Using OJS 3
Updated September 2018

Check for updates
To check if there is an updated version of this document, and to view other related resources, go to edin.ac/oa-resources

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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.
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.

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**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.*
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.

![Main Panel Image](image)

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).

![Main Panel Sub-menus Image](image)

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.

![Right Panel Image](image)
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.
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 content – Sections tab
PKP guide: Chapter 5: Settings > 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 5: Settings > 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 5: Settings > 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 7: 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 8: Tools > Statistics

**Import and export files**

Access the import/export tools of OJS, including the QuickSubmit plugin and the XML export plugins for Crossref and DOAJ.

Path: OJS admin dashboard > Tools > Import/Export

PKP video: Import and export files – Import/Export module

PKP guide: Chapter 8: Tools > Import/Export
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 11: 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 11: 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 11: 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 11: Editorial Workflow > Copyediting
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 11: 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 6: 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