

OJS

EDITOR'S GUIDE

SEPTEMBER 2020



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EDITOR’S GUIDE

Process supervision

PROCESSUS DANS OJS

The editorial process consists in 2 steps:

1. Submission: Following the initial receipt of the article, it is assessed for scientific relevance and compliance with journal policies. Some submissions will not pass this first step and will be declined.
2. Review: The article is sent for external peer review. If needed, a request for revisions will be sent to the author. Some submissions will not pass this step and will be declined.

Discussions

At each step of the process, the discussions feature included in OJS allows a user to communicate with the journal editor without informing the other users.

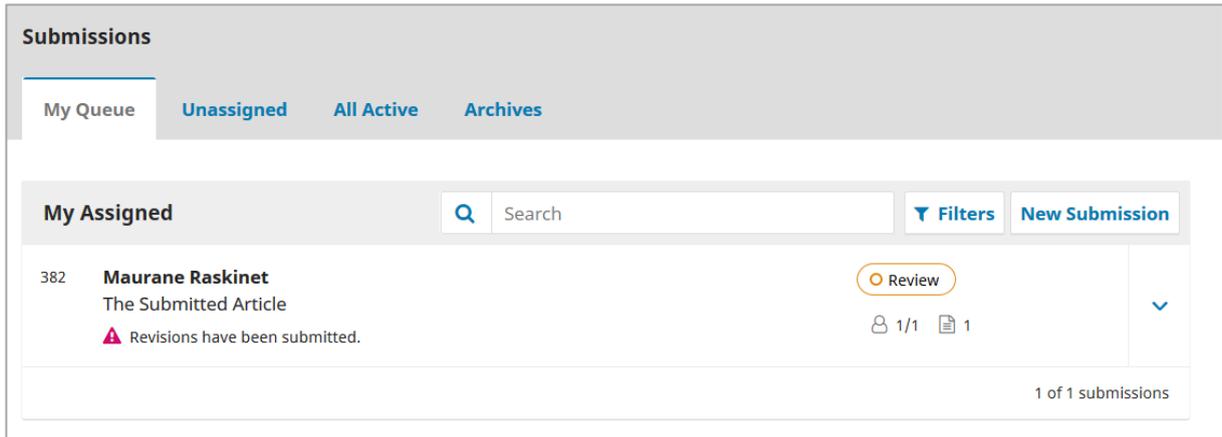
This feature helps to ensure the double blind submission process. All discussions are archived and are part of the reviewing history. It is mandatory to select an interlocutor to start a discussion.

Possible double-blind discussions

Emitter		Receiver
Author	→	Editor
Reviewer	↔	Editor
Editor	→	Author Reviewer

Dashboard

The dashboard allows you to see unassigned, active and archived submissions. The tasks displayed vary depending on the user’s role(s). The dashboard is the first page that appears after you log in.



The visible tabs on the dashboard also vary depending on the logged in user's role(s). The editor has access to all the tabs.

Submissions

This tab contains the list of all the submissions in which the user is involved.

Unassigned submissions

This tab contains the list of the submissions that are yet to be assigned to an editor.

All active

This tab contains the list of all active submissions in the system.

Archives

This tab contains the list of archived submissions, which includes accepted and declined articles.

Filters

The list of submission on the dashboard can be filtered which allows you to only display submissions that meet certain criteria.

Overdue

Shows only submissions for which actions are overdue, such as a response to a review request, a review report or the author's revisions.

Incomplete

Displays only submissions for which actions haven't been completed, for example, if an author starts a submission but doesn't finish it.

Inactive for 30 days

Displays all the submissions for which no action has been taken for 30 days.

Stages

Displays submissions according to the stage of the process they are in.

Sections

Displays submissions according to the journal section in which they were submitted (Articles or Editorial).

Submissions			
My Queue Unassigned All Active Archives			
All Active		<input type="text" value="Search"/>	Filters New Submission
Filters Overdue Incomplete Inactive for 30 days Stages Submission Review Copyediting Production Sections Articles Editorial	382	Maurane Raskinet The Submitted Article ⚠ No editor has been assigned to this submission. Assign Editor	<input type="radio"/> Submission
	458	⚠ No editor has been assigned to this submission. Assign Editor	<input type="radio"/> Submission
	454	⚠ No editor has been assigned to this submission. Assign Editor	<input type="radio"/> Submission
	449	⚠ No editor has been assigned to this submission. Assign Editor	<input type="radio"/> Submission
	448	⚠ No editor has been assigned to this submission. Assign Editor	<input type="radio"/> Submission

Submission process

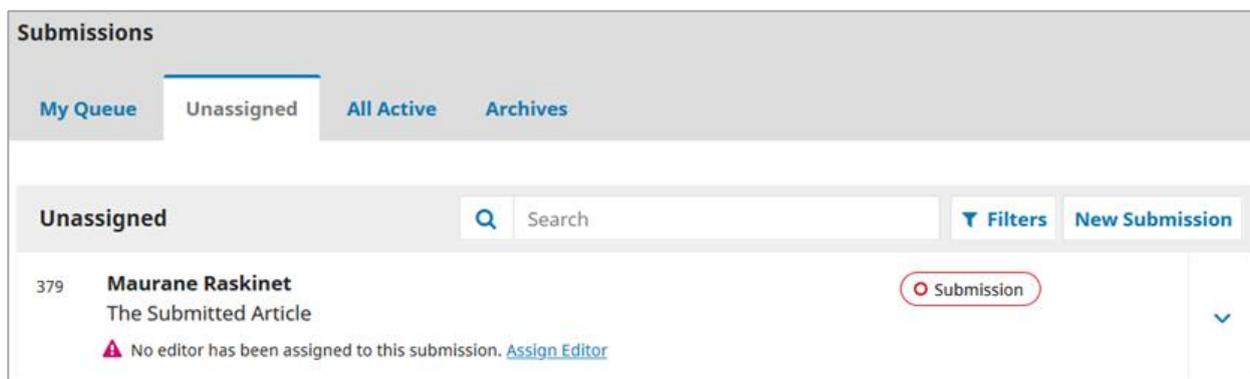
For this demonstration, we will use a fictitious submission « *The Submitted Article* ». In the dashboard, we find this submission in the **Unassigned** tab and in the **All Active** tab.

When an author submits an article, the journal's primary contact receives an email notifying them of the submission.

On the platform, the submission can be found in the Unassigned tab of the dashboard.

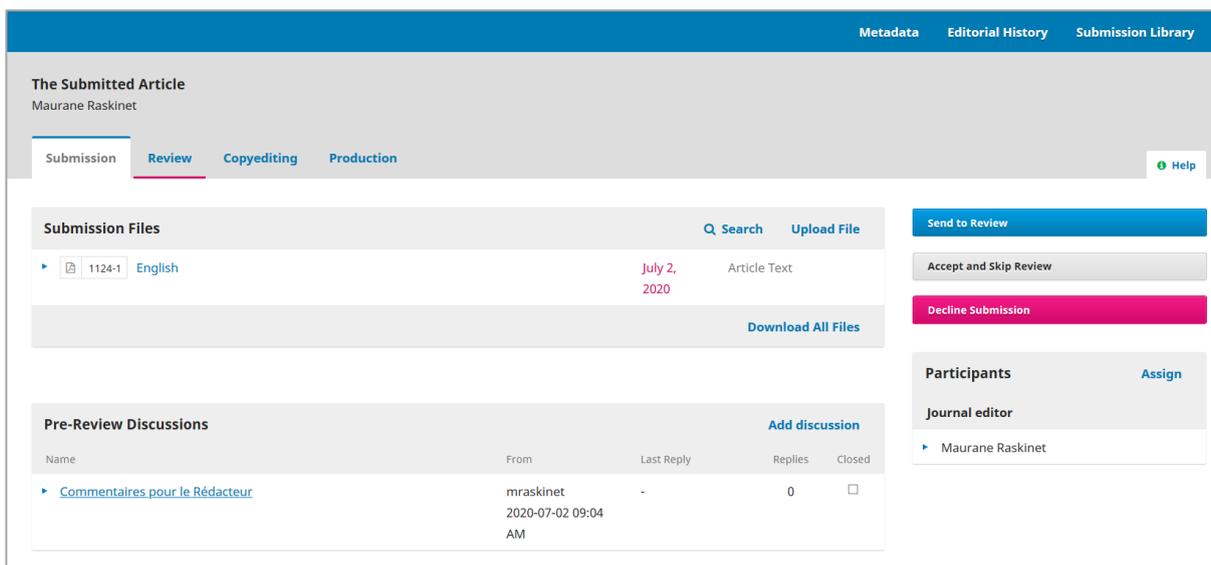
You can quickly identify the stage at which the submission is with the colored oval to the right. This article is at the "Submission" stage.

To see the submission's details, click on it.



The screenshot shows the 'Submissions' dashboard. At the top, there are four tabs: 'My Queue', 'Unassigned', 'All Active', and 'Archives'. The 'Unassigned' tab is selected. Below the tabs, there is a search bar with a magnifying glass icon and the text 'Search'. To the right of the search bar are two buttons: 'Filters' and 'New Submission'. Below the search bar, there is a list of submissions. The first submission is by 'Maurane Raskinet' with the title 'The Submitted Article'. To the right of the title is a red oval with a white circle inside, labeled 'Submission'. Below the title, there is a warning icon (a triangle with an exclamation mark) and the text 'No editor has been assigned to this submission. [Assign Editor](#)'. To the right of the submission entry is a dropdown arrow.

SUBMISSION



The screenshot shows the submission sheet interface for a submitted article. At the top, there are navigation tabs: Metadata, Editorial History, and Submission Library. Below this, the article title 'The Submitted Article' and author 'Maurane Raskinet' are displayed. The main navigation bar includes 'Submission', 'Review', 'Copyediting', and 'Production', with 'Review' currently selected. A 'Help' button is visible in the top right corner.

The 'Submission Files' section contains a table with the following data:

Submission Files	Q Search	Upload File
1124-1 English	July 2, 2020	Article Text
Download All Files		

The 'Pre-Review Discussions' section includes an 'Add discussion' button and a table with the following data:

Name	From	Last Reply	Replies	Closed
Commentaires pour le Rédacteur	mraskinet	-	0	<input type="checkbox"/>
2020-07-02 09:04 AM				

The 'Participants' section shows a 'Journal editor' with the name 'Maurane Raskinet' and an 'Assign' button.

Sections of the submission sheet:

Submission Files

This section contains the list of the files that have been submitted and the date at which they were submitted. More than one file can be added for the same submission.

Pre-Review Discussions

This section allows the journal editor to communicate with the author or with other users of the platform.

Participants

This section shows the list of participants involved in the review process of the submission. Initially, only the author is listed. The other participants will appear when they are added later in the process.

Metadata

Located in the blue bar at the top of the window, this link allows you to consult and revise the submission metadata. The *Identifiers* tab of this window allows you to add a unique identifier for the submission.

Editorial History

This link allows you to see the submission's history and all its related notes. Use the *Notes* tab to add one.

Submission Library

This link allows you to add relevant documents for the submission library.

Make the author anonymous

If you have chosen the blind review method, you have to make sure the submission's author remains anonymous throughout the editorial process.

1. In the *Submission Files* section, click on the added files to download them on your computer.
2. Remove all mentions of the author's (title, properties and all content) in each document and save the new version of the files.
3. In the *Submission Files* section, click on the link **Upload/Select Files** to upload the revision of the files and specify which document this new version corresponds to.

Upload Submission File ✕

1. Upload File 2. Review Details 3. Confirm

If you are uploading a revision of an existing file, please indicate which file.

mraskinet, OJS ARTICLE

Article Component *

Article Text

Drag and drop a file here to begin upload Upload File

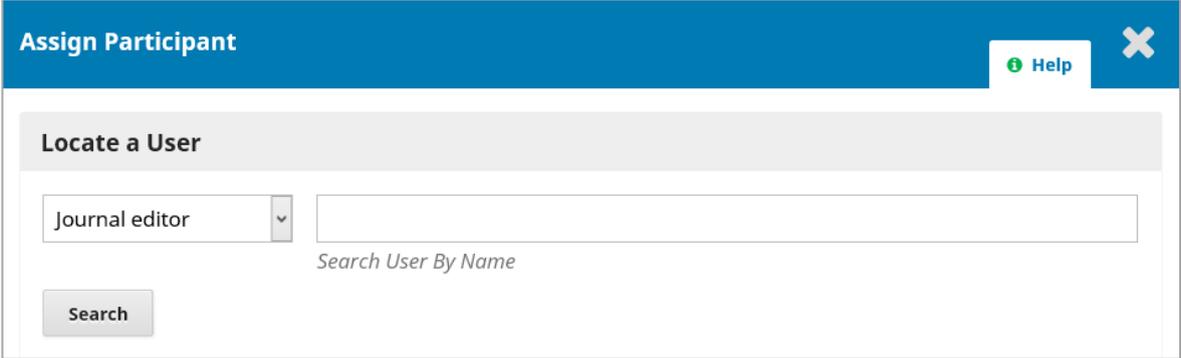
[Ensuring a Blind Review](#)

Continue Cancel

Adding a participant

To assign an editor to a submission, you have to click on **Assign** in the *Participants* section.

A journal manager can assign him/herself as editor.



The screenshot shows a web interface for assigning a participant. The main heading is "Assign Participant" in a blue bar. Below this, there's a "Locate a User" section. It features a dropdown menu currently set to "Journal editor", a search input field, and a "Search" button. The text "Search User By Name" is positioned below the search field. A "Help" button and a close "X" icon are visible in the top right corner of the form area.

The editor is now listed in the Participants section of the form and will see the submission in *My Queue* section of the dashboard. Actions buttons are also available.

Send to Review

Send the submission to the next step of the process: Review.

Accept and Skip Review

Allows you to skip the reviewing process and directly accept the submission.

Decline submission

Rejects the submission without passing through the reviewing process. The submission is therefore archived.

Send a submission to review

Once the editor made sure the content of the submission complies with the journal aims and scope, he/she can click on the **Send to Review** button.

REVIEW

Adding a reviewer

When the submission proceeds to the Review stage, a note appears indicating that reviewers have to be assigned. In the *Reviewers* section of the form, click on **Add Reviewer**.

The screenshot shows the 'Review' stage of a submission process. At the top, there are tabs for 'Submission', 'Review', 'Copyediting', and 'Production'. Below these, there are buttons for 'Round 1' and 'New Review Round'. A status box indicates 'Round 2 Status: Waiting for reviewers to be assigned.' The 'Review Files' section shows a file named '1132-1 Reviewed text, ARTICLE OJS' with a due date of 'July 2, 2020'. On the right, there are buttons for 'Request Revisions', 'Accept Submission', and 'Decline Submission'. The 'Reviewers' section is currently empty, with an 'Add Reviewer' button. Below it, the 'Participants' section lists 'Journal editor' and 'Maurane Raskinet'.

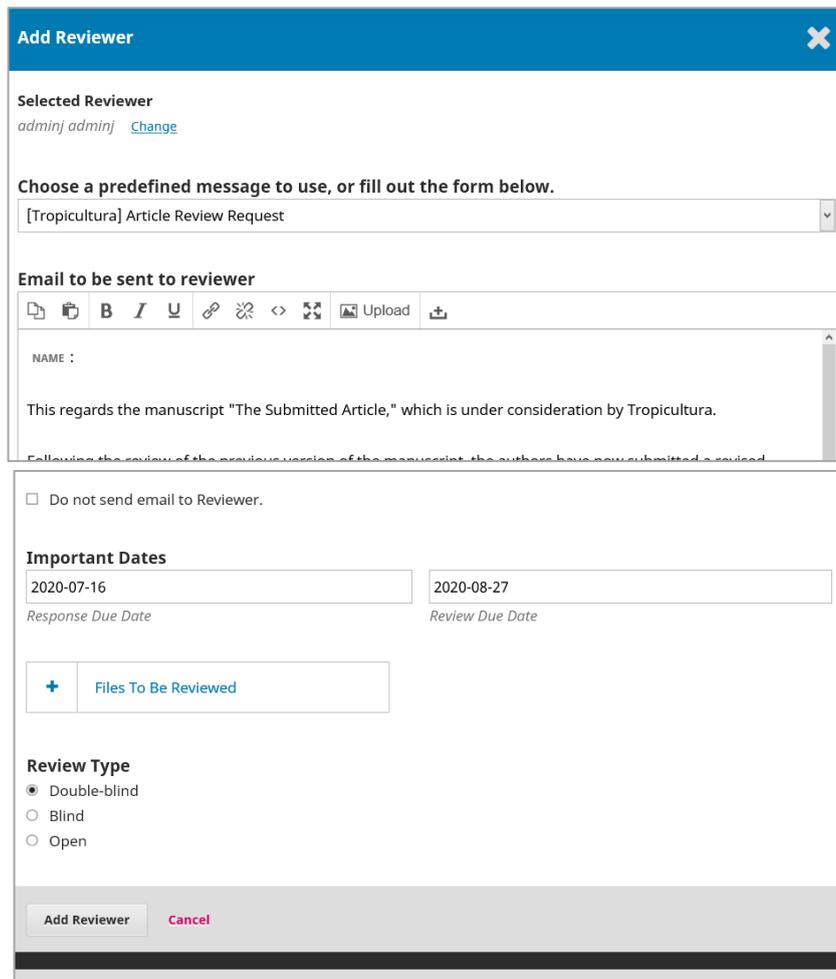
Reviewers are listed in the pop-up window. Search is available by name and discipline and is done through all the available fields. To add a reviewer, select him/her and click on the Select **Reviewer button**.

The 'Add Reviewer' pop-up window has a search bar with 'adm' entered. Below the search bar, there is a list of results for 'adminj adminj'. The first result is 'adminj' with a radio button next to it. Below the name, it shows '1' and 'Never assigned'. At the bottom of the window, there are three buttons: 'Select Reviewer', 'Create New Reviewer', and 'Enroll Existing User'.

Please note that :

- You can only add one reviewer at a time.
- There is no limitation on the number of reviewers who can be invited to review a submission.
- A reviewer who has already been selected is greyed out in the list and cannot be selected again.
- A reviewer who has been selected in a previous review cycle cannot be selected for a new cycle unless you unblock him/her.
- If the author of the submission is also a reviewer for the journal, he/she will not appear in the list.
- By clicking on the arrow on the right of each reviewer, you will see their reviewing statistics.
- It is possible to cancel the invitation of a reviewer only if the reviewer has not responded to it yet.

When you select a reviewer, a mailing window with a predefined message opens. You can modify all the pre-written sections of the email. At the bottom of the window, you can verify due dates and the review type.



Click on **Add Reviewer** to send him/her the email and assign him/her to the submission. If needed or requested, repeat the procedure to assign other reviewers to the submission.

If a reviewer refuses because of a conflict of interests, a note Conflict of Interests is displayed in the submission. Justifying this choice is mandatory. To read it, click on **Review Details**.

During the review, you can view the details and modify each reviewer's profile. To do this, click on the arrow that precedes the reviewer's name.

Reviewers		Add Reviewer
▼ adminj adminj	Request Sent Response due: 2020-07-16	Double-blind
Review Details	Email Reviewer	Edit
Unassign Reviewer	History	Login As
		Editorial Notes

Review Details

Allows you to view the files submitted by the reviewer, to modify his/her recommendation and to rate the quality of the review (not visible for the reviewer).

Email Reviewer

Allows you to contact the reviewer via OJS.

Edit

Allows you to modify due dates for responding to the invitation and for sending recommendations, to modify the review type and to modify the submission's files available for review.

Unassign Reviewer

Allows you to cancel the invitation if the reviewer.

History

Displays a brief history of the reviews made by the reviewer.

Editorial Notes

Allows you to add notes about the reviewer that you want to share with other editors but not with the reviewer him/herself.

Read a review and confirm its receipt

Once a reviewer has finished his/her job, the editor receives an email notifying him/her that a review has been received. This information is also displayed in the dashboard.

Click on Read Review to consult it. Cliquez sur le lien **Lire l'évaluation** pour la consulter.

Reviewers		Add Reviewer	
▶ adminj adminj	Évaluation soumise Recommandation: Accepter la soumission	Évaluation en double aveugle	Read Review

Review Details: The Submitted Article ✕

adminj adminj

Once this review has been read, press "Confirm" to indicate that the review process may proceed. If the reviewer has submitted their review elsewhere, you may upload the file below and then press "Confirm" to proceed.

Notified: 2020-07-02 12:37 PM

Reviewer Files

🔍 Search 📄 Upload File

▶ 1133-1 Review	July 2, 2020
--	--------------

Recommendation

Set or adjust the reviewer recommendation.

Choose One ▼

Reviewer rating

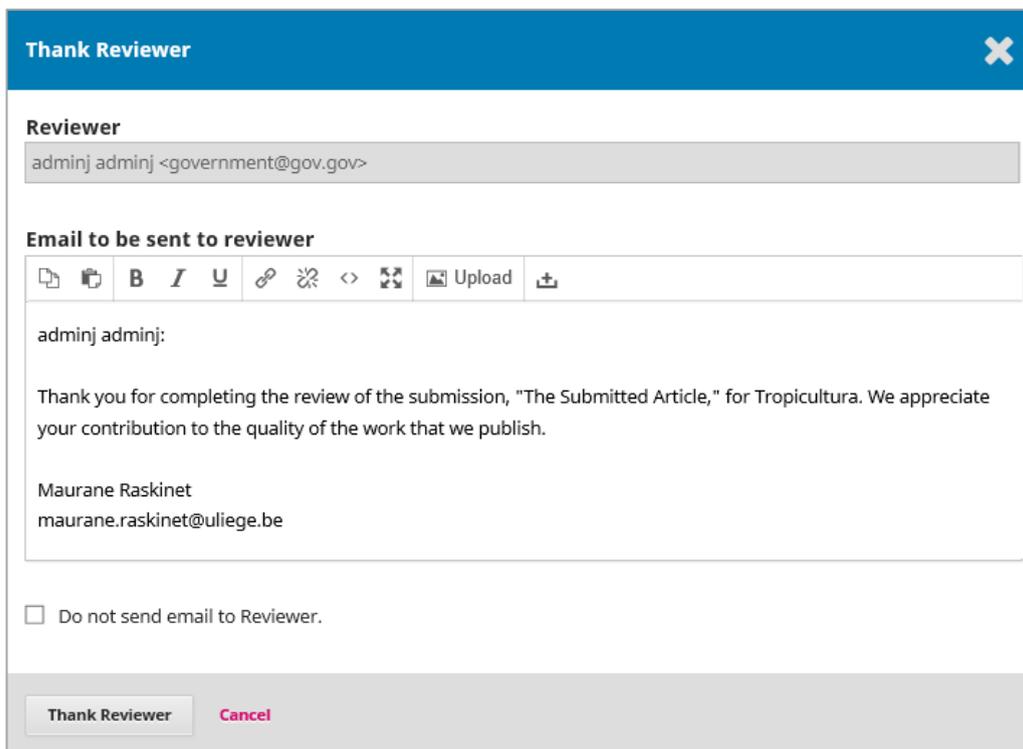
Rate the quality of the review provided. This rating is not shared with the reviewer.

No rating
 ★★★★★
 ★★★★☆
 ★★★☆☆
 ★★☆☆☆
 ★☆☆☆☆
 ★

Confirm
Cancel

As editor, you can rate the quality of the review by choosing the appropriate number of stars. This rating will be displayed in the reviewer's invitation window. Once you are done, click on **Confirm**.

Back in the form, the **Thank Reviewer** link has appeared in the Reviewers section. Click on it.



At the bottom of the mailing window, click on **Thank Reviewer** to confirm the receipt of the review and send him a thank-you email..

It is possible to revert a reviewer's decision by clicking on **Revert Decision**. This action cancels the reviewing confirmation. The reviews and its associated files will not be included in the revisions request email to the author.

Making the reviewer anonymous

You have to make sure the reviewer remains anonymous for the author.

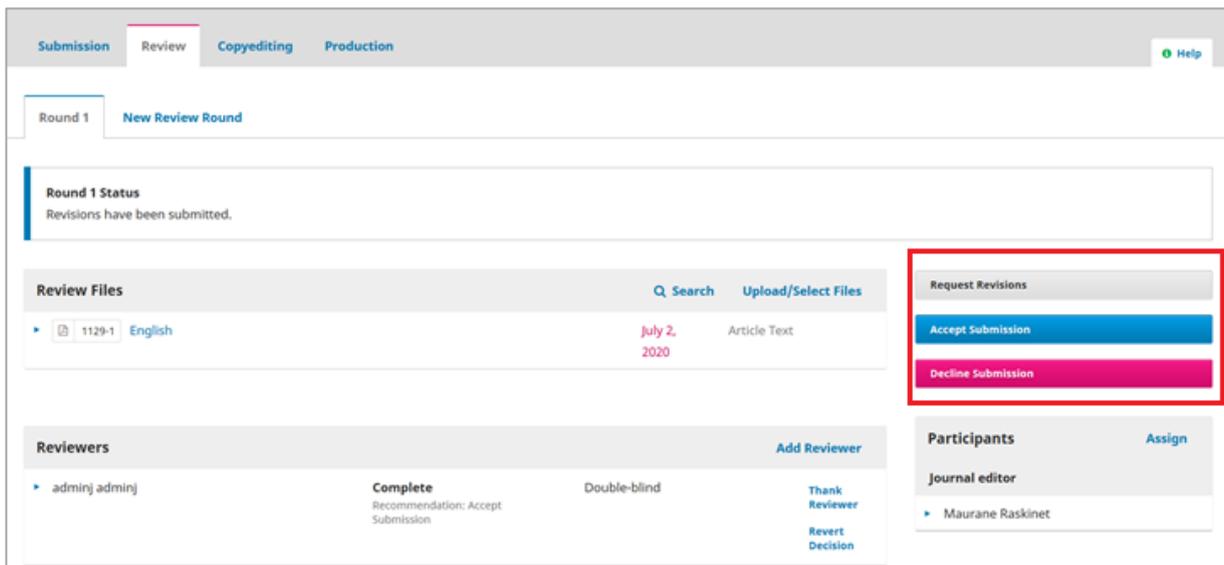
1. In the *Reviewers* section of the dashboard, click on the arrow that precedes the reviewer's name and click on **Review Details**.
2. In the *Reviewer Files* section of the pop-up window, click on all the available files to download them on your computer.
3. Delete all mentions of the reviewer's name (Title, properties and content of the document) for all the files and save the new versions.

4. In the *Reviewers* section of the dashboard, click on the arrow that precedes the reviewer's name and click on **Review Details**.
5. In the *Reviewer Files* section of the pop-up window, click on the **Upload file** link and upload the anonymous versions of the files.

Please note: Rather than making each of the reviews anonymous, the editor can upload a summary report of the reviews. The summary report file can be uploaded at the editorial decision stage explained below.

Editorial decision

Once all the reviews have been received and read, the editor must make a decision.



The screenshot shows the 'Review' stage of the submission process. The top navigation bar includes 'Submission', 'Review', 'Copyediting', and 'Production'. The 'Review' tab is active. Below the navigation, there are sections for 'Round 1 Status' (indicating revisions have been submitted), 'Review Files' (showing a file named '1129-1 English' dated 'July 2, 2020'), 'Reviewers' (listing 'adminj adminj' with a 'Complete' status and 'Double-blind' process), and 'Participants' (listing 'Journal editor' and 'Maurane Raskinet'). A red box highlights three buttons on the right side: 'Request Revisions', 'Accept Submission', and 'Decline Submission'.

Request revisions

The author shall modify the submission and a new Review Round will be necessary.

Accept Submission

The submission is accepted and is moved to the Copyediting step.

Decline submission

The submission failed to pass review and is declined. It is moved to the *Archives* section of the dashboard.

Request revisions

At the editorial decision stage, requesting revisions is the most common choice. In that case, you have to click **Request Revisions**.

Request Revisions
✕

Require New Review Round

Revisions will not be subject to a new round of peer reviews.

Revisions will be subject to a new round of peer reviews.

Send Email

Send an email notification to the author(s): Maurane Raskinet

Do not send an email notification

📄 📁 **B** *I* U [🔗](#) [🔗](#) [<>](#) [🔄](#) [📄 Upload](#) [📄](#)

Maurane Raskinet:

We have reached a decision regarding your submission to Tropicultura, "The Submitted Article".

Our decision is: Revisions Required

Maurane Raskinet
maurane.raskinet@uliege.be

[+ Add Reviews to Email](#)

Select review files to share with the author(s) [🔍 Search](#) [📄 Upload File](#)

<input type="checkbox"/>	▶		1132-1	Reviewed text, ARTICLE OJS	July 2, 2020	Article Text
<input type="checkbox"/>	▶		1133-1	Review	July 2, 2020	

[Record Editorial Decision](#)
[Cancel](#)

In the pop-up mailing window, select the review files you want to send to the author.

You may also create a summary report of the reviews (anonymous) and add it to the files by clicking Upload Files and selecting it to be shared with the author.

Click on **Record Editorial Decision** once the request for revisions is complete. The message *Revisions have been requested* on the top of the submission page confirms that the decision has been saved and that the request was sent to the author.

WARNING: The *Select Review Files [...]* section lists ALL review files. In other words, it includes all the files sent by the reviewers. If those files were not made anonymous (see section *Make the author anonymous*), you have to be careful not to select them so they will not be sent to the author.

Author's revisions

When the author uploads the revisions, an email is sent to the primary contact of the journal and to the submission's assigned editor.

You can also find the uploaded file in the dashboard, in the *Revisions* section of the *Review* tab.

Depending on the received revisions, the editor must make an editorial decision:

- Start a 2nd Review Round;
- Accept Submission;
- Decline Submission.

The screenshot displays the 'Review' tab in a journal submission system. At the top, there are navigation tabs: 'Submission', 'Review' (selected), 'Copyediting', and 'Production'. A 'Help' icon is visible in the top right corner. Below the navigation, there are two sub-tabs: 'Round 1' and 'New Review Round'. The main content area is divided into several sections:

- Round 1 Status:** A box indicating 'Revisions have been submitted.'
- Review Files:** A table with columns for file name, date, and type. It shows one file: '1129-1 English' submitted on 'July 2, 2020' as 'Article Text'. There are 'Q Search' and 'Upload/Select Files' options.
- Request Revisions:** A section with two buttons: 'Accept Submission' (blue) and 'Decline Submission' (pink).
- Reviewers:** A table with columns for reviewer name, status, and action. It shows one reviewer: 'adminj adminj' with a status of 'Complete' (Recommendation: Accept Submission) and a 'Double-blind' review type. There are 'Add Reviewer', 'Thank Reviewer', and 'Revert Decision' options.
- Participants:** A section with an 'Assign' button and one participant: 'Journal editor' (Maurane Raskinet).
- Revisions:** A table with columns for revision name, date, and type. It shows one revision: '1131-1 Reviewed text, ARTICLE OJS' submitted on 'July 2, 2020' as 'Article Text'. There are 'Q Search' and 'Upload File' options.

Start a New Review Round

Click on the **New Review Round** tab at the top of the page. All the information related to the first round will remain available under the **Round 1** tab.

New Review Round ✕

You are about to create a new review round for this submission. Files that have not been used in other review rounds are listed below.

Revisions	Q Search
<i>No Files</i>	

Click on **Create New Review Round**.

Reviewers from the first round are not pre-selected for the next review round, but they can be assigned for the second round as well. When you select your reviewers, you will have to **unblock** them before assigning them to the new review round.

Then, start all the reviewing process again. Don't forget to make the revised submission file anonymous before sending it to the reviewers.

END OF THE EDITORIAL PROCESS

Once the review round(s) is/are completed and all requested revisions have been made by the author, you have to download the final version of the article and archive the submission in OJS.

Then, you can start [laying the article out](#) in LibreOffice before uploading it to PoPuPS.

Email management

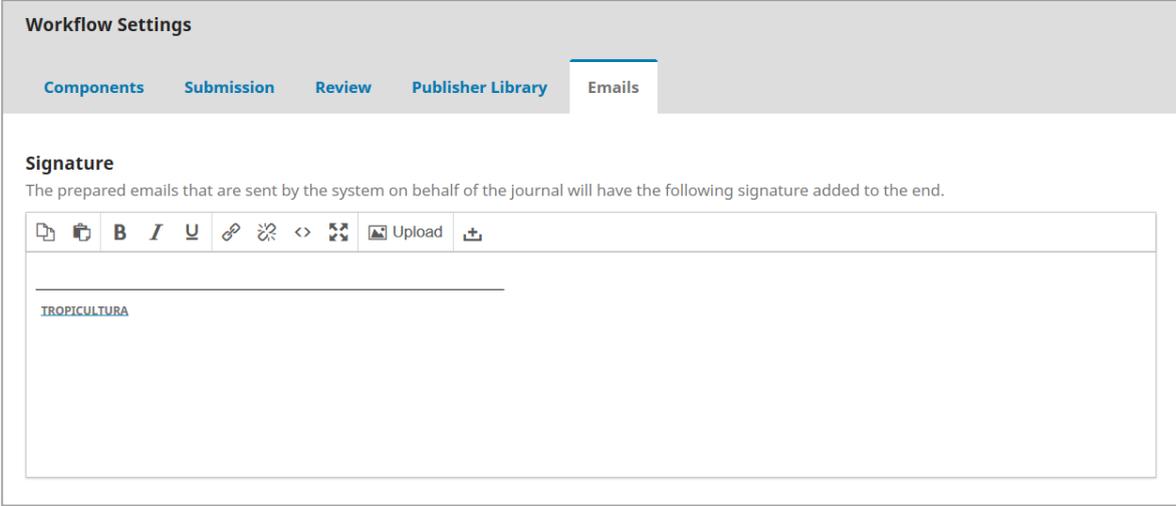
Open Journal System (OJS) offers several default email templates. These can be modified to adapt them to the context of the journal. To do this, go to *Settings > Workflow* section > *Emails* tab. Only the changes made in this section are saved in the templates.

Non-automatic emails can be modified separately before sending them. However, those changes will not apply to templates

CONFIGURATION OF EMAILS' SIGNATURE

To configure a signature that will be included in the emails sent through the platform, go to *Settings > Workflow* section > *Emails* tab. Copy and paste the desired signature in the window under *Signature*.

This signature will be displayed by default at the very end of each emails sent through the OJS system.



The screenshot shows the 'Workflow Settings' interface with the 'Emails' tab selected. Under the 'Signature' section, there is a text area containing the signature 'TROPICULTURA'. The text area has a rich text editor toolbar above it with icons for bold, italic, underline, link, unlink, list, and image upload.

ADD AN EMAIL TEMPLATE

If you want to use this feature, please contact us.

MODIFY AN EMAIL TEMPLATE

To modify an email template, click on the blue arrow at the left of the title, then click on **Edit Email**.

Prepared Email Templates

Name
▼ Citation Editor Author Query
Edit Email Reset

A window in which you can modify the *Subject* and the *Body* of the email pops up (see image below). When the changes are made, click on **Save**.

Edit Email
✕

Template Message Data

Description

This email from the Editor or Section Editor to an Author notifies them of a final "decline" decision regarding their submission.

Email Key

EDITOR_DECISION_DECLINE

Template Details

Subject *

Editor Decision
✔

Body *

B
I
U
<>

 Upload
 ✔

{\$authorName}:

 We have reached a decision regarding your submission to {\$contextName}, "{\$submissionTitle}".

 Our decision is to: Decline Submission

 {\$editorialContactSignature}

* Denotes required field

Save
Cancel

The subject of the emails will always be preceded by the journal's acronym in square brackets (ex : [CGQ] Editor Decision).

WARNING: In the email body, **the content in braces must not be changed**, braces included (see image below). These are parameters that automatically generate information in emails (ex: the name of the journal, the name of the user, etc.) **Note that in some cases, the parameters are not displayed between braces, but with a label within a gray area.**

In the template

Template Details

Subject *

Editor Decision ✔

Body *

📄 📁 **B** *I* U [🔗](#) [🗑️](#) `<>` [🔄](#) [📷 Upload](#) [+](#) ✔

{\$authorName}:

We have reached a decision regarding your submission to {\$contextName}, "{\$submissionTitle}".

Our decision is to: Accept Submission

{\$editorialContactSignature}

Email to be sent to reviewer

📄 📁 **B** *I* U [🔗](#) [🗑️](#) `<>` [🔄](#) [📷 Upload](#) [+](#)

NAME :

This regards the manuscript "The Submitted Article," which is under consideration by Tropicultura.

Following the review of the previous version of the manuscript, the authors have now submitted a revised version of their paper. We would appreciate it if you could help evaluate it.

Please log into the journal web site by RESPONSE DUE DATE to indicate whether you will undertake the review or not, as well as to access the submission and to record your review and recommendation.

The review itself is due REVIEW DUE DATE

Submission URL URL

CONTEXTS WITHOUT TEMPLATES

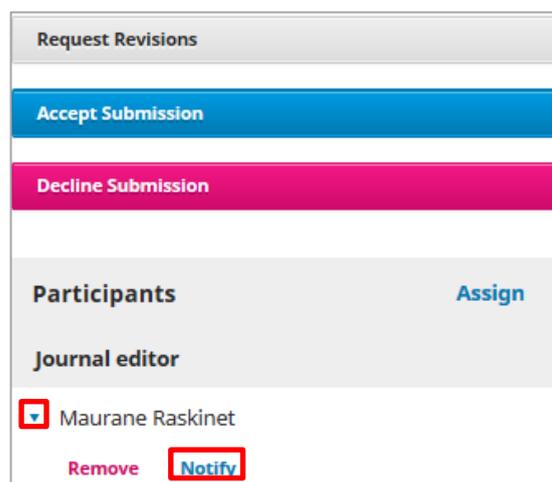
In some contexts, no template is provided. However, some cases such as notices sent manually to submission participants via the link under their name, it is possible to create templates to facilitate the communication of some information. If you want to create a template, please contact us.

AUTOMATICALLY GENERATED TEMPLATES

Some emails are generated automatically. These emails are sent through the platform without the intervention of any user, for example, at the receipt of a new submission, the platform sends an email to the editor, to the author and to co-authors.

SENDING AN ARTICLE FOR PEER REVIEW

No email is generated by the system to notify the author that his/her article is being sent for external peer review at the Submission stage. To inform the author, you have to send him/her a notice by clicking on the blue arrow at the left of the author's name, then on **Notify**.



WRITING EMAILS

Email templates can be modified in text boxes. However, in OJS, the editing language of emails is HTML. If you only use the text boxes or copy and paste from Microsoft Word (or other applications), paragraphs spacing may be inadequate.

To ensure the best email layout possible, it is essential to open and modify the HTML source. Afin d'assurer une meilleure présentation des courriels, il est indispensable de consulter et d'éditer la source HTML. Best practices are given below, but if you are not comfortable with editing the HTML source, please contact us.

To open the HTML source of emails, click on the  icon in the text box. In its HTML version, emails are displayed as illustrated below (HTML tags are highlighted in purple):

```
<p>Dear Sir, Madam,</p>
```

```
<p>Your submission entitled «{$submissionTitle}», has been submitted for publication in the journal <em>{$contextName}</em>. Would you agree to review it for us by the{$reviewDueDate}?</p>
```

```
<p>Here is the submission's abstract:</p>
```

```
<p> Please let us know your response through the following online form: {$submissionReviewUrl}. </p>
```

```
<p>URLS and contents sent in this email are confidential and must not be shared with anyone.</p>
```

```
<p> Hoping that you will accept our request, please accept the expression of our highest consideration.</p>
```

```
<p>{$editorialContactSignature}</p>
```

Here are a few simple rules to ensure optimal presentation of emails:

- Each paragraph must be surrounded by the opening paragraph tag `<p>` and the closing paragraph tag `</p>`
- The use of `
` (newline) tags should be avoided as much as possible. If these tags are present in the HTML code of the email, they can be removed.

You must *never* use HTML tags inside parameter declarations:

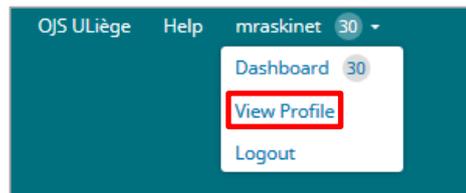
- Correct: `{$contextName}`
- Incorrect: `{ $contextName }`

If you want to lay the content of a parameter out, you must select the braces and their content.

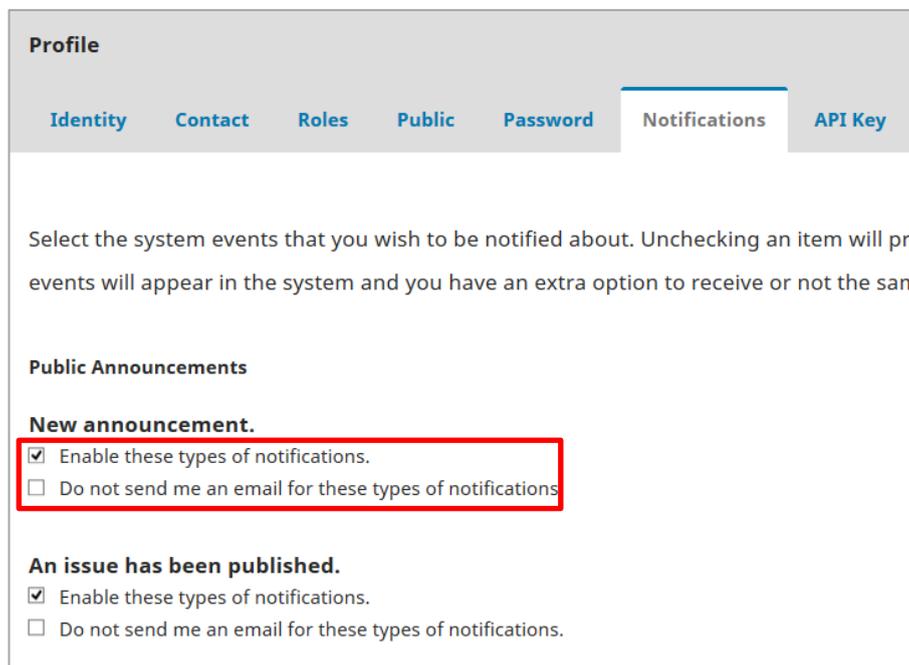
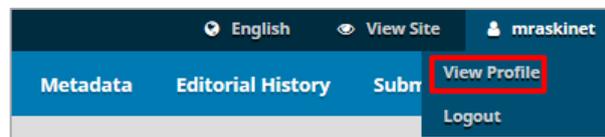
AUTOMATED NOTICES MANAGEMENT

By default, any new user receives notices by email and through notifications in their task list. However, the user can choose whether or not to receive email notifications.

To deactivate notices received by email, you must open the user's profile, open the *Notifications* tab and check **Do not send me an email for this type of notifications**. To deactivate both types of notices (emails and notifications), you must uncheck **Enable these types of notifications**.



Or



Submission events

There are two types of notice for new articles during submissions:

- *A new article, "Title," has been submitted:* this notice is sent to editors who are automatically assigned to articles.
- *A new article has been submitted. An editor must be assigned:* This notice is sent to all the journal's editors if there is not a editor automatically assigned to the article.

In the context of OJS ULiège, an editor is automatically assigned to articles only if there is no other editor(s) for the journal. If the journal has at least two editors, an assignment is necessary.