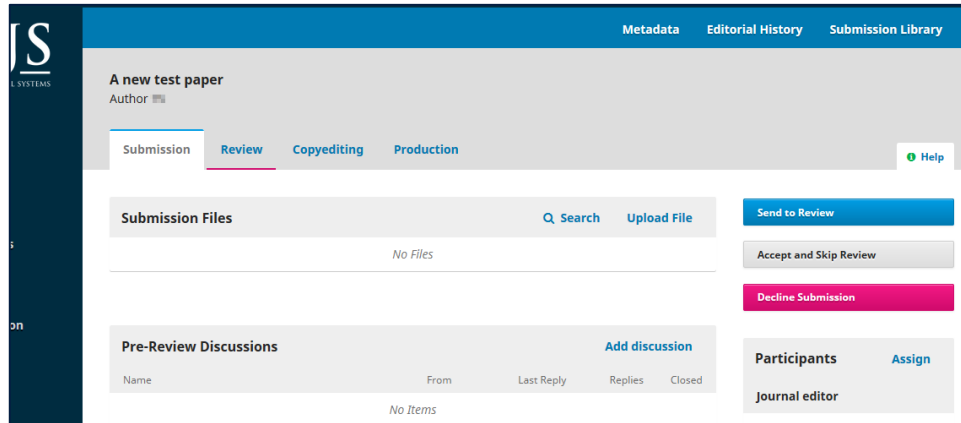
4. **Main panel sub-menus**: Within the Main Panel, you will often see tabs that allow you to view different information about the content being worked on. In this example, you can see the four sections of a submission record (Submission, Review, Copyediting, Production).
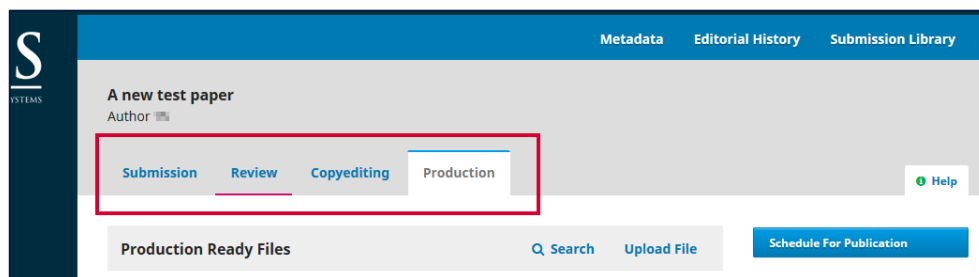
5. **Right panel**: From here you can see the action buttons, such as Schedule for Publication. Different pages have different action buttons. In this example, below the action buttons is the Participants table, which lists everyone (except Reviewers, in the case of blind peer review) involved in the submission.
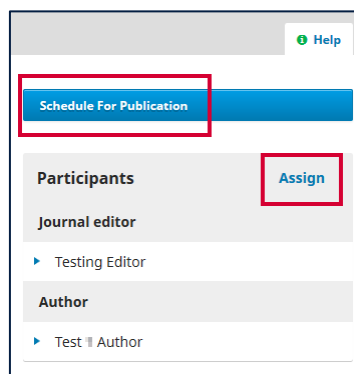
6. **Blue navigation bar**: These menu choices are specific to the different sections of the editorial workflow. Metadata, Editorial History, and Submission Library are all part of the submission record visible below.
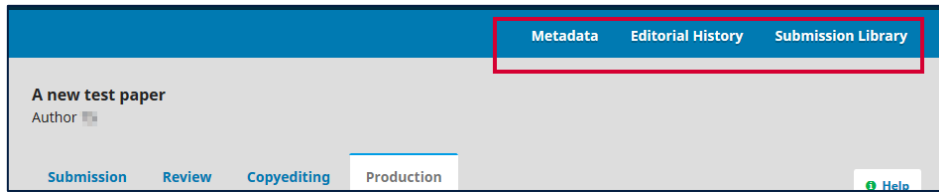
7. *Help tab*: The Help tab appears on every page and provides context-sensitive help.
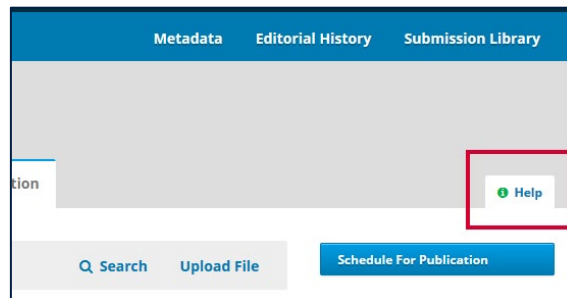
8. **Blue arrows**: You can click on the blue arrows to reveal more information about an item on the dashboard.
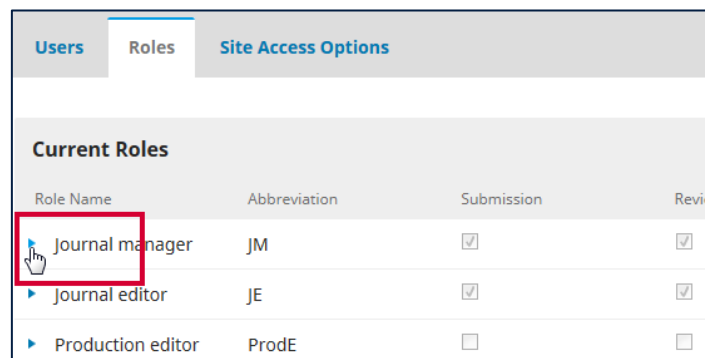
9. **Tasks menu**: Click to view a list of items that need your attention.

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Journal and website management

Edinburgh University Library will do the initial journal and website setup for all journals that use the hosting service, but the summaries and links below may be helpful in the day-to-day management of your journal and its OJS website.

Edit basic journal information

View and update journal details (e.g. title, ISSN, editorial team listing), contact information, and table of content sections (e.g. Editorial, Research Articles, Book Reviews).
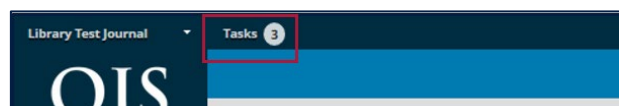
Path: **OJS admin dashboard** > **Settings** > **Journal** > navigate to the relevant tab

PKP videos: Add **journal details** – Masthead tab
                Add **contact information** – Contact tab
                Create **sections** for tables of contents – Sections tab

PKP guide: **Chapter 5: Journal Settings**

Update the website

Change how the site looks and operates, e.g. update homepage text, create announcements, create and edit static pages, activate plugins, including the Custom Block plugin, and all other blocks that appear on the sidebar in the reader interface.

Path: **OJS admin dashboard** > **Settings** > **Website** > navigate to the relevant tab

PKP videos: Customise website **appearance** – Appearance tab
                Create and publish **announcements** – Announcements tab
                Add **custom content to the sidebar** of the website – Custom Block plugin
                Edit information for **Readers, Authors and Librarians** – Information tab
                Turn **OJS features** on/off – Plugins tab

PKP guide: **Chapter 6: Website Settings**

Configure the editorial workflow

Update the setup of the journal's editorial workflow, e.g. change peer-review options, update the submission guidelines for authors, select permitted article components (e.g. article text, datasets, multimedia files), create and edit email templates.

Path: **OJS admin dashboard** > **Settings** > **Workflow** > navigate to the relevant tab

PKP videos: Edit **submission** guidelines, checklist and form – Submission tab
                Set up **peer-review** guidelines, default deadlines and forms – Review tab
                Manage **emails and automatic notifications** – Emails tab
                Edit list of **permitted article components** – Components tab
                Add **commonly-used files** to the Publisher Library

PKP guide: **Chapter 7: Workflow Settings**

Manage users and roles

Create, edit and delete users and user roles, and assign roles to users.

Path: **OJS admin dashboard** > **Users and Roles** > navigate to the relevant tab

PKP videos: Create and manage **user accounts**, and **assign roles** – Users tab
                        Create and **manage user roles** – Roles tab

PKP guide: **Chapter 3: User Accounts** and **Chapter 10: Users and Roles**

Generate reports

Generate usage statistics, reports on peer-review activity and custom reports, and export a list of all articles in the journal.

Path: **OJS admin dashboard** > **Tools** > **Statistics**

PKP video: Generate **usage statistics** and other reports – Statistics module

PKP guide: **Chapter 11: Tools > Report Generator**

Using OJS for the full editorial workflow

OJS can be used to manage the entire editorial process from submission to online publication. In the OJS 3 admin interface, the editorial workflow is divided into four stages: Submission, Review, Copyediting and Production, after which the submission can be published online. **Editors can skip stages** if they are not applicable or have been completed externally.

Path: **OJS admin dashboard** > **Submissions**

PKP video: Overview of **editorial workflow**

PKP guide: **Chapter 14: Editorial Workflow**

Submission

View details of a submission, assign it to an Editor, and respond to the author.

Path: **OJS admin dashboard** > **Submissions** > **Unassigned tab** or **All Active tab** > find and click on submission to go to the submission record > **Submission tab**

PKP video: How authors **make a submission**
               Check and respond to a submission

PKP guide: **Chapter 14: Editorial Workflow > Submissions**

Review

Release a submission for peer review, manage the peer-review process, and accept/reject submissions.

Path: **OJS admin dashboard** > **Submissions** > **All Active tab** > find and click on submission to go to the submission record > **Review tab**

PKP video: **Release a submission for peer review** and assign a reviewer
               How reviewers **complete a review**
               Check review, **respond** to reviewers and authors, request revisions, and record decision

PKP guide: **Chapter 14: Editorial Workflow > Review**

Copyediting

Assign a copyeditor, and send and receive files.

Path: **OJS admin dashboard** > **Submissions** > **All Active tab** > find and click on submission to go to the submission record > **Copyediting tab**

PKP video: Overview of **copyediting** stage

PKP guide: **Chapter 14: Editorial Workflow > Copyediting**

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Production

Assign a layout editor, upload PDF and/or other galleys, proofread galleys, check metadata, and schedule submissions for publication in an issue.

Path: **OJS admin dashboard** > **Submissions** > **All Active tab** > find and click on submission to go to the submission record > **Production tab**

PKP video: Overview of **production** stage and assignment to issue

PKP guide: **Chapter 14: Editorial Workflow > Production**

Issue management and publication

Create, manage and publish issues.

Path: **OJS admin dashboard** > **Issues** > **Future Issues tab** or **Back Issues tab**

PKP video: Create and manage issues

PKP guide: **Chapter 9: Issues**

Role-specific guides

You can share the following guides with reviewers, authors, and the people who do copyediting and typesetting work for the journal.

Guide for authors:

Submission stage: registering with a journal and submitting an article

Review stage: responding to a review and resubmitting for review

After acceptance: responding to a copyediting request and a proofreading request

Guide for reviewers

Guide for copyeditors

Guide for layout editors