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

✉️ Library.Learning@ed.ac.uk ☑️ edin.ac/journal-hosting 🐦 @EdOpenJournals
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
  - 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

✉️ Library.Learning@ed.ac.uk  🌐 edin.ac/journal-hosting  🌐@EdOpenJournals
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?*