

Library Roles in Supporting Creation of Serials: Open Journal Systems at UNCG



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Hi, I'm Anna Craft, I'm the Metadata Cataloger at UNCG, and today I'm going to talk about how we at UNCG support users of Open Journal Systems (or OJS) on our campus.

Questions:

- How many of you have serials in your libraries?
- How many of your institutions create or facilitate the creation of serials?
- How many of you are using Open Journal Systems (OJS)?
- Other OA publishing systems?



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Overview

- Open Journal Systems (OJS)
- OJS at UNCG
 - Journals
 - Library roles
 - User roles
- Challenges
- Lessons learned
- Value



Image by the author.

Open Journal Systems (OJS)

- Free, open-source software developed by the Public Knowledge Project (PKP).
- Specifically designed to assist faculty and researchers in publishing peer-reviewed open access journals.
- More information:
 - <https://pkp.sfu.ca/ojs/>
- There are several other OA publishing systems available.

OJS was developed by the Public Knowledge Project (PKP), specifically to aid faculty and researchers in publishing open access journals. This is a program that you download and run on your own web server (though PKP also offers hosted options). There are several other OA publishing systems out there; this is simply the one that we use on our campus.

OJS at UNCG

- Software selected and installed in 2010.
- The University Libraries have strong commitments to service, innovation, and open access initiatives.
- UNCG faculty members requested support in this area.
- UNCG-based journals:
 - <http://libjournal.uncg.edu/>
- Hosting for other UNC schools:
 - <http://libojs2.uncg.edu/>

UNCG started using OJS in 2010, in response to faculty requests for support in this area.

We also host OJS for a couple of other UNC system schools - not to make money, but to improve collaboration and reduce unnecessary duplication of effort.

Currently we are hosting an OJS installation for Western Carolina University, and we have another in development for UNC Asheville.

Active Journals

- Archival Practice
- Found Sounds: UNCG Musicology Journal
- Global Journal of Peace Research and Praxis
- The International Journal of Critical Pedagogy
- Journal of Appreciative Education
- Journal of Backcountry Studies
- Journal of Learning Spaces
- The North Carolina Journal of Mathematics and Statistics
- Partnerships: A Journal of Service-Learning and Civic Engagement
- Proceedings of the Conference for Entrepreneurial Librarians
- Working Papers on Language and Diversity in Education

<http://libjournal.uncg.edu/>

We currently host eleven active journals, and have several others that are in development. As you can see, there is a wide range of topics represented here-- from the archival profession to math and statistics to service learning.

Journal of Backcountry Studies

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Journal of Backcountry Studies

The Journal of Backcountry Studies is a refereed scholarly journal on the Internet focused on the colonial history of the Backcountry - the rural corridor that stretches from southern Pennsylvania to Augusta, Ga.

Vol 9, No 1: Spring 2014

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Articles

Rice Duncan's Long Rifle: A Study of the East Tennessee Long Rifle Tradition	PDF
<i>Jessi White</i>	
Backcountry Bartleby: The Account Books of James L. Smith	PDF
<i>Myra DeLapp Moffett</i>	
Richard Oswald as "An American": How a Frontier South Carolina Plantation Identifies the Anonymous Author of American Husbandry and a Forgotten Founder of the United States	PDF
<i>Robert Scott Davis</i>	
Alexander Cumming - King or Pawn? An Englishman on the Colonial Chessboard of the Eighteenth-century American Southeast	PDF
<i>Ian David Chambers</i>	

JOURNAL CONTENT

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<http://libjournal.uncg.edu/index.php/jbc>

Here is part of a screenshot of the main page for one of our hosted journals--*The Journal of Backcountry Studies*. The OJS system enforces the same basic layout for all journals, but there are also options for personalization, as you see with the banner at the top. This journal has been around since 2006, it was previously published on the web and was moved to OJS after the Libraries started offering this service.

The screenshot shows the top portion of a web page for the journal 'Archival Practice'. The page has a dark blue header with the journal title in white. Below the header is a navigation menu with links for HOME, ABOUT, LOGIN, REGISTER, SEARCH, CURRENT, ARCHIVES, and ANNOUNCEMENTS. A breadcrumb trail indicates the current page is 'Home > Vol 3 (2016) > Baur'. The main content area features the article title 'The Home Stretch: Developing Automated Solutions for Legacy Container List Data at the Cuban Heritage Collection, University of Miami Libraries'. Below the title are the authors' names and affiliations: Natalie Baur, Lyn MacCorkle, and Sevika Singh, all from the University of Miami Libraries. The article is identified as 'Archival Practice, Volume 3'. The 'Abstract' section begins with the text: 'Legacy finding aids in formats other than standardized EAD-XML encoding are problematic for archivists wishing to provide deep access to and interoperability for their archival description and metadata. This case study will detail the project development, implementation, and outcomes for the legacy PDF container list conversion project as implemented at Cuban Heritage Collection (CHC) at the University of Miami, which seeks to provide innovative automation solutions based on the tenant of iterative processing and description of archival collections.' The 'Introduction' section starts with: 'Legacy finding aids in formats other than standardized EAD-XML encoding are problematic for archivists wishing to provide deep access to and interoperability of their archival description and metadata. Archivists in the last decade have written a variety of articles on streamlining workflows for'. At the bottom of the screenshot is a URL: <http://libjournal.uncg.edu/ap/article/view/1158/876>

Here is part of a screenshot of an article from the Archival Practice journal. The majority of UNCG journals, including this one, make content immediately free and open to the public. We do have one journal that requires people to register to read articles, but “reader” accounts are free.

What can OJS do?

Home > GJCPP: Author Submission and Peer Review Management


GJCPP: Author Submission and Peer Review Management

This site is for the submission of manuscripts for PEER REVIEW for the Global Journal of Community Psychology Practice. Published issues of the Global Journal can be found at <http://www.gjcpp.org/>. Authors and reviewers are encouraged to read the previous issues for examples of the kind of articles and materials we publish.

Authors - Authors need to [register](#) (give yourself a username and password) with the journal prior to submitting. You will receive a confirmation email with additional instructions. If you are already registered, you can simply [log in](#) and begin the 5 step process.

Reviewers - Please be sure to [register](#) and let us know what kind of manuscripts you would like to review.

ISSN: 2163-8667



**Global Journal of
Community Psychology Practice**
Promoting community practice for social benefit

Vol. 6 Issue 2 Oct 15, 2015

*An exchange of Ideas,
Information and Resources for
Community Practitioners*

Search this site

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OJS was developed to support peer-reviewed journal publishing. It supports the process from initial manuscript submission through dissemination of completed, reviewed, published articles.

It can also be used as a mechanism for just part of this process. We have one journal (not included on the list of hosted journals) that uses OJS only for manuscript submission and peer review management. They have a separate website (that they run) where they publish and disseminate the journal.

OJS can also be used to disseminate things like conference proceedings. Currently the Conference for Entrepreneurial Librarians has a “journal” for its proceedings in our OJS system.

PKP has a similar product called OCS (Open Conference Systems), which can be used to create conference websites, manage proposal submissions, and share conference materials after the fact. This is not something we currently have on our campus, but it is available.

What can OJS do?

ID	MM-DD SUBMITTED	SEC	AUTHORS	TITLE	PEERREVIEW			RULING	SE
					ASK	DUE	DONE		
825	10-23	POSIT	[REDACTED]	[REDACTED]	11-08	-120	-	-	JMV
910	03-30	RES	[REDACTED]	[REDACTED]	-	-	-	-	GM
1167	05-21	CASE	[REDACTED]	[REDACTED]	-	-	-	02-16	ma
1209	07-15	CASE	[REDACTED]	[REDACTED]	09-02	-	10-04	-	KM
1236	09-04	RES	[REDACTED]	[REDACTED]	02-29	-	-	-	AS
					02-29	-	-		
					01-26	-	02-15		
					02-29	-0	-		
1286	11-12	CASE	[REDACTED]	[REDACTED]	-	-	-	01-28	PLL
1318	02-25	RES	[REDACTED]	[REDACTED]	-	-	-	-	JMV

OJS has a detailed, color-coded display to help editors discern where manuscripts are in the review process. A similar screen shows manuscript tracking through the editing process.

Library Roles

- Server and software management
 - Libraries' IT department
- User support and training
 - Technical Services
- Outreach and publicity
 - Technical Services
- Journal cataloging/discovery
 - Technical Services

We support some pieces of the journal creation process, but not all of them. Our Electronic Resources and Information Technology Department manages the OJS servers, maintains the OJS software, and does initial technical setup for new journals as they are requested. This work is primarily carried out by our Digital Technology Consultant, who spends approximately 4-5 hours a week on OJS-related tasks (but that number can vary).

I provide user support and software training to personnel at the individual journals. This became part of my job in early 2014, after one of my colleagues retired. I was already providing somewhat similar support for users of our institutional repository system, NC DOCKS, so this assignment made a certain amount of sense. My time commitment in this area can vary wildly. Some weeks I might spend an hour on OJS things, other weeks I might spend ten - there's no way to predict what sorts and how many support requests will come in. What I can say is that the number of support requests is growing (as is the number of journals we support).

Our Assistant Dean provides outreach, publicity, and faculty relations, particularly to faculty members who may potentially be interested in creating journals. She does lots of outreach about open access on campus, so she is in a good position to educate people about our offerings, including OJS. She generally spends less than an hour a week promoting OJS. And we also have help from other personnel in technical services, including our Multiformats Cataloging Technician, who helps make sure our hosted journals can be discovered and used by patrons worldwide. Her work in this area only happens when there are records needed for new or updated journals. I'll come back to this more in a few minutes.

This support model is not the only one out there. There is no rule about what hosting institutions have to provide; this model has grown organically here, and it is what has worked for us so far.

What we don't do

Roles

- » Journal Managers
- » Editors
- » Section Editors
- » Layout Editors
- » Copyeditors
- » Proofreaders
- » Reviewers
- » Authors
- » Readers
- » Subscription Managers



This is a screenshot of the available roles you can assign within OJS. Not all of these will necessarily be used (most journals don't require subscriptions, so there are not usually subscription managers). Individual journals are responsible for assigning and carrying out these roles.

Skills needed: For journal personnel

- **Content**
- Technical
- Graphic design
- Web design
- Copyediting and proofreading
- Article layout
- Policy and decision-making

Journal creators all come ready to work on content, but they may not realize some of the other skill sets they may need or want in order to make the journal meet their desired standards of professionalism. Here are some of the ones we've identified.

Technical—working in online systems

Graphic design—creating banners and other graphic elements

Web design—customizing stylesheets and web layout. There are some elements that are controlled at the top, by our digital technology consultant, but there are other things that can be customized journal-by-journal. And it is up to each journal to do those things if they want them done.

Copyediting and proofreading for articles

Layout—setting up articles with the desired look-and-feel. Some journals want the traditional two-column layout for their articles, which means they need to have someone on staff who can meet that need.

Policy issues, which could relate to things like copyright questions and much more.

Questions we get

- Technical
- Graphic design
- Web design
- Copyediting and proofreading
- Article layout
- Policy and decision-making



These are some of the types of questions we get. We don't typically get asked about content, but we get asked about everything else.

Questions we get



- Why can't I log in?
- Where is XYZ article in the review process?
- Who has permission to do XYZ action?
- Can I use the system to send a modified version of article XYZ to reviewers?
- Is there a copyright agreement for authors?
- Can I change the copyright policy for some materials?
- Can I change the look and feel of the site?
- What layout format should we use for articles?
- How do I get an ISSN for my journal?

To be a little more specific, here are some example questions. Some of these are things we can help with - logging in, figuring out where articles are in the review process, et cetera. But with questions like “what layout format should I use?”, while we can provide examples of how others are doing it, the decision is really up to the journal.

Submission

Authors Jenny Dale

Title Test HTML

Section Articles

Editor Jenny Dale

Copyediting

REVIEW METADATA	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
1. Initial Copyedit	N/A	N/A	COMPLETE	N/A
File: Request email cannot be sent until file is selected for copyediting in Editor Decision, Review page.				
2. Author Copyedit	<input type="checkbox"/>	-	-	<input type="checkbox"/>
File:				
3. Final Copyedit	N/A	N/A	2011-12-06	N/A
File:				
Upload file to <input checked="" type="radio"/> Step 1, <input type="radio"/> Step 2, or <input type="radio"/> Step 3 <input type="button" value="Browse..."/> No file selected. <input type="button" value="Upload"/>				
Copyedit Comments <input type="button" value="No Comments"/> COPYEDIT INSTRUCTIONS				

Scheduling

Schedule for publication in Vol 1, No 1 (2010) [TABLE OF CONTENTS](#)

Published December 06

2011

Layout

	REQUEST	UNDERWAY	COMPLETE	ACKNOWLEDGE
Layout Version	N/A	N/A	N/A	N/A
File: 220-1660-1-LE.HTML 2012-05-28				
Galley Format	FILE	None	ORDER	ACTION
VIEWS				
Supplementary Files	FILE	None	ORDER	ACTION

Here is a screenshot of some of the inner workings of OJS relating to submitting and publishing an article. This is just one of many screens associated with an article. I provide training on the system and the process, but journal staff need to be comfortable working in a complex online system that enforces processes—for example, a journal editor can't just upload a pre-approved article and go straight to posting it. Articles must be submitted by people in the *author* role, and must go through multiple steps before they can be posted. The system will let you track and monitor submissions closely and will also send automated emails to relevant personnel if you set up that feature. But if you miss a step, it is easy to get stuck or lost in the process, especially for new users of the system.

But what about cataloging?

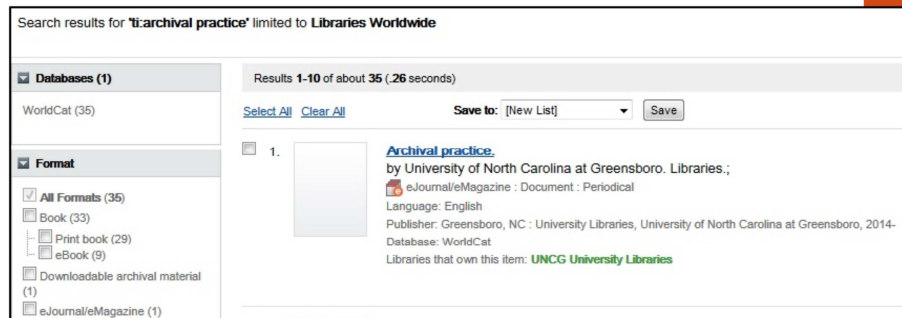
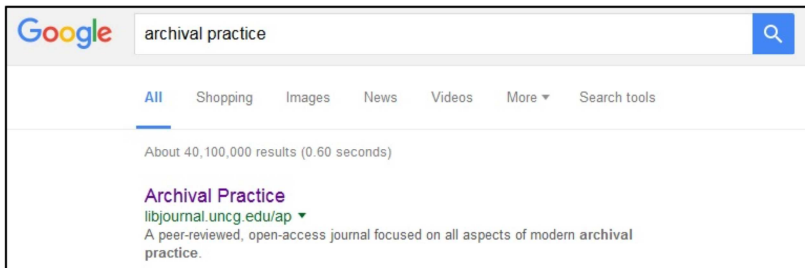
- Local process tracking and procedures
- Knowledgebase records
- ISSNs
- OCLC records

Title	Start date	End date	ISSN	OCLC record	Knowledgebase record	Notes
Global Journal of Peace Research and Praxis	2014	currently published	2325-3274	816132292	yes	Website lists v 1: no. 1 as 2014/15, PDF files have date as 2014
International Journal of Critical Pedagogy	2008	currently published	2157-1074	464483531	yes	Volume 3, Number 1 (2010) is the first issue available in OJS. Volumes one and two are available elsewhere: http://www.freireproject.org/the-international-journal-of-critical-pedagogy/

At the bottom of the slide, you see a snippet of a spreadsheet we use to track our journals and facilitate the creation of MARC records. We include information like title, start date, end date, ISSN, OCLC number, and whether or not the title has a record in our Knowledgebase.

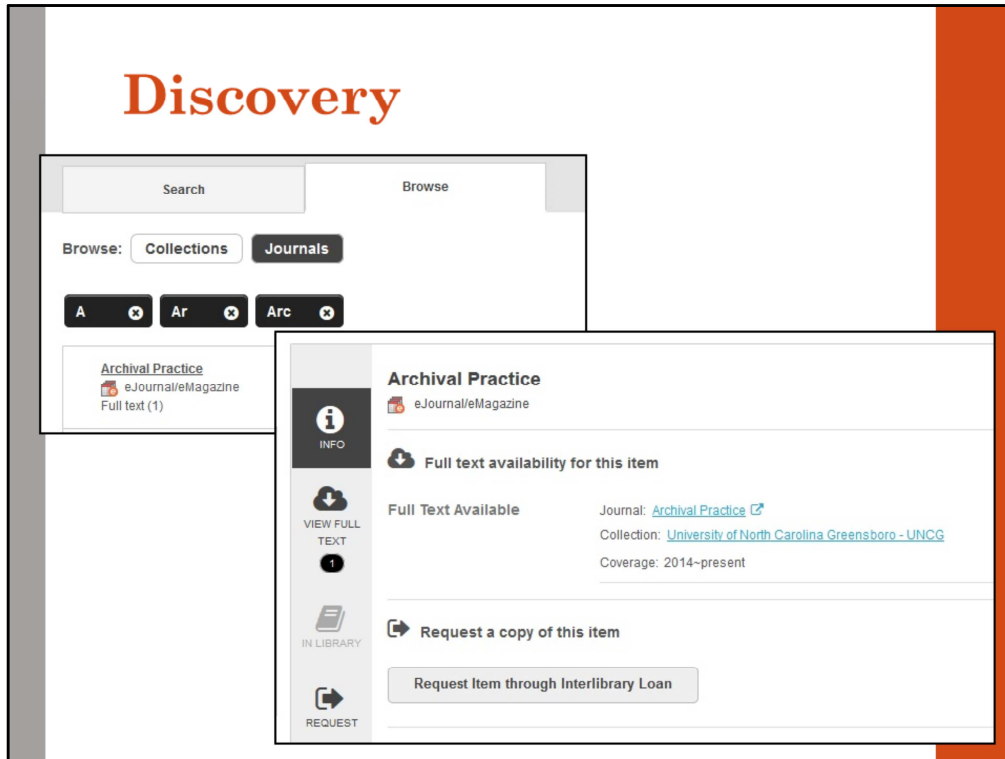
This spreadsheet is a relatively new thing, and it is important because while I'm the one that works with the journals and knows when there are new ones or changes of note, I'm not the one who creates the MARC records or Knowledgebase records for them. That's our Multiformats Cataloging Technician. In order to facilitate this process, we wanted to have this info easily, readily available for her.

Discovery



Our hosted journals are indexed and discoverable via Google and other search engines. I did a Google search for *Archival Practice* a few days ago and it was the very first result, as shown at the top of the slide.

Our journals are also discoverable in WorldCat, as shown at the bottom of the slide



Our journals are also available in our local A-Z list. Here are results from browsing and searching our A-Z list. These results come via records in our WMS Knowledgebase.

OCLC 904285693 Held by NGU - 1 other holding

Continuing Resources Rec stat c

Type a ELvl Srce
 BLvl s Form o Cont
 S/L 0 Orig EntW
 Desc i SrTp p Cont

006 m o d
 007 c #b r
 010 2015202403
 040 NGU #b eng #e rda #c NGU #d
 012 #1
 022 0 2378-4032 #2 1
 037 #b University Libraries, Univers
 042 pcc #a nsdp
 050 0 0 CD921
 082 1 0 027 #2 23
 090 #b
 049 NGUU
 222 0 Archival practice #b (Greensboro)
 245 0 0 Archival practice.
 264 1 Greensboro, NC : #b University Libraries, University of North Carolina at Greensboro, #c 2014-
 300 1 online resource
 310 Twice a year
 336 text #b bt #2 rdacontent
 337 computer #b c #2 rdamedia

Entry: Archival Practice

Title* Archival Practice
 Format* Journal
 Vendor ID
 Title URL http://libjournal.uncg.edu/index.php/ap/issue/archive
 Created 3/26/2014, 8:27:50 AM
 OCN 904285693
 Override OCN 904285693
 Grouped OCNs
 OCN
 440089415
 729691207
 904285693

And here are snippets of the records that make discovery possible. In the background you see a snippet of the OCLC record for that same journal, *Archival Practice*, and in the foreground an example of the record for that journal in our WMS Knowledgebase. Katherine creates the Knowledgebase records, and creates or edits MARC records, as needed.

ISSNs

- Journals can easily request ISSNs themselves
 - <http://loc.gov/issn/form/>
- There is no charge for ISSN assignment
- Journals can request ISSNs in advance of publication*
- *However...

U.S. ISSN CENTER

ISSN INTERNATIONAL STANDARD SERIAL NUMBER UNITED STATES

Search this site

[ISSN Home](#)
[General Information](#)
[Application Form](#)

"If the ISSN did not exist, someone would have to invent it!"

|| About the U.S. ISSN Center ||

The U.S. ISSN Center, part of the international ISSN Network, assigns International Standard Serial Numbers (ISSN) to serials published in the U.S. The ISSN is a standard identifier for serials (e.g., journals, magazines, newsletters, newspapers, annuals) whether published in print, online or other media. Each medium version is assigned a separate ISSN.

[Frequently Asked Questions \(FAQs\)](#)

|| ISSN Application Forms ||

The ISSN application is a "fillable" pdf form. Once completed, it should be emailed, faxed, or mailed to the Library of Congress for processing. Full instructions and a link to the form are provided on the application forms page.

ISSN Application Spreadsheet A spreadsheet that can be used under certain circumstances to request ISSN for multiple titles ahead of publication.

Journals can request ISSNs themselves through the Library of Congress, and most of them do. This is very easy, and it is free. They can request ISSNs in advance of publication. But there's a little complication with this for us if they do request an ISSN in advance.

OCLC		898185700		Held by NGU - no other holdings			
Continuing Resources		Rec stat	n	Entered	20141216	Replaced	20141216103049.1
Type	a	ELvl	8	Srce		GPub	
BLvl	s	Form	o	Conf	■	Freq	a
S/L	0	Orig		EntW		Reql	r
Desc	i	SrTp		Cont		Alph	a
				DISl	c	Dates	2016 , 9999
006			m o d				
007			c #b r				
010			2014271494				
040			DLC #b eng #e rda #c DLC				
012			#l 1				
022	0		2376-6409 #2 1				
037			#b Conference Committee, The Conference for , Greensboro, NC 27402				
042			msc				
050	1 0		ISSN RECORD				
090			#b				
049			NGUU				
111	2		Conference for Entrepreneurial Librarians.				
245	0 0		Proceedings of the Conference for Entrepreneurial Librarians.				
246	1		Entrelib proceedings				
263			201505				
264	1		Greensboro, NC : #b Conference Committee				
310			Annual				

Here's an example of a MARC record created by LC for one of our journals that requested an ISSN in advance of publication.
 Can any of you guess what the complication might be for our library?

OCLC		898185700		Held by NGU - no other holdings			
Continuing Resources		Rec.stat	n	Entered	20141216	Replaced	20141216103049.1
Type	a	ELvl	8	Srcce		GPub	
BLvl	s	Form	o	Conf	■	Freq	a
S/L	0	Orig		EntW		Regl	r
Desc	i	SrTp		Cont		DtSt	c
						Dates	2015 , 9999
006			m o d				
007			c #b r				
010			2014271494				
040			DLC #b eng #e rda #c DLC				
012			#i 1				
022	0		2376-6409 #2 1				
037			#b Conference Committee, The Conference for , Greensboro, NC 27402				
042			msc				
050	1 0		ISSN RECORD				
090			#b				
049			NGUU				
111	2		Conference for Entrepreneurial Librarians.				
245	0 0		Proceedings of the Conference for Entrepreneurial Librarians.				

We are not a CONSER institution, and we can't update this record.

Challenges

- Software learning curve
- Turnover / continuity
 - Libraries' personnel
 - Journal personnel
- Communication
 - Challenges related to disparate locations of journal personnel
- Technical issues
 - Individual customizations are limited
 - The system doesn't provide optimal functionality for all areas (ex: display of special characters in mathematics/statistics)

Cataloging aside, we've faced some other challenges with this service.

This software learning curve is probably the biggest one. We've had some faculty members who have had some frustrations with the software.

We've also faced turnover issues, both in the Libraries and on the staffs of the individual journals. One staffing model that can exacerbate this problem is the employment of students to handle pieces of this process. This model has worked for some journals, but the issue with students, as I'm sure you're all aware, is that they graduate. So if a journal is relying heavily on students, especially for things like managing the online system, they can end up in a bind when those students graduate.

One thing that can make communication very tricky is if you have a journal manager who starts out at your institution and then goes somewhere else, or if many or all of the journal staff are based at other institutions. Sometimes questions come up that could be answered in fifteen minutes via a face-to-face meeting, but can take hours or days through email or phone conversations.

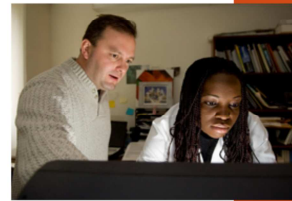
We've also had some requests from journal managers that we haven't been able to fill.

Sometimes we can't fill a request because a change for one journal would affect all of them-- individual customizations are limited in a shared, hosted system.

Sometimes we can't fill a request because the functionality doesn't exist in the system, such as support for display of some special characters used in mathematics and statistics.

Lessons learned

- Free software is not without its costs
- Sustainability planning is important
 - Journal management
 - Host institution
- On-campus contact for each journal
- Journal managers must be prepared to do some technical work, or to hire others to do it for them



Here are some of the things we've learned.

Obviously, even though the system is free, it still has costs related to time and expertise.

Sustainability planning is important, and should particularly be stressed to journal managers.

We are now requiring that each journal have at least one on-campus contact--if the primary journal manager was at UNCG when the journal started, if they leave, they must designate another person at UNCG to be the on-campus contact.

We are also trying to be proactive in educating journal managers about the tasks they may not realize will be part of their work.

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PIC13519 ACE International 121.jpg Copyright UNCG 2012

PIC13714 Chrissy Beanblossom 050.jpg UNCG © 2013

PIC12746 Ugochukwu 065.jpg © UNCG 2007

Value

- Strengthen relationships between the Libraries, faculty, and scholarly communities
- Meet needs of campus faculty
- Support new publishing models
- Facilitate content creation
- Demonstrate commitment to open access



Images courtesy of UNCG Image Collection

PIC12793 Zakia-O'Donnell 035.jpg © UNCG 2008

PIC13496 Civic Literacy 132.jpg © UNCG 2012

PIC13559 Campus 103.jpg © Mark Wagoner 2012 - University Relations has usage rights.

Looking forward



- Examine impact and readership
- Create/formalize in-house policies and procedures for cataloging, training, and sustainability.
- Publicize offerings to campus faculty

Questions?

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Image by the author.